

# **Middle-East And Africa Air Traffic Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)**

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## **Abstracts**

The Middle-East And Africa Air Traffic Management Market size in terms of Equal-1.74 is expected to grow from USD 524.18 million in 2024 to USD 581.45 million by 2029, at a CAGR of 1.74% during the forecast period (2024-2029).

The robust economic development in the Middle East and African region is fueling increased air travel demand, necessitating advanced air traffic management systems. Substantial investments in aviation infrastructure by governments to modernize airports and enhance airspace management contribute to the growth of the air traffic management market. The adoption of cutting-edge technologies such as AI, automation, and satellite-based navigation systems improves the efficiency and safety of air traffic management in the region.

The growth in passenger traffic is inviting investments in the market. The growing emphasis on modernizing air traffic management infrastructure is also driving the market's growth. With a positive outlook for the global air passenger traffic numbers in the next 10 years, airlines are increasing their fleet size to cater their services to more passengers. Airlines are procuring more aircraft and adding more routes, thereby increasing the number of flights to handle for the airports. As airspaces become busier, the necessity for better airspace management increases.

The growth in passenger traffic has necessitated the construction and expansion of new airports, which has resulted in the demand for new air traffic management (ATM) infrastructure and capacity improvements in the existing ATM systems. However, one key restraint to the market is the diverse regulatory landscape across the Middle East and Africa, leading to inconsistencies in airspace traffic management and coordination.

This regulatory complexity can hinder the seamless integration of air traffic management systems, limiting the potential for streamlined and efficient operations. Another significant challenge is the limited or outdated infrastructure in certain countries, especially in Africa, which can impede the implementation of advanced air traffic management technologies.

## Middle-East and Africa Air Traffic Management Market Trends

### Hardware Segment accounted for a Major Share of Revenue in 2023

The hardware segment is poised to secure the largest market share in the Middle East and African air traffic management market. This dominance is attributed to the region's concerted efforts in upgrading and modernizing its aviation infrastructure. As airports undergo extensive renovations and expansion projects, there is a substantial demand for advanced hardware components, including radar systems, communication equipment, and navigation devices. These hardware solutions are crucial for enhancing the overall efficiency and safety of air traffic management. The growing emphasis on security measures and the need for robust surveillance systems further drives the demand for sophisticated hardware components. As the aviation industry in the Middle East and Africa continues to experience rapid growth, the hardware segment is positioned as a critical player, ensuring the seamless functioning of air traffic management systems and contributing significantly to the region's aviation advancement. For instance, in November 2023, the UAE General Civil Aviation Authority (GCAA) awarded a contract to Rohde & Schwarz as part of a radio replacement project. The contract involves the installation of more than 200 new radios, which aims to modernize the radio communications system at the Sheikh Zayed Air Navigation Centre in Abu Dhabi. In addition to the new radio installation, the project will enhance the already installed voice communication system (VCS).

### Saudi Arabia to Dominate the Market during the Forecast Period

Saudi Arabia witnessed a surge of 26% in air traffic and flight movements from airports in 2023, and the country witnessed 403,000 flights by June 2023. The country has been investing in promoting tourism and attracting visitors, including the "Vision 2030" plan. The tourism and aviation sector is expected to draw many benefits from the ongoing development plans and projects in the Kingdom. Hence, an efficient air traffic management system has been deployed in the country to streamline airline movement

effectively. Incorporated in 2016, Saudi Air Navigation Services (SANS) covers services for the entire Saudi airspace and provides air traffic management and air navigation systems, including the procurement, operations, and maintenance of all air navigation systems. Indra has been working with SANS on the complete modernization of the country's air traffic management system since 2017, which consists of two end route control centers, four approach centers, and twenty towers.

In November 2022, the UK's air traffic control body NATS and Saudi Air Navigation Services (SANS) signed a contract to conduct a study on enhancing capacity at the King Khalid International Airport in Saudi Arabia. The contract is a part of Saudi Arabia's growth plans as it intends to secure the expansion of air traffic through the country through major investments in its aviation infrastructure. This collaboration will allow Saudi Arabia to leverage NATS expertise and digital solutions to open new possibilities in airspace management and provide a seamless flow of air traffic. The expansion of the King Khalid airport is one of the many projects underway in Saudi Arabia that are seeking to expand. Such inductions are expected to drive the market in Saudi Arabia during the forecast period.

### Middle-East and Africa Air Traffic Management Industry Overview

The Middle East and African air traffic management market is semi-consolidated and dominated by international players such as Indra Sistemas SA, Thales, Honeywell International Inc., Elbit Systems Ltd, and Leonardo SpA. To support rapid growth in passenger traffic, the market players are focusing on launching new ATM systems with artificial intelligence (AI) capabilities to minimize the chances of human error and effectively increase the efficiency of scheduling. The key players are expected to benefit from the partnership with local producers of ATM systems, parts, and components and third-party software manufacturers of ATM systems.

In the Middle East, countries like the United Arab Emirates and Saudi Arabia engaged in strategic partnerships with leading aerospace companies to upgrade their air traffic control systems. These collaborations aimed to enhance operational efficiency and accommodate the growing air traffic demand.

Companies such as Indra Sistemas SA are now incorporating artificial intelligence (AI) to support controllers' work and enable them to detect risk situations more rapidly and effectively. For instance, in June 2022, Indra Sistemas SA signed a memorandum of

agreement (MoA) with Saudi Air Navigation Services (SANS) to develop and operate the Al Ula site. It is planned that the site will receive full operational status in early 2024. Saudi Arabia's Al Ula International Airport will become the first in the Middle East to operate with a virtual air traffic control tower.

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