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Middle East and Africa Bunker Fuel Market By Fuel Type (IFO (Intermediate Fuel Oil), MDO (Marine Diesel Oil), MGO (Marine Gas Oil), LNG (Liquefied Natural Gas), Others), By Vessel Type (Large Ships, Medium Ships, Small Ships), By Application (Commercial Shipping, Tankers, Bulk Carriers, Container Ships, Passenger Ships, Others), By End-User (Ship Owners, Fuel Suppliers, Government and Defense), By Country, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

Middle East and Africa Bunker Fuel Market was valued at USD 10.67 Billion in 2024 and is expected to reach USD 18.21 Billion by 2030 with a CAGR of 9.15% during the forecast period 2026-2030F.

The Middle East and Africa Bunker Fuel Market refers to the supply and consumption of fuel used by ships for maritime transportation in the region. Bunker fuel is a critical component in the global shipping industry, which powers commercial vessels, tankers, bulk carriers, and other types of ships. The demand for bunker fuel in the Middle East and Africa is driven by the region's strategic location as a key hub for international shipping routes. Ports in the Middle East, such as those in the United Arab Emirates, Saudi Arabia, and Oman, serve as important refueling stations for vessels transiting between Europe, Asia, and Africa. Furthermore, the region's growing oil production capacity and expanding maritime infrastructure have bolstered its position as a significant player in the global bunker fuel supply chain. As shipping traffic increases,

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particularly with the rise of trade routes and the expansion of shipping fleets, the demand for bunker fuel in the Middle East and Africa is expected to continue its upward trajectory. Additionally, advancements in fuel efficiency, regulations regarding sulfur content, and the growing adoption of alternative fuels such as LNG (Liquefied Natural Gas) are expected to shape the future growth of the market. Countries in the region are increasingly investing in modernizing port facilities, fuel storage, and distribution networks, which will facilitate smoother and more efficient fuel supply to ships. With global trade volumes expected to rise, especially with the expansion of emerging markets in Africa and the Middle East, the Bunker Fuel Market in the region will experience sustained growth. This trend is further supported by the rise in maritime shipping activities, including the transportation of goods and raw materials, making the Middle East and Africa a key area for fuel consumption in the maritime industry.

European energy companies Shell, BP, and TotalEnergies, along with Japan's Mitsui, each acquired a 10% stake in Abu Dhabi's Ruwais LNG project, with Abu Dhabi's state-owned ADNOC retaining the remaining 60%. This project aims to boost the UAE's LNG production capacity to 15 million tons annually by 2028

Key Market Drivers

Strategic Geopolitical Location and Global Shipping Routes

The Middle East and Africa are strategically located at the crossroads of some of the world's busiest shipping routes. The region is home to critical maritime chokepoints, such as the Suez Canal, the Strait of Hormuz, and the Bab el-Mandeb Strait, all of which connect Europe, Asia, and Africa. The Suez Canal, in particular, serves as a vital link for goods traveling between Europe and Asia, significantly reducing the time and cost associated with shipping around the African continent. The Middle East's proximity to major oil-producing countries further enhances its importance as a global shipping hub. These strategic advantages enable the region to act as a key refueling point for vessels operating on international trade routes.

As global trade continues to grow, the volume of shipping traffic passing through these vital waterways is expected to increase. With this increase in shipping activity comes a corresponding rise in demand for bunker fuel, as vessels require fuel to operate on these long international voyages. Ports in countries such as the United Arab Emirates, Saudi Arabia, Egypt, and Oman, among others, are crucial for bunkering services, offering refueling options for both large and small vessels. Moreover, the extensive port infrastructure across the region ensures a consistent and reliable supply of bunker fuel,

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which is vital for the efficient movement of goods worldwide.

Additionally, as trade patterns evolve, the Middle East and Africa will continue to benefit from their position along major maritime routes. The expansion of trade with emerging markets, particularly in Africa, will fuel the growth of shipping activities in the region. This will, in turn, increase the demand for bunker fuel, as the need for fuel to service these expanding fleets becomes ever more critical. The strategic geographical position of the Middle East and Africa, along with their growing role in global trade, will continue to be a significant driver of the bunker fuel market in the coming years.

Rising Economic Growth and Industrialization

Economic growth and industrialization in both the Middle East and Africa are among the most significant drivers of the Middle East and Africa Bunker Fuel Market. In the Middle East, the oil and gas sector has traditionally been the cornerstone of economic development. However, many countries in the region, such as Saudi Arabia and the United Arab Emirates, are undergoing diversification efforts as part of their long-term economic visions, such as Saudi Arabia's Vision 2030. These efforts focus on expanding other sectors such as manufacturing, logistics, and tourism, all of which require significant infrastructure development, including ports and shipping capabilities. As a result, these economies are seeing increased demand for transportation and trade, which directly translates into greater consumption of bunker fuel.

In Africa, the economic growth story is similarly encouraging, with several countries experiencing rapid industrialization and urbanization. The African continent is increasingly becoming a critical player in the global supply chain, particularly for raw materials such as oil, minerals, and agricultural products. As Africa’s manufacturing and export capabilities expand, so too does the need for efficient and reliable shipping services. The rise in the import and export of goods is driving up the demand for both domestic and international shipping, creating a corresponding demand for bunker fuel.

The growth in economic activity and industrial capacity across the Middle East and Africa is pushing the expansion of port infrastructure and shipping fleets. As countries in the region continue to invest in industrial development, they are also investing in their maritime transport systems to ensure that their growing economies remain competitive in the global market. This growing economic momentum, coupled with the expansion of shipping fleets to handle increased trade, is a key factor driving the demand for bunker fuel in the region. This trend is expected to continue as more African nations invest in their industrial capabilities and as the Middle East continues its efforts to diversify its

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economy.

Expansion of Shipping Fleets and Global Trade

One of the most direct drivers for the Middle East and Africa Bunker Fuel Market is the expansion of global shipping fleets. The increase in global trade volume, driven by expanding markets, the growth of e-commerce, and the rise of emerging economies, requires more ships to transport goods efficiently. This has led to an increase in the size of the global merchant fleet, with more and larger vessels being commissioned to meet the growing demand for shipping services.

In the Middle East, many countries are actively modernizing and expanding their shipping fleets. The region's heavy reliance on oil and gas exports necessitates a robust and efficient shipping industry. With the growth in demand for energy products and other goods, many Middle Eastern nations are investing heavily in expanding their shipping fleets. Similarly, African countries with large coastlines are also seeing increased investment in maritime infrastructure to cater to the growing needs of their rapidly expanding export sectors. For example, the expansion of major ports in countries like South Africa, Nigeria, and Egypt, coupled with the development of new trade routes, has created more demand for bunker fuel to fuel the increased number of ships on the water.

As the size and capacity of the shipping fleets increase, so too does the demand for bunker fuel. Larger vessels require more fuel, and the growing frequency of international voyages adds further pressure on fuel consumption. Additionally, the adoption of newer, more fuel-efficient technologies by shipping companies has led to an increase in demand for specialized bunker fuels that meet environmental regulations, such as low-sulfur fuels. This shift in demand is likely to continue as shipping companies focus on meeting the new International Maritime Organization standards, further driving the demand for bunker fuel in the region.

Key Market Challenges

Fluctuating Global Oil Prices and Economic Instability

One of the most significant challenges facing the Middle East and Africa Bunker Fuel Market is the volatility of global oil prices, which heavily influences the cost and availability of bunker fuel. Oil prices are subject to a wide range of factors, including geopolitical tensions, global supply and demand imbalances, natural disasters, and the

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dynamics of the Organization of the Petroleum Exporting Countries. These fluctuations can create uncertainty for bunker fuel suppliers and customers, making it difficult for companies to predict and manage their costs effectively. The initial cost of establishing LNG bunkering facilities is estimated to be between USD 20-30 million per port, which may deter smaller operators from adopting these alternative fuels.

For example, when oil prices are high, bunker fuel prices tend to rise, increasing operating costs for shipping companies. This could result in a reduction in the frequency of voyages or a reduction in profitability, as shipping companies may be unwilling to pass on higher costs to their customers, especially in price-sensitive markets. Conversely, when oil prices fall, the bunker fuel market could experience a surge in demand, potentially leading to oversupply and a decrease in fuel prices. This, however, could lead to economic instability, particularly in oil-dependent economies across the Middle East and Africa. Countries like Nigeria, Saudi Arabia, and Kuwait, for instance, rely on oil revenues to support government spending and public services. Fluctuations in oil prices can directly impact national economies, leading to reduced investments in infrastructure, including ports and bunkering services. This could, in turn, constrain the growth of the bunker fuel market in the region.

Moreover, the instability caused by fluctuating oil prices is exacerbated by the economic conditions in some African countries. Many countries on the continent have historically faced economic challenges, such as high inflation rates, political instability, and currency devaluation. These factors create uncertainty and make it more difficult for bunker fuel suppliers to plan and operate sustainably. Shipping companies, particularly in Africa, often struggle to secure stable financing to purchase fuel in advance or to lock in long-term fuel prices due to these market conditions. The cost instability associated with fluctuating oil prices, therefore, poses a considerable challenge to the Middle East and Africa Bunker Fuel Market, limiting investment and growth prospects in the sector. Over 10% of global maritime trade passes through the Suez Canal, which connects Europe and Asia, directly impacting bunker fuel demand in the region. In 2023, the Suez Canal saw a daily passage of 50-60 vessels, underscoring its significance to global trade and bunker fuel requirements.

Environmental Regulations and Compliance Challenges

Another major challenge faced by the Middle East and Africa Bunker Fuel Market revolves around increasingly stringent environmental regulations, which are driving a shift towards cleaner, lower-emission fuels. The International Maritime Organization has implemented several regulations in recent years, such as the global sulfur cap that

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came into effect in 2020, limiting sulfur content in marine fuels to 0.5 percent from the previous 3.5 percent. These regulatory changes are intended to reduce air pollution and greenhouse gas emissions from ships, in line with global climate change goals. However, the implementation of these regulations poses significant challenges for bunker fuel suppliers and the shipping industry in the region.

The compliance with these environmental regulations often requires substantial investment in new infrastructure, fuel technologies, and compliance systems. For bunker fuel suppliers, transitioning to providing low-sulfur fuels and other cleaner alternatives requires modifying existing refueling infrastructure, which can be costly and time-consuming. Many of the Middle Eastern and African bunkering ports were originally built to handle high-sulfur fuel products and lack the necessary facilities to store and distribute low-sulfur fuels or alternative energy sources, such as biofuels and Liquefied Natural Gas. These infrastructure upgrades can be especially challenging in African countries with limited financial resources and technical capabilities.

Furthermore, the growing demand for alternative marine fuels, such as biofuels, could create supply chain issues and price volatility. Biofuels, for instance, require the development of a new and efficient supply chain, which could be complex and costly to establish in many regions across the Middle East and Africa. In some cases, the supply of biofuels may not meet the demand for environmentally friendly fuels, leading to further price increases or shortages. Shipping companies operating in the region must also navigate a complex web of local and international regulations, which can vary widely between countries and ports. This regulatory uncertainty and complexity can make it difficult for bunker fuel suppliers to maintain consistent pricing and service offerings across the region, further complicating their ability to operate profitably. The IMO 2030 target mandates a 40% reduction in CO2 emissions from ships by 2030 compared to 2008 levels. In line with this, Middle Eastern and African ports are preparing for increasing demand for low-carbon fuels, such as LNG and biofuels.

Key Market Trends

Adoption of Low-Sulfur Bunker Fuels

One of the most prominent trends shaping the Middle East and Africa Bunker Fuel Market is the growing adoption of low-sulfur bunker fuels, driven by global environmental regulations and a heightened focus on sustainability. The International Maritime Organization’s global sulfur cap, which came into effect in January 2020, mandates that the sulfur content in marine fuels be reduced from 3.5 percent to 0.5

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percent. This regulatory shift has prompted significant changes in the supply and demand dynamics of bunker fuels across the region, including the Middle East and Africa. The Middle East and Africa saw a 15-20% increase in demand for low-sulfur fuels, particularly in ports like Dubai, Abu Dhabi, and Suez Canal, as vessels needed to comply with the new sulfur limits.

Shipping companies operating in this region are increasingly adopting low-sulfur fuels to comply with the new regulations and avoid hefty fines. Consequently, bunker fuel suppliers are responding by enhancing their product offerings to meet the demand for cleaner fuels. Suppliers are investing in refining technologies to produce low-sulfur fuel oils, and some are exploring alternative fuels, such as Liquefied Natural Gas (LNG), biofuels, and synthetic fuels, which also meet stringent environmental standards. The transition to low-sulfur fuels has not only become a regulatory requirement but also a market differentiator for companies that prioritize environmental responsibility and sustainability. Moreover, many ports in the Middle East and Africa are upgrading their facilities to handle the increased demand for low-sulfur fuels, ensuring that their bunkering services align with global industry standards. This shift toward cleaner fuels is expected to continue as regulations tighten and pressure increases for the shipping industry to reduce its carbon footprint.

In addition to regulatory compliance, there is also an increasing demand from consumers and stakeholders for environmentally friendly shipping practices. This has prompted shipping companies to not only meet regulatory requirements but to proactively embrace cleaner alternatives in their operations, further fueling the growth of low-sulfur bunker fuels in the region. Africa’s bunker fuel consumption was estimated at approximately 5-7 million metric tons in 2023, with a projected annual growth rate of 3-4% driven by increasing maritime trade and regional port development.

Growing Interest in Alternative Marine Fuels

As part of the broader shift toward sustainability and reducing carbon emissions, the Middle East and Africa Bunker Fuel Market is witnessing a growing interest in alternative marine fuels. These alternative fuels include biofuels, Liquefied Natural Gas, hydrogen, and methanol, which are seen as viable substitutes for traditional marine fuels. The demand for these fuels is primarily driven by the maritime industry’s desire to meet increasingly stringent environmental regulations while also reducing greenhouse gas emissions.

Biofuels, in particular, have gained significant traction due to their potential to reduce

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the carbon intensity of shipping operations. Biofuels can be made from renewable sources such as plant oils, algae, or waste products, making them an attractive option for companies seeking to reduce their environmental impact. While biofuels are not yet widely used in the Middle East and Africa, pilot projects and partnerships are emerging across the region. Several bunkering suppliers are exploring biofuel blending with traditional bunker fuels as a transitional step towards full-scale adoption. Additionally, Liquefied Natural Gas is increasingly seen as an attractive alternative due to its lower carbon emissions compared to conventional marine fuels.

In addition to reducing carbon emissions, alternative fuels also offer shipping companies the potential to future-proof their operations. Many major international shipping companies are already investing in vessels that are capable of running on these alternative fuels. The increasing focus on decarbonizing the shipping industry is expected to drive significant growth in the demand for alternative marine fuels across the Middle East and Africa, with suppliers and shipping companies working together to establish the infrastructure necessary to support this transition. This trend is likely to continue as both environmental concerns and regulatory pressures grow.

Digitalization and Automation in Bunkering Operations

Digitalization and automation are emerging as key trends in the Middle East and Africa Bunker Fuel Market, as companies seek to improve operational efficiency, reduce costs, and enhance customer experience. The adoption of digital technologies, including data analytics, real-time monitoring, and automated fuel management systems, is transforming the way bunker fuel is delivered and consumed in the region.

Through digital platforms, bunker fuel suppliers can now track fuel consumption, monitor delivery schedules, and predict future demand, enabling them to optimize inventory and improve fuel delivery efficiency. Real-time data also allows for better decision-making, ensuring that fuel is delivered at the right time and in the right quantities, reducing waste and minimizing operational disruptions. Furthermore, digitalization allows shipping companies to have greater visibility into their fuel consumption patterns, helping them identify potential inefficiencies and implement more sustainable practices.

The use of automated systems in the bunkering process also enhances safety and reduces human error, which is especially important in high-risk environments such as refueling operations. Automation in fuel delivery, invoicing, and payment processes is making the entire bunkering process more seamless, streamlined, and transparent. Additionally, blockchain technology is being explored as a way to improve transparency

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in fuel transactions, ensuring that all stakeholders involved in the bunkering process have access to secure, verifiable data.

As digitalization continues to evolve, the Middle East and Africa Bunker Fuel Market is likely to see increased investment in innovative technologies, further improving the efficiency, safety, and sustainability of bunker fuel operations. This trend is expected to benefit both bunker fuel suppliers and customers, as digital and automated solutions contribute to cost reductions, better fuel management, and more environmentally responsible practices.

Segmental Insights

Fuel Type Insights

In 2024, Intermediate Fuel Oil (IFO) dominated the Middle East and Africa Bunker Fuel Market and is expected to maintain its leadership position throughout the forecast period. IFO is commonly used in large marine vessels due to its cost-effectiveness and high energy output, making it the preferred choice for most shipping companies operating in the region. Its dominance is driven by the continued reliance of commercial vessels on this fuel type for long-distance international shipping, where the affordability of fuel is a significant factor. Additionally, IFO offers a balance of performance and lower cost compared to other more refined fuels, making it suitable for various types of ships, especially for those that do not have specific environmental compliance requirements. However, the demand for Marine Gas Oil (MGO) is also growing due to increasing environmental regulations and stricter sulfur content restrictions set by global maritime authorities. While IFO remains the dominant fuel in the market, the shift towards cleaner, low-sulfur fuels is gradually increasing the market share of MGO, especially in regions with more stringent environmental regulations. Liquefied Natural Gas (LNG) is emerging as an alternative fuel with increasing interest for vessels that aim to reduce their carbon footprint and comply with environmental standards, but its adoption in the Middle East and Africa remains limited compared to IFO. Despite this growing interest in cleaner fuels, IFO’s significant cost advantages, availability, and capacity to fuel the majority of vessels continue to secure its dominance in the region's bunker fuel market, and it is expected to maintain this position in the coming years as the shift towards low-sulfur and alternative fuels progresses gradually.

Country Insights

In 2024, Saudi Arabia dominated the Middle East and Africa Bunker Fuel Market and is

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expected to maintain its leading position throughout the forecast period. Saudi Arabia’s dominance is primarily driven by its strategic geographic location along major international shipping routes, especially the Red Sea and the Arabian Gulf, which positions the country as a key hub for maritime fuel supply in the region. The country’s well-developed infrastructure, including major ports like Jeddah and Dammam, facilitates the efficient distribution of bunker fuel to vessels operating in these critical trade routes. Additionally, Saudi Arabia's significant oil reserves and established refineries contribute to its competitive advantage in providing reliable and cost-effective bunker fuel. The growing shipping industry in Saudi Arabia, coupled with the government’s investments in port expansion and maritime infrastructure, further strengthens its position in the bunker fuel market.

While the United Arab Emirates and Qatar are also key players, particularly in fueling international maritime traffic due to their advanced ports and oil exports, Saudi Arabia’s larger fleet and proximity to major shipping lanes give it a continued edge. Egypt is another strong contender, particularly with the Suez Canal playing a pivotal role in global shipping, but its bunker fuel demand remains secondary to that of Saudi Arabia. Other regions such as South Africa, Nigeria, and Turkey are important contributors, but they do not match the scale and infrastructure dominance of Saudi Arabia. Given these factors, Saudi Arabia is poised to retain its dominance in the Middle East and Africa Bunker Fuel Market as the region’s maritime activity and fuel demand continue to grow in the coming years.

Key Market Players

Exxon Mobil Corporation.

BP p.l.c

Shell International B.V

Chevron Corporation

TotalEnergies SE.

Saudi Arabian Oil Company (Saudi Aramco)

ENOC Company

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QatarEnergy

Kuwait Petroleum Corporation

National Iranian Oil Company.

Report Scope:

In this report, the Middle East and Africa Bunker Fuel Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Middle East and Africa Bunker Fuel Market, By Fuel Type:

IFO (Intermediate Fuel Oil)

MDO (Marine Diesel Oil)

MGO (Marine Gas Oil)

LNG (Liquefied Natural Gas)

Others

Middle East and Africa Bunker Fuel Market, By Vessel Type:

Large Ships

Medium Ships

Small Ships

Middle East and Africa Bunker Fuel Market, By Application:

Commercial Shipping

Tankers

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Bulk Carriers

Container Ships

Passenger Ships

Others

Middle East and Africa Bunker Fuel Market, By End-User:

Ship Owners

Fuel Suppliers

Government and Defense

Middle East and Africa Bunker Fuel Market, By Country:

Saudi Arabia

UAE

Kuwait

Iran

Qatar

Egypt

South Africa

Bahrain

Nigeria

Turkey

Rest of Middle East and Africa

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Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Middle East and Africa Bunker Fuel Market.

Available Customizations:

Middle East and Africa Bunker Fuel Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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