

Middle East and Africa Commercial Aircraft Aviation Fuels Market Segmented By Fuel Type (Jet A, Jet A1, Biofuels, Others), By Distribution Channel (Direct Sales, Retail), By Application (Domestic Flights, International Flights), By End-User (Airlines, Airports, Fuel Suppliers), By Country, Competition, Forecast & Opportunities, 2020-2030F

<https://marketpublishers.com/r/MCE5849AA816EN.html>

Date: January 2025

Pages: 133

Price: US\$ 4,000.00 (Single User License)

ID: MCE5849AA816EN

Abstracts

Middle East and Africa Commercial Aircraft Aviation Fuels Market was valued at USD 12.98 Billion in 2024 and is expected to reach USD 26.12 Billion by 2030 with a CAGR of 12.19% during the forecast period.

Middle East and Africa Commercial Aircraft Aviation Fuels Market encompasses the supply and demand for aviation fuels, primarily used by commercial aircraft in the region. This market includes various types of fuel such as Jet A and Jet A1, which are widely utilized in commercial aviation, as well as emerging alternatives like biofuels. The market's growth is largely driven by the booming aviation industry in the Middle East and Africa, fueled by increasing air travel demand, robust tourism, and the expansion of both domestic and international flight operations. The Middle East, with its strategic geographic position as a global aviation hub, plays a significant role in the market, especially with key players like Emirates, Qatar Airways, and Etihad Airways driving fuel demand. The expansion of major airports in cities like Dubai, Abu Dhabi, Doha, and Johannesburg has further increased the need for aviation fuel to support the growing fleet of commercial aircraft. Additionally, the ongoing investments in sustainable aviation fuel (biofuels) and advancements in fuel-efficient technologies are expected to provide a boost to the market, as airlines seek to reduce their carbon footprint and comply with stringent environmental regulations. Another key factor driving market growth is the rise

in air freight activities, which adds to the demand for commercial aircraft fuel. The Middle East and Africa's growing middle class, coupled with increasing disposable incomes, is also contributing to the increased frequency of air travel, thereby further propelling fuel consumption. The market is also expected to rise due to the region's strategic alliances and collaborations between fuel suppliers, airlines, and government entities to enhance the supply chain and ensure stable fuel availability. Furthermore, as the aviation industry recovers from the impacts of the COVID-19 pandemic, the Middle East and Africa Commercial Aircraft Aviation Fuels Market is poised for sustained growth over the forecast period.

In November 2024, the Ugandan government, in collaboration with Dubai-based Alpha MBM Investments LLC, announced plans to fully finance a USD 4 billion oil refinery project through equity. The refinery is expected to produce various petroleum products, including jet fuel, to meet regional demand.

Key Market Drivers

Increasing Air Traffic Demand

One of the primary drivers for the growth of the Middle East and Africa Commercial Aircraft Aviation Fuels Market is the significant increase in air traffic demand. Both regional and international travel have seen a steady rise over the past decade, with the Middle East and Africa emerging as a critical transit hub for global air travel. The region's key strategic location between Europe, Asia, and Africa has made it an essential point for connecting flights. This geographic advantage has resulted in increased passenger traffic, leading to greater fuel consumption by commercial aircraft. Additionally, the expanding middle class in many countries in the region, coupled with increasing disposable incomes, has fueled demand for air travel. For instance, nations such as the United Arab Emirates, Qatar, and Saudi Arabia have experienced rapid growth in both domestic and international flights, further escalating the demand for aviation fuel.

Furthermore, the rise in low-cost carriers across the region has made air travel more accessible, contributing to a surge in air passenger traffic. The expansion of major international airlines such as Emirates, Qatar Airways, and Ethiopian Airlines has also contributed to higher fuel needs. As air traffic continues to increase, the demand for aviation fuel in the region is expected to grow exponentially. The development of new airports and the expansion of existing ones will require substantial amounts of fuel to support larger fleets and more frequent flights, particularly in key travel hubs like Dubai,

Abu Dhabi, Cairo, and Johannesburg. This rising demand for aviation services, including both passenger and cargo flights, directly fuels the growth of the aviation fuels market in the region. The Middle East alone accounts for nearly 20% of global aviation fuel consumption, primarily driven by significant air traffic hubs like Dubai, Doha, and Abu Dhabi.

Expanding Airport Infrastructure

Another critical driver for the growth of the Middle East and Africa Commercial Aircraft Aviation Fuels Market is the continuous expansion and modernization of airport infrastructure across the region. The Middle East, in particular, has been investing heavily in the development of world-class airports that can accommodate the increasing flow of passengers and aircraft. Major airports such as Dubai International Airport, King Khalid International Airport in Riyadh, and Cairo International Airport are undergoing expansions to handle larger volumes of air traffic and provide state-of-the-art facilities to cater to passengers. These projects require significant amounts of aviation fuel to support the increased number of flights, making airport infrastructure a key driver for the market.

The ongoing investments in airport infrastructure not only aim to handle greater air traffic but also to position the region as a global aviation hub. As a result, airports in the Middle East and Africa are receiving upgrades to their fueling systems, designed to handle the rising demand for aviation fuels. With additional capacity and more advanced systems, these airports will be able to fuel a larger number of aircraft, thus contributing to the region's growing aviation fuel consumption. Furthermore, the development of cargo terminals and logistics facilities will drive fuel demand for freight and commercial shipping flights. This expanding airport infrastructure will undoubtedly continue to fuel the Middle East and Africa Commercial Aircraft Aviation Fuels Market, creating a strong base for its growth over the forecast period. The adoption of Sustainable Aviation Fuels (SAF) in the Middle East and Africa is growing, with the UAE's Dubai Airports and Abu Dhabi Airports targeting a 10% SAF usage by 2030 to align with global decarbonization efforts. Investments into SAF infrastructure are estimated to exceed USD 500 million by 2025.

Investments in Sustainable Aviation Fuel Technologies

As global aviation industry stakeholders strive to reduce their carbon footprint and comply with stricter environmental regulations, investments in sustainable aviation fuel (biofuels) technologies are becoming increasingly important. The Middle East and Africa

are witnessing growing interest and investment in biofuels, driven by the need for cleaner and more environmentally friendly alternatives to traditional fossil fuel-based aviation fuels. The push toward reducing greenhouse gas emissions is not just a global trend but also an important focus within the region, as countries aim to align with international climate goals.

Countries like the United Arab Emirates and Saudi Arabia are taking proactive steps in adopting sustainable aviation fuels and investing in the research and development of alternative fuel technologies. The development of biofuels is expected to reduce the dependency on traditional aviation fuels, providing airlines with more environmentally friendly options. The advancement in biofuel technology, supported by government policies and funding, will drive the demand for aviation fuels in the region. Moreover, international airlines operating within the Middle East and Africa are increasingly adopting biofuels as part of their sustainability efforts, which is likely to support the overall market growth. As the cost of biofuels becomes more competitive with traditional fuels, their adoption is expected to accelerate, boosting the aviation fuel market in the region.

Additionally, the Middle East's vast oil reserves offer potential for the development of sustainable fuel alternatives derived from traditional oil sources. The increasing focus on green aviation technologies, along with government incentives for cleaner fuel adoption, is expected to provide a substantial boost to the region's aviation fuel market. Air traffic in Africa is forecast to grow at a rate of 6-7% per year, contributing to an increasing demand for aviation fuel.

Key Market Challenges

Fluctuating Global Oil Prices

One of the most significant challenges facing the Middle East and Africa Commercial Aircraft Aviation Fuels Market is the volatility of global oil prices. Aviation fuel, being a derivative of crude oil, is highly susceptible to changes in the global oil market. Any fluctuations in crude oil prices can have a direct and profound impact on the cost of aviation fuel, leading to uncertainty for both airlines and fuel suppliers in the region. In periods of high oil prices, airlines may struggle with rising operational costs, as aviation fuel typically constitutes a substantial portion of their total expenditure.

The Middle East and Africa, being major players in global oil production, are deeply affected by fluctuations in the oil market. For instance, geopolitical tensions, supply

chain disruptions, and changes in demand from other sectors can cause sharp spikes or drops in crude oil prices. Such price movements can create instability for aviation fuel suppliers, leading to challenges in maintaining consistent pricing structures for commercial airlines. When oil prices increase, airlines are faced with the challenge of balancing their fuel expenditure with profitability. In some cases, high fuel costs can lead to an increase in ticket prices, which in turn may reduce consumer demand for air travel, thereby impacting overall market growth.

Additionally, the dependence on oil-producing countries in the region, such as Saudi Arabia, for the supply of aviation fuel makes the market vulnerable to external factors. While some countries in the region have made efforts to diversify their energy sources and improve fuel supply chains, the oil price volatility remains a key challenge. Consequently, both fuel suppliers and airlines in the Middle East and Africa must develop strategies to mitigate the impact of fluctuating oil prices, such as investing in hedging practices or diversifying fuel procurement strategies.

Environmental Regulations and Sustainability Pressure

The rising pressure to meet environmental regulations and sustainability targets presents another considerable challenge for the Middle East and Africa Commercial Aircraft Aviation Fuels Market. Governments around the world are increasingly focusing on reducing carbon emissions and addressing climate change, which has led to the introduction of stricter environmental regulations for the aviation sector. In particular, the International Civil Aviation Organization (ICAO) and other regulatory bodies are pushing for the reduction of greenhouse gas emissions from aircraft, which includes the adoption of sustainable aviation fuel alternatives.

For the Middle East and Africa, this presents a dual challenge. On the one hand, the region's strong reliance on fossil fuels, particularly oil and gas, is at odds with global sustainability efforts. While the region has made strides in developing renewable energy sources, such as solar and wind power, the aviation fuel industry remains heavily dependent on traditional, carbon-intensive fuels. The pressure to reduce carbon footprints in aviation requires significant investments in the research, development, and adoption of alternative fuel solutions, such as biofuels and synthetic aviation fuels.

On the other hand, the region's growing demand for air travel creates a paradox where the need for aviation fuel is increasing even as environmental pressures mount. The challenge for the industry is to find a balance between meeting the rising demand for aviation fuel and aligning with global environmental standards. Many airlines in the

region are now exploring the use of sustainable aviation fuels to comply with stricter regulations, but these alternatives are often more expensive and require substantial infrastructure investments. Fuel suppliers also face challenges in scaling up the production and distribution of sustainable fuels, given the high initial costs involved. This creates a situation where airlines and fuel suppliers must navigate both regulatory compliance and financial feasibility, all while maintaining profitability.

Key Market Trends

Growing Demand for Sustainable Aviation Fuels

The Middle East and Africa Commercial Aircraft Aviation Fuels Market is experiencing a notable shift toward the adoption of sustainable aviation fuels (SAFs). This trend is driven by increasing environmental awareness, stricter regulations, and a global push for carbon neutrality in the aviation industry. Sustainable aviation fuels, made from renewable resources such as algae, waste oils, and agricultural residues, present a significant opportunity for the region to reduce its carbon footprint.

Several airlines in the Middle East and Africa are investing in research and partnerships to develop and incorporate SAF into their operations. Countries such as the United Arab Emirates and Saudi Arabia are leading the way in adopting sustainable aviation fuel technologies, aiming to meet global emissions targets and align with the International Civil Aviation Organization's sustainability goals. This trend is expected to accelerate as the demand for greener aviation practices increases, with more airlines and fuel suppliers focusing on long-term sustainability and compliance with emerging regulatory frameworks. Furthermore, governments in the region are encouraging the use of SAF through subsidies and policy incentives, which is expected to foster greater investment and innovation within the market.

As sustainable aviation fuel technology continues to mature, its availability and cost-effectiveness are expected to improve. This will further drive the adoption of SAF across the region, especially in markets with rapidly expanding air travel, such as the Middle East and North Africa. The use of SAF aligns with global sustainability objectives and is expected to become an essential component of the region's aviation fuel mix in the coming years.

Increased Focus on Fuel Efficiency and Cost Optimization

A significant trend in the Middle East and Africa Commercial Aircraft Aviation Fuels

Market is the growing focus on fuel efficiency and cost optimization. Fuel represents one of the largest operational costs for airlines, making it a critical factor in determining profitability. As a result, airlines in the region are increasingly seeking ways to reduce fuel consumption, improve fuel management, and optimize refueling processes to lower overall fuel expenditure.

This trend is being driven by several factors, including rising global oil prices and the need for airlines to remain competitive in a challenging economic environment. Airlines are turning to advanced technologies and strategies to optimize fuel use, such as fuel-efficient aircraft, advanced flight planning systems, and improved fuel management practices. The implementation of fuel-saving techniques, such as the use of more aerodynamically efficient aircraft, flight route optimization, and the integration of fuel management software, has become a priority for many carriers in the Middle East and Africa.

Moreover, collaboration between airlines and fuel suppliers is becoming more common, with a focus on developing strategies that can help reduce fuel waste and minimize inefficiencies in the fuel supply chain. In addition, some airlines in the region are implementing carbon offset programs as part of their fuel efficiency strategies, seeking to mitigate their environmental impact. This trend is expected to continue as airlines strive to balance cost reduction with environmental responsibility, ensuring that fuel costs do not erode their profit margins while maintaining competitive prices in the marketplace.

Expansion of Airport Infrastructure and Fuel Storage Capacity

Another prominent trend in the Middle East and Africa Commercial Aircraft Aviation Fuels Market is the expansion of airport infrastructure and the development of additional fuel storage capacity. The rapid growth of air traffic in the region, coupled with the increasing demand for aviation fuel, has created a pressing need for more robust fuel supply chains and storage facilities. In particular, emerging markets across the Middle East and Africa, including Saudi Arabia, the United Arab Emirates, Egypt, and Qatar, are investing heavily in upgrading and expanding airport facilities to meet rising demand for aviation services.

This trend involves the construction of larger, more efficient refueling stations at major airports, as well as the establishment of additional fuel storage terminals in key transit points to improve supply chain reliability. Countries in the region are also working to modernize existing airport refueling infrastructure to accommodate larger aircraft and

higher fuel demands, particularly at international hubs such as Dubai International Airport and Cairo International Airport.

In addition to expanding physical infrastructure, there is also a growing focus on adopting advanced technologies for fuel management, tracking, and distribution. Smart fuel management systems, which allow real-time monitoring of fuel levels and efficient distribution of fuel, are being integrated into airport operations. The aim is to improve operational efficiency and ensure that fuel is delivered in a timely and cost-effective manner. This trend is expected to continue as the Middle East and Africa region further develops its position as a key global aviation hub, with airport infrastructure and fuel supply chains playing a critical role in supporting the growth of the aviation industry.

Segmental Insights

Fuel Type Insights

In 2024, the Jet A1 fuel segment dominated the Middle East and Africa Commercial Aircraft Aviation Fuels Market and is expected to maintain its dominance during the forecast period. Jet A1, a type of aviation turbine fuel widely used in commercial aircraft, remains the fuel of choice for the majority of airlines operating in the region. This fuel is preferred for its reliability, performance, and compatibility with most modern jet engines. It is primarily used in long-haul international flights, which are a major component of the aviation industry in the Middle East and Africa, given the region's strategic position as a key hub for global air travel. Additionally, Jet A1 has a proven track record for meeting international safety and performance standards, making it a trusted option for airlines and fueling companies.

The widespread use of Jet A1 in the Middle East and Africa is further supported by the region's established infrastructure for refining, storage, and distribution, ensuring its consistent supply at major airports. While there is growing interest in alternative fuels, such as biofuels and sustainable aviation fuels, Jet A1's affordability and well-established supply chain make it the dominant choice in the region. Although biofuels and other alternatives are being explored for their environmental benefits, they still face challenges related to cost, infrastructure, and large-scale production. Therefore, Jet A1 is expected to continue its dominance throughout the forecast period, supported by the region's ongoing expansion of air travel, the growing number of international flights, and the stability of Jet A1 fuel availability and pricing.

Country Insights

In 2024, the United Arab Emirates dominated the Middle East and Africa Commercial Aircraft Aviation Fuels Market and is expected to maintain its dominance during the forecast period. The UAE, particularly through its world-renowned hub in Dubai, plays a pivotal role in global air travel, making it a significant player in the commercial aviation fuel sector. Dubai International Airport, one of the busiest international airports globally, serves as a major transit point for passengers and cargo, driving high demand for aviation fuels. The UAE's well-established aviation infrastructure, including its state-of-the-art refueling systems and strategic location between Europe, Asia, and Africa, supports its leadership in the market.

The country's strong aviation industry, led by airlines like Emirates, contributes significantly to the fuel consumption in the region. Additionally, the UAE government's investments in expanding its airport facilities and refining capabilities, along with its role as a key transit point for intercontinental flights, further solidify its position as the dominant market player. This demand for aviation fuel is supported by continuous growth in passenger traffic, increased cargo flights, and an expanding fleet of commercial aircraft.

The UAE is also investing in sustainable aviation fuel production and innovation, aligning with global trends towards environmentally friendly fuels, although traditional aviation fuels such as Jet A1 still dominate the market. The UAE's strategic initiatives and infrastructural development, coupled with its central location in global aviation networks, ensure that it will continue to lead the **Middle East and Africa Commercial Aircraft Aviation Fuels Market** throughout the forecast period, maintaining its dominance in fueling the expanding air travel demand in the region.

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

QatarEnergy

Kuwait Petroleum Corporation

National Iranian Oil Company.

Report Scope:

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

Middle East and Africa Commercial Aircraft Aviation Fuels Market, By Fuel Type:

Jet A

Jet A1

Biofuels

Others

Middle East and Africa Commercial Aircraft Aviation Fuels Market, By Distribution Channel:

Direct Sales

Retail

Middle East and Africa Commercial Aircraft Aviation Fuels Market, By Application:

Domestic Flights

International Flights

Middle East and Africa Commercial Aircraft Aviation Fuels Market, By End-User:

Airlines

Airports

Fuel Suppliers

Middle East and Africa Commercial Aircraft Aviation Fuels Market, By Country:

Saudi Arabia

UAE

Kuwait

Iran

Qatar

Egypt

South Africa

Bahrain

Nigeria

Turkey

Rest of Middle East and Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Middle East

Middle East and Africa Commercial Aircraft Aviation Fuels Market Segmented By Fuel Type (Jet A, Jet A1, Biofuel...)

and Africa Commercial Aircraft Aviation Fuels Market.

Available Customizations:

Middle East and Africa Commercial Aircraft Aviation Fuels 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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