

Middle East & Africa Fixed-Base Operator Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Services Offered (Hangaring, Fueling, Flight Instruction, Aircraft Maintenance, and Aircraft Rental) and Application (Business Aviation and Leisure Aviation)

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Abstracts

The Middle East & Africa Fixed-Base Operator (FBO) Market is poised for significant growth, with projections indicating an increase from US\$ 2,780.8 million in 2024 to US\$ 3,807.0 million by 2031. This growth represents a compound annual growth rate (CAGR) of 4.9% from 2025 to 2031.

According to Airports Council International (ACI), the Middle East is expected to account for over 1 billion passengers of global air passenger demand by 2040. To accommodate this surge, an estimated investment of US\$ 151 billion is required for airport infrastructure development in the region. With over 110 airports, the Middle East is among the fastest-growing regions for air travel, currently handling 170 million passengers of global traffic. ACI forecasts that over US\$150 billion will be necessary for airport infrastructure development between 2021 and 2040 to meet the increasing demand for air travel.

The region is witnessing substantial airport infrastructure expansion, driven by economic growth and a strategic focus on becoming global aviation hubs. Major airports such as Dubai International Airport, Hamad International Airport, and King Fahd International Airport are at the forefront of modernization efforts, incorporating advanced technologies and undertaking extensive expansion projects. For instance, the Jeddah

Airport Company is planning a \$31 billion expansion of King Abdul Aziz International Airport, which aims to accommodate 114 million passengers annually by 2031.

The travel and tourism sector's growth in the Middle East is further propelling the general aviation industry, attracting more passengers. However, the market faces challenges, particularly from fluctuations in oil prices, as many Middle Eastern economies are heavily reliant on oil. Despite this, the demand for long-range business jets and large-cabin aircraft, known for their luxury and comfort, is driving the growth of the FBO market in the region. Key players in the FBO market include Gama Aviation, Dubai National Air Travel Agency, Signature Aviation, Jet Aviation, Jetex, and Luxaviation, all of which are pursuing strategic initiatives such as business expansion and acquisitions to strengthen their market positions.

Recent developments in the Middle East & Africa FBO market include:

In March 2025, Gama Aviation announced plans to establish a new FBO at Sharjah International Airport (OMSJ), enhancing its role as a technical stop for long-haul flights connecting Asia, Europe, the Middle East, and Africa.

In December 2024, Jetex signed an agreement to operate a new FBO at Red Sea International Airport in Saudi Arabia.

ExecuJet Middle East opened a new 15,000-square-meter private jet terminal at Dubai World Central in December 2024, featuring a 7,000-square-meter hangar, marking its second FBO facility in the UAE after Dubai International Airport.

The FBO market in the Middle East & Africa is segmented by services offered, including hangaring, fueling, flight instruction, aircraft maintenance, and aircraft rental. Fueling services held the largest market share in 2024. Additionally, the market is segmented by application into business aviation and leisure aviation, with business aviation dominating the market share in 2024.

FBOs are essential in managing aircraft and passengers, providing services such as fueling, maintenance, and flight planning. They play a critical role in the business aviation sector, offering vital ground services to private, corporate, and charter aviation. As the business aviation sector expands, FBOs are investing in technology and enhancing infrastructure to meet the industry's evolving needs. They facilitate a

seamless and efficient experience for business aviation users, allowing them to concentrate on their business objectives. Private aviation offers advantages such as quicker travel between cities, direct flights to smaller airports, and avoidance of commercial airline delays, significantly reducing travel time. According to the General Aviation Manufacturers Association (GAMA), business jet deliveries rose from 712 in 2022 to 730 in 2023, with the total value of airplane deliveries reaching US\$ 23.4 billion in 2023. This growth in the business aviation sector is a key driver for the FBO market.

Geographically, the FBO market in the Middle East & Africa is segmented into South Africa, Saudi Arabia, the United Arab Emirates, and the Rest of Middle East & Africa. The UAE held the largest market share in 2024, benefiting from robust airport infrastructure development and its strategic position as a global aviation hub. Key factors driving the FBO market in the UAE include significant infrastructure expansion, increasing traveler numbers, and rising air traffic, particularly in Dubai and Abu Dhabi. The UAE's commitment to hosting major international events and its reputation for luxury travel are expected to further fuel market growth in the coming years.

Dubai is emerging as a key destination for both business and leisure travel, with the general aviation sector experiencing remarkable growth. Major FBO operators in the UAE include Jetex, ExecuJet, and Jet Aviation, which provide services at various airport terminals. Al Bateen Executive Airport, dedicated exclusively to general aviation, is home to several FBOs, including Munawala, Falcon Aviation, and APP Jet Centers. International FBO companies are also keen to expand their operations in UAE airports, with Gama Aviation planning to establish new facilities at Sharjah International Airport and other locations.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. FIXED-BASE OPERATOR MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Porter's Five Forces Analysis
 - 4.2.1 Threat of New Entrants:
 - 4.2.2 Threat of Substitutes:
 - 4.2.3 Bargaining Power of Buyers:
 - 4.2.4 Bargaining Power of Suppliers:
 - 4.2.5 Competitive Rivalry:
- 4.3 Ecosystem Analysis
 - 4.3.1 List of Vendors in the Value Chain

5. MIDDLE EAST & AFRICA FIXED-BASE OPERATOR MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints

- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. FIXED-BASE OPERATOR MARKET - MIDDLE EAST & AFRICA MARKET ANALYSIS

- 6.1 Middle East & Africa Fixed-Base Operator Market Revenue (US\$ Million), 2024 - 2031
- 6.2 Middle East & Africa Fixed-Base Operator Market Forecast and Analysis

7. MIDDLE EAST & AFRICA FIXED-BASE OPERATOR MARKET REVENUE ANALYSIS - BY SERVICES OFFERED

- 7.1 Hangaring
 - 7.1.1 Overview
 - 7.1.2 Hangaring: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.2 Fueling
 - 7.2.1 Overview
 - 7.2.2 Fueling: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.3 Flight Instruction
 - 7.3.1 Overview
 - 7.3.2 Flight Instruction: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.4 Aircraft Maintenance
 - 7.4.1 Overview
 - 7.4.2 Aircraft Maintenance: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.5 Aircraft Rental
 - 7.5.1 Overview
 - 7.5.2 Aircraft Rental: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. MIDDLE EAST & AFRICA FIXED-BASE OPERATOR MARKET REVENUE ANALYSIS - BY APPLICATION

- 8.1 Business Aviation

8.1.1 Overview

8.1.2 Business Aviation: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Leisure Aviation

8.2.1 Overview

8.2.2 Leisure Aviation: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. MIDDLE EAST & AFRICA FIXED-BASE OPERATOR MARKET - COUNTRY ANALYSIS

9.1 Middle East & Africa

9.1.1 Middle East & Africa Fixed-Base Operator Market Revenue and Forecast and Analysis - by Country

9.1.1.1 Middle East & Africa Fixed-Base Operator Market Revenue and Forecast and Analysis - by Country

9.1.2.2 South Africa: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.1.2.2.1 South Africa: Middle East & Africa Fixed-Base Operator Market Share - by Services Offered

9.1.2.2.2 South Africa: Middle East & Africa Fixed-Base Operator Market Share - by Application

9.2.3.3 Saudi Arabia: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2.3.3.1 Saudi Arabia: Middle East & Africa Fixed-Base Operator Market Share - by Services Offered

9.2.3.3.2 Saudi Arabia: Middle East & Africa Fixed-Base Operator Market Share - by Application

9.3.4.4 United Arab Emirates: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3.4.4.1 United Arab Emirates: Middle East & Africa Fixed-Base Operator Market Share - by Services Offered

9.3.4.4.2 United Arab Emirates: Middle East & Africa Fixed-Base Operator Market Share - by Application

9.4.5.5 Rest of Middle East & Africa: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4.5.5.1 Rest of Middle East & Africa: Middle East & Africa Fixed-Base Operator Market Share - by Services Offered

9.4.5.5.2 Rest of Middle East & Africa: Middle East & Africa Fixed-Base Operator

Market Share - by Application

10 COMPETITIVE LANDSCAPE

10.1 Company Market Share Analysis

11 INDUSTRY LANDSCAPE

11.1 Overview

11.2 New Product Development

11.3 Merger and Acquisition

11.4 Other Strategic Developments

12 COMPANY PROFILES

12.1 General Dynamics Corp

12.1.1 Key Facts

12.1.2 Business Description

12.1.3 Products and Services

12.1.4 Financial Overview

12.1.5 SWOT Analysis

12.1.6 Key Developments

12.2 Avemex SA De CV

12.2.1 Key Facts

12.2.2 Business Description

12.2.3 Products and Services

12.2.4 Financial Overview

12.2.5 SWOT Analysis

12.2.6 Key Developments

12.3 DEER JET CO. LTD.

12.3.1 Key Facts

12.3.2 Business Description

12.3.3 Products and Services

12.3.4 Financial Overview

12.3.5 SWOT Analysis

12.3.6 Key Developments

12.4 dnata

12.4.1 Key Facts

12.4.2 Business Description

- 12.4.3 Products and Services
- 12.4.4 Financial Overview
- 12.4.5 SWOT Analysis
- 12.4.6 Key Developments
- 12.5 Jetex
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 Luxaviation
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 Signature Aviation Limited
 - 12.7.1 Key Facts
 - 12.7.2 Business Description
 - 12.7.3 Products and Services
 - 12.7.4 Financial Overview
 - 12.7.5 SWOT Analysis
 - 12.7.6 Key Developments
- 12.8 Swissport
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments
- 12.9 Abilene Aero
 - 12.9.1 Key Facts
 - 12.9.2 Business Description
 - 12.9.3 Products and Services
 - 12.9.4 Financial Overview
 - 12.9.5 SWOT Analysis
 - 12.9.6 Key Developments

12.10 Atlantic Aviation FBO Inc.

12.10.1 Key Facts

12.10.2 Business Description

12.10.3 Products and Services

12.10.4 Financial Overview

12.10.5 SWOT Analysis

12.10.6 Key Developments

12.11 ExecuJet Aviation Group AG

12.11.1 Key Facts

12.11.2 Business Description

12.11.3 Products and Services

12.11.4 Financial Overview

12.11.5 SWOT Analysis

12.11.6 Key Developments

12.12 Universal Weather and Aviation, Inc.

12.12.1 Key Facts

12.12.2 Business Description

12.12.3 Products and Services

12.12.4 Financial Overview

12.12.5 SWOT Analysis

12.12.6 Key Developments

13. APPENDIX

13.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Middle East & Africa Fixed-Base Operator Market Segmentation

Table 2. List of Vendors

Table 3. Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services Offered

Table 5. Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 6. Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 7. South Africa: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services Offered

Table 8. South Africa: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 9. Saudi Arabia: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services Offered

Table 10. Saudi Arabia: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 11. United Arab Emirates: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services Offered

Table 12. United Arab Emirates: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 13. Rest of Middle East & Africa: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services Offered

Table 14. Rest of Middle East & Africa: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

List Of Figures

LIST OF FIGURES

Figure 1. Middle East & Africa Fixed-Base Operator Market Segmentation - Country

Figure 2. Porter's Analysis

Figure 3. Ecosystem: Fixed-Base Operator Market

Figure 4. Middle East & Africa Fixed-Base Operator Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Middle East & Africa Fixed-Base Operator Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Middle East & Africa Fixed-Base Operator Market Share (%) - by Services Offered, 2024 and 2031

Figure 8. Hangaring: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Fueling: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Flight Instruction: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. Aircraft Maintenance: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Aircraft Rental: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Middle East & Africa Fixed-Base Operator Market Share (%) - by Application, 2024 and 2031

Figure 14. Business Aviation: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Leisure Aviation: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Middle East & Africa Fixed-Base Operator Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 17. South Africa: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Saudi Arabia: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. United Arab Emirates: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Rest of Middle East & Africa: Middle East & Africa Fixed-Base Operator Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. Company Market Share Analysis

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