Global Commercial Aircraft Cabin Interior Market by Product Type (Seating, Lighting, Windows, Galley, and Lavatory), by Aircraft Type (Wide Body Aircraft, Narrow Body Aircraft, and other Aircraft), by Fit (Line Fit and Retro Fit), and by Region – Forecast To 2023

Market Introduction

A commercial aircraft cabin interior generally consists of lights, seats, windows, In-Flight Entertainment & Connectivity (IFEC) system, galleys, and lavatories. Aspects such as lights and seat design, color varieties, and other value add-ons enhance the overall look of the aircraft interior. Cabin interiors are typically designed to augment passenger comfort and the airline services. In spite of the rising fuel prices, there has been an increase in global air traffic with growth in investments by passengers. Moreover, passenger experience is a key differentiator used by airlines to attract new customers and retain the existing ones. Hence, airlines are consistently focusing on improving the cabin interiors of their aircraft in order to enhance efficiency, luxury, and passenger comfort. Of late, orders for single-aisle aircraft are rising, primarily in Asia, EMEA, and Latin America. In addition to buying new aircraft, airlines are investing heavily in advanced information and mobile technology, upgraded cabin interiors for higher levels of service, and additional seats to improve unit costs.

Market Driving Factors

The increase in air traffic is one of the key factors driving the market growth. The rising demand for air travel has resulted in many companies developing innovative products in the IFEC field. Investment in cabin interior products and aircraft weight reduction are some of the other major drivers of the growth of the market.

Upgrading to new technologies is a significant challenge for market vendors. Airlines face a challenge while implementing changes to cabin interiors as the technology soon becomes outdated. Introduction of design innovations and retrofitting aircraft interiors are some major challenges faced by the market players.

Owing to the increasing use of mobile devices, such as tablets and smartphones, among others by the flight and cabin crew, there has been a significant inclination towards in-flight connectivity. Cabin crew uses in-flight connectivity enabled mobile devices for various applications, such as onboard sales, crew communication, and accessing crew reporting tools, among others. Due to increase in onboard Wi-Fi speeds coupled with the rising use of Personal Electronic Devices (PEDs) among customers, airline operators are focusing on replacing heavy and expensive in-flight entertainment systems with streamed content. IFEC technology implementation requires major capital investment, and currently, vendors are introducing innovative solutions that make these IFEC systems more affordable, which would be a potential source of revenue and also a way to optimize operations. Use of lightweight materials, including composites & alloys, and cabin customization & refurbishment are some other key trends that will boost the growth of the global commercial aircraft cabin interior market.

As a result, the global commercial aircraft cabin interior market is estimated to grow at a CAGR of around 11% during the forecast period.
Regional Analysis

APAC airline industry dynamics are transforming as regulations liberalize the market, enabling carriers to expand beyond national borders. It is evident from the growth of air travel, as low-cost carriers reduce fares and open new markets. Increasing purchasing power and accessibility will stimulate demand for air travel in established markets and meet the emerging travel needs of the growing middle-class population in the region.

In the Asia Pacific region, there has been an increase in demand for narrow-body aircraft, especially, from LCCs in the recent years, owing to the emergence and growth of airlines such as AirAsia, Tata Vistara, Tigerair, Lion Air, and Jetstar Airways, among others. Growth in this market will continue to depend largely on passenger travel as an increase in the passenger growth rate will lead to an increase in the demand for more aircraft and therefore, cabin seats.

Key Players

The key players of the global commercial aircraft cabin interior market are Diehl Aerosystems (Germany), Honeywell (U.S.), Jamco (Japan), Thales (France), Zodiac Aerospace (France), Aviointeriors (Italy), GKN Aerospace (U.K), Panasonic Avionics (U.S.), Recaro Aircraft Seating (Germany), and Rockwell Collins (U.S.).

Intended Audience

- Distributor & Supplier companies
- End-users
- Consultants and Investment bankers
- Government as well as Independent Regulatory Authorities
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