

Commercial Aircraft In-Flight Entertainment System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2030

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Report description:

The Commercial Aircraft In-Flight Entertainment System Market size is estimated at USD 0.85 billion in 2024, and is expected to reach USD 1.26 billion by 2030, growing at a CAGR of 6.78% during the forecast period (2024-2030).

Key Highlights

- Largest Market by Aircraft Type - Narrowbody : A fleet of narrowbody aircraft adds flexibility in terms of fleet management and helps reduce the operating costs of airlines, resulting in its rapid adoption. Narrowbody aircraft for long-haul routes are driving the demand for IFE systems.
- Fastest-Growing Market by Aircraft Type - Widebody : Widebody aircraft are primarily designed for long-haul flights. IFE systems are majorly preferred by airlines operating widebody aircraft on long-haul routes to keep the passengers engaged. Hence, the widebody aircraft segment dominates the market.
- Largest Market by Cabin Class - Economy and Premium Economy Class : The economy and premium economy cabin classes benefit from the growing emphasis on fleet expansion, passenger amenities, and comfort.
- Largest Market by Region - North America : The rising domestic and international air traffic levels in the region are driving the airlines to procure more aircraft, thereby boosting the growth of the in-flight entertainment (IFE) system market.

In-flight Entertainment and Connectivity Market Trends

Narrowbody is the largest Aircraft Type

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- In-flight entertainment has been an integral component of the cabin interior, playing an increasingly crucial part in defining a passenger's entire flight experience in recent years. Narrowbody aircraft dominated the number of deliveries, with 83% of the deliveries in 2017-2022.
- The overall passenger aircraft category, including narrowbody and widebody aircraft, witnessed a decline of 30% in 2020. This was due to the restrictions on travel, including domestic and international routes. The procurement of new aircraft was also affected due to delays by airline companies in adding new aircraft to their fleet.
- The ease in global restrictions, with the surge in domestic and international travel, aided in the recovery of the overall aircraft deliveries. During the pandemic in 2020, the decline in deliveries in narrowbody aircraft was 23% as compared to 47% in widebody aircraft.
- The adoption of narrowbody aircraft in the longer haul routes by airlines, globally, has increased, aiding the deployment of IFE systems in narrowbody aircraft. Major airlines such as Emirates have focused on increasing their number of business class seats as well as improving the customer experience in the IFE systems segment. Around 10,000+ aircraft are expected to be delivered during 2023-2029. The fleet expansion plans in the region are expected to aid the procurement of both narrowbody and widebody aircraft and drive the growth of commercial aircraft IFE systems in the forecast period.

North America is the largest Region

- Customer experience is always the top priority for airlines. It is critical that passengers have a positive experience every time they travel. So, to provide the best experience, the regional airlines focus on providing the latest IFE systems that play an increasingly important role in defining the complete passenger experience during their travel.
- The increase in passenger traffic will eventually drive the new aircraft procurements, creating the demand for the aircraft IFES market. In 2021, the air passenger traffic in North America, Europe, Asia-Pacific, and the Middle East recorded 4.3 billion, which is a growth of 167% compared to 2020, and compared to 2019, the growth was 5%. The major region that accounted for most air passenger traffic is Asia-Pacific, which accounted for 41%, followed by North America at 27%, Europe at 24%, and the Middle East accounted for 7%. Since Asia-Pacific recorded the highest air passenger traffic, it will generate the demand for new aircraft compared to other regions.
- The increasing air passenger traffic will eventually drive airlines to place new aircraft orders. As of October 2022, a total of 534 Boeing and Airbus planes were ordered by various airlines globally. A total of 534 aircraft are ordered by major airlines, such as Emirates, Qatar Airways, Etihad Airways, Delta Air Lines, American Airlines, Lufthansa, Turkish Airlines, Air France, Singapore Airlines, Japan Airlines, ANA, and Air China.
- Due to these new aircraft deliveries, the demand for aircraft IFES market increases, and various airlines in the region are creating an interactive seatback to lead to a smoother flight experience.

In-flight Entertainment and Connectivity Industry Overview

The Commercial Aircraft In-Flight Entertainment System Market is fairly consolidated, with the top five companies occupying 86.56%. The major players in this market are Burrana, Latecoere, Northern Avionics srl, Panasonic Avionics Corporation and Thales Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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