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

Market Report | 2023-02-15 | 111 pages | Mordor Intelligence

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Report description:

The North America Commercial Aircraft In-Flight Entertainment System Market size is estimated at USD 181.06 million in 2024, and is expected to reach USD 230.19 million by 2030, growing at a CAGR of 4.08% during the forecast period (2024-2030).

Key Highlights
-Narrowbody is the Largest Aircraft Type : A fleet of narrowbody aircraft adds flexibility in terms of fleet management and helps reduce airlines' operating costs, thereby resulting in its rapid adoption. Narrowbody aircraft for long-haul routes are driving the demand for IFE systems.
-Narrowbody is the Fastest-growing Aircraft Type : The convenience of air travel and its low cost due to increased competition among domestic airlines may boost the demand for narrowbody aircraft. The increasing domestic air passenger traffic globally is also leading to the dominant share of narrowbody aircraft in the market.
-Economy and Premium Economy Class is the Largest Cabin Class : The increasing focus on passenger amenities and comfort in the economy and premium economy cabin classes, along with fleet expansion plans, boosted the category's growth.
-United States is the Largest Country : The growth of the passenger aviation sector and the US-based airlines' fleet expansion plans boosted the growth of the US cabin IFE systems market.

North America Commercial Aircraft In-Flight Entertainment System Market Trends

Narrowbody is the largest Aircraft Type

- In-flight entertainment is integral to cabin interiors and defines a passenger's entire flight experience. In the United States, United Airlines, American Airlines, Southwest Airlines, and Delta Air Lines have in-flight entertainment systems in their active fleet of commercial aircraft, while Air Canada, WestJet, and Air Transat operating in Canada have in-flight entertainment systems in their active fleet of commercial aircraft.
- Panasonic offers many versions of the IFE system, including Astrova, NEXT, and X Series. Airlines use screens ranging from 12 inches to 18 inches with different configurations, such as LED, QLED, and 4K HDR screens, according to cabin class.
- As the demand for domestic aviation has increased, the market for narrowbody aircraft is anticipated to rebound faster than widebody aircraft. The 737 MAX's return to service in late 2020 may also boost the growth of the narrowbody aircraft segment.
- In terms of deliveries, North America's commercial aircraft accounted for almost 30% of the total commercial aircraft worldwide from 2017 to 2022. Of these commercial aircraft deliveries, narrowbody and widebody aircraft accounted for 91% and 9%. Compared to 2017-2022, commercial aircraft deliveries are expected to rise by 80% during the forecast period.
- The rising number of aircraft orders of new commercial passenger aircraft has positively driven the growth of the market. For instance, in July 2021, United Airlines announced an order of 270 planes for Boeing 737 Max and Airbus A320. Such orders may also generate demand for in-flight entertainment systems during the forecast period.

United States is the largest Country

- As the domestic air passenger traffic in the United States is robustly recovering compared to the international passenger traffic, the airlines are investing more in narrowbody aircraft. For instance, the number of aircraft delivered in 2021 was a 52% rise from 2020.
- The commercial aviation sector in Canada is recovering at a healthier rate after the pandemic. Air passenger traffic in the country surged around 270% during 2020-2021. Likewise, air travel in the rest of North America increased by 24.74 million air passengers traveled in 2021, compared to 7.79 million in 2020.
- As of May 2022, Boeing has a backlog of 1,296 aircraft for the US airlines, while Airbus has 1,561 commercial aircraft. In addition, passenger traffic numbers are expected to recover by 2024. Also, during 2022-2028, 190+ aircraft are expected to be delivered in Canada.
- Besides the procurement of new aircraft and increasing air passenger traffic, the IFE system market is also driven by the need to replace conventional wired IFE systems with wireless IFE systems to reduce fuel consumption and maintenance costs and increase airline profitability. OEMs, such as Panasonic, Thales, and others, are developing in-seat and cabin displays with less weight compared to the conventional IFE system. Additionally, these systems are designed to have a sleek passenger-centric design focused on ergonomics and fit seamlessly into the modern cabin environment.
- It was observed that in the United States, airlines such as Alaska Airlines, Frontier Airlines, Southwest Airlines, and Spirit Airlines are not providing any IFE system because these airlines have opted for the option of streaming entertainment on the passenger's own device with some additional cost to use their in-flight Wi-Fi.

North America Commercial Aircraft In-Flight Entertainment System Industry Overview

The North America Commercial Aircraft In-Flight Entertainment System Market is fairly consolidated, with the top five companies occupying 77.55%. 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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