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Asia-Pacific Commercial Aircraft Cabin Lighting - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 115 pages | Mordor Intelligence

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Report description:

The Asia-Pacific Commercial Aircraft Cabin Lighting Market size is estimated at 136.8 million USD in 2025, and is expected to reach 216.7 million USD by 2030, growing at a CAGR of 9.64% during the forecast period (2025-2030).

The narrowbody aircraft segment holds the highest market share in terms of the number of deliveries

- The passenger aircraft category is further segmented into narrowbody aircraft and widebody aircraft. The narrowbody aircraft segment dominated the Asia-Pacific commercial aircraft cabin lighting market in terms of the number of deliveries, with 86% of the deliveries from 2017 to 2022. In 2020, the overall passenger aircraft category, including narrowbody aircraft and widebody aircraft, witnessed a decline of 35% in Asia-Pacific. Travel restrictions imposed on domestic and international routes and delays in the addition of new aircraft to their fleets by airline companies during this period also resulted in the suspension of aircraft procurement programs.
- The adoption of narrowbody aircraft in the longer haul routes by many airlines in Asia-Pacific has increased, further aiding the deployment of mood-based cabin lighting in these aircraft. Airlines such as Singapore Airlines and All Nippon Airways are focusing on adopting mood-based lighting to improve the customer experience.
- The general benefits of LED technology over conventional lighting have been recognized in the last decade, and cabin lighting remains a major element in offering passengers an enhanced in-flight experience. Around 3,000+ aircraft are expected to be delivered in the region from 2023 to 2029. These airlines have placed huge aircraft orders for both narrowbody and widebody aircraft, and they are projected to drive the growth of the commercial aircraft lighting market in Asia-Pacific during the forecast period.

China is expected to witness the highest growth

- The Asia-Pacific region is expected to be one of the fastest-growing markets for aircraft cabin lighting during the forecast period. Despite the impact of the pandemic on the Asia-Pacific aviation sector, domestic passenger traffic grew gradually in 2021, accounting for 27.5% of the global air passenger traffic.
- The rising per capita income of the population due to increased economic and infrastructure development aided the growth in the number of air passengers and supported the fleet expansion plans of domestic and regional airlines.
- In the past few years, major countries in the region, like China, India, and Japan, witnessed a rapid increase in passenger traffic, resulting in large orders for new aircraft from airlines operating in the region. China is driving the commercial aviation market in Asia-Pacific. It is also the largest aviation market globally. The country developed an indigenous aircraft, COMAC C919, deliveries of which were planned to start in 2022.
- The rising number of new commercial passenger aircraft deliveries is driving the growth of the cabin lighting market. In 2021, Boeing delivered 91 aircraft to the region, while Airbus delivered 30% of its aircraft.
- LEDs dominate the aircraft cabin lighting market because they are energy efficient and produce brighter light than traditional (incandescent) bulbs. LED lights have an average MTBF (mean time between failures) of approximately 10,000 hours or 10 years compared to approximately 1,000 hours or 1-2 years for conventional incandescent lights.

Asia-Pacific Commercial Aircraft Cabin Lighting Market Trends

Airbus A321neo and Boeing 737 Max record the highest gross orders

- Ongoing political tensions between China and the United States have impacted Boeing, and it now plans to remarket some 737MAX jets earmarked for Chinese customers. Boeing is facing a difficult situation as Chinese airlines are no longer ordering its jets. The Boeing delivery center in Zhoushan, China, is ready and is expected to resume delivery of 737MAX aircraft. The Zhoushan plant can accommodate 100 aircraft annually.
- Airbus accumulated 1,044 net new orders (1,080 gross orders), compared to 259 net new orders (442 gross orders) in the first half of 2022. In 2022, Airbus booked 820 net new orders (1,078 gross orders), surpassing both 2021 gross orders and net new orders. In 2022, Airbus won the orders crown for the fourth consecutive year by a fairly slim margin of just 46 aircraft compared to Boeing. In 2021, Airbus booked a total of 771 gross orders and received 264 cancellations, for a total of 507 net new orders. In June 2023, Airbus booked orders for a whopping 902 aircraft for 12 different customers and reported two A321neo cancellations, for a total of 900 net new orders.
- Boeing has accumulated 415 net new orders (527 gross orders), compared to 186 net new orders (286 gross orders) in the first six months of last year. In 2022, Boeing booked 774 net new orders (935 gross orders), up from 479 net new orders (909 gross orders) in 2021. As of June 2023, Boeing booked orders from nine customers for a total of 304 jets (gross orders). However, the company also reported 16 777X cancellations, resulting in 288 net new orders.

An increase in international passenger traffic post the COVID-19 pandemic is driving market demand

- As cross-border travel was progressively restored in 2022 post the COVID-19 pandemic, the carriers in Asia-Pacific raced to increase their flights to meet runaway demand, stimulated by people's desire to travel and cash in on savings accumulated in the

two years of isolation. As a result, in 2022, the air passenger traffic in the region recovered more rapidly from the pandemic than in the other regions. For instance, in 2022, air passenger traffic in the whole of Asia-Pacific was recorded at 1.9 billion, a growth of 6% compared to 2021 and 151% compared to 2020. Airline companies in the region are implementing fleet expansion plans to cater to the growing air passenger traffic in the major countries. China, India, Japan, and Indonesia accounted for 70% of the total air passenger traffic in the region, generating higher demand for new aircraft compared to other Asia-Pacific countries.
- Airlines in Asia-Pacific also witnessed a good recovery in international air passenger markets as travel demand continued to fuel growth despite increasingly challenging global economic conditions. For instance, in August 2022, the region recorded 13.1 million international air passenger traffic, an 836% increase compared to August 2021, when it was recorded at 1.4 million. The healthy growth in international passenger traffic in the first eight months of the year showed strong travel demand from business and leisure consumers. The rapid increase in air passenger traffic in the region is expected to drive the air transport industry in the future.

Asia-Pacific Commercial Aircraft Cabin Lighting Industry Overview

The Asia-Pacific Commercial Aircraft Cabin Lighting Market is moderately consolidated, with the top five companies occupying 58.43%. The major players in this market are Collins Aerospace, Diehl Aerospace GmbH, Luminator Technology Group, SCHOTT Technical Glass Solutions GmbH and STG Aerospace (sorted alphabetically).

Additional Benefits:

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

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