Commercial Aircraft In-seat Power System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 127 pages | Mordor Intelligence

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Report description:

The Commercial Aircraft In-seat Power System Market size is estimated at USD 152.55 million in 2025, and is expected to reach USD 181.10 million by 2030, at a CAGR of 3.49% during the forecast period (2025-2030).

The demand for commercial aircraft in-seat power systems is surging, driven by both an increasing passenger reliance on personal electronic devices and airlines' efforts to cater to this need. Airlines are swiftly upgrading their fleets, equipping them with USB and AC in-seat power systems to ensure passengers' devices stay charged throughout their flights.

As passenger traffic soars and new emission regulations take effect, there has been a notable uptick in the purchase of new-generation aircraft. This trend bodes well for the commercial aircraft in-seat power systems market, as airlines keen on enhancing the passenger experience are increasingly incorporating these systems into their new fleets. The rising popularity of personal gadgets and the 'bring your own device' (BYOD) trend further underscore the necessity for in-seat power systems.

Despite this optimistic outlook, the market faces challenges. Retrofitting existing aircraft with in-seat power systems is a costly and time-consuming endeavor, posing economic challenges for airlines already operating on thin margins. Moreover, the stringent aviation standards for integrating advanced power systems present a hurdle, slowing down global deployment. Airlines must carefully weigh passenger satisfaction against financial considerations, necessitating prudent planning and investments.

With airlines globally prioritizing passenger experience and digital demands, the demand for in-seat power systems is poised for a steady rise. This momentum is further fueled by the overall growth in air travel and the expanding fleets of major airlines, especially in the burgeoning Eastern markets.

Commercial Aircraft In-seat Power System Market Trends

The Economy Class Segment to Showcase the Highest Market Growth During the Forecast Period

During the forecast period, the economy class segment is poised for significant growth in the commercial aircraft in-seat power system market. This surge is expected to be fueled by a combination of factors, including a rising number of aircraft deliveries, increased spending on advanced aircraft seats, and the rapid expansion of the aviation industry.

Given that the economy class typically dominates an aircraft's seating layout, it is no surprise that the demand for these seats has surged with the global economic upswing among middle-income group families. Responding to this heightened demand, airlines worldwide are revamping their cabin interiors to elevate the passenger experience. This overhaul includes retrofitting existing aircraft and installing specialized seats in new orders.

For example, in February 2024, Air India inked a deal with Recaro Aircraft Seating for over 22,000 seats, encompassing variants like the CL3710 and the new CL3810 for economy class, as well as the PL3530 for premium economy. This collaboration is a strategic move to bolster Air India's wide-body fleet, with plans to retrofit 40 Boeing 787 and 777 aircraft and equip future Airbus A350 and Boeing 787s. The contract spans five to six years, aligning with Air India's broader strategy of acquiring 470 new aircraft for fleet renewal.

Furthermore, in June 2022, Recaro Aircraft Seating partnered with Panasonic Avionics Corporation to introduce an innovative in-flight entertainment solution on the CL3810 economy class seat. This enhancement offers passengers a host of amenities, including a 4K OLED screen with High Dynamic Range (HDR), Bluetooth technology from Panasonic, and a robust 67W USB-C power for quick device charging.

On long-haul flights, economy class passengers are increasingly provided with USB power outlets, typically integrated into the in-flight entertainment systems. This trend, coupled with the broader push for enhanced passenger experiences, underscores the growth trajectory of the economy class segment in the coming years.

The Middle East and Africa Anticipated to Register the Highest Market Growth During the Forecast Period

During the forecast period, the Middle East and Africa regional segment is poised for significant growth, primarily fueled by escalating air traffic. This surge in air travel is propelling demand for new commercial aircraft and spurring countries like Saudi Arabia, the United Arab Emirates, and Qatar to ramp up their aircraft modernization efforts.

According to Boeing's 2023 Commercial Market Outlook, the Middle East and Africa segment is set for robust growth in the aviation industry over the coming years. Over the next two decades, the Middle East is projected to require 3,025 new aircraft to meet the escalating demands of its air traffic and cargo, effectively more than doubling its current fleet. Of these, 1,350 are slated to be wide-body jets, underscoring the region's pivotal role as an international air transit hub. This surge in aircraft demand is estimated to create a market for aviation services valued at around USD 335 billion.

Boeing's projections for Africa are equally optimistic, estimating a USD 400 billion market for commercial aviation over the next two decades. With economic growth forecasts, urbanization, rising incomes, and the push for intra-regional integration under the African Continental Free Trade Area, Africa is expected to acquire 1,030 new aircraft in the coming two decades. While single-aisle jets will dominate deliveries, bolstering domestic and regional routes, a new fleet of wide-body aircraft will significantly enhance long-haul and freight capabilities.

The segment's aviation growth is not just a result of increased air travel but also stems from a combination of economic

initiatives, demographic expansion, and substantial infrastructural investments, all of which are set to further boost demand for passenger air travel and cargo services.

Among regional countries, Saudi Arabia is ambitiously eyeing 300 million passengers and 5 million tons of freight by 2030. To achieve this, the country is heavily investing in airport infrastructure, securing new aircraft procurement contracts, and modernizing its existing fleet. For instance, in June 2023, Saudi Arabian Airlines inked a deal with Panasonic Avionics Corporation to equip up to 30 of its aircraft with the Astrova seat-end solution. This enhancement will provide each passenger with up to 100 W of direct current power via USB-C, enabling rapid charging for most phones, tablets, and even 90% of laptops.

Similarly, the United Arab Emirates is witnessing a surge in air passengers and a corresponding uptick in aircraft demand. Notably, countries like the United Arab Emirates and Saudi Arabia are vying to establish themselves as pivotal global aviation hubs.

Commercial Aircraft In-seat Power System Market Industry Overview

The commercial aircraft in-seat power systems market is dominated by a select group of suppliers offering a range of solutions. Key players include Astronics Corporation, KID-Systeme GmbH, Mid-Continent Instrument Co. Inc., IFPL Group Limited, and Inflight Canada Inc.

Manufacturers of in-seat power systems for commercial aircraft are channeling investments into advanced systems, aiming to enhance safety and aesthetics in modern aircraft. However, these investments have inherent risks, such as design responsibilities, tool development, and unique contractual obligations. Additionally, given market volatility, new aircraft programs are susceptible to cost overruns, delays, or even cancellations, directly impacting the market outlook for these players.

Additional Benefits:

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

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