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Europe Commercial Aircraft Cabin Seating - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Commercial Aircraft Cabin Seating Market size is estimated at 431.6 million USD in 2025, and is expected to reach 504.6 million USD by 2030, growing at a CAGR of 3.17% during the forecast period (2025-2030).

Europe is expected to experience a surge in demand for aircraft seats with improved technological features and enhanced passenger travel comfort

- Modern-generation aircraft seats are made from lightweight, non-metallic materials and have lightweight designs to reduce fuel expenses and increase the aircraft's sustainability. The demand for seats with enhanced features and technologically based convenience is increasing, which will accelerate market expansion in the future.
- An enhanced seating structure with more developed space than economy-class seats is becoming highly essential due to rising preferences for business-class travelers. Worldwide airline operators and OEMs are increasing their efforts to reduce weight and develop a sustainable way to manage the airline industry in consideration of the zero-emission 2050 goal.
- During 2017-2022, narrowbody aircraft accounted for the majority of deliveries, with 82% of the total aircraft delivered. As domestic demand has grown, the narrowbody segment is expected to grow at a faster rate than the widebody segment. In 2022, the procurement of new aircraft in the region exceeded the pre-pandemic levels by 38% compared to 2019.
- Factors such as the rising adoption of innovative cabin seats, the growing demand for luxury air travel, and the huge number of aircraft orders are expected to drive the market during the forecast period. On this note, as part of fleet expansion and the demand driven by new narrowbody aircraft with long range on major routes, airlines placed new orders, such as Rostec ordering 250 aircraft, Ryanair ordering 200 aircraft, and Wizz Air ordering 102 narrowbody aircraft. During 2023-2030, around 2,647 aircraft are to be delivered to the region, boosting the overall seating market in the region.

The surge in low cost carriers and demand for improved passenger seating experience is anticipated to aid the market growth in Europe

- The importance of comfortable seating in aircraft has increased. The major reason for this is to provide a better passenger experience. The increased passenger traffic drives the demand for new aircraft procurements, creating the need for a larger cabin interior market. Airline companies in the European region are implementing fleet expansion plans to cater to the growing air passenger traffic across major countries. The United Kingdom, Germany, and Russia are expected to generate the maximum demand for new aircraft compared to other European countries.
- Europe's three most prominent airline groups, Anglo-Spanish Multinational Airline IAG and Germany's Lufthansa & Air France have significantly improved their seating capacity in 2023, with healthy capacities across their route networks compared to 2022. Although these efforts have been stepped up, these carriers are still behind the levels they reached before the pandemic.
- The commercial aircraft manufacturers, namely Boeing and Airbus, are expected to deliver many aircraft in the region. About 2,647 new jets are expected to be delivered across the region. Of these, 2354 jets are expected to be narrow-body aircraft. There is a high preference for smaller and more economical aircraft, along with the introduction of long-range narrow-body aircraft.
- The success of LCCs is high in this region. Major airline companies in the region, such as Air France, British Airways, and Lufthansa, focus on improving the overall passenger experience in the aircraft market. This is expected to aid the region's demand for commercial aircraft cabin interior products.

Europe Commercial Aircraft Cabin Seating Market Trends

The main reasons for market growth are the expansion of the fleet and the increased demand for passenger air travel in Europe

- Europe was the second-largest region with the highest air passenger traffic in 2022. Air passenger traffic in Europe reached 1.05 billion in 2022, up by 11% from 2017. Airlines are concentrating on growing their fleet sizes to meet the rising demand for air travel, which may result in a significant increase in the demand for new aircraft in Europe.
- Between 2017 and 2022, a total of 1,206 new aircraft were delivered to Europe, and another 2,647 new jets are anticipated to be delivered between 2023 and 2030. During the historic period, new jet deliveries in Europe amounted to around 25% of global commercial aircraft deliveries. A number of factors may contribute to the increasing number of deliveries during the forecast period, such as LCC's business innovation to increase passenger load factors, reduce competitive costs, and create an organizational structure that satisfies the demand for travelers with a limited budget while creating distinctly affordable market opportunities. On this note, a total of 1,206 jets were delivered during this period, of which 990 were narrowbody aircraft.
- As of June 2023, around 3,000+ Airbus aircraft were delivered in the region, with major deliveries by A320ceo, A320neo, A321ceo, and A321neo aircraft in the narrowbody segment, and A330-300 and A350-900 in the widebody segment. Several major airlines in Europe, such as Ryanair, Lufthansa, Wizz Air, Aeroflot Group, Air France-KLM, and EasyJet, have a backlog of over 1,600 aircraft, including a mix of narrowbody and widebody jets. Such factors are expected to aid the growth of the commercial aircraft cabin interior market in the future.

The growth in air passenger traffic is expected to be supported by the increasing demand for domestic and international air travel

- The gradual relaxation of travel restrictions in various European countries in 2022 made travel within the continent much easier than during the COVID-19 pandemic. Due to this trend, international demand soared, with passengers unable to travel during the lockdowns eager to fly abroad once again instead of taking domestic vacations. In 2022, air passenger traffic in the whole of Europe reached 1.3 billion, a growth of 8% compared to 2021. The United Kingdom, Germany, and Spain accounted for 36% of the total air passenger traffic in Europe and, hence, may generate more demand for new aircraft compared to other European countries over the coming years. European airlines have also been responsible for carrying almost 40% of global international air passengers.
- European airport traffic grew by 247% in the first six months of 2022 compared to 2021, resulting in an additional 660 million passengers handled across the continent. The United Kingdom, the Netherlands, Turkey, and Germany, which have some of the countries with the busiest airports, recorded a significant rise in passenger traffic in H1 2022. In August 2022, passenger traffic in the top five European airports increased by 68.1% but remained -17.5% below pre-pandemic August 2019 levels, mainly due to continued travel restrictions in Asia. A similar increase in air passenger traffic was observed at airports in the Rest of Europe in August 2022. Commercial air traffic declined from Ukrainian airports, and airports in Belarus and Russia recorded declining passenger volumes as well since the beginning of the Russia-Ukraine War. The air passenger traffic is expected to surge by 31% during 2023-2030, with increased demand in domestic and international aviation.

Europe Commercial Aircraft Cabin Seating Industry Overview

The Europe Commercial Aircraft Cabin Seating Market is fairly consolidated, with the top five companies occupying 98.19%. The major players in this market are Collins Aerospace, Jamco Corporation, Recaro Group, Safran and Thompson Aero Seating (sorted alphabetically).

Additional Benefits:

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

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