SCOTTS INTERNATIONAL

Europe Commercial Aircraft In-Flight Entertainment System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 118 pages | Mordor Intelligence

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Report description:

The Europe Commercial Aircraft In-Flight Entertainment System Market size is estimated at 147.4 million USD in 2025, and is expected to reach 180.3 million USD by 2030, growing at a CAGR of 4.11% during the forecast period (2025-2030).

European airlines increasingly use narrowbody aircraft for long-haul flights, making it easier for them to use IFE systems on narrowbody aircraft

- In-flight entertainment is integral to cabin interiors and defines a passenger's entire flight experience. The adoption of narrowbody aircraft in long-haul routes by European airlines has increased, aiding the deployment of IFE systems in narrowbody aircraft. Airlines such as Lufthansa and Air France focus on improving their business-class seats and enhancing the customer experience through IFE systems.
- In the region, Panasonic is one of the major OEMs that offers many versions of the IFE system, including Astrova, NEXT, and X Series. Various airlines in Europe use screens ranging from 12 inches to 18 inches with different configurations, such as LED, QLED, and 4K HDR screens, according to cabin class. Air Europa, Turkish Airlines, and TUI Airways are the major airlines in the region that offered IFE systems in their narrowbody fleet during 2017-2022. In contrast, some of the other major carriers, such as Air France and British Airways, also offered IFE systems in their widebody fleet with a screen size ranging from 9 to 12 inches. The surge in aircraft procurement numbers due to the addition of new routes in the underserved markets of the region is expected to boost the demand for commercial aircraft and its associated IFE systems in Europe.
- During 2017-2022, narrowbody aircraft accounted for the majority of deliveries, which accounted for 82% of the total aircraft delivered. As domestic demand has grown, the narrowbody market is expected to grow at a faster rate than the widebody market. In 2022, the procurement of new aircraft in the region has exceeded the pre-pandemic levels by 38% compared to 2019.

The demand for enhanced in-flight connectivity is expected to increase in Europe, benefiting airlines that prioritize the overall passenger experience

- In-flight entertainment is an integral part of the cabin interior, playing an increasingly important role in defining the complete passenger flight experience in recent years. The IFE is an integral part of the cabin interior, playing a vital role in defining a passenger's complete flight experience. As observed, airlines are switching to lighter IFE systems to reduce the aircraft's overall weight. In terms of cabin class, economy, and premium economy, cabin class accounted for around 90% of the overall seatback in-flight entertainment screens in 2022.
- Airline companies in Europe are implementing fleet expansion plans to cater to the growing air passenger traffic in the major countries. This is expected to aid the demand for IFE systems in the region, with the importance of the IFE systems making it a necessity for airlines rather than just an additional amenity.
- Thales, Safran, and Panasonic are the major players that provide IFE systems in the European market. The major airlines in the region, such as British Airways, Air France, and Lufthansa, emphasize the adoption of 4K screens and OLED displays and increase the availability of IFE systems in their economy class to attract the attention of new customers and improve their existing services.
- The major commercial aircraft manufacturing OEMs, Boeing and Airbus, are expected to deliver many aircraft in the European region. For instance, over 2300 narrowbody aircraft and 290+ widebody aircraft are expected to be delivered in the region during 2023-2030. Thus, with the increase in deliveries of new aircraft, the European commercial aircraft in-flight entertainment systems market is expected to achieve higher growth during the forecast period.

Europe Commercial Aircraft In-Flight Entertainment System 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 In-Flight Entertainment System Industry Overview

The Europe Commercial Aircraft In-Flight Entertainment System Market is fairly consolidated, with the top five companies occupying 89.88%. 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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