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

Market Report | 2025-04-28 | 111 pages | Mordor Intelligence

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Report description:

The North America Commercial Aircraft In-Flight Entertainment System Market size is estimated at 193 million USD in 2025, and is expected to reach 230.2 million USD by 2030, growing at a CAGR of 3.59% during the forecast period (2025-2030).

Rising demand for narrowbody aircraft and airlines focusing on passenger's overall experience are some of the factors that expected to drive the demand for IFE in North America

- 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. Similarly, Air Canada, WestJet, and Air Transat operating in Canada also have in-flight entertainment systems in their active fleet of commercial aircraft.
- 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 North America 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, during 2017-2022, a total of 2,049 aircraft were procured by various airlines in the region. Out of these 2,049 aircraft, narrowbody aircraft accounted for 92%, and widebody aircraft accounted for 8%, respectively. 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 that it placed a 270-plane order for Boeing 737 Max and Airbus A320s, and Delta Airlines placed orders for 100 Boeing 737-10 aircraft, with an option for 30 more. Such orders are expected to generate demand for IFE in North

America's aircraft cabin market, and during 2023-2030, a total of 2,885 aircraft are expected to be delivered.

Rise of narrowbody aircraft, and airlines focusing on passengers to provide personalized travel experiences are the driving factors

- The commercial aircraft segment is expected to experience significant growth, primarily driven by the demand for narrowbody aircraft and the growing number of air passengers in North America. Fleet development of the airlines, increase in demand for fuel-efficient aircraft, and the airline industry's consideration of the zero-emission 2050 goal fuel the demand for commercial aircraft. As of August 2023, the region has a backlog of 1,474 Boeing aircraft and 986 Airbus aircraft. Of these total aircraft, the US alone has 2,405 aircraft in backlog. Hence, the country is expected to witness larger growth during the forecast period.
- Additionally, the demand for IFE systems is driven by passengers as they seek personalized travel experiences. So, airlines are responding by investing in enhanced IFE systems. 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 that weigh less than the conventional IFE system.
- Furthermore, it was observed that in the US, 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. Overall, with such developments, the market is expected to grow by 1.92% from 2023 to 2030.

North America Commercial Aircraft In-Flight Entertainment System Market Trends

Airlines are placing huge orders for new fuel-efficient aircraft, and the expansion of LCCs is contributing to the growth of the market

- The United States accounted for 80% of the total air passenger traffic in North America in 2022. Therefore, the United States is expected to generate the highest demand for new aircraft deliveries compared to other North American countries over the forecast period. Airlines are looking to expand their fleet size to cater to the growing demand for air travel, which may generate significant demand for new aircraft in North America.
- A total of 1,903 new passenger aircraft were delivered in North America between 2017 and 2022, and a further 2,885 new jets are expected to be delivered to the region during 2023-2030. Of the 1,903 jets delivered, 1,748 were narrowbody aircraft, and 155 were widebody aircraft. The expansion of low-cost carriers has resulted in huge demand for newer generation narrowbody aircraft, which offer advantages such as low operation costs and fuel efficiency in short-haul routes. It is expected that out of all the jets that will be delivered during the forecast period, around 2,678 of them will be narrowbody aircraft. This is due to several factors, including the preference for economical and smaller aircraft, the success of low-cost carriers, and the introduction of long-range narrowbody aircraft. Some of the major airlines in North America are American Airlines, Delta Air Lines, United Airlines, Southwest Airlines, Air Canada, and Alaska Airlines. These airlines together have a backlog of over 2,460 aircraft, including a mix of both narrowbody and widebody aircraft. During the COVID-19 pandemic, most major airlines retired some of their old aircraft models and procured new fuel-efficient aircraft to remain profitable. As the airlines try to maintain a younger fleet, large orders for new aircraft are expected during the forecast period.

Rising economy, increase in tourism industry and ease of restrictions are the driving factors for a consistent air passenger traffic growth in North America

- North America's vast landmass and diverse destinations make it a popular choice for millions of passengers who choose to fly both domestically and internationally. Factors such as a growing economy, increased affordability of air travel, and a rising middle class have contributed to a significant uptick in air passenger traffic. Air passenger traffic in the United States reached 1.04 billion in 2022, up by 7% compared to 2021 and 12% compared to 2019. In 2022, from January through December, US airlines carried 853 million passengers, up from 658 million in 2021 and 388 million in 2020. The total number of passengers carried by airlines in Canada reached 107 million in 2022, surpassing the levels in 2021 by 6%. In 2022, Mexico had 100 million air passenger traffic, representing a 7% growth compared to its 2021 traffic levels. North America has benefitted from fewer and shorter-lasting travel restrictions than many other countries and regions. This has boosted domestic travel in the large home market, as well as international travel. Net profits in the region are expected to rise from USD 9.9 billion in 2022 to USD 11.4 billion in 2023.
- To cater to the demand driven by air passenger traffic, various airlines in the region are planning to procure new aircraft. For instance, around one-third of global aircraft deliveries in 2023 were anticipated to be received by various carriers in North America. Although the region's aircraft deliveries were already above 2019 levels in 2022, they were expected to grow by an additional 72 units in 2023. Overall, with consistent air travel, the region's air passenger traffic is expected to increase by 1.7 billion in 2030 compared to 1.2 billion recorded in 2022.

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 71.42%. 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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