

Aircraft Interiors 2020

The 7th annual review of the world aircraft interiors market from
Counterpoint Market Intelligence Limited

Why buy this 628-page report?

Because at this time of unprecedented market stress, we offer rigorous and insightful market analysis reflecting experience from many years in the design, manufacturing, and marketing of aircraft interiors products, through previous peaks and troughs of the commercial aircraft cycle. As before, our team for this report includes Ben Bettell, who brings with him 35+ years of experience in the interiors sector.

The interiors industry has been hit hard by Covid-19, with sales down 50% compared to 2019, likely to be followed by further declines in retrofit in 2021. We look at the consequences for the industry, including consolidation and restructuring, and at prospects for future growth.

Our 2020 report offers comprehensive market analysis including:

- The current trends and expected future impacts on this \$15.8 billion market
- Market growth projections and segmentation under three different Covid-19 scenarios over the period 2019-2029
- How the market segments by:
 - Large Commercial, Regional, and Business Jets
 - OE, aftermarket; retrofit and spares
- Market shares in each sector:
 - Seats (now includes Pilot and Super-numerary seats)
 - Galleys, Galley inserts, stowage, boxes, and carts
 - Lavatories
 - Crew rest compartments
 - Monuments
 - Cabin lighting
 - Interior panels
 - Overhead luggage bins
 - In-flight Entertainment, In-seat Power Supply, and Connectivity (analysed separately)
 - Floor coverings and Cabin floors (new for 2020)
 - Cockpit furnishings (new for 2020 including items like Bullet-proof doors, panels, and storage)

We analyse demand drivers, including;

- Line fit, including new/expected new types
- Retrofit and Replacement cycles

We describe the market and its key characteristics;

- Trends in suppliers' profitability
- In-house supply or outsourcing by the aircraft OEMs
- The rise and role of China in interiors
- Manufacturing in low cost countries
- How the SFE model is developing
- Industry consolidation
- Technology change e.g. the growth in composites, and new product development

The report provides profiles of 169 companies. Our expanded profiles cover;

- Origins and ownership; Our estimate of interiors sales, plus financials if obtainable; operations and technologies; customers and contracts; strategy and recent developments; our comments

The report is supplied with an Excel data pack, which provides all the numbers in our charts and tables

We offer purchasers of our report a free teleconference to discuss any aspects.

CONTENTS

1. SUMMARY
2. MARKET DEFINITION AND SEGMENTATION
3. GLOSSARY
4. METHODOLOGY
 - 4.1. Sources of information
 - 4.2. Our market model
 - 4.3. Company profiles and analysis of trends
5. THE IMPACT OF COVID-19
 - 5.1. Some initial observations
 - 5.2. Forecasts in this report
6. OVERALL INTERIORS MARKET
 - 6.1. Market size
 - 6.2. Drivers of growth, OE and aftermarket
 - 6.2.1. Retrofit programmes
 - 6.2.2. Twin aisle and Very Large Aircraft Prospects
 - 6.2.3. The rise of the long-range single aisle aircraft and slower growth in wide bodies
 - 6.2.4. Growth beyond our 10-year forecast period
 - 6.3. Overall commercial aircraft interiors market shares
 - 6.3.1. In-house supply or outsourcing by the aircraft OEMs
 - 6.3.2. Opportunities for new entrants and smaller companies
 - 6.3.3. The role of MRO companies in interiors
 - 6.3.4. Consolidation of suppliers
 - 6.3.5. Current M&A in interiors
 - 6.4. Technology
 - 6.4.1. Interiors certification
 - 6.4.2. The use of composites in interiors
 - 6.4.3. Waste and recycling
 - 6.4.4. Aircraft Interiors Mock-up/prototypes
 - 6.4.5. Additive Manufacturing (AM) of aircraft interior components
 - 6.5. Product design
 - 6.5.1. The impact of Covid 19 - New product developments
 - 6.5.2. The influence of airlines
 - 6.5.3. Aviation Brand and Brand Experience Specialists
 - 6.5.4. Cabin of the future and new products
 - 6.5.5. Intellectual property
 - 6.5.6. The Internet of Things
 - 6.6. Industry structure and sector-wide trends
 - 6.6.1. The impact of Covid-19
 - 6.6.2. Buyer Furnished Equipment and Supplier Furnished Equipment
 - 6.6.3. Retrofit market prospects
 - 6.6.4. The role of China
 - 6.6.5. Use of low-cost countries
 - 6.6.6. Corporate jets, VIP aircraft and completion centres
 - 6.6.7. Industry profitability
 - 6.6.8. Other market characteristics
 - 6.6.8.1. Lead times before aircraft delivery
 - 6.6.8.2. Intensity of commercial competition
7. SEATS
 - 7.1. Market size
 - 7.2. Market growth
 - 7.2.1. Commercial aircraft
 - 7.2.2. Business jets & VIP aircraft
 - 7.3. Market model
 - 7.3.1. Replacement cycle
 - 7.4. Market shares
 - 7.5. Pilot, Co-Pilot and Cockpit supernumerary seating
 - 7.6. Market trends
 - 7.6.1. Emergence of a new seat class distribution
 - 7.6.1.1. Single Aisle Lie-Flat Seating (SALFs)
 - 7.6.1.2. Super Business Class Seating (SBCs) and High Density Business class seating (HDBD)

- 7.6.1.3. Premium Economy Seating (PYC)
 - 7.6.1.4. Fixed-back Economy Seating
 - 7.6.2. New types of seats
 - 7.6.3. To recline, or not to recline
 - 7.6.4. Seating standardisation or differentiation
 - 7.6.5. NRE/NRC
 - 7.6.6. Seat supplier profitability
 - 7.6.7. Leasing companies
 - 7.6.8. BFE versus SFE
 - 7.6.9. New entrants and capacity requirements
 - 7.6.10. Low cost manufacturing strategy
 - 7.6.11. Intellectual property
 - 7.6.12. Aftermarket
 - 7.6.13. Manufacturing and operations
 - 7.6.14. Seat components
 - 7.6.15. Aircraft seats and enhanced comfort
 - 7.6.16. The effect of Covid-19 on seat design
 - 7.6.17. M&A in seating
- 8. GALLEYS
 - 8.1. Market size
 - 8.2. Market growth
 - 8.3. Market model
 - 8.3.1. Aircraft configuration
 - 8.3.2. Replacement cycle
 - 8.4. Manufacturing and operations
 - 8.5. Principal suppliers
 - 8.6. Trend analysis
- 9. ELECTRIC GALLEY INSERTS
 - 9.1. Market size
 - 9.2. Market growth
 - 9.3. Market model
 - 9.3.1. Aircraft configuration
 - 9.3.2. Replacement cycle
 - 9.4. Manufacturing and operations
 - 9.5. Principal suppliers
 - 9.5.1. Market shares – electric inserts
 - 9.6. Trend analysis
 - 9.7. Intellectual property
 - 9.8. Second tier suppliers
- 10. GALLEY STOWAGE BOXES, TROLLEYS AND CARTS
 - 10.1. Market size
 - 10.2. Market growth
 - 10.3. Market model
 - 10.3.1. Aircraft configuration
 - 10.3.2. Replacement cycle
 - 10.4. Manufacturing and operations
 - 10.5. Principal suppliers
 - 10.5.1. Galley containers
 - 10.5.2. Carts/trolleys
 - 10.6. Trend analysis
 - 10.7. Intellectual property
 - 10.8. Second tier suppliers
- 11. LAVATORY MODULES
 - 11.1. Market size
 - 11.2. Market growth
 - 11.3. Market model
 - 11.3.1. Aircraft configuration
 - 11.3.2. Replacement cycle
 - 11.4. Manufacturing and operations
 - 11.5. Procurement
 - 11.6. Principal suppliers
 - 11.7. Trend analysis
 - 11.8. Second tier suppliers

12. CREW REST COMPARTMENTS
 - 12.1. Market size
 - 12.2. Market growth
 - 12.3. Market model
 - 12.3.1. Aircraft configuration
 - 12.3.2. Replacement cycle
 - 12.4. Manufacturing and operations
 - 12.5. Principal suppliers and market
 - 12.6. Trends
 - 12.7. Intellectual property
 - 12.8. Tier 2 suppliers
13. OTHER MONUMENTS
 - 13.1. Market size
 - 13.2. Market growth
 - 13.3. Market model
 - 13.3.1. Aircraft configuration
 - 13.4. Manufacturing and operations
 - 13.5. Principal suppliers
 - 13.6. Trend analysis
 - 13.7. Intellectual property
 - 13.8. Second tier suppliers
14. LIGHTING
 - 14.1. Market size
 - 14.2. Market growth
 - 14.3. Market model
 - 14.3.1. Aircraft configuration
 - 14.3.2. Replacement cycle
 - 14.4. Manufacturing and operations
 - 14.5. Principal suppliers
 - 14.6. Trend analysis
 - 14.7. Intellectual property
15. INTERIOR PANELS
 - 15.1. Market size
 - 15.2. Market growth
 - 15.3. Market model
 - 15.3.1. Aircraft configuration
 - 15.3.2. Replacement cycle
 - 15.4. Manufacturing and operations
 - 15.5. Principal suppliers
 - 15.6. Trend analysis
 - 15.7. Intellectual property
 - 15.8. Second tier suppliers
16. OVERHEAD LUGGAGE BINS
 - 16.1. Market size
 - 16.2. Market growth
 - 16.3. Market model
 - 16.3.1. Aircraft configuration
 - 16.3.2. Replacement cycle
 - 16.3.3. Manufacturing and operations
 - 16.4. Principal suppliers
 - 16.5. Trend analysis
 - 16.6. Second tier suppliers
17. IN-FLIGHT ENTERTAINMENT AND CONNECTIVITY
 - 17.1. Introduction
 - 17.2. IFEC Market size and growth
 - 17.3. IFE Market size and growth
 - 17.4. Cabin connectivity Market size and growth
 - 17.5. Market model
 - 17.5.1. Aircraft configuration
 - 17.5.1.1. Which aircraft have IFEC?
 - 17.5.1.2. What IFE/IFEC configuration will prevail in the future?
 - 17.5.1.3. Business jet/VIP Cabin Management Systems
 - 17.5.2. Replacement cycle

- 17.6. Increasing capability through partnerships
- 17.7. Increasing capability through acquisition
- 17.8. Principal suppliers
- 17.9. Trend analysis
- 17.10. In-seat power supply systems
 - 17.10.1. Market size
 - 17.10.2. Market growth
 - 17.10.3. Market and product numbers
 - 17.10.4. Principal suppliers
 - 17.10.5. Other trends
- 18. FLOOR COVERINGS
 - 18.1. Market size
 - 18.2. Market growth
 - 18.3. Market model
 - 18.3.1. Aircraft configuration
 - 18.3.2. Replacement cycle
 - 18.4. Manufacturing and operations
 - 18.5. Principal suppliers
 - 18.6. Trend analysis
 - 18.7. Intellectual property
 - 18.8. Second tier suppliers
- 19. CABIN FLOOR PANELS
 - 19.1. Market size and segmentation
 - 19.2. Market growth
 - 19.3. Estimated sales and market shares of the major suppliers
 - 19.4. Market characteristics and trends
 - 19.4.1. Market structure
 - 19.4.2. Procurement issues
 - 19.4.3. Technology
 - 19.4.4. Use of Low Cost Countries (LCCs)
 - 19.4.5. Aftermarket
 - 19.5. List of suppliers in this segment
- 20. COCKPIT FURNISHING
 - 20.1. Market size and segmentation
 - 20.2. Market growth
 - 20.3. Estimates sales and market shares of the major suppliers
 - 20.4. Market characteristics and trends
 - 20.4.1. Market structure
 - 20.4.2. Procurement issues
 - 20.4.3. Technology
 - 20.4.4. Use of low cost countries
 - 20.4.5. The importance of being local
 - 20.4.6. Aftermarket
 - 20.5. List of suppliers in this segment
- 21. Company Profiles – Major Suppliers
5 profiles
- 22. Company Profiles – Smaller Suppliers
164 profiles
- 23. Counterpoint Market Intelligence Limited terms of business

WHY COUNTERPOINT?

Counterpoint Market Intelligence Limited was formed by George Burton and Richard Apps in 2004 to offer original, independent, and rigorous research into aerospace markets. Between them, George and Richard have over 40 years of experience in senior positions in aerostructures, engine components, and aerospace equipment.

Counterpoint is an international business, with 80% of sales outside the UK. Sales of research reports have led to consultancy projects. Two thirds of sales are to the aerospace industry – aircraft and engine OEMs and first and second tier suppliers. Other clients are private equity funds, investment banks and government organisations.

In addition to this report the following reports are available from Counterpoint Market Intelligence Limited:

- Aerostructures 2020
- Aerospace Actuation 2020
- Aero-Engine and IGT components 2020
- Aerospace composites 2019
- Tooling & automated assembly for aerostructures 2017
- Mini reports;
 - Aerospace Environmental and Thermal Control Systems 2020
 - Electrical Power Systems 2020
 - Engine Controls and Health Monitoring 2020
 - Aircraft Harnesses and Electrical Standard Parts 2020
 - Aircraft Fluid Conveyance 2019
 - Aerospace Sensors 2019
 - Aerospace Valves 2019
 - Aerospace Machining 2019

Counterpoint Market Intelligence Limited also undertakes commissioned consultancy studies for its clients in areas including the following:

- Deep-dive market analysis
- Evaluation of the strategic positioning of businesses
- Market and strategy-related due diligence for M&A
- Acquisitions search

How to buy the report

Please contact us using the contact details below or email us on enquiries@cpmil.com.

Ben Bettell	Mobile: +44(0)7884 060777	Richard Apps	Tel: +44 (0)1235 868051
	e-mail: benbettell@cpmil.com		Mobile: +44 (0)7741 035969
			e-mail: richardapps@cpmil.com

Address: Counterpoint Market Intelligence Ltd, Curlew Meadow, Denchworth, Oxfordshire OX12 0EA, UK

Website: www.cpmil.com

COUNTERPOINT MARKET INTELLIGENCE LIMITED TERMS AND CONDITIONS OF TRADING

Use

Single Site Licence: This report may be used by an unlimited number of people within the same site. Each of these people may use the report on any computer, and may print out the report, but may not share the report (or any information contained therein) with any person or persons outside that site without the written approval of Counterpoint Market Intelligence Limited.

Group Licence: This report may be used by an unlimited number of people within the same group of companies. Users must not share the report (or any information contained therein) with any person or persons outside that group of companies without the written approval of Counterpoint Market Intelligence Limited.

Limitation on liability of Counterpoint Market Intelligence Limited

Counterpoint Market Intelligence Limited makes no representation or warranty, expressed or implied, as to the accuracy or completeness of the information contained in this report.

Counterpoint Market Intelligence Limited shall not be held liable for consequential and indirect losses or loss of profit or revenue resulting from the use of this report.

No recommendations are made or should be implied from this report.

Intellectual Property

All intellectual property rights, including but not limited to copyright, shall remain the property of Counterpoint Market Intelligence Limited or any third-party licensors.

Payment

Payment of Counterpoint Market Intelligence Limited's invoices is to be made within 30 days of the date of invoice.

Governing Law and Jurisdiction

Any dispute or claim arising out of or in connection with this report (including non-contractual disputes or claims) shall be governed by, and construed in accordance with, the Law of England and Wales. The purchaser of this report irrevocably agrees that the courts of England and Wales shall have exclusive jurisdiction to settle any dispute or claim that arises out of or in connection with this report (including non-contractual disputes or claims).