



THE FUTURE OF AIRCRAFT SEATING & IN-SEAT POWER - 2019



Some of the key questions answered by this report include:

- How will shipments of aircraft seats grow between 2018 and 2028? How will associated revenues grow over the same time period?
- What is the current and future size of the market for AC, USB and AC+USB combination in-seat power whether integrated into IFE or not?
- How do the aircraft seating and in-seat power markets break down by product type, fitment type, cabin class, aircraft type and region?
- How will disruptive technologies and new, lightweight materials affect seat design?
- To what extent will changing aircraft mission statements and the emergence of IFC/W-IFE raise demand for in-seat power on single-aisle aircraft?
- What is the use case for Type-C with USB Power Delivery in economy class?
- What does the future of inductive charging look like in different cabins?
- Is there a significant enough commercial incentive for airlines to upgrade the passenger experience in economy cabins?
- What are the market shares of leading seat makers and in-seat power vendors?
- Who are the new and established players and what are the features, functionalities and capabilities of their offerings?
- How are OEMs diversifying their supply chains to reduce risk and encourage competition?
- What are the key drivers and inhibitors of market growth? What are the main technological developments taking place?

>30
interviews

184
pages

4
chapters

57
tables

36
charts

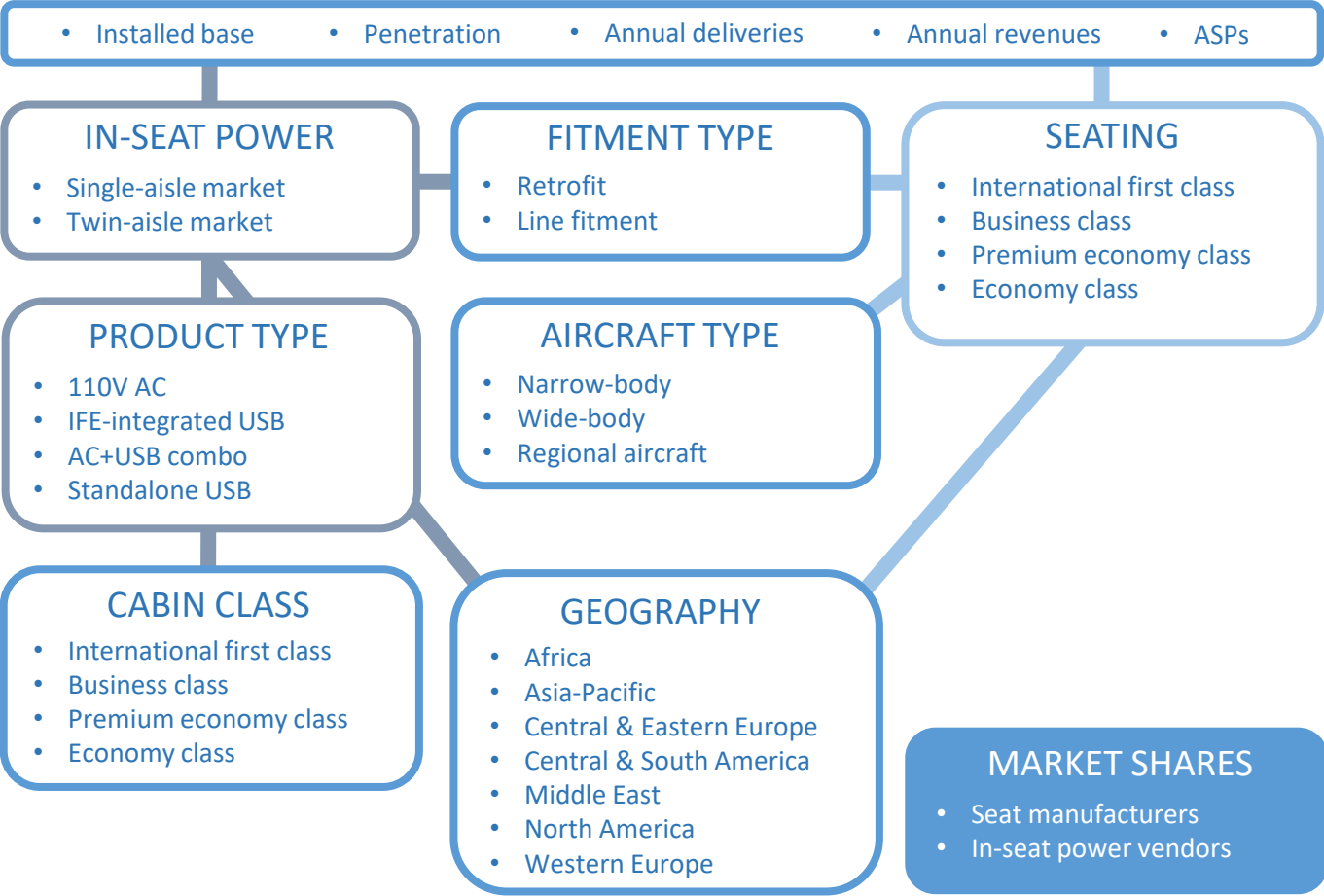


OVERVIEW

The “Future of Aircraft Seating and In-Seat Power” is a new two-part report from Valour Consultancy that sits within the firm's highly-regarded aviation portfolio of research. Based on a period of twelve months' research and developed with input from more than 30 companies from across the value chain, this study provides an unprecedented view of the markets for aircraft seating and in-seat power.

Alongside a lengthy discussion of key drivers and inhibitors of market growth, this report quantifies seating and in-seat power system shipments, installed base and revenues in 2017 and 2018 and provides a ten-year forecast out to 2028. Data is segmented by product type, fitment type, aircraft type, cabin class and geographic region, with a full qualitative discussion of the key trends at play in support of this. In-depth company profiles of major players are also included, along with their respective revenue market shares.

MARKET BREAKDOWN



WHAT YOU RECEIVE – KEY POINTS

- 184 pages of quantitative and qualitative analysis giving rich insight
- 2 reports for the price of 1 – aircraft seating AND in-seat power
- Double base year (2017 and 2018) and forecasts to 2028, alongside robust justifications
- Short but revealing survey on airline attitudes to in-seat power
- Full overview of the competitive environment and market trends
- 34 in-depth profiles of key companies involved in seating and in-seat power
- Dedicated analyst time from the author to answer questions you have on the study
- PDF report and Excel tables, plus an invite to an exclusive summary webinar

EXAMPLE TABLES AND CHARTS

Example Table 1

Global Annual Commercial Aircraft Seating Deliveries and Revenues by Cabin Class: Forecast (2017 - 2028)

Annual Deliveries, Revenues and ASPs

		2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (18 - 28)
International First Class Seats	Annual Deliveries	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M - exc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	Revenues (\$M - inc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	4.0%
Business Class	Annual Deliveries	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M - exc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	Revenues (\$M - inc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	4.0%
Premium Economy Class	Annual Deliveries	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M - exc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	Revenues (\$M - inc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	4.0%
Economy Class	Annual Deliveries	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M - exc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	Revenues (\$M - inc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	4.0%
Total	Annual Deliveries	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M - exc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	Revenues (\$M - inc. Spares)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	4.0%

Source: Valour Consultancy

May 2019

Example Table 2

Global Installed Base, Annual Deliveries and Annual Revenues of In-Seat Power Systems by Product Type: Forecast (2017 - 2028)

Installed Base at Year End, Seats With Power, Annual Seat and Outlet Installations, Annual Revenues (\$M), ASP (\$)

		2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (18 - 28)
Multiple In-Seat Power Systems														
110V AC	Annual Deliveries (Outlets)	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
IFE-Integrated USB	Annual Deliveries (Outlets)	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
AC+USB Combo	Annual Deliveries (Outlets)	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
Annual Deliveries (Seats)		1	2	3	4	5	6	7	8	9	10	11	12	1.0%
Standalone In-Seat Power Systems														
USB	Annual Deliveries (Outlets)	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
AC+USB Combo	Annual Deliveries (Outlets)	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%
	ASP (\$)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	3.0%
Annual Deliveries (Seats)		1	2	3	4	5	6	7	8	9	10	11	12	1.0%
Total	Installed Base (Outlets)	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Annual Deliveries (Outlets)	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Annual Deliveries (Seats)*	1	2	3	4	5	6	7	8	9	10	11	12	1.0%
	Revenues (\$M)	\$1.0	\$2.0	\$3.0	\$4.0	\$5.0	\$6.0	\$7.0	\$8.0	\$9.0	\$10.0	\$11.0	\$12.0	2.0%

Source: Valour Consultancy

May 2019

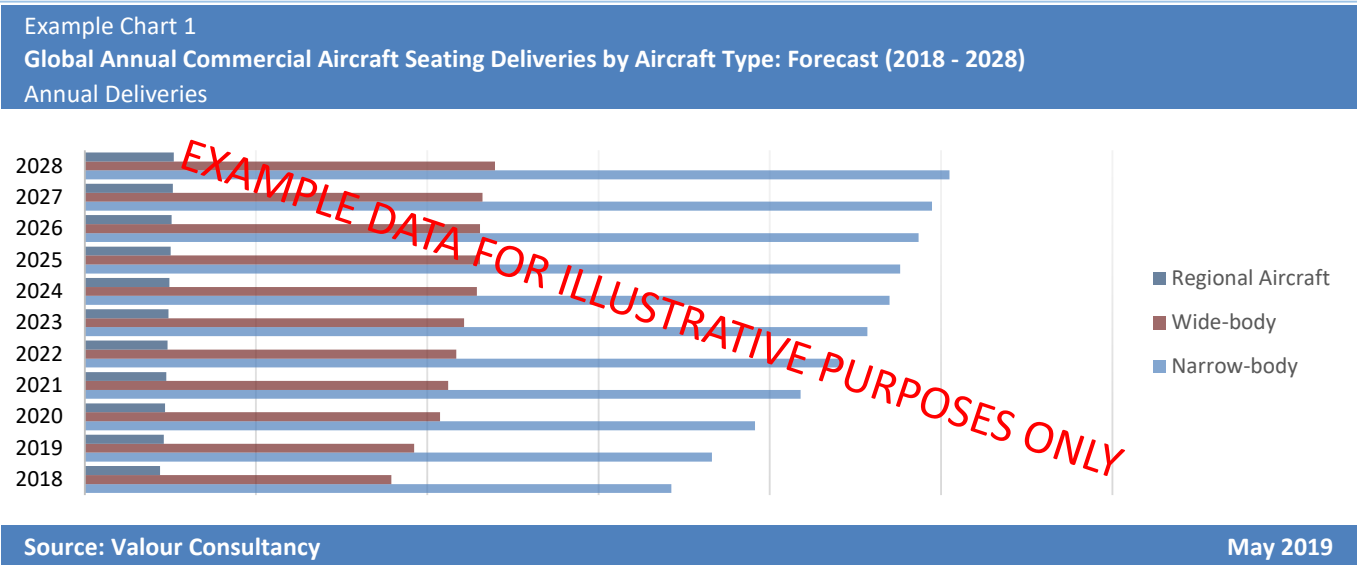


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ABOUT VALOUR CONSULTANCY

Valour Consultancy is a UK-based provider of market intelligence services. Founded in 2012, the company has grown rapidly and is renowned for the extremely high-quality of its research and consultancy. Having firmly established itself in the aviation space, where many of the leading players rely on its expert insight and analysis, Valour Consultancy has successfully expanded into a number of other markets including, maritime, industrial, drones and body-worn cameras.

The company's aim is to deliver solutions that deliver real value and it continues to operate with the three core values it was founded on – Honesty, Trust and Time. As a result, Valour Consultancy continues to build long-lasting relationships.

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