

# **In-flight Retail and Advertising Market by End-User (Commercial Aviation, Business Aviation), Mode (Advertising, Retail), Seat Class (First, Business, Economy, Premium Economic), Operation (Stored and Streamed) and Region - Global Forecast to 2029**

<https://marketpublishers.com/r/IB340E0F5D40EN.html>

Date: June 2024

Pages: 213

Price: US\$ 4,950.00 (Single User License)

ID: IB340E0F5D40EN

## **Abstracts**

The inflight retail and advertising market is valued at USD 3.5 billion in 2024 and is projected to reach USD 5.1 billion by 2029, at a CAGR of 7.8% from 2024 to 2029. The inflight retail and advertising market is thriving due to increased passenger traffic, enhanced connectivity, and evolving digital platforms that allow for personalized shopping and targeted ads. Airlines are actively improving the passenger experience with a broader product range, while expanding networks open new markets. Strategic partnerships between airlines like Delta, Emirates, and brands provide exclusive retail opportunities, boosting sales. Key players such as Panasonic Avionics and Thales are instrumental in developing the technology that supports inflight retail and advertising, significantly contributing to the sector's growth by leveraging the captive audience during flights.

'Based on end user, the commercial segment is estimated to have the largest market share in 2024.'

The commercial aviation segment holds the largest share in the inflight retail and advertising market, primarily due to its vast passenger volumes which provide a diverse and expansive audience for marketing efforts. Its widespread flight network enhances visibility and opportunity for retail initiatives, while economies of scale allow for more cost-effective marketing and sales strategies. The demographic variety of passengers also supports targeted and effective advertising, and substantial investments in the latest inflight technologies foster innovative advertising and retail strategies, further

driving growth in this sector.

'Based on mode, the advertising segment is estimated to have the largest market share in 2024.'

The advertising segment in the inflight retail and advertising market is seeing the fastest growth due to several pivotal factors. The widespread use of seat-back screens and personal devices offers advertisers a large, captive audience. Technological advancements enable precise, real-time targeting, increasing ad effectiveness and profit margins. Additionally, airlines' ability to harness passenger data enhances content relevancy, boosting engagement. Furthermore, growing partnerships between airlines and brands capitalize on this inflight engagement opportunity, utilizing creative campaigns to attract consumers, significantly driving the segment's growth.

'Based on seat class, the business class segment is estimated to have the largest market share in 2024.'

The business class segment in the inflight retail and advertising market is growing at the highest rate compared to economy and premium economy classes for several reasons. Primarily, business class passengers typically have higher disposable incomes, making them more likely to engage in inflight purchasing and more receptive to premium advertising. Additionally, the personalized service and exclusive atmosphere in business class create an ideal environment for targeted marketing campaigns and high-end product placements. Airlines also tend to focus more on enhancing the business class experience with the latest digital technologies and bespoke services, further driving sales and engagement in this segment. This combination of factors makes business class a lucrative market for inflight retail and advertising efforts.

'Based on regions, the North America region is estimated to have the largest market share in 2024.'

The North America region is witnessing robust growth in the inflight retail and advertising market, driven by the technological advancement. North America's inflight retail and advertising market is experiencing the highest growth due to several strategic advantages. The region boasts a large, affluent consumer base with a high propensity for travel, driving substantial passenger volumes that marketers aim to tap into. North America also leads in technological innovation, particularly in digital connectivity and entertainment systems, which enhances the effectiveness and reach of inflight advertising and retail offerings. Additionally, the presence of major global airlines and

their willingness to invest in advanced inflight services further stimulates market growth. Together, these factors make North America a dominant player in the inflight retail and advertising landscape.

The break-up of the profile of primary participants in the inflight retail and advertising market:

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C Level – 35%, Director Level – 25%, and Others – 40%

By Region: North America – 25%, Europe – 15%, Asia Pacific – 35%, Middle East – 15% Rest of the World (RoW) – 10%

Major companies profiled in the report include as Panasonic Avionics Corporation (US), Thales (France) , Viasat, Inc. (US), Anuvu (US) and IMM International (France) among others.

Research Coverage:

This market study covers the inflight retail and advertising market across various segments and subsegments. It aims to estimate this market's size and growth potential across different parts based on and region. This study also includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies they adopted.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall Inflight Retail and Advertising market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The market for inflight retail and advertising involves providing goods and promotional content to passengers, such as duty-free shopping, travel essentials, and targeted

advertisements via inflight entertainment systems. Key growth drivers include technological advancements that enhance personalized shopping and advertising experiences, increased global air travel, rising consumer demand for enhanced travel experiences, strategic partnerships between airlines and brands, and airlines' need for revenue diversification beyond ticket sales. These factors collectively boost the appeal and effectiveness of inflight retail and advertising services.. The report provides insights on the following pointers:

**Market Drivers** (Rising Passenger numbers, Growing Focus on Ancillary Revenue, Rise of low cost carriers (LCC) ), **restraints** (Data Privacy Concerns, Limited Inflight Connectivity ), **Opportunities** (Exclusive Inflight Offers, Multi-Channel Campaigns) **challenges** (Technological Integration, Passenger Acceptance and Engagement) there are several factors that could contribute to an increase in the Inflight Retail and Advertising market.

**Market Penetration:** Comprehensive information on Inflight Retail and Advertising offered by the top players in the market

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the Inflight Retail and Advertising market

**Market Development:** Comprehensive information about lucrative markets – the report analyses the Inflight Retail and Advertising market across varied regions.

**Market Diversification:** Exhaustive information about new products, untapped geographies, recent developments, and investments in the Inflight Retail and Advertising market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the Inflight Retail and Advertising market

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 MARKET DEFINITION

#### 1.3 STUDY SCOPE

##### 1.3.1 MARKETS COVERED

#### FIGURE 1 IN-FLIGHT RETAIL AND ADVERTISING MARKET SEGMENTATION

##### 1.3.2 REGIONS COVERED

##### 1.3.3 YEARS CONSIDERED

#### 1.4 INCLUSIONS AND EXCLUSIONS

#### TABLE 1 INCLUSIONS AND EXCLUSIONS

#### 1.5 CURRENCY CONSIDERED

#### TABLE 2 USD EXCHANGE RATES

#### 1.6 STAKEHOLDERS

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

#### FIGURE 2 RESEARCH PROCESS FLOW

#### FIGURE 3 RESEARCH DESIGN

##### 2.1.1 SECONDARY DATA

###### 2.1.1.1 Key data from secondary sources

##### 2.1.2 PRIMARY DATA

###### 2.1.2.1 Primary sources

###### 2.1.2.2 Key data from primary sources

###### 2.1.2.3 Breakdown of primary interviews

#### FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

#### 2.2 FACTOR ANALYSIS

##### 2.2.1 INTRODUCTION

#### 2.3 DEMAND-SIDE ANALYSIS

##### 2.3.1 INTRODUCTION

##### 2.3.2 DEMAND-SIDE INDICATORS

###### 2.3.2.1 Passenger traffic

#### FIGURE 5 GLOBAL PASSENGER TRAFFIC, 2015–2030

###### 2.3.2.2 Emerging economies

#### FIGURE 6 G7 AND BRICS GLOBAL GDP SHARE AT PURCHASING POWER

PARITY, 1997–2023

## 2.4 SUPPLY-SIDE ANALYSIS

### 2.4.1 SUPPLY-SIDE INDICATORS

## 2.5 RESEARCH APPROACH AND METHODOLOGY

### 2.5.1 BOTTOM-UP APPROACH

FIGURE 7 BOTTOM-UP APPROACH

### 2.5.2 TOP-DOWN APPROACH

FIGURE 8 TOP-DOWN APPROACH

## 2.6 DATA TRIANGULATION

FIGURE 9 DATA TRIANGULATION

## 2.7 RESEARCH ASSUMPTIONS

### 2.7.1 PARAMETRIC ASSUMPTIONS

### 2.7.2 GROWTH RATE ASSUMPTIONS

## 2.8 RESEARCH LIMITATIONS

## 2.9 RISK ASSESSMENT

## 3 EXECUTIVE SUMMARY

FIGURE 10 COMMERCIAL AVIATION SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

FIGURE 11 ADVERTISING SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD

FIGURE 12 NORTH AMERICA TO ACCOUNT FOR LARGEST MARKET SHARE IN 2024

## 4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN IN-FLIGHT RETAIL AND ADVERTISING MARKET

FIGURE 13 GROWING ADOPTION OF E-COMMERCE AND DIGITAL PLATFORMS TO DRIVE MARKET

4.2 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER

FIGURE 14 COMMERCIAL AVIATION TO HOLD LARGER MARKET SHARE DURING FORECAST PERIOD

4.3 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE

FIGURE 15 ADVERTISING SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE DURING FORECAST PERIOD

4.4 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY COUNTRY

FIGURE 16 UAE TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

## 5 MARKET OVERVIEW

### 5.1 INTRODUCTION

### 5.2 MARKET DYNAMICS

FIGURE 17 IN-FLIGHT RETAIL AND ADVERTISING MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

#### 5.2.1 DRIVERS

5.2.1.1 Rise in airline passenger traffic

FIGURE 18 REGION-WISE PASSENGER GROWTH, 2020–2050

5.2.1.2 Growing focus on ancillary offerings

5.2.1.3 Booming low-cost carrier market

TABLE 3 TOP 10 COUNTRIES WITH HIGHEST NUMBER OF LOW-COST CARRIERS IN SCHEDULE CAPACITY, MARCH 2023

#### 5.2.2 RESTRAINTS

5.2.2.1 Data privacy concerns

5.2.2.2 Limited in-flight connectivity

#### 5.2.3 OPPORTUNITIES

5.2.3.1 Increasing interest in exclusive offers

5.2.3.2 Surge in multi-channel campaigns

#### 5.2.4 CHALLENGES

5.2.4.1 Technological integration

5.2.4.2 Passenger acceptance and engagement

### 5.3 TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 19 REVENUE SHIFT AND NEW REVENUE POCKETS

### 5.4 ECOSYSTEM ANALYSIS

#### 5.4.1 PROMINENT COMPANIES

#### 5.4.2 PRIVATE AND SMALL ENTERPRISES

#### 5.4.3 END USERS

FIGURE 20 ECOSYSTEM ANALYSIS

TABLE 4 ROLE OF COMPANIES IN ECOSYSTEM

### 5.5 VALUE CHAIN ANALYSIS

FIGURE 21 VALUE CHAIN ANALYSIS

### 5.6 KEY STAKEHOLDERS AND BUYING CRITERIA

#### 5.6.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 22 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY END USER

TABLE 5 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY END USER (%)

## 5.6.2 BUYING CRITERIA

FIGURE 23 KEY BUYING CRITERIA, BY END USER

TABLE 6 KEY BUYING CRITERIA, BY END USER

## 5.7 USE CASES ANALYSIS

5.7.1 IMPROVED CUSTOMER EXPERIENCE WITH GENERATIVE AI

5.7.2 ENHANCED PASSENGER EXPERIENCE IN ETIHAD AIRWAYS THROUGH IN-FLIGHT ENTERTAINMENT SYSTEM

5.7.3 INCREASED SALES WITH EMIRATESRED IN-FLIGHT RETAIL SERVICE

5.7.4 PERSONALIZED IN-FLIGHT SHOPPING USING KRISSHOP PLATFORM IN SINGAPORE AIRLINES

## 5.8 TRADE ANALYSIS

5.8.1 IMPORT DATA

FIGURE 24 IMPORT DATA, BY COUNTRY, 2019–2022 (USD THOUSAND)

5.8.2 EXPORT DATA

FIGURE 25 EXPORT DATA, BY COUNTRY, 2019–2022 (USD THOUSAND)

## 5.9 KEY CONFERENCES AND EVENTS, 2024–2025

TABLE 7 KEY CONFERENCES AND EVENTS, 2024–2025

## 5.10 BUSINESS MODELS

FIGURE 26 BUSINESS MODELS

## 5.11 INDICATIVE PRICING ANALYSIS

TABLE 8 INDICATIVE PRICING ANALYSIS, BY END USER, 2023

## 5.12 OPERATIONAL DATA

FIGURE 27 NEW AIRCRAFT ORDERS, BY OEM (UNITS), 2023–MAY 2024

TABLE 9 NEW AIRCRAFT ORDERS, BY OEM (UNITS), 2023–MAY 2024

FIGURE 28 NEW AIRCRAFT ORDERS, BY AIRCRAFT TYPE

TABLE 10 NEW AIRCRAFT ORDERS, BY AIRCRAFT TYPE (UNITS) 2023–2024

TABLE 11 Y-O-Y PENETRATION OF IN-FLIGHT RETAIL AND ADVERTISING INTO ACTIVE FLEET, BY AIRCRAFT TYPE (UNITS)

## 5.13 TECHNOLOGY ANALYSIS

5.13.1 KEY TECHNOLOGIES

5.13.1.1 High-speed in-flight Wi-Fi

5.13.1.2 Augmented Reality and Virtual Reality

5.13.2 COMPLEMENTARY TECHNOLOGIES

5.13.2.1 Beacon technology

5.13.3 ADJACENT TECHNOLOGIES

5.13.3.1 High-fidelity audio

5.13.3.2 Noise cancellation

5.13.3.3 Advanced satellite connectivity

## 5.14 REGULATORY LANDSCAPE



#### 5.14.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 12 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 REST OF THE WORLD: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

## 6 INDUSTRY TRENDS

### 6.1 INTRODUCTION

### 6.2 TECHNOLOGY TRENDS

6.2.1 WIRELESS TECHNOLOGIES IN AIRCRAFT CABINS

6.2.2 GENERATIVE AI AND LARGE LANGUAGE MODELS

6.2.3 CLOUD NATIVE TECHNOLOGY

### 6.3 IMPACT OF MEGATRENDS

6.3.1 SMART SEAT DISPLAY UNITS

6.3.2 ADVANCEMENTS IN NANOTECHNOLOGY AND MICRO-ELECTRO-MECHANICAL SYSTEMS

### 6.4 SUPPLY CHAIN ANALYSIS

FIGURE 29 SUPPLY CHAIN ANALYSIS

### 6.5 PATENT ANALYSIS

FIGURE 30 PATENT ANALYSIS, 2013–2023

TABLE 16 INNOVATIONS AND PATENT REGISTRATIONS, 2021–2024

## 7 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER

### 7.1 INTRODUCTION

FIGURE 31 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029

TABLE 17 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 18 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

### 7.2 COMMERCIAL AVIATION

7.2.1 NARROW-BODY AIRCRAFT

7.2.1.1 Growing air travel to drive market

## 7.2.2 WIDE-BODY AIRCRAFT

7.2.2.1 Increasing number of long-haul flights to drive demand

## 7.2.3 REGIONAL TRANSPORT AIRCRAFT

7.2.3.1 Booming aviation industry in emerging economies to drive market

## 7.3 BUSINESS AVIATION

7.3.1 RISING INCLINATION TOWARD PERSONALIZED TRAVEL EXPERIENCES TO DRIVE MARKET

## 8 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE

### 8.1 INTRODUCTION

FIGURE 32 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029

TABLE 19 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 20 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

### 8.2 ADVERTISING

#### 8.2.1 SEATBACK SCREENS

8.2.1.1 Surge in targeted advertising to drive market

#### 8.2.2 OVERHEAD SCREENS

8.2.2.1 Growing adoption of flexible and creative advertising to drive market

#### 8.2.3 IN-FLIGHT APPS

8.2.3.1 Booming e-commerce and entertainment industries to drive market

### 8.3 RETAIL

#### 8.3.1 ALCOHOL & BEVERAGES

8.3.1.1 Increasing dependence on advanced analytics to drive market

#### 8.3.2 BEAUTY & CARE PRODUCTS

8.3.2.1 Growing collaborations with beauty brands to drive market

#### 8.3.3 TRAVEL ESSENTIALS & ELECTRONICS

8.3.3.1 Rising competition in airlines industry to drive market

## 9 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS

### 9.1 INTRODUCTION

FIGURE 33 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2024–2029

TABLE 21 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2020–2023 (USD MILLION)

TABLE 22 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS,  
2024–2029 (USD MILLION)

### 9.2 FIRST CLASS

9.2.1 GROWING FOCUS ON EXCLUSIVE AND LUXURIOUS TRAVEL EXPERIENCE  
TO DRIVE MARKET

### 9.3 BUSINESS CLASS

9.3.1 NEED FOR COMFORTABLE WORK ENVIRONMENT TO DRIVE MARKET

### 9.4 PREMIUM ECONOMY CLASS

9.4.1 NEED TO ADDRESS VALUE-CONSCIOUS CONSUMERS TO DRIVE MARKET

### 9.5 ECONOMY CLASS

9.5.1 INCREASING ADOPTION OF STRATEGIC CONTENT TO DRIVE MARKET

## 10 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION

### 10.1 INTRODUCTION

FIGURE 34 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION,  
2024–2029

TABLE 23 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION,  
2020–2023 (USD MILLION)

TABLE 24 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION,  
2024–2029 (USD MILLION)

### 10.2 STORED

10.2.1 RISING INTEGRATION OF ACCESSIBLE ADVERTISEMENTS IN LIMITED  
NETWORK CONDITIONS TO DRIVE MARKET

### 10.3 STREAMED

10.3.1 INCREASING DEMAND FOR REAL-TIME SHOPPING AND ADVERTISING  
TO DRIVE MARKET

## 11 IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY REGION

### 11.1 INTRODUCTION

### 11.2 NORTH AMERICA

11.2.1 RECESSION IMPACT ANALYSIS

11.2.2 PESTLE ANALYSIS

FIGURE 35 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET  
SNAPSHOT

TABLE 25 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
END USER, 2020–2023 (USD MILLION)

TABLE 26 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY

END USER, 2024–2029 (USD MILLION)

TABLE 27 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 28 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

TABLE 29 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2020–2023 (USD MILLION)

TABLE 30 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2024–2029 (USD MILLION)

TABLE 31 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION, 2020–2023 (USD MILLION)

TABLE 32 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION, 2024–2029 (USD MILLION)

TABLE 33 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 34 NORTH AMERICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

### 11.2.3 US

11.2.3.1 Growing adoption of high-speed Wi-Fi and advanced seatback systems to drive market

TABLE 35 US: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 36 US: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 37 US: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 38 US: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

### 11.2.4 CANADA

11.2.4.1 Increasing regulatory compliance with content and data privacy laws to drive market

TABLE 39 CANADA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 40 CANADA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 41 CANADA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 42 CANADA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

## 11.3 EUROPE

### 11.3.1 RECESSION IMPACT ANALYSIS

### 11.3.2 PESTLE ANALYSIS

FIGURE 36 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET SNAPSHOT

TABLE 43 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 44 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 45 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 46 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

TABLE 47 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2020–2023 (USD MILLION)

TABLE 48 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2024–2029 (USD MILLION)

TABLE 49 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION, 2020–2023 (USD MILLION)

TABLE 50 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION, 2024–2029 (USD MILLION)

TABLE 51 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 52 EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

### 11.3.3 UK

11.3.3.1 Rising focus on digitalized sales channels and cabin crew engagement to drive market

TABLE 53 UK: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 54 UK: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 55 UK: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 56 UK: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

### 11.3.4 GERMANY

11.3.4.1 High frequency of domestic and intra-European flights to drive market

TABLE 57 GERMANY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 58 GERMANY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 59 GERMANY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 60 GERMANY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.3.5 FRANCE

11.3.5.1 Growing adoption of advanced digital platforms and connectivity solutions to drive market

TABLE 61 FRANCE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 62 FRANCE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 63 FRANCE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 64 FRANCE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.3.6 ITALY

11.3.6.1 Surge in budget airlines to drive market

TABLE 65 ITALY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 66 ITALY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 67 ITALY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 68 ITALY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.3.7 SPAIN

11.3.7.1 Booming tourism industry to drive market

TABLE 69 SPAIN: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 70 SPAIN: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 71 SPAIN: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 72 SPAIN: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.3.8 REST OF EUROPE

TABLE 73 REST OF EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY

END USER, 2020–2023 (USD MILLION)

TABLE 74 REST OF EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
END USER, 2024–2029 (USD MILLION)

TABLE 75 REST OF EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
MODE, 2020–2023 (USD MILLION)

TABLE 76 REST OF EUROPE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
MODE, 2024–2029 (USD MILLION)

## 11.4 ASIA PACIFIC

### 11.4.1 RECESSION IMPACT ANALYSIS

### 11.4.2 PESTLE ANALYSIS

FIGURE 37 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET  
SNAPSHOT

TABLE 77 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END  
USER, 2020–2023 (USD MILLION)

TABLE 78 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END  
USER, 2024–2029 (USD MILLION)

TABLE 79 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
MODE, 2020–2023 (USD MILLION)

TABLE 80 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
MODE, 2024–2029 (USD MILLION)

TABLE 81 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
SEAT CLASS, 2020–2023 (USD MILLION)

TABLE 82 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
SEAT CLASS, 2024–2029 (USD MILLION)

TABLE 83 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
OPERATION, 2020–2023 (USD MILLION)

TABLE 84 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
OPERATION, 2024–2029 (USD MILLION)

TABLE 85 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
COUNTRY, 2020–2023 (USD MILLION)

TABLE 86 ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
COUNTRY, 2024–2029 (USD MILLION)

### 11.4.3 CHINA

#### 11.4.3.1 Growing middle class population to drive market

TABLE 87 CHINA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER,  
2020–2023 (USD MILLION)

TABLE 88 CHINA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER,  
2024–2029 (USD MILLION)

TABLE 89 CHINA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE,

2020–2023 (USD MILLION)

TABLE 90 CHINA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE,  
2024–2029 (USD MILLION)

#### 11.4.4 INDIA

11.4.4.1 Increasing connectivity between smaller cities to drive market

TABLE 91 INDIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER,  
2020–2023 (USD MILLION)

TABLE 92 INDIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER,  
2024–2029 (USD MILLION)

TABLE 93 INDIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE,  
2020–2023 (USD MILLION)

TABLE 94 INDIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE,  
2024–2029 (USD MILLION)

#### 11.4.5 JAPAN

11.4.5.1 Growing collaborations between duty-free retailers and advertising agencies  
to drive market

TABLE 95 JAPAN: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER,  
2020–2023 (USD MILLION)

TABLE 96 JAPAN: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER,  
2024–2029 (USD MILLION)

TABLE 97 JAPAN: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE,  
2020–2023 (USD MILLION)

TABLE 98 JAPAN: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE,  
2024–2029 (USD MILLION)

#### 11.4.6 SOUTH KOREA

11.4.6.1 Rising focus on personalized in-flight sales to drive market

TABLE 99 SOUTH KOREA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
END USER, 2020–2023 (USD MILLION)

TABLE 100 SOUTH KOREA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
END USER, 2024–2029 (USD MILLION)

TABLE 101 SOUTH KOREA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
MODE, 2020–2023 (USD MILLION)

TABLE 102 SOUTH KOREA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY  
MODE, 2024–2029 (USD MILLION)

#### 11.4.7 AUSTRALIA

11.4.7.1 Increasing partnerships between airlines and advertising agencies to drive  
market

TABLE 103 AUSTRALIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END  
USER, 2020–2023 (USD MILLION)



TABLE 104 AUSTRALIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 105 AUSTRALIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 106 AUSTRALIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.4.8 REST OF ASIA PACIFIC

TABLE 107 REST OF ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 108 REST OF ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 109 REST OF ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 110 REST OF ASIA PACIFIC: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.5 MIDDLE EAST

##### 11.5.1 RECESSION IMPACT ANALYSIS

##### 11.5.2 PESTLE ANALYSIS

FIGURE 38 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET SNAPSHOT

TABLE 111 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 112 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 113 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 114 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

TABLE 115 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2020–2023 (USD MILLION)

TABLE 116 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2024–2029 (USD MILLION)

TABLE 117 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION, 2020–2023 (USD MILLION)

TABLE 118 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION, 2024–2029 (USD MILLION)

TABLE 119 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 120 MIDDLE EAST: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY

**COUNTRY, 2024–2029 (USD MILLION)****11.5.3 GULF COOPERATION COUNCIL****11.5.3.1 UAE**

11.5.3.1.1 Presence of leading airlines and advanced infrastructure to drive market

TABLE 121 UAE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 122 UAE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 123 UAE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 124 UAE: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

**11.5.3.2 Saudi Arabia**

11.5.3.2.1 Increasing adoption of cloud-based content management systems to drive market

TABLE 125 SAUDI ARABIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 126 SAUDI ARABIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 127 SAUDI ARABIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 128 SAUDI ARABIA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

**11.5.3.3 Qatar**

11.5.3.3.1 Growing emphasis on luxury and customer service excellence to drive market

TABLE 129 QATAR: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 130 QATAR: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 131 QATAR: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 132 QATAR: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

**11.5.4 TURKEY**

11.5.4.1 Rising strategic partnerships between airline companies and service providers to drive market

TABLE 133 TURKEY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 134 TURKEY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 135 TURKEY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 136 TURKEY: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

## 11.6 REST OF THE WORLD

### 11.6.1 RECESSION IMPACT ANALYSIS

### 11.6.2 PESTLE ANALYSIS

TABLE 137 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 138 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 139 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 140 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

TABLE 141 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2020–2023 (USD MILLION)

TABLE 142 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY SEAT CLASS, 2024–2029 (USD MILLION)

TABLE 143 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION, 2020–2023 (USD MILLION)

TABLE 144 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY OPERATION, 2024–2029 (USD MILLION)

TABLE 145 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 146 REST OF THE WORLD: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

### 11.6.3 BRAZIL

#### 11.6.3.1 Growing focus on localized offerings to drive market

TABLE 147 BRAZIL: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 148 BRAZIL: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 149 BRAZIL: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 150 BRAZIL: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.6.4 MEXICO

11.6.4.1 Increasing adoption of wireless streaming technologies to drive market

TABLE 151 MEXICO: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 152 MEXICO: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 153 MEXICO: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 154 MEXICO: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.6.5 SOUTH AFRICA

11.6.5.1 Rising need to cater to culturally diverse passenger base to drive market

TABLE 155 SOUTH AFRICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 156 SOUTH AFRICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 157 SOUTH AFRICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 158 SOUTH AFRICA: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

#### 11.6.6 OTHER COUNTRIES

TABLE 159 OTHER COUNTRIES: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2020–2023 (USD MILLION)

TABLE 160 OTHER COUNTRIES: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 161 OTHER COUNTRIES: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2020–2023 (USD MILLION)

TABLE 162 OTHER COUNTRIES: IN-FLIGHT RETAIL AND ADVERTISING MARKET, BY MODE, 2024–2029 (USD MILLION)

## 12 COMPETITIVE LANDSCAPE

### 12.1 INTRODUCTION

#### 12.2 KEY PLAYER STRATEGIES/RIGHT TO WIN, 2020–2024

TABLE 163 KEY PLAYER STRATEGIES/RIGHT TO WIN, 2020–2024

#### 12.3 MARKET RANKING ANALYSIS, 2023

FIGURE 39 MARKET RANKING ANALYSIS, 2023

#### 12.4 REVENUE ANALYSIS OF TOP 5 PLAYERS, 2021–2023

FIGURE 40 REVENUE ANALYSIS OF TOP 5 PLAYERS, 2021–2023

## 12.5 MARKET SHARE ANALYSIS, 2023

### FIGURE 41 MARKET SHARE OF KEY PLAYERS, 2023

### TABLE 164 IN-FLIGHT RETAIL AND ADVERTISING MARKET: DEGREE OF COMPETITION

## 12.6 BRAND COMPARISON

## 12.7 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

### 12.7.1 STARS

### 12.7.2 EMERGING LEADERS

### 12.7.3 PERVASIVE PLAYERS

### 12.7.4 PARTICIPANTS

### FIGURE 42 IN-FLIGHT RETAIL AND ADVERTISING MARKET: COMPANY EVALUATION MATRIX (KEY PLAYERS), 2023

### 12.7.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023

#### 12.7.5.1 Company footprint

### FIGURE 43 IN-FLIGHT RETAIL AND ADVERTISING MARKET: COMPANY FOOTPRINT, 2023

#### 12.7.5.2 Mode footprint

### TABLE 165 IN-FLIGHT RETAIL AND ADVERTISING MARKET: MODE FOOTPRINT

#### 12.7.5.3 Operation footprint

### TABLE 166 IN-FLIGHT RETAIL AND ADVERTISING MARKET: OPERATION FOOTPRINT

#### 12.7.5.4 Region footprint

### TABLE 167 IN-FLIGHT RETAIL AND ADVERTISING MARKET: REGION FOOTPRINT

## 12.8 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023

### 12.8.1 PROGRESSIVE COMPANIES

### 12.8.2 RESPONSIVE COMPANIES

### 12.8.3 DYNAMIC COMPANIES

### 12.8.4 STARTING BLOCKS

### FIGURE 44 IN-FLIGHT RETAIL AND ADVERTISING MARKET: COMPANY EVALUATION MATRIX (STARTUPS/SMES), 2023

### 12.8.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023

### TABLE 168 IN-FLIGHT RETAIL AND ADVERTISING MARKET: LIST OF STARTUPS/SMES

### TABLE 169 IN-FLIGHT RETAIL AND ADVERTISING MARKET: COMPETITIVE BENCHMARKING

## 12.9 COMPETITIVE SCENARIOS AND TRENDS

### 12.9.1 PRODUCT LAUNCHES

### TABLE 170 IN-FLIGHT RETAIL AND ADVERTISING MARKET: PRODUCT LAUNCHES, MARCH 2020–FEBRUARY 2024

### 12.9.2 DEALS

TABLE 171 IN-FLIGHT RETAIL AND ADVERTISING MARKET: DEALS, MARCH 2020–FEBRUARY 2024

### 12.9.3 OTHER DEVELOPMENTS

TABLE 172 IN-FLIGHT RETAIL AND ADVERTISING MARKET: OTHER DEVELOPMENTS, MARCH 2020–FEBRUARY 2024

## I would like to order

Product name: In-flight Retail and Advertising Market by End-User (Commercial Aviation, Business Aviation), Mode (Advertising, Retail), Seat Class (First, Business, Economy, Premium Economic), Operation (Stored and Streamed) and Region - Global Forecast to 2029

Product link: <https://marketpublishers.com/r/IB340E0F5D40EN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/IB340E0F5D40EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below

and fax the completed form to +44 20 7900 3970