

# North America Commercial Aircraft Upholstery Market By End User (Narrowbody Aircraft, Widebody Aircraft, Regional Jets, Business Jets), By Seat Type (First Class, Business Class, Economy Class), By Country, Competition, Forecast & Opportunities, 2020-2030F

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## Abstracts

### Market Overview

North America Commercial Aircraft Upholstery Market was valued at USD 0.5 Billion in 2024 and is expected to reach USD 0.7 Billion by 2030 with a CAGR of 4.1% during the forecast period. The North America Commercial Aircraft Upholstery Market is evolving in response to shifting passenger expectations, airline brand differentiation, and regulatory standards. Upholstery plays a vital role in influencing the overall passenger experience and operational performance of airlines. The increasing pressure on airlines to enhance in-cabin ambiance and provide long-haul comfort has driven interest in high-quality seating and cabin materials. Aircraft OEMs and airlines are collaborating with upholstery manufacturers to design products that combine lightweight performance with luxurious aesthetics, helping to reduce fuel consumption and reinforce brand identity.

Growth is also supported by the introduction of premium economy and differentiated seating classes, which demand distinct upholstery specifications. With the aviation industry focusing on fuel efficiency, upholstery materials are selected for their weight-saving capabilities without compromising durability and safety. Innovations in textile engineering and sustainable materials are also transforming upholstery solutions to meet environmental regulations and brand values. Growth in the region is further enabled by aircraft refurbishments and fleet upgrades, which present a steady demand for upholstery retrofitting services.

Challenges such as compliance with fire safety regulations, cost-effective maintenance, and balancing comfort with material lifespan continue to influence product development. At the same time, opportunities arise from smart textiles, 3D printing, and antimicrobial coatings. The upholstery market remains competitive with an emphasis on customized designs, modular installation, and long-term durability. Airlines seek solutions that enhance passenger retention while meeting operational efficiency, keeping upholstery innovation at the center of aircraft interior development.

## Market Drivers

### Fleet Modernization Initiatives

Airlines in North America are actively upgrading their aging aircraft to newer, more efficient models. According to the Federal Aviation Administration (FAA), as of 2024, North America has over 7,000 active commercial aircraft, with the U.S. accounting for roughly 85% of the fleet. This directly impacts demand for interior components, including upholstery, due to maintenance, refurbishment, and retrofitting cycles.

This process includes complete interior overhauls, driving demand for advanced commercial aircraft upholstery. The focus on enhancing passenger experience while optimizing aircraft efficiency has prompted airline operators to invest in lightweight and ergonomic upholstery. These upgrades align with efforts to reduce operating costs, comply with evolving safety standards, and provide enhanced seating comfort. According to the Department of Transportation (DOT), the average age of commercial aircraft in North America is around 12.3 years, indicating that mid-life refurbishments, which include seat and cabin upholstery replacement, are becoming increasingly routine.

As the commercial fleet undergoes modernization, both OEMs and aftermarket suppliers benefit from sustained demand for innovative upholstery products.

## Key Market Challenges

### High Cost of Advanced Upholstery Materials

High-performance aircraft upholstery requires materials that offer flame retardance, lightweight characteristics, durability, and aesthetic appeal. These features often come at a premium cost, placing pressure on airlines operating under constrained budgets. The expense of sourcing sustainable or technologically advanced upholstery can deter

some operators, particularly during periods of low profitability or economic uncertainty. Balancing cost with performance remains a major concern in decision-making.

## **Key Market Trends**

### Integration of Sustainable Upholstery Materials

Environmental concerns and corporate sustainability goals are influencing material choices in aircraft upholstery. Airlines are beginning to request upholstery solutions made from recycled or bio-based materials to reduce their environmental footprint. Upholstery suppliers are exploring options such as plant-based textiles, eco-friendly leather alternatives, and recyclable composites that meet fire-resistance and durability standards. While the aerospace industry remains conservative about adopting new materials, the growing emphasis on ESG (Environmental, Social, and Governance) compliance is accelerating research and acceptance. These materials offer a dual advantage: reducing lifecycle environmental impact and aligning with evolving passenger values around sustainability. As regulations around emissions and materials sourcing tighten, the trend toward sustainable upholstery is expected to gain traction among OEMs and aftermarket providers alike. Airlines are already using eco-conscious branding to appeal to environmentally aware travelers, with cabin design becoming a key communication tool in that strategy.

## **Key Market Players**

Aerofoam Industries

Aircraft Interior Products, Inc. (AIP)

Douglass Interior Products

Franklin Products, Inc.

InTech Aerospace

International Aero Services (IAS)

Lantal Textiles AG

OmnAvia Interiors

Spectra Interior Products

Tapis Corporation

### **Report Scope:**

In this report, the North America Commercial Aircraft Upholstery Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

North America Commercial Aircraft Upholstery Market, By End User:

Narrowbody Aircraft

Widebody Aircraft

Regional Jets

Business Jets

North America Commercial Aircraft Upholstery Market, By Seat Type:

First Class

Business Class

Economy Class

North America Commercial Aircraft Upholstery Market, By Country:

United States

Canada

Mexico

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies presents in the North America Commercial Aircraft Upholstery Market.

## **Available Customizations:**

North America Commercial Aircraft Upholstery Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## **Company Information**

Detailed analysis and profiling of additional market players (up to five).

## Contents

### 1. INTRODUCTION

- 1.1. Market Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

### 2. RESEARCH METHODOLOGY

- 2.1. Methodology Landscape
- 2.2. Objective of the Study
- 2.3. Baseline Methodology
- 2.4. Formulation of the Scope
- 2.5. Assumptions and Limitations
- 2.6. Sources of Research
- 2.7. Approach for the Market Study
- 2.8. Methodology Followed for Calculation of Market Size & Market Shares
- 2.9. Forecasting Methodology

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Country
- 3.5. Overview of Market Drivers, Challenges, and Trends

### 4. NORTH AMERICA COMMERCIAL AIRCRAFT UPHOLSTERY MARKET OUTLOOK

- 4.1. Market Size & Forecast
  - 4.1.1. By Value
- 4.2. Market Share & Forecast
  - 4.2.1. By End User (Narrowbody Aircraft, Widebody Aircraft, Regional Jets, Business Jets)
  - 4.2.2. By Seat Type (First Class, Business Class, Economy Class)

- 4.2.3. By Country
- 4.2.4. By Company (2024)
- 4.3. Market Map

## **5. UNITED STATES COMMERCIAL AIRCRAFT UPHOLSTERY MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By End User
  - 5.2.2. By Seat Type

## **6. CANADA COMMERCIAL AIRCRAFT UPHOLSTERY MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By End User
  - 6.2.2. By Seat Type

## **7. MEXICO COMMERCIAL AIRCRAFT UPHOLSTERY MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By End User
  - 7.2.2. By Seat Type

## **8. MARKET DYNAMICS**

- 8.1. Drivers
- 8.2. Challenges

## **9. MARKET TRENDS & DEVELOPMENTS**

- 9.1. Merger & Acquisition (If Any)
- 9.2. Product Launches (If Any)
- 9.3. Recent Developments

## **10. PORTERS FIVE FORCES ANALYSIS**

- 10.1. Competition in the Industry
- 10.2. Potential of New Entrants
- 10.3. Power of Suppliers
- 10.4. Power of Customers
- 10.5. Threat of Substitute Products

## **11. COMPETITIVE LANDSCAPE**

- 11.1. Company Profiles
  - 11.1.1. Aerofoam Industries
    - 11.1.1.1. Business Overview
    - 11.1.1.2. Company Snapshot
    - 11.1.1.3. Products & Services
    - 11.1.1.4. Financials (As Per Availability)
    - 11.1.1.5. Key Market Focus & Geographical Presence
    - 11.1.1.6. Recent Developments
    - 11.1.1.7. Key Management Personnel
  - 11.1.2. Aircraft Interior Products, Inc. (AIP)
  - 11.1.3. Douglass Interior Products
  - 11.1.4. Franklin Products, Inc.
  - 11.1.5. InTech Aerospace
  - 11.1.6. International Aero Services (IAS)
  - 11.1.7. Lantal Textiles AG
  - 11.1.8. OmnAvia Interiors
  - 11.1.9. Spectra Interior Products
  - 11.1.10. Tapis Corporation

## **12. STRATEGIC RECOMMENDATIONS**

## **13. ABOUT US & DISCLAIMER**

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