

North America Leather for Aviation Market Size and Forecast (2021 - 2031)

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Abstracts

The North America Leather for Aviation Market is projected to grow significantly, reaching an estimated US\$ 3,072.3 million by 2031, up from US\$ 2,300.3 million in 2024. This growth represents a compound annual growth rate (CAGR) of 4.4% from 2025 to 2031.

Executive Summary and Market Analysis

The aviation industry in North America is witnessing a rising demand for leather, driven by increasing passenger comfort expectations and strategic branding initiatives by airlines. In recent years, airlines have prioritized enhancing customer experiences as a key competitive differentiator, particularly in premium and business class segments. Leather has become the material of choice for aircraft seating due to its luxurious appearance, durability, and ease of maintenance compared to traditional fabric options. In the high-traffic environment of commercial airplanes, the ability to quickly clean and maintain surfaces is essential, and leather's resistance to spills and wear makes it a practical yet upscale choice. As airlines aim to boost passenger satisfaction and minimize long-term maintenance costs, leather's aesthetic appeal and durability, along with its evolving sustainability credentials, position it as a strategic material in the North American aviation sector. Furthermore, the resurgence in air travel demand, fueled by economic recovery and increased tourism, has led to fleet expansions and aircraft refurbishments, further driving the need for leather interiors.

Strategic Insights

Market Segmentation Analysis

The North America Leather for Aviation Market is segmented by type, application, and aircraft type:

By Type: The market is divided into Genuine Leather, Artificial Leather, Polyurethane, Polyvinyl Chloride, and Others. The Genuine Leather segment is expected to dominate the market in 2024.

By Application: The market is segmented into Seats, Headrests, Armrests, Cushions, Cabin Interiors, and Others, with the Seats segment leading in 2024.

By Aircraft Type: The market is categorized into Private Aircraft, Commercial Aircraft, Military Aircraft, and Others, where the Commercial Aircraft segment is anticipated to hold the largest share in 2024.

Market Outlook

The increasing number of tourism activities and international business connections is pressuring the aviation industry to enhance passenger comfort and aircraft design. As global air travel continues to grow, airlines and aircraft manufacturers are prioritizing passenger comfort, aesthetics, and safety, which drives the demand for high-quality leather in seating, upholstery, and cabin accessories.

According to the International Air Transport Association (IATA, 2025), the Asia Pacific region holds the largest global market share at 33.5%, with significant growth in Revenue Passenger Kilometers (RPKs) at 16.9% and Available Seat Kilometers (ASK) at 12.3%. Europe follows with a 26.7% share, recording RPK growth of 8.7% and ASK growth of 8.1%. North America accounts for 22.9% of the global market, experiencing more modest growth, with RPKs and ASKs increasing by 4.6%. The Middle East represents 9.4% of the global share, showing balanced expansion with RPK growth of 9.5% and ASK growth of 8.4%. Latin America holds a 5.3% share, supported by RPK and ASK growth rates of 7.8% and 7.1%, respectively. Africa, while accounting for the smallest portion at 2.2%, has shown notable growth with RPKs increasing by 13.2% and ASKs by 9.9%. This data highlights regional differences in market size and capacity growth within the global aviation industry, indicating a strong demand for new fleets to enhance overall customer satisfaction. The manufacturing of new fleets is driving the adoption of leather for developing superior, durable, high-quality, and comfortable seating and cabin interiors.

Moreover, the expansion of aircraft capacity and the development of new fleets are increasing the demand for leather to improve the overall passenger experience. Boeing projects that the fleet size will grow by 2.8% between 2022 and 2041, with approximately 41,170 aircraft deliveries expected. Airlines are procuring these aircraft to meet the rising air passenger demand, thus boosting the demand for leather as an ideal material for seats, headrests, armrests, and cushions.

Country Insights

The North America Leather for Aviation Market is segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. In the US, the demand for leather in aviation applications has surged due to a growing emphasis on enhancing passenger comfort and brand image in both commercial and private aircraft. Airlines and jet manufacturers are investing in premium cabin experiences, favoring leather for its luxurious feel, durability, and ease of cleaning compared to fabric alternatives. The post-pandemic recovery in air travel has prompted airlines to refurbish cabins to attract high-end travelers, leading to more upgrades featuring leather seating and interior trims. According to the Bureau of Transportation Statistics, US airlines carried 77.5 million scheduled service passengers in April 2023. Additionally, leather aligns with modern interior design trends that emphasize sophistication and minimalism. In private aviation, where personalization and luxury are paramount, leather remains the preferred material for bespoke interiors. Innovations in eco-friendly tanning and sustainable leather sourcing are also enhancing leather's appeal amid growing sustainability concerns, contributing to its rising demand in the US aviation sector.

Company Profiles

Key players in the North America Leather for Aviation Market include BASF SE, BOXMARK Leather GmbH & Co KG, Teijin Ltd, Toray Industries Inc, Covestro AG, San Fang Chemical Industrial Co Ltd, FILWEL Co., Ltd., Curtidos Trevi?o S.A. de C.V., Wickett-Craig, Super Tannery Ltd., Wollsdorf Leder Schmidt & Co Ges.m.b.H., Elmo Sweden AB, ICAIPLAST Spa, Conceria Leonica S.p.A., and Giriraj Coated Fab PVT. LTD. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to provide innovative products and increase their market share.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. LEATHER FOR AVIATION MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Porter's Five Forces Analysis
 - 4.2.1 Threat of New Entrants:
 - 4.2.2 Threat of Substitutes:
 - 4.2.3 Bargaining Power of Buyers:
 - 4.2.4 Bargaining Power of Suppliers:
 - 4.2.5 Competitive Rivalry:
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors or Suppliers
 - 4.3.4 End-Use Industry
 - 4.3.5 List of Vendors in the Value Chain
- 4.4 Average Selling Price, 2024, US\$ per Sq. Meter

5. NORTH AMERICA LEATHER FOR AVIATION MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. LEATHER FOR AVIATION MARKET - NORTH AMERICA MARKET ANALYSIS

- 6.1 North America Leather for Aviation Market Volume (Sq. Meter), 2021 - 2031
- 6.2 North America Leather for Aviation Market Volume Forecast and Analysis (Sq. Meter)
- 6.3 North America Leather for Aviation Market Revenue (US\$ Million), 2024 -2031
- 6.4 North America Leather for Aviation Market Forecast and Analysis

7. NORTH AMERICA LEATHER FOR AVIATION MARKET VOLUME AND REVENUE ANALYSIS - BY TYPE

- 7.1 Genuine Leather
 - 7.1.1 Overview
 - 7.1.2 Genuine Leather: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)
 - 7.1.3 Genuine Leather: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.2 Artificial Leather
 - 7.2.1 Overview
 - 7.2.2 Artificial Leather: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)
 - 7.2.3 Artificial Leather: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.3 Polyurethane
 - 7.3.1 Overview
 - 7.3.2 Polyurethane: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)
 - 7.3.3 Polyurethane: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.4 Polyvinyl Chloride

7.4.1 Overview

7.4.2 Polyvinyl Chloride: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

7.4.3 Polyvinyl Chloride: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.5 Others

7.5.1 Overview

7.5.2 Others: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

7.5.3 Others: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. NORTH AMERICA LEATHER FOR AVIATION MARKET VOLUME AND REVENUE ANALYSIS - BY APPLICATION

8.1 Seats

8.1.1 Overview

8.1.2 Seats: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

8.1.3 Seats: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Headrests

8.2.1 Overview

8.2.2 Headrests: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

8.2.3 Headrests: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Armrests

8.3.1 Overview

8.3.2 Armrests: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

8.3.3 Armrests: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.4 Cushions

8.4.1 Overview

8.4.2 Cushions: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

8.4.3 Cushions: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.5 Cabin Interiors

8.5.1 Overview

8.5.2 Cabin Interiors: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

8.5.3 Cabin Interiors: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.6 Others

8.6.1 Overview

8.6.2 Others: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

8.6.3 Others: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. NORTH AMERICA LEATHER FOR AVIATION MARKET VOLUME AND REVENUE ANALYSIS - BY AIRCRAFT TYPE

9.1 Private Aircrafts

9.1.1 Overview

9.1.2 Private Aircrafts: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

9.1.3 Private Aircrafts: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Commercial Aircrafts

9.2.1 Overview

9.2.2 Commercial Aircrafts: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

9.2.3 Commercial Aircrafts: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Military Aircrafts

9.3.1 Overview

9.3.2 Military Aircrafts: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

9.3.3 Military Aircrafts: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4 Others

9.4.1 Overview

9.4.2 Others: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

9.4.3 Others: North America Leather for Aviation Market - Revenue and Forecast,

2021 - 2031 (US\$ Million)

10. NORTH AMERICA LEATHER FOR AVIATION MARKET - COUNTRY ANALYSIS

10.1 North America

10.1.1 North America Leather for Aviation Market Revenue and Forecast and Analysis - by Country

10.1.1.1 North America Leather for Aviation Market Volume and Forecast and Analysis - by Country

10.1.1.2 North America Leather for Aviation Market Revenue and Forecast and Analysis - by Country

10.1.2.2 United States: North America Leather for Aviation Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Sq. Meter)

10.1.2.2.1 United States: North America Leather for Aviation Market Share - by Type

10.1.2.2.2 United States: North America Leather for Aviation Market Share - by Application

10.1.2.2.3 United States: North America Leather for Aviation Market Share - by Aircraft Type

10.2.3.3 Canada: North America Leather for Aviation Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Sq. Meter)

10.2.3.3.1 Canada: North America Leather for Aviation Market Share - by Type

10.2.3.3.2 Canada: North America Leather for Aviation Market Share - by Application

10.2.3.3.3 Canada: North America Leather for Aviation Market Share - by Aircraft Type

10.3.4.4 Mexico: North America Leather for Aviation Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Sq. Meter)

10.3.4.4.1 Mexico: North America Leather for Aviation Market Share - by Type

10.3.4.4.2 Mexico: North America Leather for Aviation Market Share - by Application

10.3.4.4.3 Mexico: North America Leather for Aviation Market Share - by Aircraft Type

11 COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Market Share Analysis, 2024

12 INDUSTRY LANDSCAPE

- 12.1 Overview
- 12.2 New Product Development
- 12.3 Merger and Acquisition
- 12.4 Other Strategic Developments

13 COMPANY PROFILES

13.1 BASF SE

- 13.1.1 Key Facts
- 13.1.2 Business Description
- 13.1.3 Products and Services
- 13.1.4 Financial Overview
- 13.1.5 SWOT Analysis
- 13.1.6 Key Developments

13.2 BOXMARK Leather GmbH & Co KG

- 13.2.1 Key Facts
- 13.2.2 Business Description
- 13.2.3 Products and Services
- 13.2.4 Financial Overview
- 13.2.5 SWOT Analysis
- 13.2.6 Key Developments

13.3 Teijin Ltd

- 13.3.1 Key Facts
- 13.3.2 Business Description
- 13.3.3 Products and Services
- 13.3.4 Financial Overview
- 13.3.5 SWOT Analysis
- 13.3.6 Key Developments

13.4 Toray Industries Inc

- 13.4.1 Key Facts
- 13.4.2 Business Description
- 13.4.3 Products and Services
- 13.4.4 Financial Overview
- 13.4.5 SWOT Analysis
- 13.4.6 Key Developments

13.5 Covestro AG

- 13.5.1 Key Facts
- 13.5.2 Business Description

- 13.5.3 Products and Services
- 13.5.4 Financial Overview
- 13.5.5 SWOT Analysis
- 13.5.6 Key Developments
- 13.6 San Fang Chemical Industrial Co Ltd
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments
- 13.7 FILWEL Co., Ltd.
 - 13.7.1 Key Facts
 - 13.7.2 Business Description
 - 13.7.3 Products and Services
 - 13.7.4 Financial Overview
 - 13.7.5 SWOT Analysis
 - 13.7.6 Key Developments
- 13.8 Curtidos Trevi?o S.A. de C.V.
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis
 - 13.8.6 Key Developments
- 13.9 Wickett-Craig
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 Super Tannery Ltd.
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments

13.11 Wollsdorf Leder Schmidt & Co Ges.m.b.H.

- 13.11.1 Key Facts
- 13.11.2 Business Description
- 13.11.3 Products and Services
- 13.11.4 Financial Overview
- 13.11.5 SWOT Analysis
- 13.11.6 Key Developments

13.12 Elmo Sweden AB

- 13.12.1 Key Facts
- 13.12.2 Business Description
- 13.12.3 Products and Services
- 13.12.4 Financial Overview
- 13.12.5 SWOT Analysis
- 13.12.6 Key Developments

13.13 ICAIPLAST Spa

- 13.13.1 Key Facts
- 13.13.2 Business Description
- 13.13.3 Products and Services
- 13.13.4 Financial Overview
- 13.13.5 SWOT Analysis
- 13.13.6 Key Developments

13.14 Conceria Leonica S.p.A.

- 13.14.1 Key Facts
- 13.14.2 Business Description
- 13.14.3 Products and Services
- 13.14.4 Financial Overview
- 13.14.5 SWOT Analysis
- 13.14.6 Key Developments

13.15 Giriraj Coated Fab PVT. LTD.

- 13.15.1 Key Facts
- 13.15.2 Business Description
- 13.15.3 Products and Services
- 13.15.4 Financial Overview
- 13.15.5 SWOT Analysis
- 13.15.6 Key Developments

14. APPENDIX**14.1 About The Insight Partners**

List Of Tables

LIST OF TABLES

Table 1. North America Leather for Aviation Market Segmentation

Table 2. List of Vendors

Table 3. North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Table 4. North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 5. North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Type

Table 5. North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 6. North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Application

Table 6. North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 7. North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Aircraft Type

Table 7. North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aircraft Type

Table 8. North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Country

Table 9. North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 10. United States: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Type

Table 11. United States: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 12. United States: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Application

Table 13. United States: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 14. United States: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Aircraft Type

Table 15. United States: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aircraft Type

Table 16. Canada: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Type

Table 17. Canada: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 18. Canada: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Application

Table 19. Canada: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 20. Canada: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Aircraft Type

Table 21. Canada: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aircraft Type

Table 22. Mexico: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Type

Table 23. Mexico: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 24. Mexico: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Application

Table 25. Mexico: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 26. Mexico: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter) - by Aircraft Type

Table 27. Mexico: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Aircraft Type

Table 28. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. North America Leather for Aviation Market Segmentation - Country

Figure 2. Porter's Analysis

Figure 3. Ecosystem: Leather for Aviation Market

Figure 4. North America Leather for Aviation Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. North America Leather for Aviation Market Volume (Sq. Meter), 2021 - 2031

Figure 7. North America Leather for Aviation Market Revenue (US\$ Million), 2024 - 2031

Figure 8. North America Leather for Aviation Market Share (%) - by Type, 2024 and 2031

Figure 9. Genuine Leather: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 9. Genuine Leather: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Artificial Leather: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 10. Artificial Leather: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. Polyurethane: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 11. Polyurethane: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Polyvinyl Chloride: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 12. Polyvinyl Chloride: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Others: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 13. Others: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. North America Leather for Aviation Market Share (%) - by Application, 2024 and 2031

Figure 15. Seats: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 15. Seats: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Headrests: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 16. Headrests: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Armrests: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 17. Armrests: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Cushions: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 18. Cushions: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Cabin Interiors: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 19. Cabin Interiors: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Others: North America Leather for Aviation Market - Volume and Forecast,

2021 - 2031 (Sq. Meter)

Figure 20. Others: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. North America Leather for Aviation Market Share (%) - by Aircraft Type, 2024 and 2031

Figure 22. Private Aircrafts: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 22. Private Aircrafts: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Commercial Aircrafts: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 23. Commercial Aircrafts: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. Military Aircrafts: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 24. Military Aircrafts: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Others: North America Leather for Aviation Market - Volume and Forecast, 2021 - 2031 (Sq. Meter)

Figure 25. Others: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. North America Leather for Aviation Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 27. United States: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 28. Canada: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 29. Mexico: North America Leather for Aviation Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 30. Company Market Share Analysis, 2024

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