

Aircraft EXPO®
Interiors



AIX Global Cabin Concepts Lab

—
APAC MARKET

Words by Emma Kelly





REGIONAL OVERVIEW

Air traffic in the Asia-Pacific (APAC) is booming, with the region set to be the global air transport powerhouse for decades to come. Airlines in the region are responding with massive fleet development, providing a growing platform for the cabin innovation the region is renowned for. At the same time, APAC carriers are stepping up to the challenge of meeting the expectations of a rapidly expanding middle class eager to travel, a young demographic that has embraced digital solutions, as well as the demands of operating some of the longest flight sectors in the world.

In 2025, APAC airlines saw a 10.9% rise in full-year international traffic compared with the previous year, according to the International Air Transport Association. The region now accounts for 34.5% of the total global air passenger market, far ahead of Europe (26.6%) and North America (21.8%).

The Association of Asia Pacific Airlines, which represents 18 of the region's airlines, reports international passenger traffic in 2025 of 390.5 million – up 9.4% on 2024.

Since 2015, carriers in the region have launched more than 600 new routes, boosting total APAC routes to 2,780, according to Alton Aviation Consultancy. Asia is emerging as the engine of global aviation growth, with India, China and Southeast Asia (SEA) set to account for eight of the world's 10 fastest-growing air travel markets through to 2044, Alton says.

SEA is an emerging growth region, driven by favourable demographics, rising incomes, strong GDP growth and improved air connectivity, with IATA expecting the

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growth pillars of SEA – Indonesia, Thailand, Vietnam and the Philippines – to join the ranks of the top 20 largest aviation markets in the world.

Airbus forecasts a global demand for 42,450 new passenger aircraft between 2025 and 2044, with the Asia-Pacific region (excluding China) to need 10,050 of these, while Boeing anticipates 43,600 global deliveries in the same timeframe, forecasting airline fleet growth of 6.7% in South Asia; 6.6% in SEA; 1.6% in Northeast Asia; and 2.2% in Oceania. Boeing expects the population of SEA alone to increase by 10% and the middle class to double by 2044, resulting in a requirement for almost 5,000 aircraft deliveries through to 2044.

Carriers in the region already have fleet replacement and expansion programmes under way, including Malaysia Airlines, Philippine Airlines (PAL), Qantas, Singapore Airlines (SIA) and Thai Airways, while the region's booming low-cost carriers, including AirAsia, Cebu Pacific, Lion Air and Vietjet, have massive orderbooks. CAPA-Centre for Aviation says 1,678 commercial aircraft are already on order from SEA airlines, with the majority (85%) being narrowbodies, largely from LCCs.

The lines between LCCs and full-service carriers in APAC are blurring more than anywhere else in the world, thanks to the nature of LCC operations in the region, operating longer legs. The long-haul LCC sector has flourished, with AirAsia X, Cebu Pacific, Jetstar, Scoot, Vietjet and Zipair among those flying routes beyond six hours, requiring a different onboard product to LCCs elsewhere.

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CABIN INNOVATIONS IN THE ASIA-PACIFIC

Across APAC, cabin innovation is shaped by several defining forces: demographic expansion, digital sophistication and ultra-long-haul operations, factors that suppliers and airlines can leverage to differentiate their products, and capture new market share.

While passenger expectations are increasingly globalised, regional characteristics, particularly service culture, design heritage and digital behaviour, continue to influence airline decision-making.



DESIGN EXCELLENCE AND CULTURAL IDENTITY

APAC passengers have long valued service excellence and continue to have high expectations.

"Appearance counts for a lot in the perception of safety and reliability," says Daniel Baron, Managing Director of LIFT Aero Design, an Asia-based design studio which specialises in aircraft cabin design, airline branding and customer experience. As a result, passengers look at all aspects onboard, including the appearance of tidiness and hygiene. Travellers in the region are also accustomed to intense competition and relatively short consumer product lifecycles so they continually expect something new, including on aircraft, he says.

LIFT has worked with airlines throughout the region, including Air Seychelles, Bamboo Airways, Cebu Pacific, China Airlines, HK Express, PAL, Royal Brunei Airlines, Skymark Airlines and Vietjet.

Most recently the company was responsible for the cabin and seat styling of PAL's new Airbus A350-1000s, following an almost



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20-year association with the carrier. The cabin design is “smart evolution meets tomorrow”, with a strong emphasis on comfort, privacy and functionality. The cabin design includes a new PAL Sunrise partition design, reflecting the warmth and understated elegance Filipinos are famous for, while the carpet features the colours of a tropical sea. Seat trim and finish blend slate blue with champagne gold, with light wood-look inlays on meal tables, creating a premium ambience that is unmistakably PAL, says LIFT, which also developed 22 mood lighting scenarios.

Embracing heritage in cabin design is important for APAC carriers, with the latest designs cleverly blending heritage and contemporary elements. Thai Airways’ new Airbus A321neo interior, for example, designed

by longstanding partner PriestmanGoode, retains the airline’s rich purple palette, the symbolic use of Thai traditional motifs and tactile materials including silk curtains, combined with a contemporary design language, reflecting the airline’s move towards a more global outlook, says PriestmanGoode. The design “feels uniquely Thai while being suited to a global audience, combining cultural authenticity with a quietly modern sensibility”, adds PriestmanGoode.

JPA Design also has a long association with the APAC region, collaborating in the past with SIA, including its Airbus A380 Business Class cabin, and undertaking the cabin redesign of China Airlines’ A321s. It also has a longstanding partnership with Cathay Pacific which has included a full nose-to-tail redesign of its Boeing 777-300ER fleet. Most recently, JPA designed Cathay’s multi-award-winning Aria Business Class Suite and refreshed its Premium Economy and Economy cabins.

“As a global design agency, JPA balances regional sensitivity with universal passenger expectations,” says Richard D’Cruze, Managing Director. “Across APAC and globally, passengers consistently prioritise comfort, personal space and privacy, particularly on long-haul journeys,” he adds. “There is a strong demand for technology that feels intuitive and seamlessly integrated rather than visually dominant, alongside calm, refined cabin environments that support rest, relaxation and overall wellbeing,” he says.

D’Cruze says passenger priorities tend to be shaped more by airline brand positioning, route profile and cabin class than geography alone, with human-centred design principles, comfort, clarity, ease of use and emotional wellbeing resonating universally.



MIDDLE CLASS GROWTH AND EVOLVING PASSENGER EXPECTATIONS

With the region experiencing massive traffic growth, a rapidly expanding middle class with disposable income to travel, often for the first time, as well as population that is more tech-savvy than other regions of the world,

airlines and cabin designers must adapt strategically, tailoring products to meet evolving expectations and capitalise on new revenue opportunities.

“There is an increased emphasis on intuitive layouts, clarity and ease of use to accommodate passengers with varying levels of travel experience. Cabins must feel welcoming and easy to navigate, ensuring customers feel comfortable rather than overwhelmed,” says D’Cruze.

At the same time, design solutions must be adaptable and future ready, with modularity, allowing them to be refreshed and evolve as passenger demographics and expectations change, he says. “Technology plays a key role, but it should enhance the experience quietly and seamlessly, without adding complexity,” he adds.

LIFT’s Baron highlights its work with Vietnamese carrier Bamboo Airways, which positioned itself as the country’s boutique airline, between state-owned Vietnam Airlines and LCC Vietjet, targeting the country’s growing middle class.

“They [middle class travellers] are looking for an experience that reflects their aspirations and experiences with consumer products and hotels. Every element in our cabin styling, for example partitions, seat covers, carpets and curtains, had to communicate ‘youthful and dynamic’ along with a more comfortable and premium feeling than the competition,” Baron explains.

“For the newly minted middle class, there is an overlap with younger adult customers in general, the common factor being a newfound freedom to fly on their own terms,” adds Aaron Young, LIFT’s Design Partner. “We have a passenger that might notice and appreciate small creature comforts in the soft product and catering,” he explains.



PREMIUM EVOLUTION AND INNOVATION LEADERSHIP

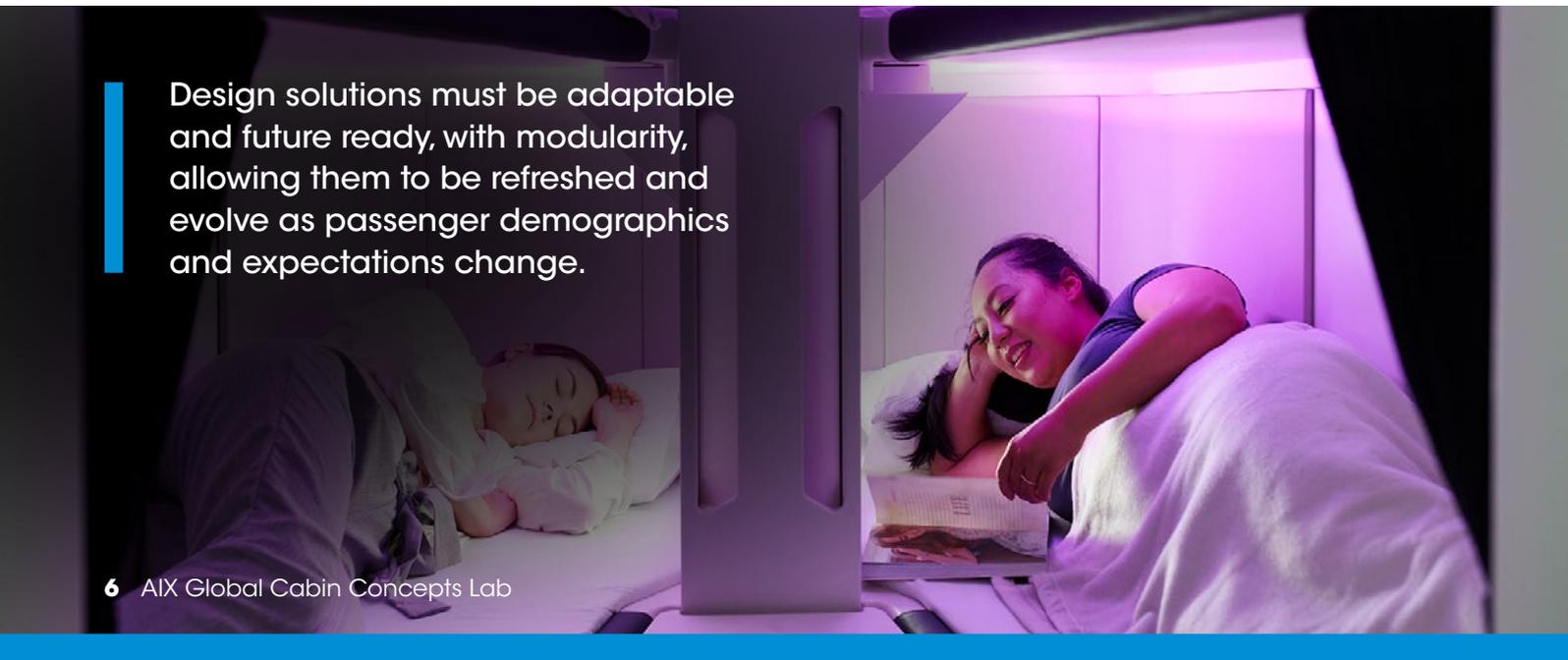
Innovation is important for carriers in the region, with APAC airlines setting benchmarks and dominating global product awards. “Year after year for many decades, APAC network airlines have taken more awards than any other region,” says Baron. “This is the result of continual investment in innovation in seat hardware, cabin ambience, soft product and service delivery, which have in turn fuelled very high expectations,” he says.

Being a “smart follower” is not an option for many carriers in the region. “Leveraging design as a strategic tool of brand differentiation is a given, be it a game-changing seat design or simply a unique colour,” he adds.

Innovation is critical, with passengers increasingly comparing the experience across international carriers, thus raising expectations, says D’Cruze. “Continuous innovation allows airlines to remain competitive, relevant and differentiated, reinforcing JPA’s belief that we have a responsibility to consistently push boundaries and redefine what’s possible in cabin design,” he says.

Innovation is not just in design, with one of the biggest cabin evolutions over the last few decades, Premium Economy as a separate cabin class, born in the region,

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with Taiwan's EVA Air in 1992. Last year, the carrier unveiled its fourth-generation Premium Economy seats on its 787-9s, with a 42 inch seat pitch, 15.6 inch high-resolution widescreen monitors, tray table with a holder for personal devices, 110V AC and USB combo power outlets, headrest side privacy panels and built-in reading lights.

"As the world's first airline to launch Premium Economy Class, EVA Air has consistently focused on innovation driven by passenger needs and setting industry trends," EVA Air President Clay Sun said at the launch.

SIA is one APAC carrier renowned for cabin innovation. "SIA has a long-standing commitment to cabin innovation, with a focus on improving comfort, convenience, and personalisation for our customers across all cabin classes," the airline says.

SIA has repeatedly set industry benchmarks for its Suites, First Class and Business Class products. In 2006, for example, it launched the industry's widest First and Business seats on its Boeing 777-300ERs, with the Business Class seat, featuring a fully flat bed and enhanced privacy, also the first to offer direct aisle access.

In 2007, as well as being the first airline to operate the A380, it launched the Suites concept, offering "an unprecedented level of luxury and privacy with full-sized bed, sliding doors with window blinds". For couples travelling together, the design allowed beds in adjacent centre Suites to be combined into a double bed, as well as allowing passengers to dine together.

In 2021, it extended the lie-flat Business Class concept to narrowbody aircraft on its Boeing 737-8 MAX, making it one of a handful of airlines in the world to feature this offering across its entire fleet.

SIA is promising to further push the boundaries of comfort, luxury and modernity with the new product onboard its retrofitted A350-900 long-haul and ultra-long-range (ULR) fleet this year, as well as its new, delayed Boeing 777-9s.

The airline says the seven A350-900ULRs, operating the world's longest routes, will feature a "luxurious First Class cabin", setting new industry benchmarks. Business Class seats across the A350-900 fleet will feature "innovative designs that will offer even greater levels of privacy, comfort, and convenience". Premium Economy and Economy are also being refreshed.

Since its launch in 1995, SIA's KrisWorld has been regarded as one of the most advanced in-flight entertainment (IFE) offerings in the world. In 1997, SIA was the first airline in the world to offer audio- and video-on-demand (A/VOD) across its fleet with the Wisemen system, developed by Matsushita Avionics Systems (now Panasonic Avionics). The system allowed passengers in the airline's premium cabins to watch and listen to video and audio programming at any time during the flight, choosing from 15 movies, 20 short films and around 50 CDs, paving the way for interactive developments that continue today.

SIA says digital innovation and personalisation are core pillars of its customer experience. SIA was also a

pioneer in IFE personalisation, with its Companion App launched on selected aircraft in 2016, in conjunction with Panasonic, allowing passengers to control the IFE screen using their personal devices, browse IFE in advance and build favourites lists.

The following year, myKrisWorld was launched, delivering personalisation across all flights, allowing KrisFlyer members to continue watching content from where they left off on a previous journey, recall saved preferences, receive tailored content recommendations and create favourite lists.

A next generation KrisWorld offering greater personalisation and an extensive range of lifestyle options is set to be launched on the A350-900s and 777-9s.

The airline was also an early pioneer of satcom telephony, the first to offer in-flight fax, and one of the first to offer unlimited, complimentary WiFi, using Panasonic's Geostationary Earth Orbit (GEO) satellite solution. It is now looking to enhance its WiFi with a Low Earth Orbit (LEO) solution, recognising that high-speed, reliable connectivity is increasingly important to its customers. A LEO provider and timelines have yet to be announced.

Cathay Pacific, meanwhile, is aiming to be "one of the world's best premium airlines", with its latest product developments part of this vision. The airline's Aria Suite, launched on its 777-300ERs in October 2024, features a range of innovations and enhancements that elevate the experience with increased comfort and control. The suite offers a more personalised and immersive experience, according to Cathay, with a spacious cabin, intuitive seat design and refined finishes. Innovations include the ability to control the suite environment through connected control panels, co-designed with JPA Design, with Reaktor developing the IFE interface. Cabin lighting and seat position can be synchronised with a single touch through activity

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Fleet redevelopment is allowing airlines, such as Qantas, to rethink the in-flight experience. Its new Airbus A220s feature increased space and comfort, including Economy seats with extra padding, while its Airbus A321XLRs have wider seats, free WiFi and a more comfortable experience, designed for domestic legs and short-haul international services. The airline's Airbus A330 refurbishment, meanwhile, includes new seats in Economy and 4K OLED 13.3inch IFE touchscreens with Bluetooth audio connectivity.



ULTRA-LONG-HAUL COMFORT AND WELLBEING

Operating some of the longest flight sectors in the world, comfort, passenger wellbeing and the ability to sleep are priorities for APAC carriers.

Air New Zealand has focused on sleep more than any airline in the world. Its Skynest is set to revolutionise the Economy Class experience, allowing passengers to lie flat, with its long-awaited debut on ultra-long-haul, 787-9 Auckland-New York services this year. Skynest is the result of five years and 170,000 hours of extensive research and design. It comprises a six-pod configured sleep zone, which will be available for purchase in four-hour sessions. Skynest follows an earlier Economy Class first, Skycouch, which converts three economy seats to a lie flat bed.

SIA has passenger comfort in mind on its 19 hour, 9,000nm marathon flights between Singapore and New York, with the airline operating its A350-900ULRs with just two classes – Business and Premium Economy.

Wellness goes beyond the hard product, however. Since 2021, SIA has partnered destination spa Golden Door to enhance passenger wellness on ultra-long-haul flights, including menu items designed to support alertness, rest and balance energy levels, in addition to in-flight stretching exercises and sleep-enhancing content on KrisWorld. A collaboration with Singapore-based wellness brand COMO Shambhala provides wholesome and nutritious in-flight meals on other selected flights.



Passenger wellness is at the heart of Qantas's plans for its non-stop, ultra-long-haul Project Sunrise flights from the east coast of Australia to London and New York, set for launch in the first half of 2027. The airline has used the ultra-long-haul flight experience from its direct Perth-London Heathrow services, since 2018, to fine tune the Project Sunrise offering.

Qantas has continued its long-running partnership with sleep and nutrition experts at Sydney University's Charles Perkins Centre (CPC), with their findings contributing to the David Caon-designed Project Sunrise A350-1000ULR cabins and service. A groundbreaking series of Project Sunrise research flights from New York and London to Sydney in 2019 in partnership with CPC researchers collected real-world passenger data from volunteer Qantas frequent flyers, which has helped shape the in-flight experience.

The Project Sunrise cabin has been developed to maximise comfort, reduce jetlag and set a "new global benchmark for the in-flight experience". The aircraft will feature completely redesigned First, Business, Premium Economy and Economy seats, with more than 40% of seating to be in premium cabins.

The aircraft will also feature a world first, purpose-built Wellbeing Zone, developed in conjunction with Diehl Aviation. Located between Premium Economy

and Economy cabins, the Wellbeing Zone has been scientifically designed to address hydration, nourishment, prolonged sitting and jetlag. The zone features sculpted walls panels, integrated stretch handles, guided on-screen exercise programmes, a hydration station and refreshments, providing passengers with a place to stretch, hydrate and refresh.

Even the lighting is grounded in science, based on state-of-the-art modelling of circadian rhythms to promote circadian adaptation, sleep and wake. Over 150 hours of testing of hundreds of lighting patterns and sequences in Airbus's A350 cabin mockup resulted in 12 unique lighting scenes inspired by the colours of the Australian landscape and grounded in science for passenger comfort, says the airline.

Qantas's wellbeing research doesn't stop with Project Sunrise, with the airline aiming to apply learnings to future cabin designs.

JPA's D'Cruze expects the next wave of cabin innovation to be driven by an even deeper focus on passenger wellbeing, through advanced lighting strategies, improved ergonomics and a greater sensory balance. He also expects smarter integration of digital systems that will allow cabins to function as "cohesive, intuitive ecosystems rather than collections of disconnected technologies".



DIGITALISATION AND IN-FLIGHT CONNECTIVITY

APAC passengers love technology, on the ground and in the air. IATA's latest Global Passenger Survey found travellers in the region to be the most digitally-savvy in the world, embracing mobile apps, digital wallets and biometrics for faster and more seamless journeys. This creates both a challenge and opportunity for airlines and suppliers to deliver seamless, high-performance digital experiences that differentiate their brand.

"The region itself is way more mobile centric [than others] and always has been," says Daniel Welch, Co-Founder and Senior Research Consultant at market intelligence specialist Valour Consultancy.

Digitally savvy airlines in the region are responding with innovative digital development, says Melbourne-based Welch, highlighting Cathay Pacific, Qantas and PAL. "We've seen a lot of really good innovation come out of this region... There's a lot of awareness of what is good for their passengers," he says.

He points to tailored experiences onboard, adding that APAC airlines are aided in their personalisation quest as passengers in the region are perhaps more used to and open to having data collected than elsewhere. Innovative partnerships are also emerging, allowing teams to drive a service to benefit passengers.

Qantas recognises that its passengers are highly digital and is investing accordingly. The airline has expanded the Qantas App significantly over the last year, for example, providing information on what to expect before and during travel, including the onboard experience. Qantas says there were more than 180 million visits to the app in 2025.

Further digital initiatives are expected from the airline's new Adelaide-based Product Innovation Centre, with the team tasked with designing and building intuitive digital experiences for the entire journey, supported by specialists in AI, software engineering and digital design, with the aim of lifting the customer experience.

With a digital savvy population, it's not surprising that APAC passengers have high expectations when it comes to IFC, which has been both a blessing and a challenge for carriers and their IFC providers.

Valour's Welch says as well as a digitally savvy demographic, there are added complexities in APAC, including that internet on the ground is generally cheap so passengers expect IFC to be free. At the same time, countries in the region, such as Korea and Singapore, boast the fastest terrestrial WiFi in the world.

"When you've got the fastest WiFi in the world, you can't offer a service that's substantially slower in the air as you are just going to annoy people," he says. He points to Korean Group's recent announcement committing



to Starlink when the airline confirmed it had been waiting for a service that matched passengers' on-ground experience. "When you are trying to establish a brand identity as one of quality, the last thing you want to do is offer a service that is below the experience [on the ground]," he says, adding that this highlights the role IFC is playing in the region.

"IFC is undoubtedly a significant priority for airlines and passengers here," says Ryan Maitland, Senior Director of Commercial Aviation, Asia-Pacific at Viasat. "Our research clearly shows passengers no longer view connectivity as a bonus, but an expectation, with a significant proportion finding no WiFi access highly frustrating. The demand for free WiFi, particularly on long-haul flights, is also incredibly pronounced in APAC," he says. Viasat's research points to "a highly digitally savvy and demanding passenger base that prioritises a personalised experience".

Their use of IFC is also different, in terms of the nature and intensity of demand, says Maitland. It's less about just sending emails and more about a full, uninterrupted, on-the-ground digital experience at 30,000ft. "This is driven by a digitally native passenger base that prioritises high-bandwidth applications," he says, adding there is strong demand in the region to use their own personalised streaming services in-flight.

Viasat has more than 20 APAC airline customers, including All Nippon Airways, China Airlines, Malaysia Airlines, PAL, Qantas, SIA and Starlux, all with a focus on performance. "They are meticulously tracking monthly metrics. The expectation extends beyond basic connectivity – it's about delivering the capacity and reliability to meet intense, concentrated demand," he says, adding performance is about guarantees per device, not per aircraft. As a result, Viasat's new multi-network, multi-orbit solution Amara, which promises

guaranteed quality of service, flexible business models and a suite of digital products, is resonating strongly in the region, he says.

APAC provides an excellent climate for IFC innovation, motivated by passenger demographics, Maitland believes, while the rapidly expanding travel market offers an opportunity for airlines to differentiate themselves. "This combination of a demanding, tech-forward passenger base and a dynamic market makes APAC a fertile ground for IFC innovation, enabling airlines to exceed expectation and secure a significant commercial advantage," he suggests, with advancing technology, evolving passenger expectations and the demand for personalisation providing the right ingredients for innovation.

Valour's Welch has high hopes for developments in the unconnected fleet, especially APAC's LCCs. "There's still such a large chunk of the commercial fleet, particularly in this part of the world, that is unconnected. Now it's all about what sort of [business] models can come through that are going to allow airlines to connect," he says. "If any carrier is going to crack the IFC business model, it's going to be a carrier in this part of the world," he predicts, due to the region being mobile-centric, digitally focused and supporting large traffic volumes.



BUSINESS AVIATION TAKING OFF

The Asia-Pacific business aviation market is mirroring commercial aviation, with APAC being the world's fastest-growing business aviation market.

Private jet travel and the fleet are increasing throughout the region thanks to economic growth, a rapidly expanding population of high-net worth individuals and the recognition of the speed, comfort and privacy benefits of business aviation.

APAC is driving the global business aviation market, according to global aircraft charter specialist Chapman Freeborn. The region's corporate charter requests tripled in 2025 compared to 2024, while the region's business jet fleet is expected to grow from 1,600 aircraft in 2025 to 1,900-plus by 2030, it says.

Meanwhile, there is a new generation of younger, digitally-driven business aircraft buyers in the region embracing private aviation as a strategic business asset rather than a luxury purchase, according to business aircraft sales company Jetcraft. In SEA, demand is being driven by legacy families, younger buyers, entrepreneurs and business leaders in emerging industries such as tech.

Business aviation is playing an increasingly important role for businesses in the region, according to Airbus Corporate Jets (ACJ). Research it conducted among 34 executives at some of the largest corporations in Asia and 33 Asia-based family offices, hedge funds and private equity firms, revealed 63% of the overall business travel of senior executives at the Asian corporations surveyed is now conducted via business aviation, and 69% for the private equity and hedge fund managers and family offices surveyed.

More than half of those questioned expect their use of business jets to increase by 50-75% over the next two years, while a further 9% expected an increase of between 75-100%.

"Business aviation isn't just faster, it's smarter. It allows professionals to recover valuable hours, work securely and make better use of their time in transit," says Chadi Saade, ACJ President.

Comfort, privacy, productivity and flexibility top of the list of APAC customers' onboard requirements. The latest technology is extremely important to the market, with secure, reliable, broadband IFC solutions especially vital, allowing executives to be as productive as possible.

Global private aviation group Vista, for example, has started upgrading its APAC fleet with Gogo's Galileo broadband connectivity system as part of a global roll out. The solution, powered by Eutelsat's OneWeb LEO constellation, delivers an on-the-ground connectivity experience, allowing users to stream, host video conferences and connect seamlessly, across all flight phases.

Vista is seeing an increased demand for private flying across the region. In the first six months of last year alone, Vista saw a 26% year-on-year increase in its Program subscription membership in Asia, while its XO global digital marketplace for private aviation is providing immediate access to private aviation. "We are seeing increasing demand from clients in Asia who are seeking flexible and instant flight solutions," says Crystal Wong, President Asia-Pacific.

In the region, Vista sees a clear trend for "bleisure travel", combining work commitments with holiday, with major commercial hubs also popular tourist and luxury destinations. As a result, the dual-use capability of business aircraft interiors, offering the highest comfort and luxury as well as productivity, come to the fore.

The demand for ultra-long-range business jets in the region, with their large cabins, multi-use interiors and latest onboard technology, is growing. Vista highlights its long-range Global 7500, supporting flights of up to 17 hours, and large cabin featuring four separate living spaces, including a bedroom, suited for business or family use.





SUSTAINABILITY AND INDUSTRY HEADWINDS

With airline growth also comes an onus on sustainability, including in the cabin. Airlines in the region have introduced a raft of initiatives minimising single-use plastics, introducing sustainable packaging, reducing waste and weight where possible.

In financial year 2025, for example, Qantas removed more than 21 million single-use plastic items, introducing paper cups and more sustainable amenity kits, and expanding its reuse and recovery pathways.

SIA, meanwhile, has removed single-use plastic items and plastic packaging; replaced Economy Class earphone packaging with a material comprising 50% kraft paper; and introduced Premium Economy amenity kits made from certified kraft paper fabric. Main course meals are served in FSC-certified paper meal boxes, with bamboo cutlery wrapped in paper. To reduce waste, selected amenities are offered on request, while passengers can pre-order or skip meals prior to their flight.

Sustainability also extends to cabin design. For Qantas, sustainability is increasingly embedded in how it designs and refreshes cabins, influencing material and product choice, factoring in material efficiency, supporting lower lifecycle waste and improved operational efficiency.

While APAC carriers are ready to grow, wider industry challenges are stifling them, most notably supply chain issues. IATA estimates the global airline industry has suffered additional costs of over US\$11 billion since COVID, primarily in fuel and maintenance costs, due to

new aircraft delivery delays forcing airlines to continue operating older aircraft. APAC airlines have been heavily impacted.

Airlines are also facing increasing costs through sustainability commitments; geopolitical crises forcing longer routings and increased fuel costs; the shadow of tariffs; along with ongoing cost pressures, oil price volatility, workforce and infrastructure constraints.

Profit margins are slim, with IATA estimating that the operating margin for carriers in the region in the year ahead will be "just shy of 5%", while net margin will be just 2.3% - significantly lower than the rest of the world - equating to an average per passenger profit of just US\$3.

Margin pressures are forcing airlines in the region to evaluate new business models, with airline consolidation under way and expected to continue. Qantas recently exited Jetstar Asia operations in Singapore and plans to exit Jetstar Japan, Korean Air and Asiana Airlines merged to form a stronger national carrier, while AirAsia has completely restructured. "As competition intensifies and financial headwinds persist, consolidation has become a strategic necessity for many airlines in Asia," says Adam Cowburn, Managing Director of Alton's Singapore office. He adds: "We're seeing patterns that echo past restructuring cycles in North America and Europe, but in Asia, this shift is unfolding against a backdrop of ongoing traffic growth, which presents a very different kind of opportunity."





IMPLICATIONS & TAKEAWAYS

THE FUTURE OF CABIN INNOVATION IN APAC

- APAC carriers are dealing with a rapidly growing market, with passengers who have high expectations. Airlines and suppliers must invest in product quality, service innovation and brand positioning to compete effectively in a fast-expanding but increasingly demanding market.
- Carriers in the region have long been known for innovation and their quest for excellence will not diminish. Carriers that fail to refresh cabin products, digital ecosystems and service models risk falling behind regional and global peers.
- APAC airlines have a highly digitally savvy market to cater for. Airlines must partner with technology and AI specialists to deliver seamless, personalised and high-performance digital experiences, while suppliers must ensure systems are scalable, intuitive and future-ready.
- Operating some of the longest flight sectors in the world, passenger wellbeing is a priority. From seat ergonomics to lighting and circadian science, comfort and sleep solutions are both a passenger expectation and a differentiation opportunity.
- Sustainability is more important than ever before, and APAC carriers are responding. Airlines and suppliers must balance environmental responsibility with weight, cost and passenger experience considerations, making material innovation and lifecycle thinking increasingly important.
- The region's low-cost carriers are flourishing and the opportunities for digital innovation for this sector are huge. With large narrowbody orderbooks and expanding route networks, LCCs represent a significant innovation frontier.
- APAC airlines know what their passengers want and expect and invest wisely. Airlines that leverage data effectively can tailor cabin products and services more precisely, strengthening loyalty and ancillary revenue potential.
- APAC carriers embrace their cultural identity throughout their cabin product. Cabin design that authentically reflects regional heritage while meeting global standards can strengthen brand recognition and emotional connection with passengers.
- APAC carriers are not immune to the economic challenges facing the global industry and are adjusting business models accordingly. Airlines must balance investment in innovation with margin discipline, creating opportunities for suppliers that can deliver efficiency, flexibility and measurable return on investment.

ASIA-PACIFIC PERSPECTIVES AT AIX 2026

As the Asia-Pacific market enters its next phase of expansion, the question is not whether it will grow, but how airlines and suppliers will respond to that growth.

For suppliers, the APAC market represents both scale and sophistication - a region where innovation is expected, not optional. For airlines, it is a competitive environment where design, digital capability and cultural identity are strategic assets.

AIX 2026 provides a vital forum to explore the defining questions shaping the APAC cabin landscape: How can airlines balance rapid fleet expansion with differentiated, future-ready cabin products? What role will digital ecosystems and high-performance connectivity play in meeting the expectations of the world's most tech-savvy passengers? How can ultra-long-haul operations continue to evolve around passenger wellbeing? And how can sustainability be embedded meaningfully into cabin design without compromising comfort or commercial viability?

At AIX 2026, these conversations will move firmly from theory to practice. Airlines, business aviation operators and interior suppliers will come together to showcase solutions, share regional insight and form the partnerships that will shape the next generation of cabin experience in the world's fastest-growing aviation market.

The following companies referenced in this report will be exhibiting at AIX 2026:

- **Airbus S.A.S / Airbus Atlantic - Stands 5A20 / 7A30**
- **Diehl Aviation Laupheim GmbH - Stand 7D20**
- **Panasonic Avionics Corporation - Stand 4A10**
- **Reaktor Innovations Oy - Stand 4B60**
- **ViaSat - Stand 2A08**
- **Zipair - Stand 2D41**



ABOUT THE AUTHOR:

Emma Kelly has been writing about the airline and aerospace industries for more than 30 years. Her interest in the in-flight passenger experience was first piqued when working at global satellite system operator Inmarsat (now Viasat) as Editor of Aeronautical Satellite News in the 1990s. Emma edited Flight International's specialist newsletter on IFE before moving to the news desk of the then weekly magazine, spearheading its coverage of in-flight developments, before becoming news editor. Emma left the UK for a new life in Australia in the early 2000s, since when she has contributed to publications and news services worldwide, with her work recognised with multiple Aerospace Media Awards. Regularly travelling between Australia and the UK, Emma has become an expert in the economy class long-haul experience.