

Valour Consultancy report forecasts in-seat power in more than 4 million seats by 2033



Device charging on a tray table inflight

Valour Consultancy has released its second edition of [The Future of In-Seat Power](#). This 2025 update offers insights into the dynamic in-seat power milieu, while also including an in-depth analysis of the market.

In-seat power has become less a halo and more a hygiene product as airlines and passengers deepen their dependence upon personal electronic devices (PEDs). Such devices act as a concierge, navigational guide, entertainment platform, payment platform and general companion to passengers, but our psychological attachment to them has led to the common experience of “low-battery anxiety” – the sight of a dwindling battery icon that can trigger a cascade of emotions, from mild unease to full-blown panic.

While travellers have a range of options on the ground to keep their PEDs fully charged, such anxiety has largely faded into the background. However, it’s a different story onboard aircraft, where worries over charging anxiety – the fear over the unavailability of charging ports – has taken flight.

Airlines are addressing this concern with [Valour Consultancy](#) estimating that there will be more than 4.1 million airline seats with power in 2033, up from 2 million in 2023. Facilitating this, annual deliveries of outlets will reach in excess of 597,000 in 2033 – up from 316,000 in 2023 – creating a market worth \$319 million, an increase from the \$220 million in 2023.

As report author Alex Preston comments, “With rising digitalization in the cabin, and the greater rollout of in-flight connectivity (IFC) and wireless in-flight entertainment (W-IFE), airlines risk turning

their digital strategies, especially in-flight ancillary revenue channels, into paper tigers if in-seat power is not provided.”

Whilst wide-body aircraft have traditionally been the dominant driver for in-seat power systems, the report shows how narrow-body operators are beginning to address the mismatch between passenger needs and airline capabilities. This move will see narrow-body revenues eventually outstrip those of wide-bodies towards the end of the forecast period, with single aisle revenues reaching \$182 million in 2033, against twin-aisle revenues of \$137 million. Factors such as the introduction into service of new ultra-range single aisle aircraft and more low-cost carriers following the example of [Southwest Airlines](#) and responding to passenger requests for charging ports, are expected to drive this change.

One of the most interesting insights from this report is the future direction of travel for USB ports. Whether integrated into IFE platforms, as has become a standard feature for today’s generation of systems, or simply incorporated into seat architecture, USB, through both Type A and Type C, is becoming the de facto charging technology. Changes in consumer electronic technology and [recent EU legislation](#) will spearhead the move to offer USB ports onboard, particularly Type C. However, airlines will remain mindful of alienating passengers, so we will continue to see different combinations of 110V AC, USB-A and USB-C ports depending upon seat class, region and positioning/personality of the airline as premium or low-cost.

While [Astronics](#) continues its reign as the market leader, with [KID-Systeme](#) reinforcing its place in distant second, both [Burrana](#) and [IMAGIK](#) are beginning to disturb the duopolistic nature of the market, offering credible alternatives to airlines embarking on in-seat power provision for the first time.

[Valour Consultancy](#) is a multi-award-winning provider of high-quality market intelligence and consultancy services. Previously published as a combined report with aircraft seating in 2019, *‘The Future of In-Seat Power - 2025’* is a new standalone report exploring technology evolutions, applications and opportunities associated with passenger power solutions in greater detail.

The report evaluates the market for in-seat power systems driven by traditional 110V AC ports and the growing traction of USB Type A and Type C charging outlets, as well as emerging wireless charging solutions. With over 100 pages of qualitative analysis, it provides commentary on the evolving competitive environment, technological trends, and drivers of growth, developed with input from over 15 companies across the value chain. This is supported by 73 data tables containing market estimates and forecasts out to 2033, as well as current market shares. Additionally, the report features company profiles that assess solutions, product developments, business models, and partnerships.