Aircraft Interiors EXPO®



AIX Global Cabin Concepts Lab

MIDDLE EASTERN MARKET

Words by Chloe Greenbank



REGIONAL OVERVIEW

The Middle East has long been a global aviation powerhouse and is now emerging as a leading sector for cabin innovation. The region's airlines and business jet operators have combined rapid fleet expansion, long-haul networks, and a strong desire to differentiate through luxury and technology to distinguish themselves from carriers in other regions. This, in turn, has ensured that cabin interiors are seen as a competitive advantage and a strategic driver of brand identity and innovation, helping Middle Eastern airlines stand out in a globally competitive market.

Much of this development is driven by major economic growth, spurred on by big players in the UAE, Saudi Arabia and Qatar. According to market research firm Mordor Intelligence, the Middle East commercial aircraft cabin interior market, valued at US$1.4 billion in 2025, is expected to grow from US$1.5 billion in 2026 to over US$2 billion by 2031.

Across both commercial and business aviation, the Middle East is differentiated by its premium-led approach to cabin interiors. Enabled by young fleets, long-haul hub dominance and state-backed aviation strategies, the region has become a reference point for cabin innovation.

The trends shaping the next generation of cabins in the Middle East are driven by several key factors:

A premium-led strategy is the foundation underpinning product development, with a strong cultural emphasis on hospitality and discretion. This has led to a higher share of premium cabins, with IATA reporting that the Middle East had the highest share of premium travellers globally, with nearly 15% of customers opting to fly in business or first-class cabins in 2024.

Second, the region has consistently launched flagship cabin products that have influenced global benchmarks. Examples include Qatar Airways' Qsuite,



Emirates' introduction of sky-high showers for the A380 and Etihad's multi-room Residence, all of which elevate social and experiential elements of long-haul travel.

Third, the Middle East boasts one of the youngest long-haul widebody fleets, with Boeing forecasting the region will require 1,370 new widebodies over the next 20 years. This enables airlines to design interiors from entry into service, rather than being retrofitted on ageing aircraft.

This holistic approach is further reinforced by the region's long-haul hub-and-spoke operating model. Carriers place heightened emphasis on comfort, privacy, entertainment and wellbeing – elements that become increasingly relevant as flight durations extend.

The pace of innovation is also being accelerated by the rapid adoption of digital technologies, including high-speed connectivity, advanced in-flight entertainment (IFE) and smart tech.

Finally, state-backed aviation strategies, such as Saudi Arabia's Vision 2030, position aviation as a tourism enabler and driver of economic diversification. This supports higher tolerance of long-term investment and capital expenditure (CAPEX) on cabin interiors.

Over the past five years, these drivers have paved the way for Middle Eastern carriers to pursue aggressive fleet expansion and modernisation programmes.

With around 800 aircraft in the region's collective orderbooks, major fleet investments from Emirates, the Saudia Group, Qatar, and Etihad are all enabling capacity growth, while supporting next-generation cabin products.

Nowhere is the region's leadership more evident than in Emirates' US$5 billion cabin retrofit programme, which was launched in 2022. The scale of the investment is a clear illustration of how the region approaches the cabin interiors market as a core competitive tool. Sir Tim Clark, President of Emirates, previously stated that the retrofit programme is designed to "continuously elevate standards... delivering consistency at scale, in tandem with next-generation innovations in seating, entertainment and connectivity being brought into service."

> These factors position the Middle East at the forefront of global cabin interior innovation, setting the agenda for what the passenger experience will look like in the years ahead.



CORE CABIN INNOVATIONS IN THE MIDDLE EAST

Across the Middle East, cabin innovation is increasingly defined by a premium-led, experience-driven approach.

Airlines are no longer simply upgrading aircraft interiors in response to fleet renewal cycles or competitive pressure; instead, they are redefining the cabin as a luxury environment. Interiors are designed to reflect local culture, hospitality traditions and national identity, while integrating the latest advancements in technology, materials and digital infrastructure.

Flag carriers, including Emirates, Qatar, Etihad, Saudia and Oman Air, as well as new entrants such as Riyadh Air and flyadeal, are investing heavily in cabin upgrades and new interior concepts. As competition intensifies on long-haul routes and premium travellers become increasingly discerning, cabin interiors have evolved into a core pillar of differentiation rather than a supporting feature.

THE PREMIUM FOCUS

“Premium travel remains a key differentiator for the region, while competition amongst airlines in the Middle East for the premium traveller’s business continues to be intense,” says Anita Gradwohl, F/LIST Group Director Customer Relations and Sales. Airlines are responding by investing specifically in innovative seat configurations, privacy concepts, personalised lighting, advanced IFE systems and carefully curated design aesthetics.

These investments are particularly visible on long-haul widebody aircraft, which continue to play an integral role in the region’s hub-and-spoke operating model. “In this context, premium cabins are the primary drivers of technological progress and high-quality cabin interior solutions,” adds Gradwohl.

The emphasis on a premium experience is also reflected in the region’s expanding cabin interiors ecosystem. F/LIST recently opened its new completion facility in Dubai to meet growing demand from locally based customers for high-quality aftermarket services and customised cabin materials. It's a move that reinforces the Middle East’s role not only as a consumer of premium products in aviation, but also as a global hub for cabin design and innovation.

LUXURY REDEFINED

Recent cabin launches and refurbishment projects further illustrate how premium expectations are reshaping interior design across both commercial and business aviation. According to Edése Doret, Founder and President of Edése Doret Industrial Design, the region is at the leading edge of cabin design evolution, “blending residential-grade comfort, advanced technology, cultural customisation and premium travel expectations.”

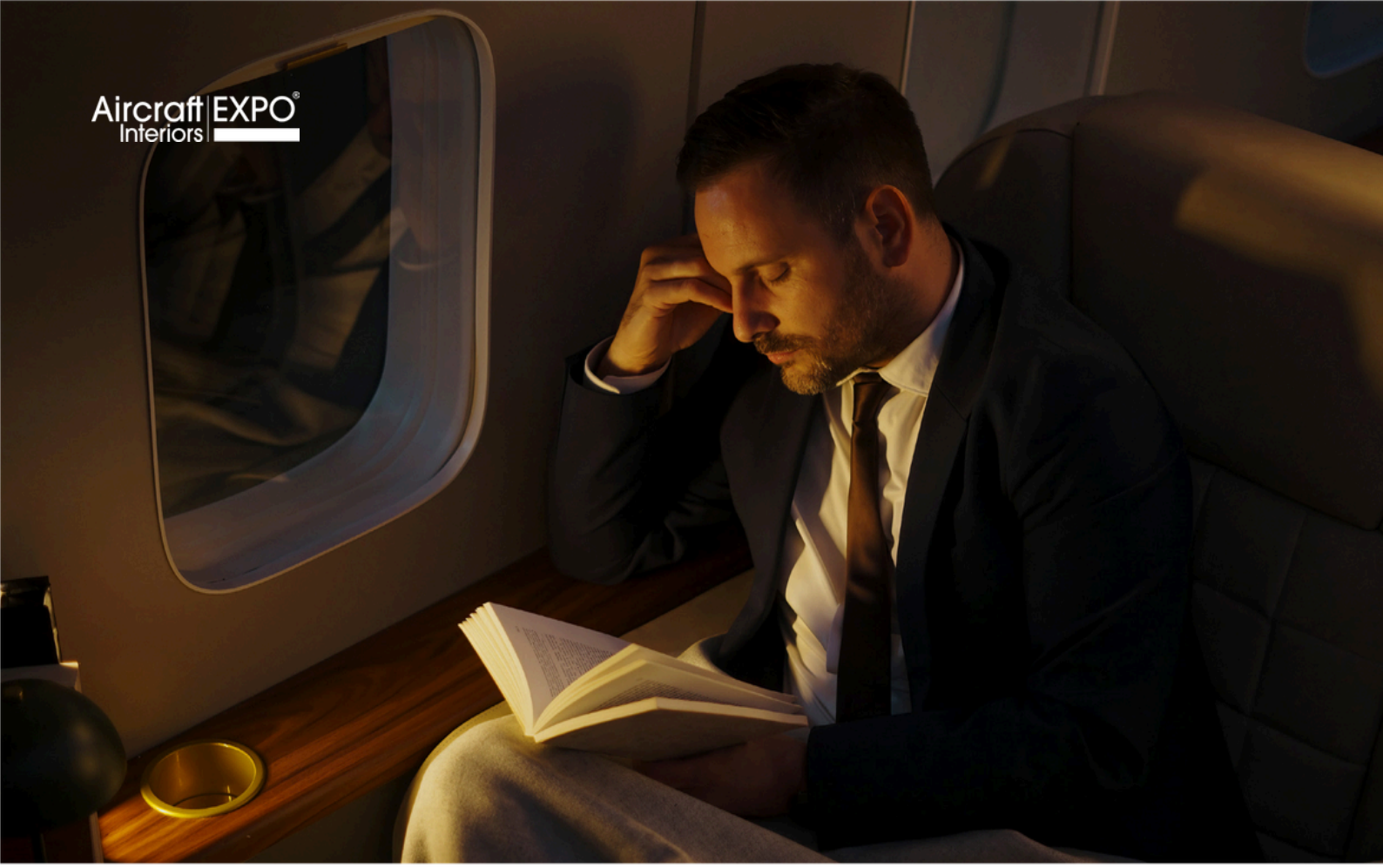
Cabin layouts in the Middle East are also influenced by cultural norms, religious practices and regional travel behaviours. “Hospitality traditions favour face-to- face seating, salon-style lounges and dining spaces, while privacy, family travel and entourage dynamics drive multi-zone layouts with layered privacy gradients and discreet circulation paths,” says Doret, referencing growth in the region’s private aviation sector.

Religious considerations further shape cabin redesign, influencing the need for quiet, private zones, generous washrooms and flexible floor areas. Meanwhile, rising demand for ultra-long-range travel requires true sleep capability, acoustic isolation and night-mode cabin environments. “Together these forces are transforming cabins into flying Majlis, private residences and diplomatic salons rather than seat-centric transport spaces,” continues Doret.

Crucially, there has also been a notable shift away from overtly opulent finishes towards refined, quiet luxury. “Premium travel in the region is not just a discretionary upgrade; it is the core product,” says Doret. “Cabin interiors are no longer treated as a cosmetic cost centre, but as a strategic capital investment that drives brand authority, geopolitical signalling and long-term asset value.”



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WELLBEING AND COMFORT

Seating trends in aircraft cabins also reflect the region's premium-first philosophy and a growing focus on passenger wellbeing. Fully enclosed business class suites with direct aisle access have become the regional benchmark, while Emirates and Etihad continue to refine their widebody business class product with wider beds, increased pitch, enhanced personal storage, and increasingly sophisticated lighting and control interfaces, enabling passengers to tailor their environment to their specific needs.

Premium economy seating has also undergone significant enhancements in the region. Suppliers, including Safran Seats, Collins Aerospace, and Recaro, are introducing wider seats, deeper recline, leg rests, and larger high-definition IFE screens to differentiate the product from economy for carriers throughout the region. Etihad, for example and low-cost carrier flydubai are deploying lie-flat or near-flat business-class seats on their fleets of narrowbody aircraft, bringing long-haul comfort standards to regional and medium-haul routes.

Even in economy cabins, Middle Eastern airlines are increasingly prioritising comfort-led differentiation rather than pure density, as demonstrated by Riyadh Air with its 3-3-3 seat configuration in economy. Airlines are also investing in next-generation economy seats that prioritise improved ergonomics, reduced weight and enhanced personal space. Key trends include slimmer, lighter seat structures that preserve or increase legroom, improved seat cushioning and sculpted backrests for long-duration comfort, and larger, high-definition IFE screens.

With wellbeing a defining influence on cabin design, Gradwohl observes "passengers increasingly expect environments that promote calm, comfort and a sense of space." In keeping with this, "material choices are shifting toward natural, tactile fabrics, while immersive lighting concepts are being designed to support circadian rhythms and emotional comfort and improved air quality and acoustics create a more restorative in-flight experience."

FLAGSHIP CARRIERS LEADING THE CHANGE

With aclear emphasis on expanding the premium experience across all cabin classes and aircraft types, the region's flagship carriers are redefining what "premium" means across their entire fleets, spanning widebody and narrowbody models, long-haul and regional routes and even low-cost operations.

As a cornerstone of Middle Eastern aviation, Emirates' ongoing US$5 billion cabin refurbishment programme underlines how seriously it treats interiors as a strategic differentiator. Safran has been appointed to upgrade the flag carrier's Boeing 777-300ERs and Airbus A380s with its latest-generation seating across all cabins. In economy, the introduction of Safran's Z400 lightweight seats introduces extra leg room and enhanced neck and head support. In business class, the S-Lounge design offers greater privacy, adjustable ambient lighting and wireless charging.

Complementing its physical upgrades, Emirates began rolling out fleet-wide Starlink connectivity in 2025, providing all passengers with access to high-speed WiFi.

Simultaneously, flydubai's enhanced business class seating on its Boeing 737 MAX aircraft introduces elements such as private window suites and flatbeds, which traditionally have been rarely associated with narrowbody aircraft.

Further underpinning this trend for 'premiumisation' in regional and medium-haul travel, Etihad, in line with its 'Journey 2030' vision, is introducing lie-flat beds in its first-class cabins and premium business pods on its narrowbody A321LR fleet.

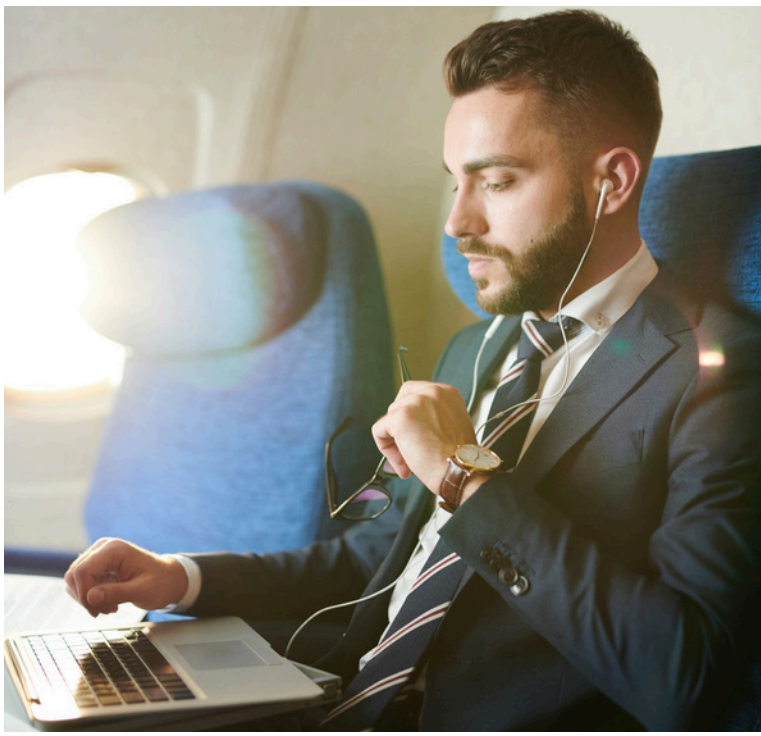
Meanwhile, Saudi Arabia's new national carrier, Riyadh Air, represents a compelling case study in digitally driven cabin innovation. Conceived with a digital-first ethos, its cabins embrace AI to deliver a highly personalised experience. The airline's cabin interiors feature rich purple tones, plush padded materials and a design aesthetic reflecting Saudi heritage, all of which is complemented by the latest tech, including 4K OLED screens, Devialet audio systems embedded in the headrest and smart storage solutions.

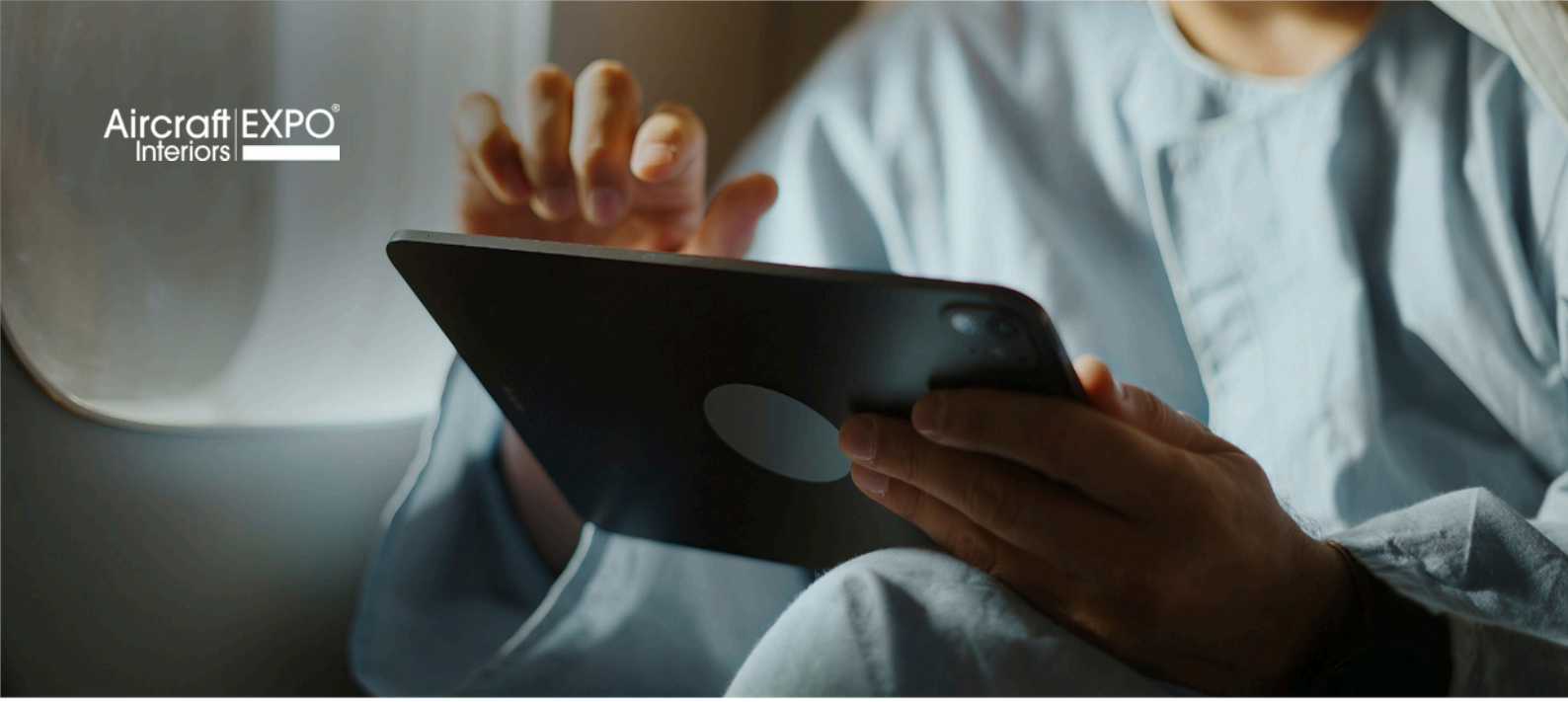
THE BUSINESS CLASS REVOLUTION

One of the most influential cabin innovations in business travel is Qatar Airways' Qsuite. Launched in 2017, the Qsuite redefined business class cabins across the region and beyond, introducing fully enclosed suites with sliding privacy doors, modular seating, and the first double bed in business class. It transformed passenger expectations and reset the industry standard for long-haul comfort.

Qatar is now rolling out an updated version, Qsuite Next Gen, on its new Boeing 777-9 aircraft, increasing privacy and enhancing technology, while retaining flexible layouts for private, shared, or family spaces for up to four passengers.

Etihad's The Residence takes luxury even further, underscoring the Middle East's willingness to push boundaries. It boasts a sky-high multi-room suite with an ensuite shower, private bedroom and living room area on its A380 fleet.





BESPOKE PRIVATE AVIATION

Beyond scheduled commercial carriers, private aviation is a rapidly growing sector in the Middle East, driven by demand for privacy, control and luxury. Husham Osman, VP Technical Services at RoyalJet, notes that the pandemic accelerated this shift by creating new entrants in terms of clients. “Many corporates and VIPs in the Middle East turned to charter and private travel versus first class airline travel due to minimum touch points and better control of schedules.”

RoyalJet’s Airbus Corporate Jets (ACJ) cabin refurbishment, which was completed in January 2026 in partnership with Edese is a prime example of this trend. The project marks RoyalJet’s first ACJ completion, and aims to “raise the bar across the industry”. It also highlights the importance of storytelling and brand identity in premium cabin interiors, with the “design narrative inspired by the UAE’s cultural and leadership design vision,” says Osman.

Looking ahead, RoyalJet is tendering for three new ACJ completions scheduled for delivery in 2028. These aircraft will feature bespoke Abu Dhabi-inspired designs and the latest connectivity, IFE and mood lighting systems. These aircraft will accommodate up to 38 passengers, a bedroom suite and premium service delivery, highlighting the region’s appetite for spacious, hotel-like business aviation interiors and ultra-long-range travel.

DIGITALISATION AND THE SMART CABIN

Digitalisation is now integral to cabin innovation in the Middle East. High-speed WiFi is no longer a luxury; it is an expectation, with passengers increasingly expecting their terrestrial digital experience to be matched at altitude. Dave Falberg, Senior VP Sales for EMEA/ APAC at Gogo, notes that connectivity in the Middle East is “much more than an expected service; it is essential.”

Gogo has been operating in the region for over 15 years and has seen demand evolve in keeping with changes in aircraft operators, types and passenger demographics. “Reliability and consistency are paramount in the region,” Falberg notes. To support growing demand for seamless connectivity, Gogo appointed UAE-headquartered Falcon as an authorised dealer in November 2025, providing installation, maintenance and upgrades for connectivity systems.

Multi-orbit solutions, namely Low Earth Orbit (LEO) and Geostationary Earth Orbit (GEO) satellites, are transforming onboard connectivity. They enable passengers to stream live content, work remotely and communicate effectively throughout the flight. As a result, cabins are being reconfigured to support greater device usage, with increased charging options and storage. “More devices are being brought on board. Passengers want immediate access to data, images and music, on their own systems, not pre-canned data delivered by a third-party provider,” reveals Falberg. He also notes that “the adoption of reliable connectivity offers real differentiation to operators.”

SUSTAINABILITY AND OPERATIONAL INNOVATION

Sustainability is increasingly shaping cabin design in the Middle East, particularly as airlines are investing heavily in new aircraft and operational efficiency. Lightweight materials, circular design principles, and sustainable sourcing are being integrated into premium cabins in ways that preserve luxury while reducing environmental impact. Doret notes that rather than sustainability being a visible marketing statement, it is being quietly embedded into engineering decisions and lifecycle logic.

Lightweight materials and modern cabin systems contribute to fuel reduction and lower emissions, making them critical to future cabin strategies, especially for long-haul carriers such as Saudia, Emirates and Qatar. Modular, serviceable and upgrade-ready cabin designs allow components to be refurbished or replaced without discarding entire cabin sections, reducing waste and the need for repeating certification campaigns.

Energy-efficient systems are also becoming standard in the region. LED lighting, advanced climate control and efficient onboard electronics reduce energy consumption and contribute to sustainability goals, particularly in long-haul operations.

“Together, these approaches reflect a distinctly Middle Eastern sustainability philosophy for premium aviation: one that prioritises light-weighting, longevity, modularity, certification discipline, and responsible sourcing, rather than superficial eco-signalling,” says Doret. “The result is a new generation of cabins that quietly reduce lifecycle impact while preserving the craftsmanship and cultural gravitas that define luxury travel in the region.”





IMPLICATIONS & TAKEAWAYS

THE FUTURE OF CABIN INNOVATION IN THE MIDDLE EAST

Middle Eastern carriers and business jet operators are not just responding to global aviation trends, they are actively shaping them. Throughout the region, the aircraft cabin has evolved into a strategic asset. For operators engaging in this market, success depends on understanding that premium experience, not seat density or incremental upgrades, is the primary competitive currency.

Premium expectations in the Middle East extend well beyond widebody aircraft, with lie-flat seats, private suites and high-end finishes increasingly being rolled out by carriers on narrowbody and medium-haul aircraft. Premium is no longer a niche offering, but the baseline expectation regardless of fleet type or route profiles. Product strategies must therefore deliver a consistent brand experience across all cabins, not just at the top end.

Technology should be integrated discreetly to personalise the journey without clutter, while embracing wellness features such as circadian lighting, acoustics and air quality.

Connectivity is now a critical component of the cabin experience. Passengers in the Middle East expect reliable, high-speed connectivity equivalent to their experience on the ground. However, the in-flight connectivity landscape is also entering a period of rapid technological change, with evolving LEO and GEO solutions and increasing complexity.

A priority action for stakeholders, according to Gogo, is to invest in multi-orbit, upgrade-ready connectivity architectures, while selecting partners that offer ecosystem-based solutions rather than single-technology platforms. Cabins must be designed to evolve, protecting long-term investment.

Cabin design in the region is also increasingly led by hospitality principles rather than Western airline conventions. Nowhere is this more visible than face-to-face seating, layered privacy and configurations that support zones for work, play, rest, and social interaction reflect regional cultural norms as well as a propensity for family travel and long-range missions.

Across the Middle East, luxury is becoming quieter, more refined and more personal. The market is moving away from overt opulence toward tactile finishes, emotional resonance and design narratives rooted in cultural identity.

Together, these innovations and design principles point toward a new generation of Middle Eastern cabin interiors that are intelligent, but discreet, luxurious but disciplined, culturally rooted yet technologically future-ready. Emerging technologies from AI and analytics to sustainable tech will further blur the boundaries between comfort, efficiency and personalisation.

As the region continues to grow, it is likely to remain a global leader in shaping what the future cabin will look like, how it will feel and how it will operate. Those who prioritise flexibility, premium consistency, cultural wisdom and future-ready digital infrastructure will help define the global benchmark for the next era of aviation.

MIDDLE EASTERN PERSPECTIVES AT AIX 2027

Aircraft Interiors Expo (AIX) has long recognised the Middle East as one of the most influential forces shaping the future of the global passenger experience. The region's airlines, business jet operators and supply chain partners consistently set new benchmarks in premium design, technology integration and long-haul comfort - innovations that increasingly define global cabin standards.

AIX actively engages with Middle Eastern stakeholders as both contributors and collaborators, providing a platform where regional perspectives help inform industry-wide dialogue on luxury, wellbeing, digitalisation and sustainability. From flagship airline product launches to the rapid growth of private and business aviation in the Gulf, AIX reflects the region's role not simply as a high-value market, but as a driver of ideas, investment and design leadership.

As Middle Eastern carriers continue to expand fleets, redefine premium travel and invest in future-ready cabin strategies, AIX 2027 serves as a focal point for connecting these ambitions with the global aircraft interiors ecosystem.

AIX 2027 will take place on 6-8 April 2027 at the Hamburg Messe.

The following companies referenced in this report will be exhibiting at AIX 2027:

- **Collins Aerospace**, Stand 5B30
- **Emirates Airlines**, Stand 7C41
- **F/LIST Group**, Stand 6B62
- **Neo Space Group**, Stand 4C32
- **Panasonic Avionics Corporation**, Stand 6B111
- **Recaro Aircraft Seating**, Stand 7B20
- **Safran**, Stand 7B40



ABOUT THE AUTHOR:

A frequent flyer with a penchant for long-haul travel and the in-flight experience, Chloe Greenbank has been immersed in aviation journalism since writing her first article for an in-flight magazine more than two decades ago. A regular contributor to Arabian and African Aerospace – she frequently travels to both regions - she also edits Business Traveller Africa and writes for Show Business Airshow dailies, Aerospace Global News, Inflight, Regional Gateway, and Aviation Week. She served on the advisory board for inter airport Europe 2025, as a judge for the Business Traveller Awards 2026, and moderates at aviation events around the world.