

# India Short-Haul Aircraft Market: Current Analysis and Forecast (2025-2033)

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## Abstracts

Short-haul aircraft are aircraft that often have flights with short distances, and the typical range is less than 1,500-3,000 kilometers. They fly between regional and domestic destinations, with smaller cities connecting to the major hubs, with efficiency, fast turnarounds, and low costs of operation being of utmost importance. The majority of the short-haul fleets consist of narrow-body jetliners like the Airbus A320 family and the Boeing 737 series, and turboprops, including the ATR 72 and Dash 8, which are very short route performers. Cabin designs are usually designed with high passenger congestion, and systems are designed to handle several takeoffs and landings per day, which support stable as well as high-frequency flight schedules.

The India Short-Haul Aircraft market is set to show a growth rate of about 18.45% during the forecast period (2025-2033F). The short-haul aircraft market in India includes aircraft that are mainly utilized on domestic and near international flights, usually less than -2-3 hours, between metros and tier-1/2/3 cities, and in high-frequency services. Single aisle narrowbodies dominate the portion of trunk routes, which are supplemented by regional aircraft (turboprops and smaller jets) where demand is weaker, or the airport infrastructure is limited. Several factors support market momentum, such as high growth in domestic travel, growing urbanization and disposable incomes, growing airline network depth, and ongoing airport development in states. Slot constraints at large airports also influence capacity, forcing carriers to move to more extensive utilization, shorter turnaround, and gauge optimization to achieve maximum use of the seats and stay schedule reliable.

Based on aircraft type, the Indian Short-haul aircraft market is segmented into regional jets, narrowbody, turboprops, and others. Among them, the major market share has been held by regional jets. This leadership is nurtured by the

fact that they can serve thin and medium density routes relatively profitably, especially between tier-2 and tier-3 cities, where the demand is still young, and frequencies are important. The regional jets also have better block times, overtaking the turboprops on longer short-haul routes, and retain right-sized capacity over the narrowbodies, which aid airlines in safeguarding yields and enhancing load factors. They are highly suited to the emerging network requirements in India due to their operational flexibility, i.e., good climb performance, compatibility with a broad spectrum of airport infrastructure, and potential to be used in multi-sector day-to-day operation. Moreover, regional jets are commonly employed to offer feeder connectivity service to major hubs, which enhances hub-and-spoke economics and facilitates network expansion in general.

The market of the Indian short-haul aircraft is divided into Less than 50, 50-100, 100-150, and 150 and above based on seating capacity. Among them, the 50-100 has been the greatest market share holder. Due to a high demand for high-frequency regional connectivity, where airlines require the appropriate balance of capacity and cost per seat, this dominance is motivated. Planes in this range can be used profitably in Tier-2 and Tier-3 flights, shorter runways, and high utilization with short turnaround times. They are also compatible with the developing UDAN-like network planning and feeder traffic to metro hubs.

According to the range, the Indian short-haul aircraft market will be divided into Less than 500 km, 500-1000 km, and above 1000 km. Among them, the above 1000km category has dominated the majority of the market. This has mostly been occasioned by the long intercity links of India and the necessity to link the metros to far-off Tier-1 and Tier-2 destinations via just one hop. Long-haul routes of over 1000km usually provide greater yields, greater utilization of aircraft, and broader network options among airlines, particularly when paired with hub-and-spoke and high-demand business and leisure travel routes.

For a better understanding of the market adoption of the India Short-Haul Aircraft market, it is analyzed based on its state-wise presence in India, such as North India, East India, West India, and South India. South India is expected to grow with a significant CAGR during the forecast period (2025-2033). The short-haul aircraft market in South India is facilitated by high demand in intercity travel in key hubs like Bengaluru, Hyderabad, Chennai, and Kochi due to the presence of a high number of business travelers, movement related to education, and tourism. Trunk routes are anchored by high-frequency connectivity to the metros

of Mumbai, Delhi, and other metros, and trunk routes are extended to tier-2/3 cities within Tamil Nadu, Karnataka, Kerala, Telangana, and Andhra Pradesh to enhance the regional network. The region has a relatively strong airport infrastructure and a variety of operationally viable secondary airports, which can be used to increase the use and reduce turnaround. There is also the short-haul growth through international near routes to the Middle East and Sri Lanka, which supplements aircraft deployment economics and the entire year demand.

Some major players running in the market include Airbus, Boeing, ATR, Embraer, De Havilland Canada, Hindustan Aeronautics Limited (HAL), United Aircraft Corporation / Yakovlev, Textron Aviation, and Pilatus Aircraft.

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