



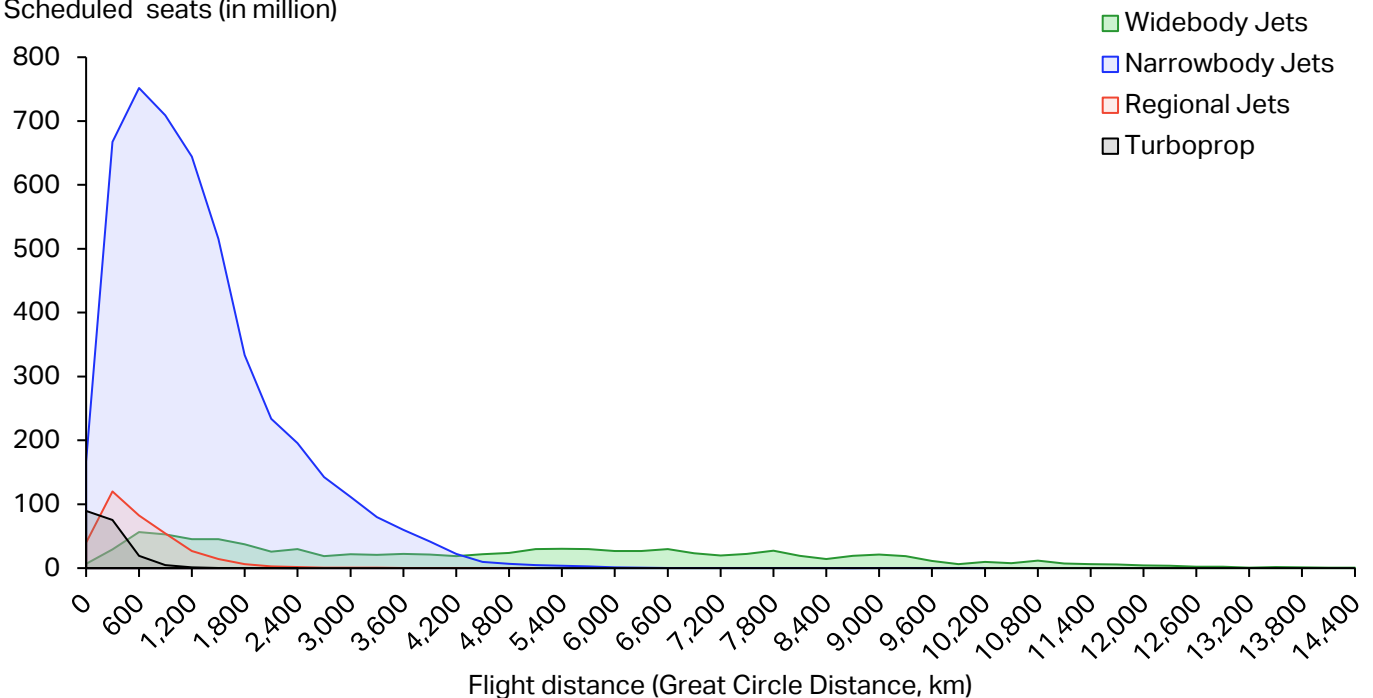
## Chart of the Week

5 July 2024

### The dominance of narrowbody jets in airline operations

#### Global scheduled seats by aircraft type, 2024, millions

Scheduled seats (in million)



Source: IATA Sustainability and Economics, OAG

- Airlines use a variety of aircraft types depending on their business model and markets. Smaller equipment such as turboprops and regional jets are the most used types on shorter and domestic routes, while widebody jets dominate the long-haul international routes. Narrowbody jets, on the other hand, are increasingly suited for a wide range of operations and are the most common aircraft type currently in the industry. The actual allocation of an aircraft to different missions can deviate from these general principles, as passenger and cargo demand also influence airlines' operational decisions.
- High demand on short flights might incentivize airlines to use widebody jets, while niche markets might be supplied by turboprop aircraft or regional jets. Consequently, it appears at the global level that operations within a flight distance of 1,200 kilometers are served by all those aircraft types combined. To fly greater distances, airlines turn naturally to widebody and narrowbody jets, but more and more to the latter. Indeed, narrowbody aircraft, benefitting from the latest technological improvements, have become a key asset for airlines in reaching sustainability, noise, and financial targets, while accommodating rising demand for air travel.
- Prior to the pandemic, the average distance traveled by narrow and widebody jets grew at the same pace, reflecting the expansion of the international network. Today, narrowbody jets have outpaced their larger counterparts in that same race. Nevertheless, widebody jets remain the preferred type for ultra-long-haul flights while their operational range is broadly unchanged compared to pre-pandemic. At the opposite end of the spectrum, the declining use of regional jets was exacerbated by the pandemic, and turboprop operations are still the optimal choice for flights shorter than 300 kilometers.

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