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AIRPORTS IN INDIA 2019

Trends, Developments, New Opportunities and Projections

- ❖ Report (PDF)
- ❖ Data-set (Excel)
- ❖ 11 monthly updates
- ❖ 52 weekly newsletters

Current Scenario and Emerging Trends

- Indian Aviation sector has been growing at the rate of 20% for last four years - the fastest growing aviation sector in the world. Domestic air traffic passengers have doubled during the last five years. In December 2018, Indian aviation completed 52 consecutive months of double digit growth.
- According to IATA Traffic Study, India, at seventh position as of now, is likely to take third position by 2023-24 overtaking UK, Japan, Spain & Germany. The current rate of the growth in domestic aviation sector of India is the highest globally.
- Most airports (joint venture and AAI-operated) have either reached saturation levels or expected to reach optimal capacity within a decade. Timely creation of new capacity as well as augmentation of existing capacity through increasing productivity is thus the need of the hour.

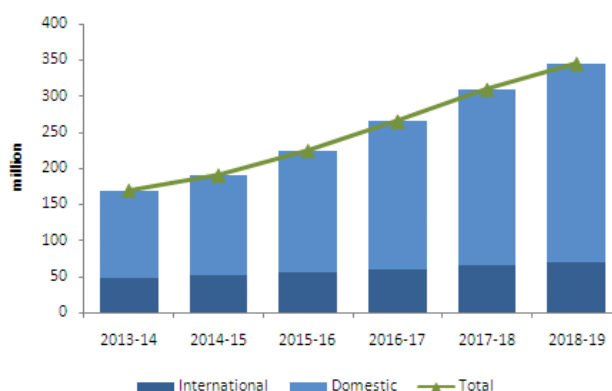
Opportunities Galore

- Vision 2040 for aviation sector was unveiled recently. It charts out a comprehensive strategy for the growth of the sector going forward. India will require 200 airports and a financial commitment of \$40-50 billion to handle at minimum 1.1 billion passengers flying to, from and within the country.
- In order to meet the growing demand, NABH Nirman was launched to create enhanced airport capacity to handle 1 billion trips in the next 10 to 15 years. In August 2018, a new transaction structure for future greenfield airports proposed under NABH Nirman was unveiled.
- AAI's plans to privatise six airports - Ahmedabad, Jaipur, Lucknow, Guwahati, Thiruvananthapuram and Mangaluru also inched closer to reality. This is expected to enhance the revenue to AAI and increase economic development in these areas in terms of job creation and allied infrastructure.

Bright Outlook

- The industry is of the view that the sector is in a desperate need for an institutional reboot. While drafting ambitious plans holds value, actual implementation can only happen once a sound institutional set up is in place.
- Going forward, several cities are expected to have multiple airports. Government has granted approval for Noida International Airport (Jewar), Mopa (Goa), Purandar Airport (Pune), Bhogapuram Airport (Visakhapatnam), Dholera Airport (Ahmedabad), Hirasar Airport (Rajkot).
- In the private sector also, upgradation and expansion is in the offing for Delhi, Bengaluru, Hyderabad Airports in the next five years' time.
- Airport capacity upgradation and expansion require both development of new greenfield airports and expansion of existing brownfield airports and same will be funded by the Indian private sector and Airports Authority of India (AAI) by leveraging its balance sheet.
- Enhancing passenger experience is another focus area. In October 2018, the ministry released the policy on biometric based digital processing of passengers at airports called "Digi Yatra". An upgraded version of AirSewa 2.0 web portal and mobile app has also been launched.
- The government has also unveiled a Drone Policy to ensure that drones are manufactured in India. Technologies like Artificial Intelligence and Big Data should be leveraged to improve the flying ecosystem.

Passenger and Freight



Executive Summary**SECTION I: MARKET ANALYSIS, KEY TRENDS AND RECENT DEVELOPMENTS****1. Sector Overview**

- ❖ Size and Growth
- ❖ Growth Drivers
- ❖ Key Sector Trends
- ❖ Recent Developments
- ❖ Institutional and Regulatory Regime
- ❖ Risks and Challenges
- ❖ Future Outlook

2. Performance at Key Airports: Traffic and Capacity Analysis

- ❖ Traffic Trends
- ❖ Inter-Airport Comparison
- ❖ Existing Capacity
- ❖ Capacity Utilisation
- ❖ Recent Capacity Additions
- ❖ Future Capacity Constraints
- ❖ Additional Capacity Requirements by 2022-23
- ❖ Potential Cities in Need for Second and Third Airports

3. Vision 2040 and Key Policy Initiatives

- ❖ Targets under Vision 2040:
 - Passengers
 - Cargo
 - Airports
 - Aircraft
 - Revenue
- ❖ Proposed Transaction Structure/Business Models
- ❖ NCAP, 2016 - Features and Impact
- ❖ Recent Amendments in AERA Act
- ❖ Air Cargo Policy
- ❖ Drone Policy & Drone 2.0 Regulations

4. Airport Development under NABH Nirman

- ❖ Salient Features
- ❖ Key Targets
- ❖ Upcoming Projects
- ❖ Expected Capacity Addition
- ❖ Proposed NABH Nirman Fund

5. Regional Connectivity

- ❖ Regional Connectivity Scheme (RCS)-UDAN- Scope and Progress
- ❖ Operational Airports/Airstrips
- ❖ Progress So Far Under:
 - UDAN 1 & 2
 - UDAN 1 & 2 Impact
 - UDAN 3
 - UDAN 3.1
- ❖ Route Cancellations
- ❖ The Airline Experience and Issues Faced
- ❖ Viability of Regional Operations
- ❖ Progress under UDAN International

- ❖ Future Plans and Targets
- ❖ Upcoming Airports/Airstrips

6. Investment Trends and Experience

- ❖ Investment Trends
- ❖ Airport Revenues and Historical IRRs
- ❖ Tariff Trends at Key Airports
- ❖ Economic Regulation and Impact on Investor Interest
- ❖ Emerging Sources of Investment
- ❖ Opportunities for Financial Investors
- ❖ Key Risks and Projected IRRs

7. Potential for Airport Privatisation

- ❖ Progress So Far
- ❖ Bidding Scenario
- ❖ Lender/Investor Interest in Brownfield Assets
- ❖ Industry Response and Expectations
- ❖ Future Potential and Plans

SECTION II: PROJECT PIPELINE, KEY PROJECTIONS, AND MARKET OPPORTUNITIES (TILL 2024-25)**8. Demand Forecast and Capacity Projections**

- ❖ Passenger Segment
- ❖ Projected Capacity Addition
- ❖ Cargo Segment

9. Project Pipeline

- ❖ Overall Project Pipeline
- ❖ Expansion Plans at Brownfield Airports
- ❖ Greenfield Airports
- ❖ Airside Infrastructure
- ❖ Commercial Development
- ❖ Fuel Farms
- ❖ Analysis by Mode of Implementation
- ❖ By Stage of Implementation

10. Future Outlook and Market Opportunities

- ❖ Investment Projections and Outlook
- ❖ AAI's Plans & Capital Expenditure Targets for 2019-20
- ❖ Market Opportunities
- ❖ Opportunity Areas, Risks and Mitigation Strategies
- ❖ Policy and Regulatory Outlook
- ❖ The Way Forward

SECTION III: FOCUS ON ANCILLARY SEGMENTS**11. Cargo Infrastructure Development**

- ❖ Operational Facilities
 - Domestic Cargo Infrastructure
 - International Cargo Infrastructure
- ❖ Capacity Addition Plans
- ❖ Planned Investments
- ❖ Upcoming Projects and Opportunities
- ❖ Future Outlook

12. Maintenance, Repair and Overhaul

- ❖ Current Scenario
- ❖ Demand for MRO
- ❖ Upcoming projects and Opportunities
- ❖ Future Outlook

13. Ground Handling

- ❖ Segment Overview
- ❖ AAI's Licensing Plans for Ground Handlers
- ❖ Recent Bidding Scenario
- ❖ Upcoming Opportunities
- ❖ Future Outlook

SECTION IV: EQUIPMENT AND TECHNOLOGY MARKET**14. Equipment (Communication, Navigation and Surveillance)**

- ❖ Current Infrastructure
- ❖ Recent Trends and Advancements
- ❖ Key Suppliers
- ❖ Procurement Targets for Equipment at Airports
- ❖ Investment Plans for Procurement of ANS Infrastructure
- ❖ Key Growth Drivers
- ❖ Upcoming Opportunities for Equipment Suppliers

15. Technology

- ❖ Current Technologies in Use (terminal gates, x-ray machines, check-in counters, baggage handling, biometric access system, e-gate, etc.)
- ❖ Recent Trends and Advancements
- ❖ Technology Plans at Key Airports
- ❖ Upcoming Opportunities for Technology Providers

SECTION III: PROJECT PROFILES**16. Key Operational/Completed Airports**

- ❖ Indira Gandhi International Airport (IGIA), Delhi
- ❖ Chhatrapati Shivaji International Airport (CSIA), Mumbai
- ❖ Kempegowda International Airport, Bengaluru
- ❖ Chennai International Airport, Tamil Nadu
- ❖ Netaji Subhash Chandra Bose International Airport (NSCIA), Kolkata
- ❖ Rajiv Gandhi International Airport, Hyderabad
- ❖ Cochin International Airport, Kerala
- ❖ Kazi Nazrul Islam Airport, West Bengal
- ❖ Pakyong Airport, Sikkim
- ❖ Kannur Airport, Kerala
- ❖ Sindhudurg Airport, Maharashtra
- ❖ Shirdi Airport, Maharashtra
- ❖ Orwakal Airport, Andhra Pradesh
- ❖ Gulbarga Airport, Karnataka

Each profile provides an overview of the airport, traffic trends, financial performance, current capacity, expected timelines, key initiatives, recent contracts, and expansion plans.

17. Upcoming Projects and Under Construction Airports

- ❖ Navi Mumbai Airport, Maharashtra
- ❖ Mopa Airport, Goa
- ❖ Bhogapuram Airport, Andhra Pradesh
- ❖ Dholera Airport, Gujarat
- ❖ Hassan Airport, Karnataka
- ❖ Kushinagar Airport, Uttar Pradesh
- ❖ Deoghar Airport, Jharkhand
- ❖ Dagadharthi Airport, Andhra Pradesh
- ❖ Dabra Airport, Madhya Pradesh
- ❖ Bijapur Airport, Karnataka
- ❖ Shimoga Airport, Karnataka
- ❖ Karaikal Airport, Puducherry
- ❖ Jewar Airport, Uttar Pradesh
- ❖ Hollongi Airprot, Arunachal Pradesh
- ❖ New Pune (Purandar) international Airport, Maharashtra
- ❖ New Rajkot airport, Gujarat

Each profile covers the project's scope and details, detailed status, mode of implementation, future capacity, funding pattern, expected timelines, recent contracts, and expansion plans.

Monthly Updates

The 11 monthly updates will cover:

- Monthly Traffic (Airports and Airlines)
- Key Policy Developments
- Update on Government Initiatives/Programmes
- Project Completions
- Project Awards
- New Project Announcements
- Upcoming Tenders
- Key Data and Statistics

Weekly Newsletters

The 52 weekly newsletters will cover:

- Policy Announcements
- Government Initiatives
- Project Completions/Awards/Announcements
- Update on Key Programmes
- Key Financings/Deals
- Etc.

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