

AIRPORTS IN INDIA 2020

SECTOR ANALYSIS, INVESTMENT OPPORTUNITIES AND FUTURE OUTLOOK

- ❖ Research Report
- ❖ Data-set (Excel)
- ❖ 52 Weekly Newsletters
- ❖ 11 Monthly Updates

The report will help you to:

- ❖ Analyse the growth scenario, market trends and key developments
- ❖ Assess the impact of recent policy and regulatory developments
- ❖ Track the upcoming projects and emerging opportunities in the sector
- ❖ Gain insights into segment-wise outlook for the sector
- ❖ Understand the risks and returns associated with greenfield airport projects
- ❖ Support business planning and strategy

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The past few years have been quite eventful for the airport sector. India's emergence as the fastest growing aviation market can be attributed to the growth in traffic volumes. During 2013-14 to 2018-19, air passenger traffic grew at a CAGR of over 15 per cent. However, Indian airports have a capacity of over 356 million passengers per annum. Most airports (joint ventures and AAI-operated) have either saturated or are likely to exhaust their capacity within a decade. Airports at Delhi and Mumbai are also expected to saturate and require a third airport. That said, the past few years have seen big-ticket greenfield projects make significant headway. Airports are coming up at Navi Mumbai, Jewar, Mopa, Purandar, Bhogapuram, Dholera and Hirasar. By 2040, Indian airports will need the capacity to handle a minimum of 1.1 billion passengers flying to, from and within the country. This will open up tremendous investment opportunities for the development and upgradation, and O&M of airport infrastructure.

The report will cover:

- ❖ A comprehensive analysis of sector trends, policy initiatives and investment scenario
- ❖ A detailed project pipeline of greenfield and brownfield projects
- ❖ AAI's performance, targets and future plans
- ❖ Demand forecast and capacity and investment projections
- ❖ Upcoming airport privatisation opportunities
- ❖ Current level of technology deployment in the sector and the future requirements
- ❖ Detailed profiles of operational, ongoing and upcoming airport projects

EXECUTIVE SUMMARY

SECTION I: TRENDS, POLICY INITIATIVES AND INVESTMENT SCENARIO

1. Sector Growth & Key Developments

- ❖ Traffic Trends
- ❖ Capacity Growth
- ❖ Key Trends
- ❖ Growth Drivers
- ❖ Recent Developments
- ❖ Capacity Gaps & Incremental Capacity Requirements
- ❖ Cities in Need of Second and Third Airports
- ❖ Risks and Challenges
- ❖ Future Targets
- ❖ Sector Outlook

2. Demand Forecast and Capacity Projections (till 2025-26)

- ❖ Passenger Segment
 - Traffic Forecast
 - Projected Capacity Addition (Existing & Upcoming Airports)
- ❖ Cargo Segment
 - Traffic Forecast
 - Projected Capacity Addition (Existing & Upcoming Airports)

3. Policy and Regulatory Landscape

- ❖ NCAP, 2016 - Features and Impact
- ❖ Regulatory Regime
- ❖ AERA's Role in Tariff Fixation AERA (Amendment) Bill, 2019
- ❖ Draft MCA for Greenfield Airports
- ❖ National Air Cargo Policy
- ❖ FDI Policy for Airports
- ❖ Drone Policy & Drone 2.0 Regulations

4. AAI's Performance, Plans and Targets

- ❖ Recent Capacity Additions
- ❖ Tariff Trends at Key Airports
- ❖ Financial Performance
- ❖ Greenfield Airport Development
- ❖ Key Completed Projects
- ❖ Capacity Expansion Plans at Airports
- ❖ New Initiatives
- ❖ Upcoming Opportunities
- ❖ Progress under NABH Nirman
- ❖ Capex Targets

5. Private Operators' Performance

- ❖ Key Private Players
- ❖ Project Portfolio
- ❖ Performance of Key Private Airports
 - Delhi
 - Mumbai
 - Hyderabad
 - Bengaluru
 - Cochin
- ❖ Tariff Trends at Private Airports
- ❖ Airport Revenues and IRRs

- ❖ Future Plans and Strategies
- ❖ Key Challenges and Lessons Learnt

6. AAI's Privatisation Experience & Plans

- ❖ Progress under Adani's Airports
- ❖ Bidding Experience
- ❖ Expected Investments & Future Opportunities
- ❖ Key Upcoming Airports for Privatisation (20-25 Planned)
 - Amritsar
 - Varanasi
 - Bhubaneswar
 - Indore
 - Raipur
 - Trichy
 - Others
- ❖ Lender/Investor Interest in Brownfield Assets
- ❖ Opportunities for Airport Operators
- ❖ Potential Role of Global Investors
- ❖ Industry Response and Expectations
- ❖ Future Potential and Plans

7. Focus on Key Upcoming Greenfield Airports

- ❖ Navi Mumbai Airport, Maharashtra
- ❖ Jewar Airport, Uttar Pradesh
- ❖ Mopa Airport, Goa

This chapter will include detailed profiles covering the current status, recent contracts, upcoming tenders, future opportunities for stakeholders, and the key issues and challenges.

8. Project Pipeline

- ❖ By Type
 - Greenfield Airports
 - Brownfield Airports
 - Airside Infrastructure (New Terminal Buildings, Parking Bays, Runways, etc.)
 - Others
- ❖ By Mode of Implementation
 - EPC
 - PPP
- ❖ By Stage
 - Ongoing
 - Approved
 - Planned

9. Sector Outlook and Opportunities

- ❖ Targets under Vision 2040
 - Passengers
 - Cargo
 - Airports
 - Aircraft
 - Revenue
- ❖ Investment Opportunities
 - Greenfield Opportunities
 - Commercial Development
 - City-side/Aerotopoli Development
 - Fuels Farms
 - Others

- ❖ Market Opportunities
 - Developers
 - Operators
 - Contractors
 - Consultants
 - Financiers/Investors
 - Material Suppliers
 - Equipment Providers
 - Technology Providers
- ❖ Future Outlook
- ❖ Policy and Regulatory Outlook

10. Investment Trends and Experience

- ❖ Investment Trends
- ❖ Regulations and Impact on Investor Interest
- ❖ Emerging Sources of Investment
- ❖ Private Equity Trends
- ❖ M&A Deals
- ❖ Recent Financial Closures
- ❖ Opportunities for Investors
- ❖ Key Risks and Projected IRRs

SECTION II: KEY FOCUS AREAS

11. New Opportunities under the Regional Connectivity Scheme

- ❖ Opportunities under UDAN 4
- ❖ Regional Analysis
- ❖ Scope and Progress
- ❖ Operational Airports/Airstrips
- ❖ Progress & Experience under Rounds 1, 2, 3, and 3.1
- ❖ Progress under UDAN International
- ❖ Airline Experience and Issues Faced
- ❖ Viability of Regional Operations
- ❖ Upcoming Airports/Airstrips/Water Aerodromes
- ❖ Future Plans and Targets

12. Cargo Infrastructure Development

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

13. 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

14. Maintenance, Repair and Overhaul

- ❖ Currently Scenario
- ❖ Demand for MRO
- ❖ India as a Potential MRO Hub
- ❖ Competitive Advantage
- ❖ Upcoming projects and Opportunities
- ❖ Future Outlook

15. Ground Handling

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

16. Role of Technology & Digital Solutions

- ❖ Potential Technology Disruptions
 - Artificial Intelligence
 - Blockchain
 - Big Data
 - IoT

- ❖ Key Solutions: Experience & Future Potential
 - E-boarding Systems
 - DigiYatra
 - In-line Baggage Screening Systems (ILBS)
 - Self check-in kiosks
 - Biometric systems
 - Digi-Yatra
 - AirSewa 2.0
 - E-gates
- ❖ Recent Trends and Advancements
- ❖ New Safety and Surveillance Solutions
- ❖ Technology-focused Plans at Key Airports
- ❖ Upcoming Opportunities for Technology and Solution Providers

SECTION III: PROJECT PROFILES

17. Key Operational/Completed Airports

- ❖ Indira Gandhi International Airport (IGIA), Delhi
- ❖ Chhatrapati Shivaji International Airport (CSIA), Mumbai
- ❖ Kempegowda International Airport Bengaluru (KIAB)
- ❖ Chennai International Airport (ChIA), 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
- ❖ Orvakal Airport, Andhra Pradesh
- ❖ Gulbarga/Kalaburagi Airport, Karnataka

Each profile will provide an overview of the airport, key stakeholders involved, ownership structure, traffic trends, financial performance, user charges, current capacity, expansion plans, key initiatives, recent contracts; etc.

18. Other Upcoming/Under Construction Airports

- ❖ Bhogapuram Airport, Andhra Pradesh
- ❖ Dholera Airport, Gujarat
- ❖ Hassan Airport, Karnataka
- ❖ Kushinagar Airport, Uttar Pradesh
- ❖ Deoghar Airport, Jharkhand
- ❖ Dagadarthi Airport, Andhra Pradesh
- ❖ Dabra Airport, Madhya Pradesh
- ❖ Bijapur Airport, Karnataka
- ❖ Shimoga Airport, Karnataka
- ❖ Karaikal Airport, Puducherry
- ❖ Mandi Airport, Himachal Pradesh
- ❖ Other Greenfield & RCS Airports

Each profile will provide an overview of the airport, traffic projections, ownership structure, expected capacity, future timelines, recent contracts; expansion, etc.

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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