

# Airports in India 2022

Recent Trends, New Opportunities and Future Outlook

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

## The Airports in India 2022 report will cover the following:

- ❖ Sector Trends, Progress and Developments
- ❖ Pipeline of Upcoming Brownfield and Greenfield Projects
- ❖ Traffic and Capacity Projections (till 2026-27)
- ❖ Inter-airport Operational and Financial Performance
- ❖ Market Opportunities for Developers/Investors, Consultants, Technology and Equipment Providers

Traffic at the Indian airports had grown by almost three times of the GDP in the decade preceding 2020. India has become the third largest domestic civil aviation market in the world. Despite the disruptions caused by the Pandemic, the airport sector in India is looking for large scale capacity expansion in the next few years, driven by construction of greenfield airports and expansion of existing airports. Greenfield airport projects at Navi Mumbai, Jewar, Mopa, Purandar, Bhogapuram, Dholera have made significant headway in the past couple of years. The National Infrastructure Pipeline has also provided for capex of Rs 900 billion over FY2020-25 to scale up passenger handling capacity. Several airports are being developed under the Regional Connectivity Scheme (RCS-UDAN), and terminal buildings are being expanded to improve amenities and passenger handling capacity. Further, the National Monetisation Pipeline has identified a monetisable asset base of 25 airports with an indicative value of over Rs 207 billion. The government aims to privatise 13 airports by March 2022.

## Summary and Key Insights

### SECTION I: SECTOR ANALYSIS, OPPORTUNITIES, PROJECTIONS AND OUTLOOK

#### 1. Sector Trends and Developments

- ❖ Sector Size and Growth
- ❖ Key Trends
- ❖ Growth Drivers
- ❖ Policy Initiatives
- ❖ Recent Developments
- ❖ Impact of Covid on:
  - Traffic and Revenues
  - Projects (Announced, Ongoing and Under Bidding)
  - Capacity Addition and Capex Plans
- ❖ Risks and Challenges
- ❖ Future Targets and Outlook

#### 2. Traffic and Capacity Analysis (2017-18 to 2021-22)

- ❖ Traffic Trends
- ❖ Impact of Covid on Traffic Volumes during 2021-22 versus 2020-21
- ❖ Inter-Airport Comparison
- ❖ Capacity Utilisation Trends
- ❖ Recent Capacity Additions
- ❖ Additional Capacity Requirement (By 2026-27 and Beyond)

#### 3. Progress and Potential: Public Asset Monetisation

- ❖ Progress and Experience
- ❖ Targets under National Monetisation Pipeline
- ❖ Upcoming Opportunities
- ❖ Key Timelines

#### 4. Focus on Mega Greenfield Airports: Navi Mumbai, Jewar and Mopa

- ❖ Progress and Current Status
- ❖ Recent Contracts
- ❖ Opportunity Areas
- ❖ Key Challenges

#### 5. Sector Projections and Demand Forecasts (till 2026-27)

- ❖ Traffic: Passenger and Cargo
  - By 2022-23
  - By 2024-25
  - By 2026-27
- ❖ Capacity: Passenger and Cargo
  - By 2022-23
  - By 2024-25
  - By 2026-27
- ❖ Investment: Passenger, Cargo and Other Aviation Infrastructure
  - By 2022-23
  - By 2024-25
  - By 2026-27
- ❖ Expected Capacity Addition
  - Brownfield
  - Greenfield
  - Terminal Infrastructure
- ❖ Targets under Vision 2040
  - Passengers
  - Cargo
  - Airports
  - Aircraft
  - Revenue

#### 6. Project Pipeline Analysis

- ❖ Upcoming Projects
  - By 2022-23
  - By 2024-25
  - By 2026-27
- ❖ Analysis by Type
  - Greenfield Airports
  - Brownfield Airports
  - Airside Infrastructure
  - Others

- ❖ Analysis by Stage of Development
  - Planned/Announced
  - Approved
  - Under Construction/Awarded
  - Under Bidding
- ❖ Analysis by Mode of Implementation
  - EPC
  - PPP
- ❖ Top Investible Projects
- ❖ Projects Awaiting Clearances/Land Acquisition/Financial Closure

- Operational Performance
- Financial Performance
- Recent Deals and Transactions
- Future Plans

## 7. Investment and Market Opportunities

- ❖ Opportunities Under:
  - Acquisition/Privatisation
  - Greenfield Project Development
  - Brownfield Project Development
  - Operations and Maintenance
  - Commercial Development
  - City-side/ Aerotropolis Development
  - Fuels Farms
  - Etc.
- ❖ Market Opportunities for:
  - Project Developers
  - EPC Contractors
  - Financiers/Investors
  - Equipment/Technology Providers
  - Material Suppliers
  - Consultants
- ❖ Big-ticket Opportunities to Look Out For

## 8. Operational and Financial Performance of Key Players

- ❖ Airports Authority of India
  - Traffic Performance
  - Recent Capacity Addition
  - Key Completed Projects
  - Financial Performance
  - Capex Targets and Investment Plans
  - Capacity Expansion Plans
- ❖ Private Operators' Performance
  - Project Portfolios

## 9. Update on Regional Connectivity Scheme

- ❖ Progress and Experience So Far
- ❖ Operationalised Airports/Airstrips
- ❖ Airline Experience, Route Viability and Issues Faced
- ❖ Upcoming Airports/Airstrips/Water Aerodromes
- ❖ Future Plans and Targets

## 10. Financing and Investment Trends

- ❖ Debt Market Trends
- ❖ Private Equity Trends
- ❖ M&A Deals
- ❖ Recent Financial Closures
- ❖ Key Risks and Projected IRRs
- ❖ Impact of Key Recent Regulations

## SECTION II: FOCUS ON KEY SEGMENTS

### 11. Cargo Infrastructure Development

- ❖ Existing Capacity
- ❖ Operational Facilities
- ❖ Recent Capacity Additions
- ❖ New Initiatives and Developments
- ❖ Future Capacity and Investment Targets
- ❖ Upcoming Projects and Opportunities
- ❖ Segment Outlook

### 12. Equipment: Communication, Navigation and Surveillance

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

**13. Maintenance, Repair and Overhaul**

- ❖ Currently Scenario
- ❖ Demand for MRO
- ❖ Government Initiatives
- ❖ Upcoming Projects and Opportunities
- ❖ Future Outlook

**14. Passenger Facilitation: Role of Technology & Digital Solutions**

- ❖ Recent Trends and Advancements
- ❖ Use Cases at Key Airports
- ❖ Key Solutions Deployed at Airports
  - E-boarding Systems
  - In-line Baggage Screening Systems (ILBS)
  - Self-check-in kiosks
  - Biometric systems
  - Digi-Yatra
  - AirSewa 2.0
  - E-gates
  - Safety and Video Surveillance Solutions
- ❖ Technology Plans at Key Airports

**SECTION III: PROJECT PROFILES (Brownfield and Greenfield)****15. Operational 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
- ❖ Orvakal Airport, Andhra Pradesh
- ❖ Gulbarga/Kalaburagi Airport, Karnataka
- ❖ Darbhanga Airport, Bihar
- ❖ Rourkela Airport, Odisha
- ❖ Rupsi airport, Assam

**16. Upcoming 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
- ❖ Purandar Airport, Maharashtra
- ❖ Kalyani Airport, West Bengal
- ❖ Holongi Airport, Arunachal Pradesh
- ❖ Rajkot Airport, Gujarat
- ❖ Sabarimala Airport, Kerala
- ❖ Parandur Airport, Tamil Nadu
- ❖ Sriperumbudur Airport, Tamil Nadu
- ❖ Ayodhya Airport, Uttar Pradesh
- ❖ Other Greenfield & RCS Airports

*The project profiles will cover parameters like project scope, cost, implementing agency, key stakeholders, current status, recent contracts, new tenders, expected COD, etc.*

## Monthly Updates

The 11 monthly updates will cover:

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

## Weekly Newsletters

The 52 weekly newsletters will cover news and developments on:

- Policy
- Regulation
- Projects
- Government plans and programmes
- Financing
- Etc.

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