

India Airport Infrastructure Market Segmented By Airport Type (Brownfield Airports, Greenfield Airports), By Ownership (Government, Private, Public-Private Partnership), By Component (Ground Support Equipment, Fixed Equipment, Airport Services), By Application (Hangers, Maintenance, Repair & Overhaul Facilities, Terminal, Warehousing, Runways, Others), By Region, Competition Forecast & Opportunities, 2028

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Abstracts

India Airport Infrastructure Market is expected to register a robust CAGR during the forecast period due to increase in government spending, expansion & modernizing of airports.

The aviation industry plays an important role in the economic development of a country. The industry is vital to the long-term growth of the economy. Air travel facilitates the rapid and timely transportation of people and cargo that are vital to trade and commerce. The number of passengers in air traffic and the number of aircraft managed at airports continues to grow each year. This caused the airport terminal to become overcrowded. As passenger numbers increase, the existing airport infrastructure needs to be modernized. In addition, airports are being built in small towns and cities to improve connectivity. The airport needs upgrading in various areas such as better air traffic control systems, longer runways, and the ability to handle more passengers simultaneously. Passenger numbers are expected to double over the next 20 years, increasing the need to expand existing airport infrastructure to accommodate future increases in air traffic.

Additionally, as airlines look to expand connectivity, demand for airport infrastructure is likely to rise in smaller cities planning to build new airports. As demand for longer runways, more gate capacity, and improved air traffic control systems are needed for today's airports, these are likely to further drive the growth of the aviation infrastructure market over the next decade.

The Indian Air Transport Infrastructure Market is characterized by the presence of several regional players competing for new contracts for both construction and expansion of air transport infrastructure. Several new contracts have been awarded to support upcoming projects. The airport consists of three zones: cityside, terminal, and airside. The city side is primarily designed for easy access to the airport and is linked by road, metro or bus. Hospitality related to airport hotels is one of the components as they provide hotels for transit flyers and other business travelers. The centerpiece of the airport is the terminal with check-in desks, security checks and boarding bridges.

As part of the prime minister's UDAN policy, airports in Tier II and Tier III cities are being upgraded and privatized. India's aviation infrastructure is currently largely complete, however initiatives involving this sector have a long maturation period and must keep up with expansion to satisfy future demand.

India has grown to become the world's third largest domestic aviation market and is expected to overtake UK to become the third largest passenger market by 2024. According to IBEF (India Brand Equity Foundation) in 2023, the Indian aviation industry contributed 5% to the GDP and creates a total of 4 million jobs. In addition to this, the total value added to GDP of this industry is USD72 billion. According to the International Air Transport Association (IATA), India is expected to become the world's third largest air passenger market by 2030, surpassing China and the United States. As domestic traffic accounts for around 69% of all air traffic in South Asia, India's airport capacity is expected to manage 1 billion flights per year by 2023.

In the Union Budget of 2022-23, the Indian government allocated USD 1280.04 billion to the Ministry of Civil Aviation. In India, there were 150.44 million passengers in 2022–2023 (April–September 2022). In FY2022, Indian airports are projected to manage 166.80 million domestic passengers, up 58.5% from the previous year, and 22.10 million international passengers, up 118% from FY2020-21. The Indian government is working to increase the number of airports to accommodate the growing air traffic. As of 2022, India has 114 domestic, 29 international and 10 customs operational airports. The Jewar Airport in greater Noida and Mopa International Airport in Goa are some of the

upcoming international airports in the country. The country plans to increase the number of operational airports to 190-200 by FY2040. India's aviation industry is expected to invest USD 4.99 billion over the next four years. The Indian government plans to invest USD 1.83 billion in developing airport infrastructure and air navigation services by 2026.

Government projects fueling the growth of India Airport Infrastructure Market

In 2021, the Airports Authority of India (AAI) is planning to invest approximately USD 3.58 billion over the next five years to revitalize the country's aviation sector, hard hit by the Covid-19 pandemic. Construction includes, but is not limited to, activities such as building Greenfield Airport and new terminals, refurbishing and expanding existing terminals, and improving runways of three Public Private Partnership (PUBLIC-PRIVATE PARTNERSHIP) airports in Delhi, Hyderabad and Bengaluru for USD 3.6 billion by 2025. An investment of USD 4.32 billion is planned to develop new greenfield airports in PUBLIC-PRIVATE PARTNERSHIP mode across the country. The centre approved in principle the establishment of 21 Greenfield airports in August 2021.

Latest Projects driving the India Airport Infrastructure Market

In February 2023, the Government of India announced plans to develop one hundred airports by 2024 under the Regional Connectivity Scheme (RCS) - Ude Desh ka Aam Nagrik (UDAN) Infrastructure Program. In addition, airports in Delhi, Bangalore, Hyderabad, Lucknow, Guwahati, Ahmedabad, and Mangalore will be modernized and expanded. These projects are a part of USD 11.76 billion investment by the government.

The Adani Group will invest up to USD 600 million in upgrading Lucknow's Chaudhary Charan Singh International Airport (CCSIA). The combined passenger capacity of two existing terminals is 43 lakh aircraft per year, but the airport is currently managing 55 lakh flyers which is 28% above construction capacity. Lucknow International Airport Corporation (LIAL), among other things, is seeking rate increases to fund large integrated terminals and related facilities to increase flight movement. Phase 1 of the new Integrated Terminal 3 (T3), capable of handling 80 lakh passengers per year, is expected to be completed by October 2023. In another year to 18 months, it will be ready for Phase II, which will be able to accommodate 50 lakh passengers per year, bringing T3's total capacity to Rs 1.3 crore. With the T3 and the new T4 there is room for further expansion. These calls will be answered based on traffic growth.

The central government has allocated Rs 180 crore for infrastructure development at Bagdogra airport in West Bengal, exploring options to introduce helicopter services on various routes. The Airports Authority of India (AAI) was planning to develop a private residential quarter at Bagdogra Airport, which is expected to be completed by 2025.

Market Segments

India Airport Infrastructure Market is segmented based on airport type, ownership, component, application and region. Based on airport type, the market is fragmented into brownfield airports & greenfield airports. Based on Application, the market is further fragmented into government, private & Public-Private Partnership. Based on component, the market is fragmented into ground support equipment, fixed equipment & airport services. Based on application, the market is further fragmented into hangers, maintenance, repair & overhaul facilities, terminal, warehousing, runways & others. Based on region, the market is fragmented into north, south, west, east.

Market Players

The market players in the India Airport Infrastructure Market include Airport Authority of India, GMR Airports Infrastructure Ltd, GVK Power & Infrastructure Limited, Larsen & Toubro Limited, Hindustan Aeronautics Ltd., VRH Construction Pvt. Ltd., Adani Enterprises Ltd, Blue Dart Aviation Ltd, Celebi NAS Airport Services India Pvt. Ltd, Menzies Aviation Bobba (Bangalore) Pvt. Ltd.

Report Scope:

In this report, India Airport Infrastructure Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Airport Infrastructure Market, By Airport Type:

Brownfield Airports

Greenfield Airports

India Airport Infrastructure Market, By Ownership:

Government

Private

Public-Private Partnership

India Airport Infrastructure Market, By Component:

Ground Support Equipment

Fixed Equipment

Airport Services

India Airport Infrastructure Market, By Application:

Hangers

Maintenance

Repair & Overhaul Facilities

Terminal

Warehousing

Runways

Others

India Airport Infrastructure Market, By Region:

North India

South India

West India

East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Airport Infrastructure market.

Available Customizations:

Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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Detailed analysis and profiling of additional market players.

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