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AIRPORTS IN INDIA 2018

Sector Overview, Opportunities and Future Outlook

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India Infrastructure Research

Key Takeaways

- Factors such as increasing affordability, falling fares, online portals offering discounted fares, focus on Tier 2 and 3 cities, greater use of technology and growing fleet size, have aided the growth in traffic.
- During the past five years (2013-14 to 2017-18), air passenger and freight traffic grew at a CAGR of 16% and 10% respectively.
- Most non-metro airports are heavily over-utilised with airports such as Rajkot, Nagpur and Patna witnessing utilisation rates of over 300%.
- On the other hand, some airports such as Aurangabad, Bhopal and Tripura have not yet reached even 30% of their capacities.
- With regard to metro airports, Hyderabad and Mumbai airports are over-utilised with utilisation rates as high as 125.86% and 96.07%, respectively. On the other hand, Kolkata airport is under-utilised with a utilisation rate of ~60%.
- The introduction of the National Civil Aviation Policy (NCAP), 2016, has been the biggest development in the recent past. It has addressed some of the long pending demands of the industry relating to amendment of the 5/20 rule; allowing viability gap funding; according infrastructure status for maintenance, repair and overhaul, cargo, ground handling and fuelling; introducing the hybrid-till approach for airports; etc.

Key Constraining Factors

- Timely creation of new capacity as well as augmentation of existing capacity through increasing productivity is thus the need of the hour.
- Land acquisition is major concern area, especially for greenfield projects.
- India's restrictive bilateral policy with other countries has adversely impacted international passenger traffic growth.
- The whole ecosystem of the Bureau of Civil Aviation Security (BCAS) needs restructuring.
- Contracts need to be made more attractive and profitable for investors.
- Fluctuations in fuel price, depreciation of rupee and exclusion of air turbine fuel from the goods and services tax pose other challenges.

Overall Sector Outlook

- Overall, the outlook for the airport sector remains positive, mostly backed by traffic projections.
- India's civil aviation market is already among the top 10 globally and expected to be the third largest by 2022.
- The domestic segment is expected to drive passenger traffic with annual growth projection of 18-20%. The international segment is currently expected to grow at 10-12% per annum.
- From 2018-19 to 2021-22, AAI has planned a capital expenditure of Rs 180 billion-Rs 200 billion, of which about Rs 41 billion is expected in 2018-19.
- The regional connectivity scheme is expected to provide an impetus to the sector by making air travel affordable for the masses. About 25 airports have already been operationalised under the scheme.

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