



सत्यमेव जयते

**Ministry of Civil Aviation**  
Government of India

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Narendra Modi  
Hon'ble Prime Minister

# सब उड़ें सब जुड़ें



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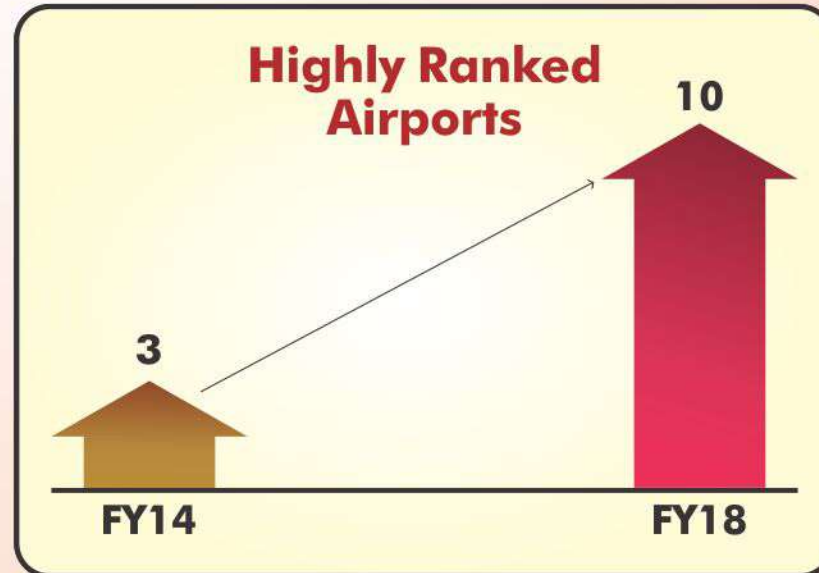
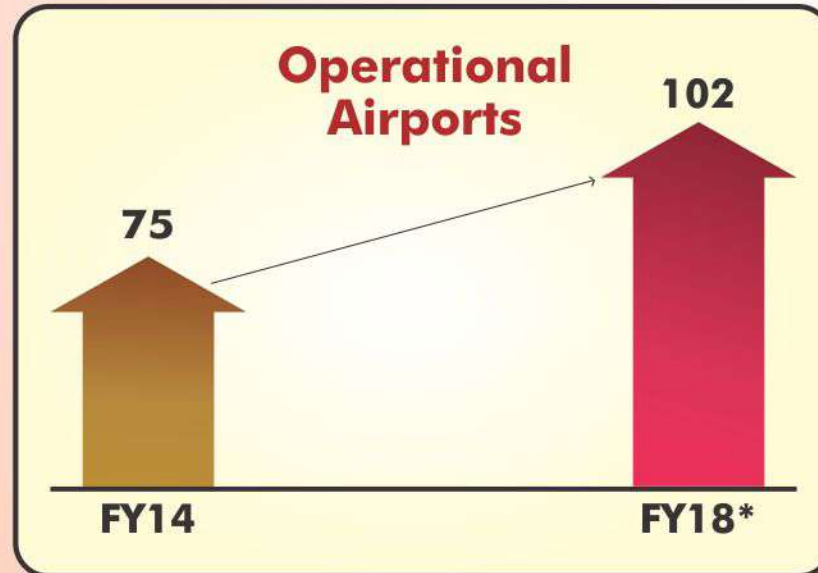
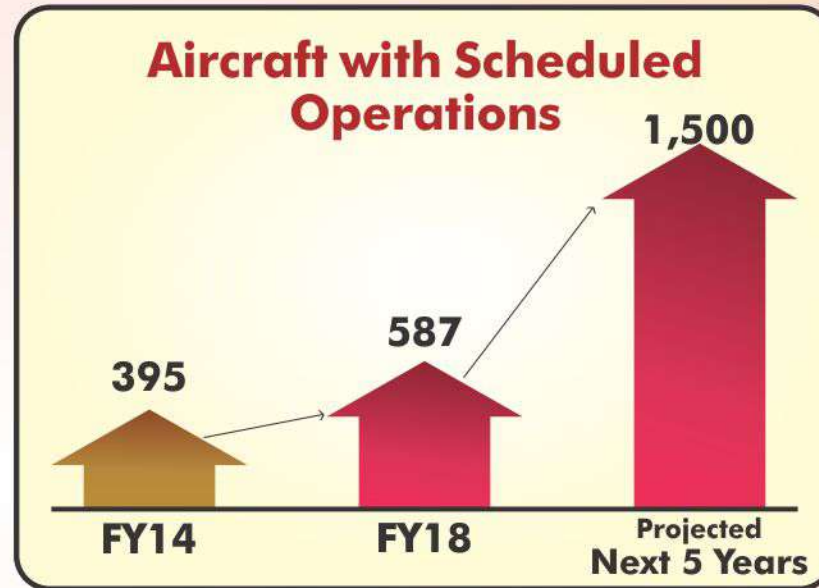
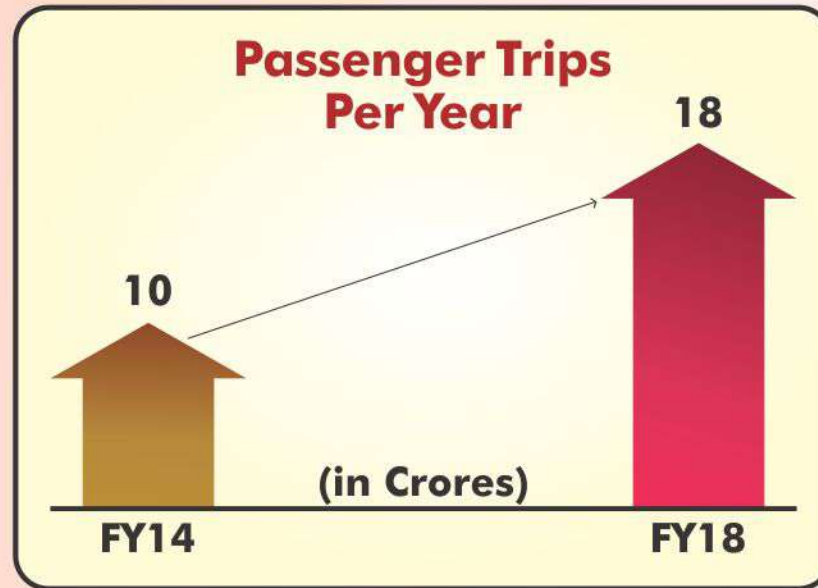
# 48

**MONTHS  
OF  
TRANSFORMING  
AVIATION IN INDIA  
2014 - 2018**





# 48 MONTHS OF TRANSFORMING AVIATION IN INDIA



\*By July 2018



Suresh Prabhu



Minister  
Ministry of Civil Aviation  
Government of India  
New Delhi

## MESSAGE

Under the leadership of the Honourable Prime Minister Shri Narendra Modi ji, Civil Aviation has emerged as an outstanding success story for our nation. In four short years, we have thoroughly transformed the aviation sector and India has now emerged as the world's third largest domestic aviation market. Our country has been connected like never before and flying has become affordable and accessible for all Indians. These transformational changes have been possible through the National Civil Aviation Policy 2016. Many long-pending issues that were inhibiting growth were resolved and many new initiatives were launched. The UDAN (*Ude Desh ka Aam Nagrik*) scheme is one of these initiatives and has brought flight services to 30 additional airports ranging from Bastar in Chattisgarh to Pasighat in Arunachal Pradesh to Shimla in Himachal Pradesh. People are thrilled to have flight services which will enable them to get better medical services, improve their job prospects, travel for education and visit their families and friends.

The best is yet to come. Our airlines have ordered over 900 planes in the next few years thereby dramatically improving both connectivity and frequency prospects across our airport network. We are working to increase our system capacity threefold in the next 10-15 years through our NABH (Next Generation Airports for Bharat) Nirman capacity expansion program. Passenger rights will be strengthened immeasurably through our new Passenger Charter initiative and the world's leading digital traveller program (DigiYatra). The new Cargo policy will soon be released to make our aviation sector a key player in global logistics. Our Make-in-India and Drone Task Forces have begun work and will ensure that India is a world-leader in aerospace design and manufacturing. We collectively look forward to taking this sector to new heights.

(Suresh Prabhu)



Jayant Sinha



Minister of State  
Ministry of Civil Aviation  
Government of India  
New Delhi

## MESSAGE

As the Honourable Prime Minister Shri Narendra Modi ji has said so memorably: *Hawaii chappal wale bhi ab hawaii jahaj par chal rahe hain*. Truly, flying has become affordable for most Indians and they are taking to the skies in unprecedented numbers. India has seen 48 months of uninterrupted double digit growth in passenger traffic with passenger trips now exceeding 20 crore and more Indians flying domestically rather than taking AC trains. This extraordinary performance is due to the untiring efforts of airlines, airport operators, ground handling companies, our security forces, equipment suppliers, and all the other participants in the Aviation sector. The Ministry of Civil Aviation, through the National Civil Aviation Policy 2016, and through all our stakeholder consultations has provided significant improvements in Ease-of-Doing Business spurring the sector to even faster growth.

We are particularly proud that even as passenger traffic has doubled, our quality scores have improved substantially with many of our airports being ranked among the best in the world. Air India's operational turnaround has been impressive and its performance metrics are now on par with the industry. Air India has a bright future ahead as a great global airline with flights spanning the world. We have launched several signature schemes: AirSewa, UDAN, NABH Nirman, and DigiYatra. Our Drone policies, our DigitalSky air traffic management, and the Gagan satellite navigation system have put us on the Aviation Technology frontier. Collectively, these initiatives have established India as a world-leader in Aviation with most top Aviation companies expanding their operations rapidly in India. With clear blue skies ahead, Indian Aviation has a bright future!

(Jayant Sinha)



# 48 months of transforming Aviation in India



IGI Airport, Delhi

- 
**National Civil Aviation Policy 2016** - first-ever integrated policy package to drive growth in the Aviation sector leading to unprecedented growth on every metric: passenger traffic, planes in operation, planes ordered, cargo tonnage, passenger satisfaction, number of operational airports, airport capacity, and investments in future airport capacity
- 
**AirSewa** - umbrella initiative to systematically improve passenger satisfaction includes new Passenger Charter strengthening passenger rights, DigiYatra digital traveller program, AirSewa app for grievance management, and streamlined passenger handling
- 
**UDAN** - world's leading Regional Connectivity Scheme has added over 30 airports to the 70 or so operational airports in India transforming connectivity to Tier 3 and 4 towns. UDAN has also sparked off use of helicopters, turboprops, and seaplanes. With ticket prices capped at ₹ 2,500 for one hour of flying, lakhs of passengers are now flying for the first time every day
- 
**NABH Nirman** - comprehensive program to build billion trip airport capacity including revamped airport operator regulations, massive build-out of greenfield airports, many new terminals at existing airports, strengthening air traffic control systems, and collaboration with States
- 
**Cargo & Logistics** - rapid growth in cargo tonnage as warehousing capacity and seamless transportation has been provided. Close collaboration with Customs, National Highways, and Indian Railways is leading to innovative logistics solutions
- 
**Air India Turnaround** - every operating parameter has shown consistent improvement and, despite rising oil prices, the airline has strengthened passenger satisfaction as well as operating profitability. With many new direct destinations and an unparalleled global network, Air India is India's choice for international travel
- 
**Robust Security** - India has implemented unified command and control of its airports through our valiant CISF personnel. Passenger handling has been streamlined while several new security measures have been implemented
- 
**Ease of Doing Business** - multiple reforms undertaken through stakeholder consultation to streamline regulations and procedures. Aviation sector investment (foreign and domestic) has dramatically increased
- 
**Enhanced Skill Development Programmes** - over 10 lakh high-quality direct and indirect jobs have already been created in the Aviation sector and on-going growth will require skilled personnel in all areas: cabin crew, engineering, air traffic control, pilots, agents, design, and so on
- 
**Advanced Technology Systems** - many new technologies such as Drones, aerospace manufacturing, and satellite navigation systems are being introduced to keep Indian Aviation at the global technology frontier



# National Civil Aviation Policy 2016

## Flying for All

Affordable flying for all - India continues to have among the lowest airfares in the world and, with the airport network growing rapidly, flying has truly become available for all

Number of domestic passengers increased from 6.1 crore in FY14 to 12.3 crore in FY18; number of international passengers increased from 4.3 crore in FY14 to 6.0 crore in FY18

International and domestic freight handled at airport increased from 2.3 million tons in FY14 to 3.4 million tons in FY18

Number of aircraft increased from 395 in FY14 to 587 now; more than 900 planes are on order

UDAN scheme launched in October 2016 to facilitate and stimulate regional connectivity - over 30 unserved and underserved airports are now part of this scheme

Total number of operational airports increased from 75 in FY14 to 100 airports now with Pakyong in Sikkim about to become the 100th operational airport

MRO policies rationalized with lower customs duties, simplification of goods clearance, zero-rated VAT, and adequate land in all airports for MRO activities

Vadodara Airport



## AirSewa Service in the Skies

Passenger Charter prepared to strengthen passenger rights across a range of areas including cancellation charges, compensation for lost and damaged baggage, handling of on-tarmac delays, overbooking, flight cancellations, and facilities for passengers with special needs

Safety-oriented National No-Fly List regulations promulgated to prevent unruly behaviour during flights; reported incidents of unruly behaviour have decreased dramatically

DigiYatra standards implemented to enable world's leading digital traveling experience with single point verification, e-boarding, higher throughput, and enhanced security

AirSewa app and web portal has handled close to 10,000 passenger grievances with 96% reaching closure

Inflight Wifi connectivity approved so that passengers can stay in touch while they are traveling





Over 30 Airports operationalized

AIRPORT (D)	
<b>Un Served</b>	
1.	ADAMPUR
2.	BHATINDA
3.	BIKANER (NAL)
4.	JAGDALPUR
5.	JAISALMER
6.	JALGAON
7.	KANDLA
8.	KOLHAPUR
9.	LUDHIANA
10.	MUNDRA
11.	MYSORE
12.	NANDED
13.	OZAR (NASIK)
14.	PATHANKOT
15.	SALEM
16.	SHIMLA
17.	VIDYANAGAR
18.	PAKYONG
<b>Under Served</b>	
19.	AGRA
20.	BHAVNAGAR
21.	DIU
22.	GWALIOR
23.	JAMNAGAR
24.	KADAPA
25.	PONDICHERRY
26.	PORBANDAR
27.	SHILLONG (BARAPANI)
28.	ALLAHABAD
29.	HUBLI
30.	TEZPUR
31.	JAMSHEDPUR
32.	KANPUR

Map Not to Scale, only for depiction/representation purposes

# UDAN

## Ude Desh ka Aam Nagrik

World's most innovative Regional Connectivity Scheme launched by Honourable Prime Minister in Shimla on April 27, 2017 to extend flight connectivity to Tier 3 and 4 towns

Over 30 unserved and underserved airports added through UDAN, transforming connectivity in these communities; over 40 lakh seat capacity created for UDAN flights

Maximum airfare for 50% of seats on UDAN flights capped at ₹2,500 for one hour of flying

₹4,500 crore earmarked for revival and upgradation of UDAN airports; corpus of ₹300 crore raised to subsidise UDAN flights

UDAN scheme has sparked massive increase in helicopter services in hilly areas and islands through use of 31 heliports

UDAN scheme will now be extended to provide connectivity for underserved tourist destinations and international routes



# NABH Nirman

## Planning for a billion trips

NABH (Next-gen Airports for BHarat) Nirman program formulated to prepare Aviation sector for a billion passenger trips

System capacity being raised in all areas including airports, skilled staff, aircraft parking and maintenance, air traffic management, and financing

Close collaboration with States to ensure equitable land acquisition, integrated urban planning, high-speed transportation networks, and balanced regional development

Regulations for greenfield and brownfield airports being revamped to attract necessary private sector investments

Over ₹1 lakh crore of investment lined up in airports in the next five years; AAI will invest over ₹20,000 crore

Greenfield airports completed: Durgapur, Shirdi, Pakyong, Kannur, and Sindhudurg; 14 other greenfield airports being constructed: Mopa, Navi Mumbai, Shimoga, Kushinagar, Jewar, Dholera, Rajkot, Bhogapuram, Nellore, Orvakallu, Purandare, Bhiwadi, Singroli, and Kotagodam

New terminals being constructed: Delhi, Hyderabad, Bangalore, Lucknow, Leh, Chennai, Patna, Pune, Guwahati, Agartala, Trichy, Jaipur, and many others

Pakyong Airport, Sikkim



# Cargo and Logistics

## Accelerating Global Supply Chains

Cargo tonnage increased by over 10% per year in last four years with courier services increasing by 15%; cargo growth had been negative from 2010 to 2014

Dwell time reduced at major airports by 30-50% on import cargo<sup>1</sup> and by 20-70% on export cargo<sup>2</sup>

India ranks among top 10 globally for e-Air Way Bill penetration; many cargo terminals among the top few in the world on terminal service quality

Dedicated AAI Cargo Logistics company set up; cargo facilities now at 20 AAI airports versus 3 such facilities prior to 2014

Integrated Cargo Policy to be released shortly

<sup>1</sup> 47% Dwell Time reduction in Import Cargo at Bengaluru airport over FY15-FY18, 44% at Chennai airport, 52% at Kolkata airport, 32% at Cochin airport, 37% at Mumbai airport, 47% at Hyderabad airport

<sup>2</sup> 46% Dwell Time reduction in Export Cargo at Bengaluru airport over FY15-FY18, 18% at Chennai airport, 26% at Kolkata airport, 69% at Cochin airport, 46% at Mumbai airport, 59% at Hyderabad airport





# Air India Turnaround

## Poised to be a Great Global Airline

Performance improvement on every important parameter - yield, load factor, on-time performance, aircraft utilization, number of new destinations, and operating profitability; operating performance now on par with industry competitors

Air India Group inducted a total of 60 new aircraft, commenced new/increased frequencies at 37 domestic and 30 international destinations, and established 33 UDAN routes in the last 4 years

Revenues have grown from ₹16,000 crore in FY13 to ₹23,400 crore in FY18; passenger load factor has increased from 72% to 79%

State-of-the-art MRO facility in Nagpur launched and operationalized

Progressive HR policies implemented with special focus on women empowerment and apprenticeship-based training





# Robust Security Systems

## Ensuring Safe and Secure Travel

Planning for and implementing unified command and control of airports through our valiant CISF personnel; will require enhanced CISF deployment and national/regional control centres

ICAO Security Requirements Compliance at 99.6% and Effective Implementation at 99.2%

Passenger handling has been streamlined (no baggage stamping, DigiYatra) while several new security measures have been implemented such as HD CCTV, Perimeter Intrusion Detection Systems

Anti-Hijacking Act enacted with provision for death penalty for offenders

National No-Fly list implemented with close coordination between airlines, airports, and security agencies





# Ease-of-Doing Business

## Driving Sustained Investment and Growth

- Multiple reforms undertaken through stakeholder consultation to streamline regulations and procedures; regular meetings with different industry working groups such as airlines, airport operators, cargo companies, and ground handling companies
- Open Skies offered to 49 countries and 5 SAARC nations under NCAP 2016
- Code share agreements do not require any approvals; NOC validity extended from 18 to 36 months; foreign registered aircraft allowed to fly in India
- Implementation of online building height permits through NOCAS 2.0
- Launched Online Processing of Proposal Assessment and Approval System (OPAAS) for building plans





# Skill Development

## Providing High-Quality Jobs

Over 10 lakh high-quality direct and indirect jobs have already been created in the Aviation sector and on-going growth will require skilled personnel in all areas: cabin crew, engineering, air traffic control, pilots, agents, design, and so on

National Aviation University operationalized with Executive and Management Development programs already underway; PG Diploma in Airport Operations is under development

Aviation Multi-Skill Development Centre (AMSDC) launched in Chandigarh with Ministry of Skill Development and Entrepreneurship; 5 more AMSDCs being operationalized

Standard and Accelerated AME Apprenticeship Program developed with industry partners to provide top quality hands-on training and job placement for aircraft maintenance engineers

Number of Air Traffic Controllers increased by 50% to over 3,000 now



# Advanced Technology Systems

At the Aviation and Aerospace Technology Frontier

Drone Regulations 1.0 issued to provide predictable regulatory framework for inventors, entrepreneurs, investors, and operators; Drone Task Force constituted to propel India to the world leader status in this vital new technology area

Inflight Wifi Connectivity standards established and necessary security requirements worked out

GAGAN satellite navigation system rolled out and being fitted onto Indian aircraft to track aircraft continuously; Airport Operations Control Centres being established at 12 airports

Central Air Traffic Control Centre operating at AAI Vasant Kunj facilities; Regional Control Centres also being established

Make-in-India Aerospace Manufacturing Task Force launched to ensure aircraft manufacturing and assembly in India

Nationwide Air Traffic Flow Management (ATFM) system implemented which enables optimum utilization of airport and airspace resources to reduce congestion, fuel wastage, and environmental pollution



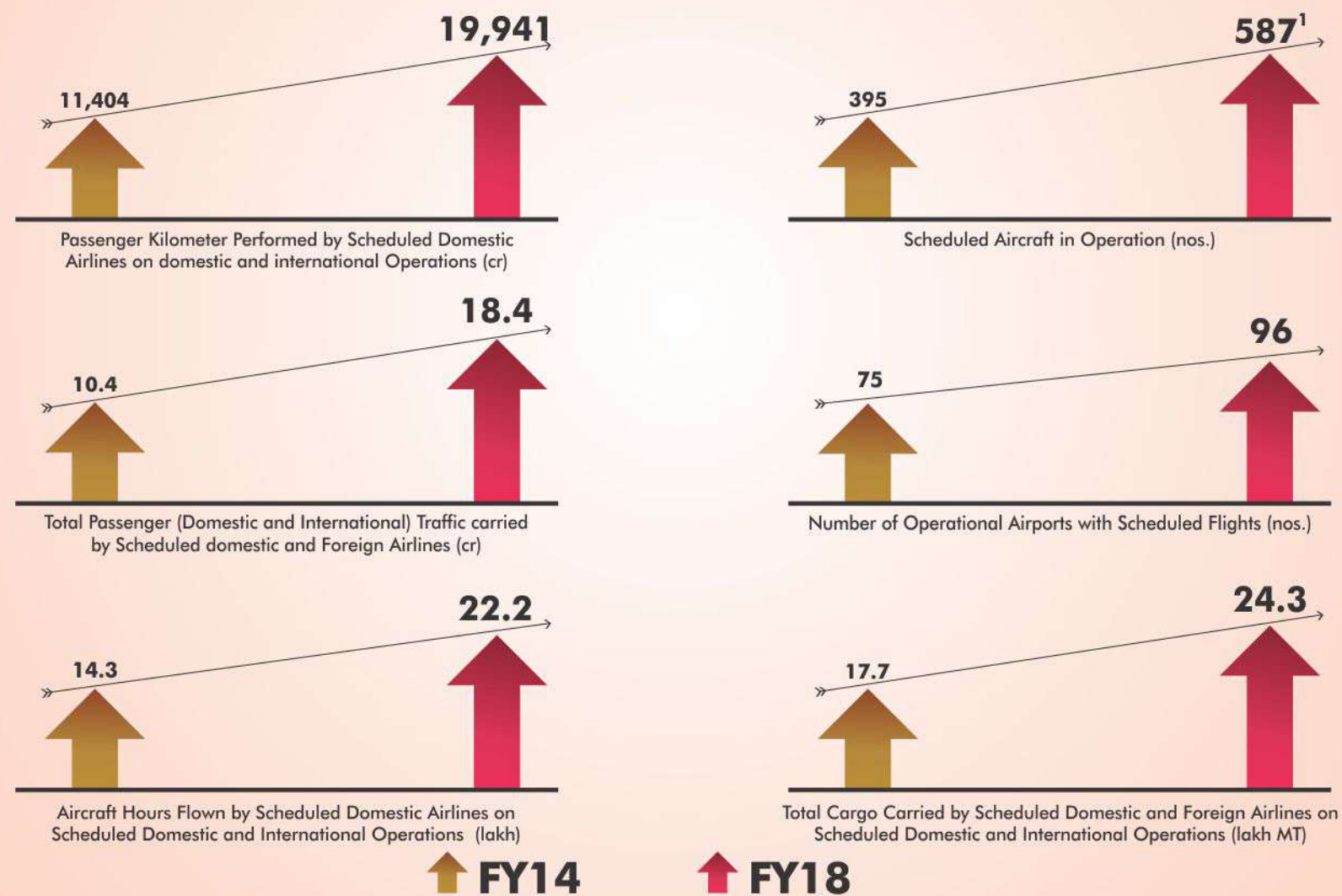
# Key Facts

- 1 Aviation Sector:** India's Civil Aviation among the fastest-growing aviation markets globally, with FY18 recording 20% year on year growth
- 2 Passenger Traffic:** 3rd largest aviation market by domestic air passenger traffic which stood at over 12.3 crore in FY18 registering a growth of 19% CAGR from FY14
- 3 Airports:** 75 airports opened in 75 years of Civil Aviation in India while in 16 months of UDAN, 56 airports & 31 heliports awarded
- 4 Airlines:** Distance flown by Scheduled Operators rose to 19,941 crore km (FY18) from 11,404 crore km (FY14), recording 15% CAGR growth
- 5 Fleet Strength:** 587 aircraft of scheduled Indian carriers operating year around; private scheduled airlines plans to add over 900 aircrafts in the next 5 years

- 6 Cargo Traffic:** Witnessing continuous expansion with total air cargo handled at ~34 lakh MT, recording a 10% CAGR from FY14
- 7 NSOPs (Non-Scheduled Operators):** Undergoing strong revival, domestic non-scheduled passengers grew to 14 lakh (FY18) registering a 6% growth
- 8 Commitment to greener airspace:** Comprehensive regulatory policies and strategies adopted to reduce aviation carbon footprints
- 9 High-quality job creation:** 2 lakh people are directly employed in various segments across aviation industry with substantial growth ahead
- 10 Ensuring hassle-free travel:** Incorporated systematic approaches to redress passenger grievances, and improve operational efficiencies across the system



## ONE OF THE FASTEST GROWING SECTORS IN INDIA



India's strong GDP growth **7.4%** in 2018

Rising per capita income in India: ₹**1.1 lakh** (FY18) vs. ₹0.6 lakh (FY10)

Travel & Tourism is a ₹**9.4 lakh crore** strong industry

Strong policy support through **NCAP 16**

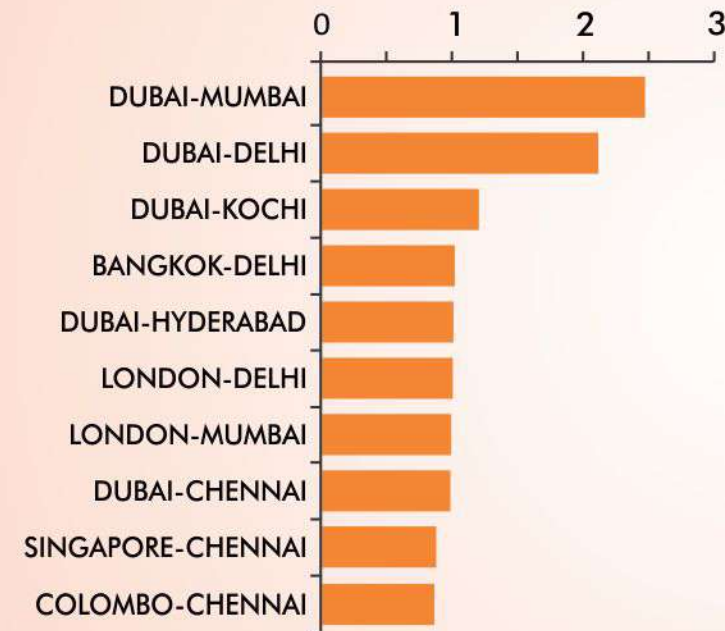
₹**16,000 crore** investments made on airport infrastructure from FY14-18; investments exceeding ₹**1 lakh crore** planned in next five years

Source: DGCA; <sup>1</sup>Provisional figures as of 31st March 2018



# TOP TEN INTERNATIONAL AND DOMESTIC ROUTES

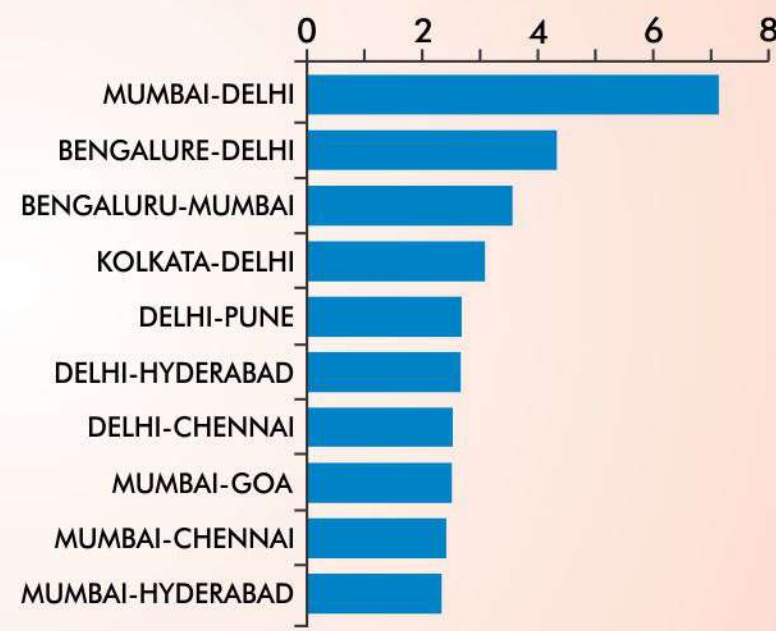
TOP 10 INTERNATIONAL ROUTES



Seats (in million) for FY18

The UAE constituted almost half of the total international seats from India, primarily led by migrant workers and business market in the Middle East. Top 10 international routes comprise around 75% of overall traffic

TOP 10 DOMESTIC ROUTES



Seats (in million) for FY18

Metros such as Mumbai, Delhi, Bangalore drive passenger traffic domestically



# AROUND 18 CR PASSENGERS FLOWN IN FY18

Historical Trend of Indian Passenger Traffic





## INDIA HAS SOME OF THE BEST AIRPORTS IN THE WORLD



## KEY ACHIEVEMENTS

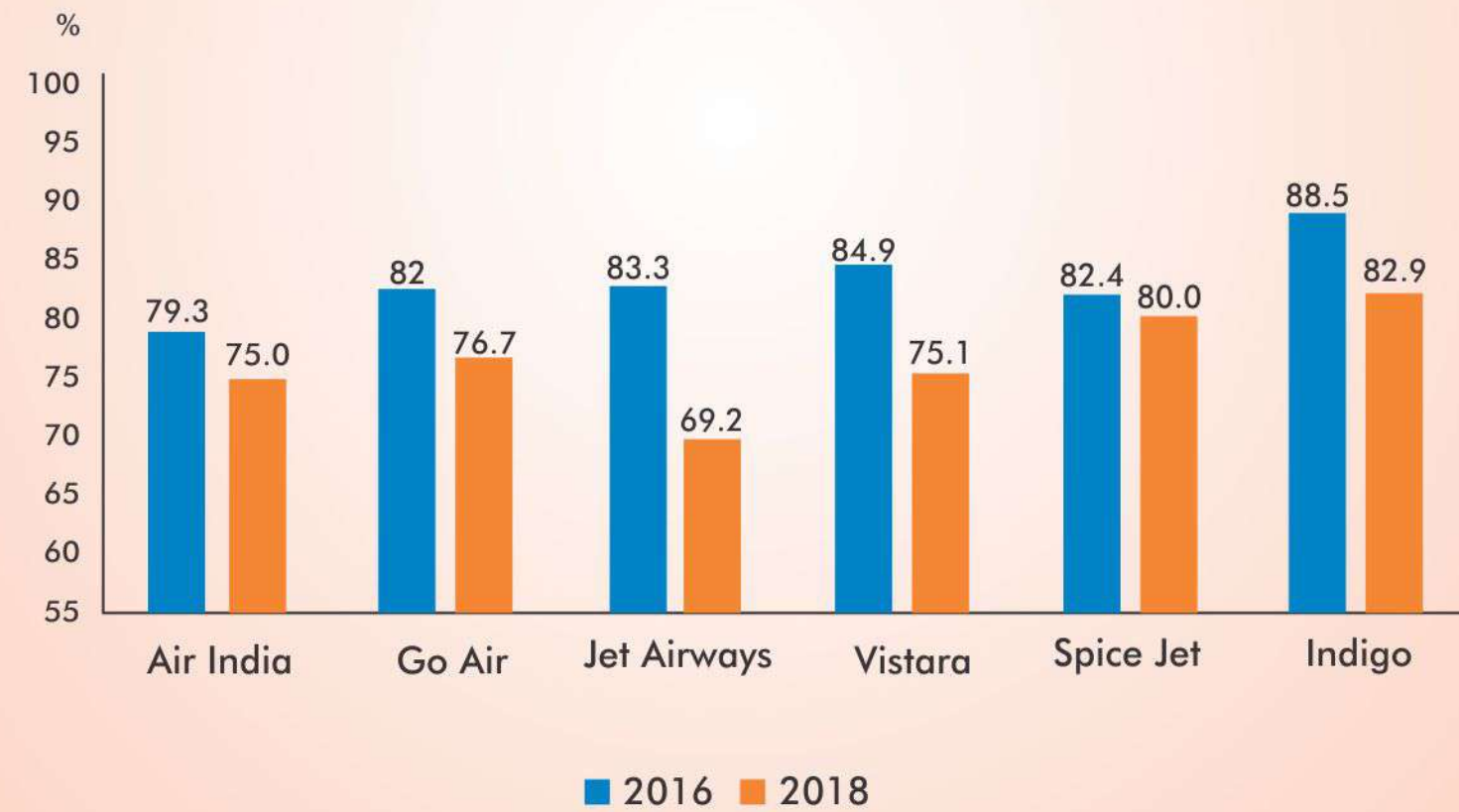
- Operation & Maintenance contracts of Airport Terminal Buildings at Jaipur & Ahmedabad to be awarded under PPP route
- 70<sup>1</sup> airports to be connected under UDAN
- Top 6 Airports\* contributed ~65% of total Indian passenger traffic in FY18
- Delhi and Mumbai airports combinedly handle over 10 Crore passengers in FY18
- Increased focus on airport city & aerotropolis model to enhance non-aeronautical revenues

Source: AAI; # Footfalls accounted for passenger traffic; \*6 airports are Mumbai, Delhi, Hyderabad, Bengaluru, Chennai & Cochin; <sup>1</sup>31 currently served, 27 unserved, 12 under served; <sup>2</sup> Airports Council International (ACI) World Rank 2015



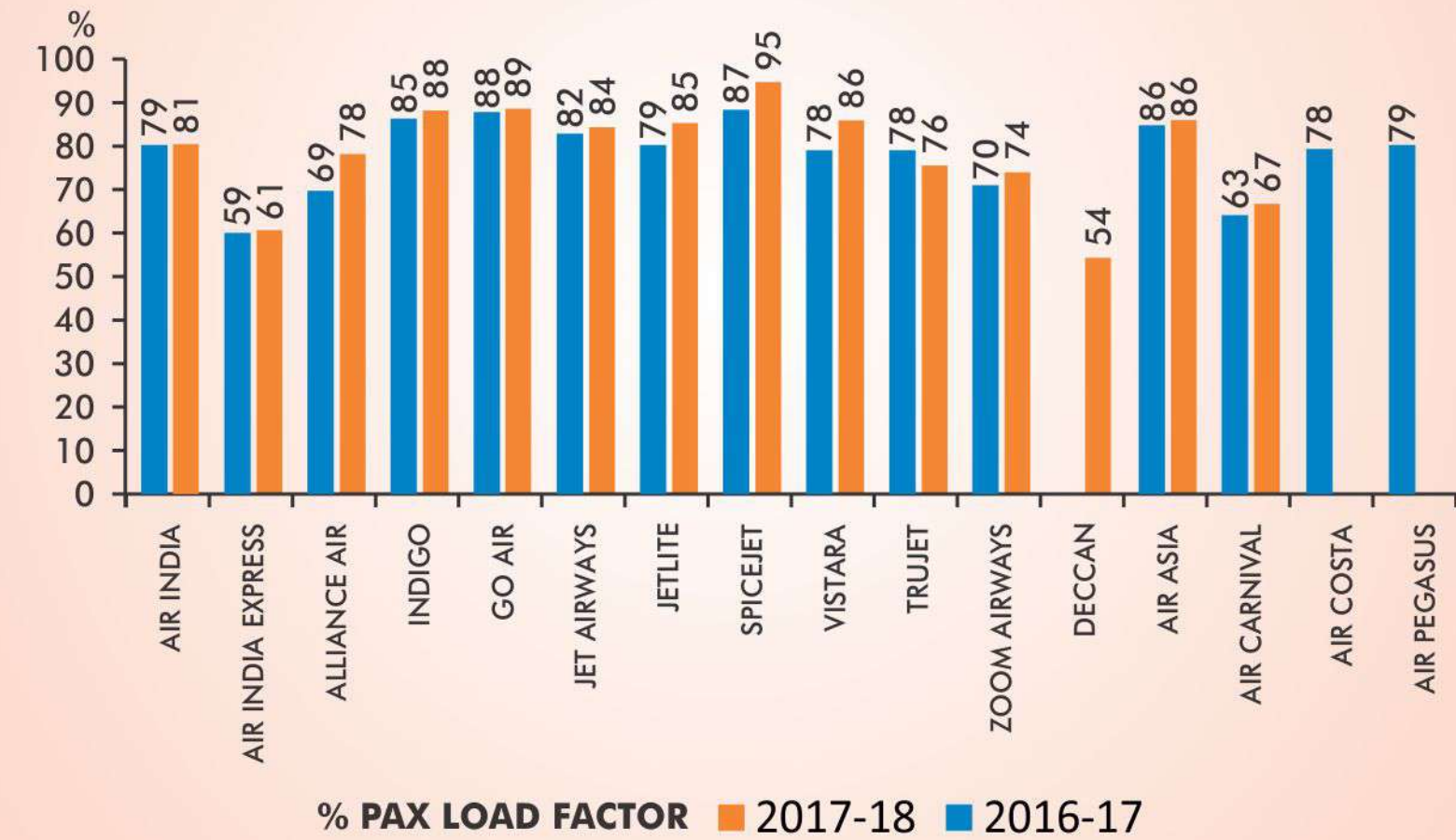
## DOMESTIC MARKET KEY INDUSTRY PLAYERS

On-Time Performance (OTP) at 4 metro airports<sup>1</sup>



## PASSENGER LOAD FACTOR

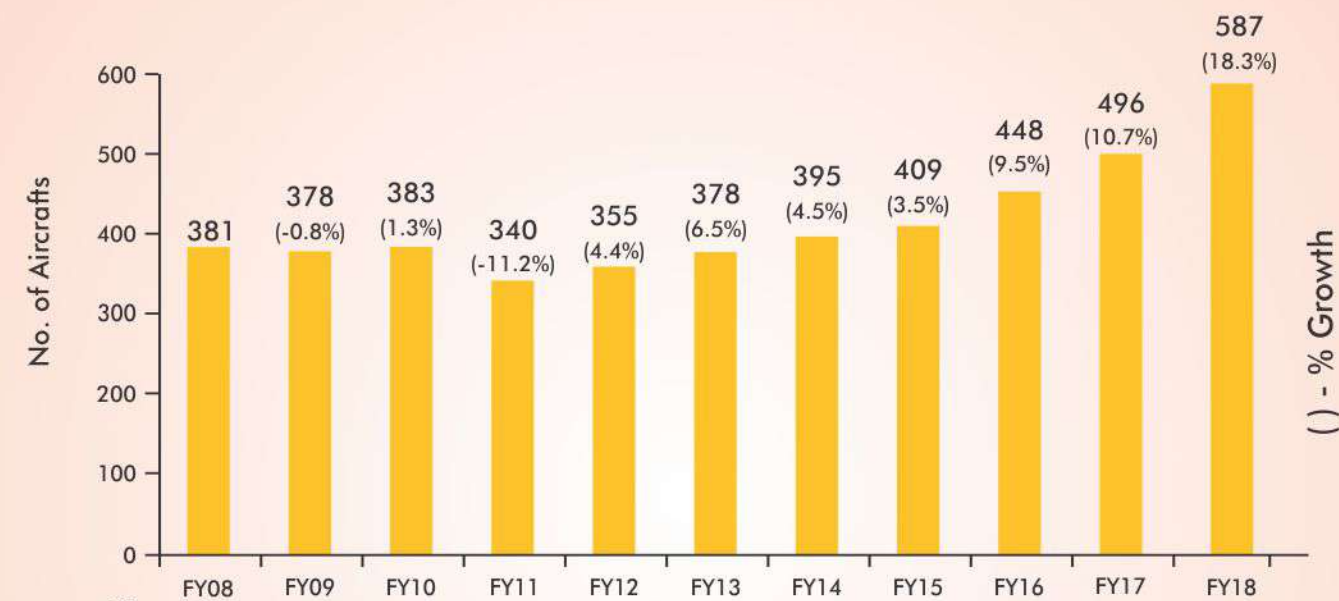
Passenger Load Factor of All Scheduled Indian Airlines on Scheduled Domestic Operations for the Year 2017-18



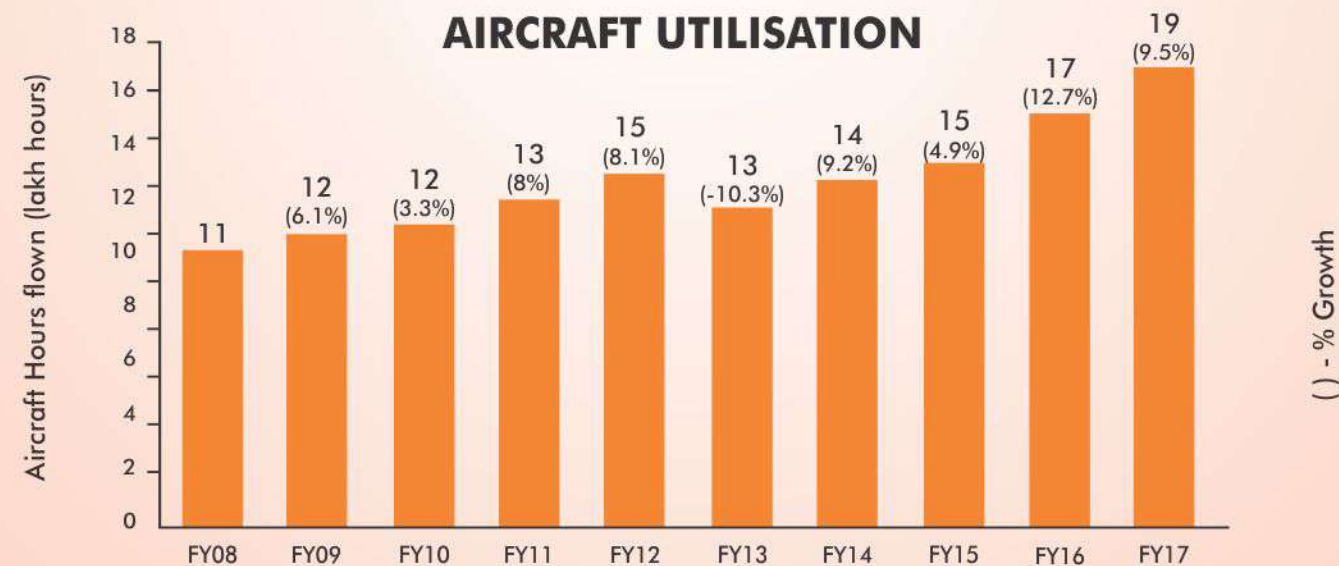
Source: DGCA; <sup>1</sup>4 metro airports include Bengaluru, Delhi, Hyderabad, Mumbai



## FLEET STRENGTH



## AIRCRAFT UTILISATION



\*Average Seat Capacity = Total ASK flown / Total Aircraft Km. Flown



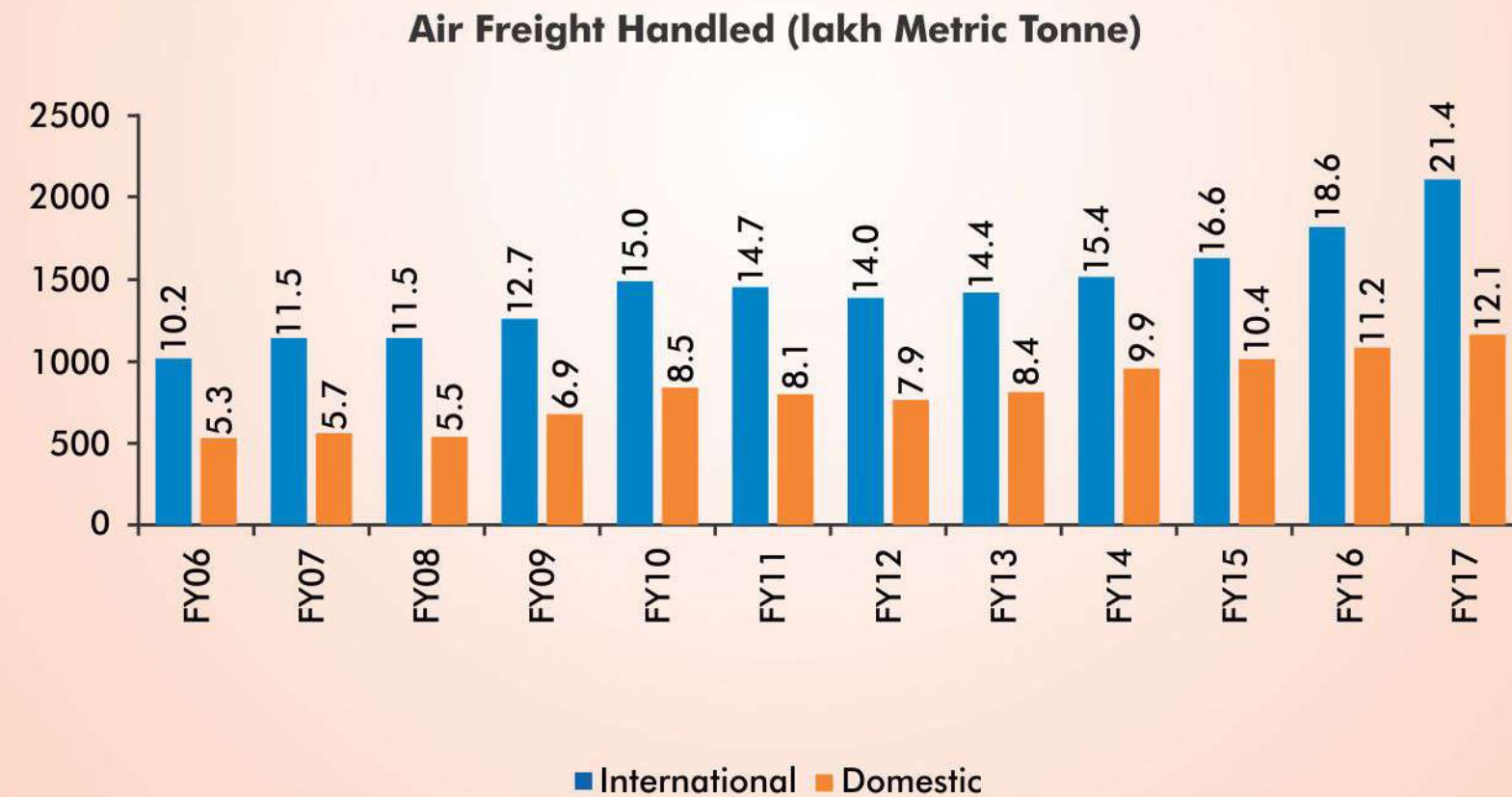
# INDIAN SKIES HAVE ~600 AIRCRAFT OPERATING YEAR ROUND

- Over 9.2 lakh scheduled domestic aircraft movements in FY18, 14% growth over FY17
- About 1.5 lakh scheduled international aircraft movements of Indian airlines in FY18, 7% growth over FY16
- 900 new aircraft orders placed by domestic airlines
- Over 3,781 hours flown per aircraft, up from 3,763 hours in FY17

Source: DGCA



## INTERNATIONAL AND DOMESTIC FREIGHT HANDLED AT INDIAN AIRPORTS



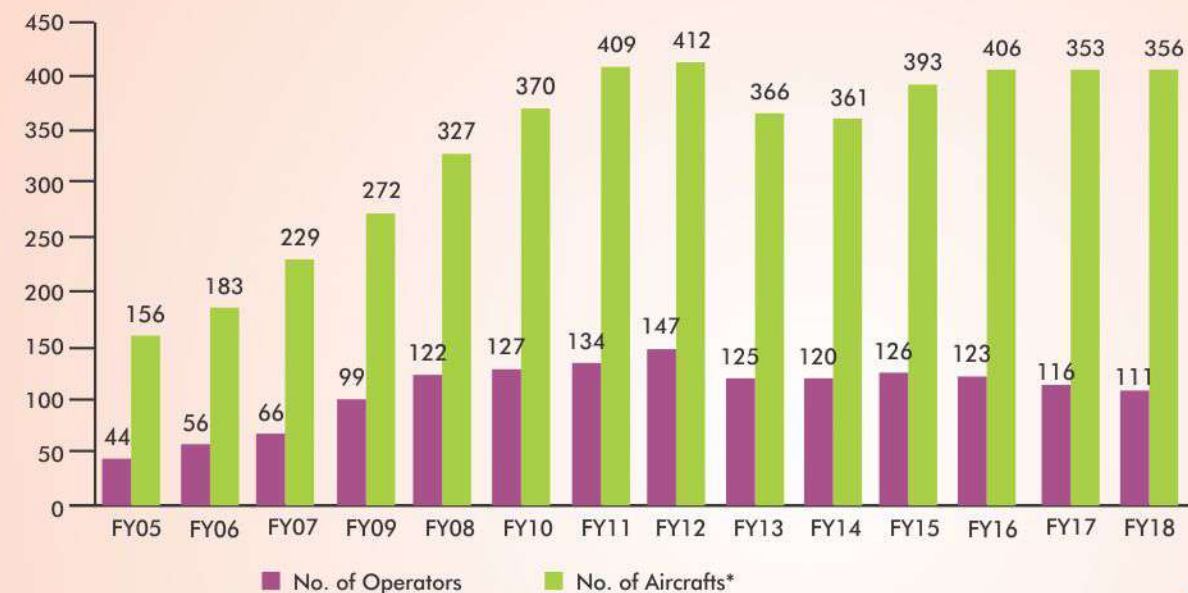
## CARGO TRAFFIC WITNESSING RAPID GROWTH

- Regional Connectivity Scheme to boost air cargo growth, regulations to ease business and development of multi-modal cargo hubs
- Reduction in free period **from 72 hrs to 48 hrs** for import & Export cargo
- Advisory issued on service level standards leading to **reduced dwell time**
- 17 Common User Domestic Cargo Terminals (CUDCTs) in AAI airports; 15 developed during FY14 to FY18
- More than **52%** of Outbound Freight from India goes to Africa & Middle East
- India gets Inbound Freight in **equal** proportion from all over the world, except the Americas

Source: AAI, DGCA

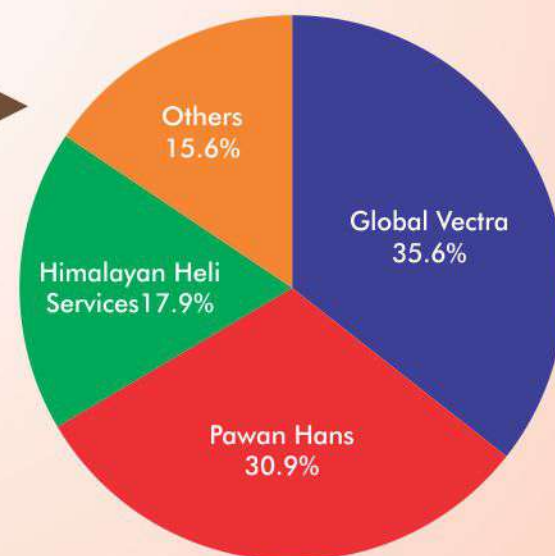


## NON-SCHEDULED OPERATORS (NSOP)



### Major Non-Scheduled Operators

Out of the total 55 non-scheduled Helicopter operators, top 3 operators accounted for more than 80% of the total number of flights operated in FY17



Market Share based on total no. of Flights Operated in FY17

## NSOP PLACED FOR STRONG GROWTH

- Over **3.7 lakh** passengers carried by scheduled Indian operators on non-scheduled operations in FY18, ~**2%** growth over FY14
- Over **3.3 lakh** domestic NSOP flights operated in FY18, **2.6%** CAGR growth over FY14
- India's **1st** dedicated Heliport launched at Rohini in Delhi in FY17
- No prior ATC clearance** required in airspace below 5,000 feet\* for Helicopters and seaplanes

Source: DGCA; \*In areas other than controlled airspace



## AIRPORTS GOING GREEN



-  Daily generational capacity through Solar Power making it absolutely power neutral airport
-  Certification for green buildings, rooftop solar power generation, sewage treatment plants, rain water harvesting facilities
-  Commissioned construction of large solar power plants to save on total expenditure by almost one - third and reduced carbon footprints
-  Incorporated advanced security systems, energy-saving cooling mechanism, rainwater harvesting set-up & super sensitive fire system alarm

## INDIA'S COMMITMENT TO GREENER AIRSPACE



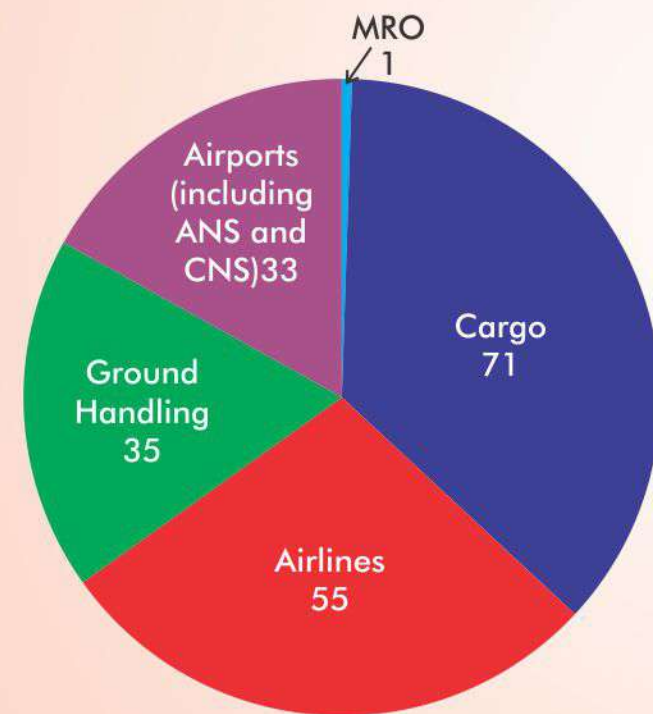
- World's 1st fully operational** solar powered airport at Kochi
- National Excellence Award\*** for AAI for use and promotion of solar energy by Ministry of New and Renewable Energy (MNRE) in FY17
- AAI was conferred **2 prestigious SKOCH BSE Award** for Environmental Protection (Green Technology) for Chandigarh Airport Project in FY17
- Solar PV Policy: Government targets 146 MWp solar energy across all airports; 30.43 MWp generated by AAI till May 2018
- Energy audits and Water audits being conducted in AAI and other agencies under the Ministry

Source: AAI Airports India Business Magazine April June 2017, \*under PSU category, Categories: Two Hundred Projects of India & Top Thirty Projects of India



## HUMAN RESOURCES

Total Direct Employees across Aviation Sector : ~ 2 lakh  
Number of employees (in '000) 2015



Major Employment Segments  
No. of personnel (in '000)

Job Roles	No. of Personnel (in '000) 2015
Terminal and Airside Ground Handling	28
Airside Management	14
Flight and Cabin Crew	11
MRO (Airlines)	11
CNS & ATC	7
Pilots and Co pilots	5
Aircraft Maintenance Engineers	0.5

## SKILL DEVELOPMENT



- Setting up of Rajiv Gandhi National Aviation University to offer graduate and higher level degree courses in aviation
- On 26th Feb'17, **1st all-women flight operated** around-the-globe by Air India
- India has **51** DGCA approved AME training institutes & **29** DGCA approved flying training organizations
- 599** Commercial Pilot Licenses issued in FY18
- 492** Airline Transport Pilot Licenses issued in FY18

Source: DGCA



## ENSURING HASSLE-FREE TRAVEL

Approval of e-boarding facility for domestic fliers to **reduce waiting time** for baggage check-in and security clearance

**91.4%** of all grievances redressed till date\* through AirSewa platform - 95% Airport-related issues, 94% Immigration, 93% Security and 92% Airline-related issues resolved

Implementation of **DISHA**<sup>1</sup> by **AAI** has led to almost **25-50% reduction** in queuing time<sup>2</sup> in 10 of its airports, added additional passenger traffic in these airports, improving overall passenger travel experience

\* From 26 Nov 2016 to 16 May 2018; <sup>1</sup> DISHA – Driving Improvements in Service and Hospitality at Airports; <sup>2</sup> Queuing time in entry, check in, and security; <sup>3</sup> As per 2015-16 passengers traffic

## AirSewa

Launch of AirSewa, an integrated portal through web (airsewa.gov.in) and a mobile app for both android and iOS platforms

First time brought together all stakeholders of aviation sector on one platform

Single-platform mechanism for customer grievance redressal, integrated back-office operations, flight status/schedule information, airport Information & FAQs

Passengers can easily track complaint status of grievances, provide feedback & rate overall experience & satisfaction level

## Project DISHA

Largest airport transformation efforts taken by AAI in 10 airports

10 airports are Chennai, Kolkata, Lucknow, Varanasi, Coimbatore, Bhubaneswar, Goa, Trivandrum, Pune, and Guwahati; constitute almost 60%<sup>3</sup> of total AAI traffic

DISHA envisions enhancing non aeronautical revenue through fixture of basic airport facilities and systematic capacity building in airport infrastructure through best in class business processes

Implementation of DISHA has led to operational efficiency, improving customer service and travel experience in these airports



# Key Facts Region-wise

**1** **Northern Region:** Recorded a CAGR of 18% in Passenger Traffic, 16% in Air Traffic Movements, and 11% in Freight Traffic in the last three years

**2** **Western Region:** Recorded a CAGR of 14% in Passenger Traffic, 9% in Air Traffic Movements, and 10% in Freight Traffic in the last three years

**3** **Southern Region:** Recorded a CAGR of 17% in Passenger Traffic, 13% in Air Traffic Movements, and 9% in Freight Traffic in the last three years

**4** **Eastern and North Eastern Region:** Recorded a CAGR of 25% in Passenger Traffic, 16% in Air Traffic Movements, and 8% in Freight Traffic in the last three years





## NORTHERN REGION

- 9 States & UTs
- 36 Airports
- 6 International Airports
- 25 RCS Airports (20 unserved and 5 underserved)

S N.	STATE	Aircraft Movements (In '000)		%CAGR FY15-FY18	Total Passengers (In lakh)		%CAGR FY15-FY18	Total Cargo (In '000 MT)		%CAGR FY15-FY18
		FY15	FY18		FY15	FY18		FY15	FY18	
1	CHANDIGARH	11.0	18.7	19.5	12.1	21.4	21.0	5.1	5.7	3.7
2	DELHI	300.9	441.3	13.6	409.9	656.9	17.0	696.5	963.0	11.4
3	HIMACHAL PRADESH	2.3	4.1	21.5	0.7	1.8	37.7	0.0	0.0	-
4	JAMMU & KASHMIR	28.4	38.3	10.5	34.0	45.8	10.4	8.9	10.7	6.3
5	MADHYA PRADESH <sup>1</sup>	1.1	1.7	14.6	0.7	0.8	3.8	0.0	0.0	-
6	PUNJAB	9.4	18.4	24.9	10.8	23.5	29.4	0.9	1.7	25.0
7	RAJASTHAN	28.6	59.9	28.0	29.5	64.3	29.7	3.3	16.3	70.3
8	UTTAR PRADESH	30.7	54.8	21.3	36.5	70.0	24.2	5.5	7.5	10.8
9	UTTARAKHAND	5.0	12.7	36.6	3.8	11.4	44.1	0.0	0.2	72.1
	<b>TOTAL</b>	<b>417.3</b>	<b>649.9</b>	<b>15.9</b>	<b>538.0</b>	<b>895.9</b>	<b>18.5</b>	<b>720.2</b>	<b>1,005.1</b>	<b>11.8</b>

MADHYA PRADESH<sup>1</sup> = includes only Khajuraho, Gwalior and Satna.

**Launch of 1st RCS flight from Shimla to Delhi under RCS - UDAN in April 2017**

**New Civil Air Terminal inaugurated at Bathinda; Completed Development of Kishangarh Airport**

**Commissioning of New Terminal Buildings at Bikaner, Khajuraho, Chandigarh (CAT) & Jammu (CE)**

**Provision of CAT IIIB Lighting System for low visibility operations to assure airlines all weather access to airport at Jaipur, Lucknow and Amritsar**

**Common User Domestic Cargo Terminals (CUDCT) operationalized at Lucknow, Srinagar and Varanasi**

**In-principle approval given for setting up of Noida International Airport (Jewar) in Uttar Pradesh on 8th May, 2018**



## WESTERN REGION

- 5 States & UT
- 27 Airports
- 4 International Airports
- 12 RCS Airports (8 unserved and 4 underserved)

S N.	STATE	Aircraft Movements (In '000)		%CAGR FY15-FY18	Total Passengers (In lakh)		%CAGR FY15-FY18	Total Cargo (In '000 MT)		%CAGR FY15-FY18
		FY15	FY18		FY15	FY18		FY15	FY18	
1	DAMAN & DIU	0.7	0.5	-10.9	0.2	0.2	-2.1	0.0	0.0	-
2	GOA	33.4	50.6	14.8	45.1	76.1	19.0	4.5	4.4	-0.9
3	GUJARAT	55.4	92.1	18.4	65.7	115.9	20.8	61.7	94.5	15.3
4	MADHYA PRADESH <sup>1</sup>	21.5	29.8	11.6	18.7	32.2	19.8	7.3	12.1	18.5
5	MAHARASHTRA	343.9	422.1	7.1	428.1	594.5	11.6	729.3	957.9	9.5
	<b>TOTAL</b>	<b>454.9</b>	<b>595.1</b>	<b>9.4</b>	<b>557.8</b>	<b>818.8</b>	<b>13.6</b>	<b>802.8</b>	<b>1,068.8</b>	<b>10.0</b>

MADHYA PRADESH<sup>1</sup> = includes only Jabalpur, Indore, Bhopal and Khandwa

One of the first operational routes under UDAN flagged off between Nanded and Hyderabad in April 2017

Inauguration of new terminal buildings at Vadodara and Goa

Foundation stone laid for setting up of greenfield airport at Mopa in Goa. 'In-principle' approval granted for setting up of greenfield airports at Dholera (Gujarat) and Hirasar, Distt. Rajkot (Gujarat)

Tendering process for award of Navi Mumbai International Airport completed. MoU signed between GoI and NMIAL on 11th April, 2018.

Common User Domestic Cargo Terminal (CUDCT) facility operationalised at Goa, Ahmedabad, Aurangabad, and Indore

Site clearance given for setting up of greenfield airport at Purandar (Pune) Maharashtra



## SOUTHERN REGION

- 7 States & UTs
- 26 Airports
- 11 International Airports
- 12 RCS Airports (9 unserved and 3 underserved)

S N.	STATE	Aircraft Movements (in '000)		%CAGR FY15-FY18	Total Passengers (in lakh)		%CAGR FY15-FY18	Total Cargo (in '000 MT)		%CAGR FY15-FY18
		FY15	FY18		FY15	FY18		FY15	FY18	
1	ANDHRA PRADESH	26.2	48.3	22.7	17.3	41.2	33.6	1.3	4.9	57.2
2	KARNATAKA	147.4	220.5	14.4	168.3	294.2	20.5	280.2	350.9	7.8
3	KERALA	92.7	127.4	11.2	121.7	177.1	13.3	123.5	123.9	0.1
4	LAKSHDAWEEP ISLAND	2.2	1.9	-4.5	0.3	0.4	11.3	0.0	0.0	63.0
5	PONDICHERY	0.0	0.5	-	0.0	0.3	-	0.0	0.0	-
6	TAMILNADU	158.9	204.5	8.8	176.9	258.2	13.4	318.3	437.3	11.2
7	TELANGANA	94.1	149.6	16.7	104.0	181.6	20.4	98.9	134.1	10.7
	<b>TOTAL</b>	<b>521.4</b>	<b>752.8</b>	<b>13.0</b>	<b>588.4</b>	<b>952.9</b>	<b>17.4</b>	<b>822.2</b>	<b>1,051.1</b>	<b>8.5</b>

Operationalisation of RCS flight from Kadapa – Hyderabad route in April 2017

New terminal buildings inaugurated at Tirupati, Kadapa, Vijaywada, Kochi, Hubballi and Belagavi Airports

Common User Domestic Cargo Terminals (CUDCTs) operationalized at Madurai, Mangaluru, Visakhapatnam, Vijayawada, Trivandrum and Chennai

In-principle approval granted for setting up of Greenfield airports at: Dagadarthi (Andhra Pradesh); Orvakal (Andhra Pradesh); Bhogapuram (Andhra Pradesh)

Site clearance accorded for setting up of New Greenfield airport at Kothagudem (Telangana)



## EASTERN AND NORTH EASTERN REGION

- 14 States & UTs
- 40 Airports
- 5 International Airports
- 24 RCS Airports (19 unserved and 5 underserved)

S N.	STATE	Aircraft Movements (In '000)		%CAGR FY15-FY18	Total Passengers (In lakh)		%CAGR FY15-FY18	Total Cargo (In '000 MT)		%CAGR FY15-FY18
		FY15	FY18		FY15	FY18		FY15	FY18	
1	A & N ISLAND	9.6	14.2	13.7	8.2	15.5	23.9	3.0	5.7	23.1
2	ARUNACHAL PRADESH	0.1	0.0	-100.0	0.0	0.0	-100.0	0.0	0.0	-
3	ASSAM	35.0	49.9	12.6	27.9	54.7	25.1	11.2	23.6	28.1
4	BIHAR	12.7	24.4	24.3	13.3	33.0	35.5	5.2	6.9	9.8
5	CHHATISHGARH	8.4	12.8	15.0	9.3	16.3	20.7	4.0	4.1	1.2
6	JHARKHAND	7.6	15.0	25.2	6.5	17.8	39.6	3.5	4.7	10.7
7	MANIPUR	4.8	6.7	11.9	6.1	9.9	17.3	4.5	4.3	-1.2
8	MEGHALAYA	0.4	0.5	3.3	0.1	0.1	7.8	0.0	0.0	-
9	MIZORAM	2.9	3.5	6.9	1.6	3.0	22.0	0.3	0.7	41.0
10	NAGALAND	0.6	1.5	35.5	0.5	1.9	52.2	0.2	0.6	48.3
11	ODISHA	12.5	23.2	22.8	14.9	32.5	29.6	6.0	7.8	9.6
12	TRIPURA	7.6	10.1	9.8	8.8	13.8	16.2	5.7	5.3	-2.2
13	WEST BENGAL	107.3	165.1	15.5	119.8	221.5	22.7	138.9	168.3	6.6
14	SIKKIM	-	-	-	-	-	-	-	-	-
	<b>TOTAL</b>	<b>209.5</b>	<b>326.8</b>	<b>16.0</b>	<b>217.0</b>	<b>419.9</b>	<b>24.6</b>	<b>182.4</b>	<b>232.1</b>	<b>8.4</b>

Construction of 3 new Hangars in Guwahati airport

Development of Tezu airport (Arunachal Pradesh)

Construction of new integrated office Complex - AAI and BCAS office - at Bhubaneswar and Guwahati

Common User Domestic Cargo Terminals (CUDCTs) operationalized at Kolkata, Bagdogra, Raipur, Bhubaneswar, Ranchi and Guwahati

Development of Greenfield airport - Pakyong, Sikkim at a cost of ₹553 crore





Agatti Airport

