

India Aviation Infrastructure - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Report description:

The India Aviation Infrastructure Market size is estimated at USD 99.43 billion in 2024, and is expected to reach USD 121 billion by 2029, growing at a CAGR of 4% during the forecast period (2024-2029).

The Indian aviation infrastructure market is projected to grow significantly during the forecast period owing to the growth in the number of aviation operations and growing investments in commercial aircraft acquisitions by various airline companies. Such acquisitions have been mainly driven by the significant growth in terms of air traffic passengers within the country in recent years.

The introduction of new low-cost carrier airlines, such as Akasa Air, is expected to lead to the opening up of new routes and destinations within the country. Such opportunities are also anticipated to lead to a significant increase in the number of investments by airport authorities toward new airport construction/expansion programs in order to meet the future needs of the Indian aviation industry.

On the other hand, stringent regulations imposed by the Indian aviation authority are expected to hamper the growth of the market studied in the long run. The growth in the usage of artificial intelligence and blockchain technologies is expected to further increase the business opportunities for aviation infrastructure companies in India in the coming years.

India Aviation Infrastructure Market Trends

Terminal Segment Will Showcase Remarkable Growth During the Forecast Period

The terminal segment is anticipated to show significant growth in the Indian aviation infrastructure market. Noteworthy

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developments in the number of airport terminal construction projects to cater to the future aviation industry requirements in the country are expected to drive the growth of the market studied in the near future.

According to the Directorate General of Civil Aviation, airports in India catered to 37.5 million passengers traveling on domestic flights between January and March 2023. The Indian government also plans to spend USD 12 billion till 2025 as well as acquire a significant number of commercial aircraft to meet the resurgent travel demand within the country. These developments are expected to lead to increasing construction as well as expansion projects for new airport terminals in the near future. Furthermore, airport infrastructure companies in India are also investing in the development of new airport terminals within the country to meet the present as well as future aviation growth requirements. For instance, in October 2023, the Airport Authority of India announced that they had started issuing tenders for the construction of a new domestic terminal at Kadapa Airport in Andhra Pradesh under an estimated cost of USD 0.22 billion. Thus, the growth in terminal construction projects within the country is expected to generate significant growth in the market studied during the forecast period.

Greenfield Airport Segment is Projected to Show Significant Growth During the Forecast Period

The greenfield airport segment is expected to show significant growth in the market during the forecast period. Factors such as an increase in the number of greenfield airport developments within the country to cater to the growing aviation requirements are expected to lead to significant growth in the market studied in the coming years.

The growth in the number of disposable incomes, as well as rapid urbanization, has led to the Indian aviation industry witnessing major growth to be at par with other aviation leaders in the world. The Ministry of Civil Aviation recognizes the need to expand and modernize the industry by developing newer airports in Tier 2 cities. Greenfield airports typically consist of aviation facilities that are built from scratch or on previously undeveloped land. Thus, under the Indian greenfield airport policy, the central government, in July 2023, announced that they have granted 'in-principle' approval for the construction of twenty-one new greenfield airports across various states of India. On the other hand, out of the total twenty-one new greenfield airport construction projects, eleven airports, such as the ones located in Durgapur, Shirdi, and Itanagar, have already been operationalized. The Indian government has also issued first-stage clearance to construct three greenfield airports: Alwar in Rajasthan, Singrauli in Madhya Pradesh, and Mandi in Himachal Pradesh.

Furthermore, a greenfield airport acts as a key enabler toward the development of an industrial region. Some other notable developments have also been witnessed in this segment in recent years. For instance, in November 2023, the Indian government announced that a new greenfield airport would be developed near Parandur of Kanchipuram district in the Indian state of Tamil Nadu, and the airport would service the Chennai International Airport. Moreover, the new greenfield airport development is also expected to help ease the burden on the Chennai airport, which is expected to reach saturation by 2028. Thus, growing development in greenfield airport projects is expected to generate significant growth in the market studied during the forecast period.

India Aviation Infrastructure Industry Overview

The Indian aviation infrastructure market is consolidated in nature, with the presence of a few players holding significant shares in the market. Some of the prominent players in the market are GMR Infrastructure Limited, Adani Group, L&T Construction, Tata Sons Private Limited, and AIC Infrastructures Pvt. Ltd. Major players within the market are now focusing on acquiring new airport construction/expansion contracts in order to significantly increase their market share as well as develop new airports as per the requirements of the aviation authorities. Furthermore, growing investments by major players to develop smart airports that are able to handle future capacity requirements of the industry are expected to lead to growth in the market studied. Companies are also integrating artificial intelligence technologies such as chatbots in order to better service the needs of the Indian aviation industry in the near future, generating growth in the market studied.

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Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
- 4.3 Market Restraints
- 4.4 Porter's Five Forces Analysis
 - 4.4.1 Bargaining Power of Buyers/Consumers
 - 4.4.2 Bargaining Power of Suppliers
 - 4.4.3 Threat of New Entrants
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

- 5.1 Airport Construction Type
 - 5.1.1 Greenfield Airport
 - 5.1.2 Brownfield Airport
- 5.2 Airport Type
 - 5.2.1 Commercial Airport
 - 5.2.2 Military Airport
 - 5.2.3 General Aviation Airport
- 5.3 Infrastructure Type
 - 5.3.1 Terminal
 - 5.3.2 Control Tower
 - 5.3.3 Taxiway and Runway
 - 5.3.4 Apron
 - 5.3.5 Hangar
 - 5.3.6 Other Infrastructure Type

6 COMPETITIVE LANDSCAPE

- 6.1 Vendor Market Share
- 6.2 Company Profiles
 - 6.2.1 GMR Infrastructure Limited
 - 6.2.2 Taneja Aerospace & Aviation Ltd

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- 6.2.3 ADANI GROUP
- 6.2.4 L&T Construction
- 6.2.5 AIC Infrastructures Pvt. Ltd
- 6.2.6 Gujarat State Aviation Infrastructure Company Limited
- 6.2.7 Tarmat Ltd
- 6.2.8 GVK Industries Limited
- 6.2.9 AIRPORTS AUTHORITY OF INDIA
- 6.2.10 Tata Sons Private Limited

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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