



# Aviation & Tourism Pulse

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## Vision for a Global Aviation Hub

“India’s aviation sector has undergone a historic transformation, emerging as the world’s third-largest domestic market. Our long-term vision has turned air travel from an exclusive club into a mass mode of transport. We are now committed to expanding our network to 400 airports by 2047.”



GOVT. SECTOR

## From the President, FAST desk

### Charting the Flight Path to Viksit Bharat:

Dear Members and Partners of FAST,

As India aligns its corporate and national vision with the goal of Viksit Bharat by 2047, the civil aviation sector has transitioned from a supporting utility to a primary driver of economic prosperity. This commitment to a grand vision is reflected in the unprecedented growth the nation has witnessed—a decade of progress where airport infrastructure, aircraft fleets, and passenger volumes have all nearly doubled.



Today, India stands as the fastest-growing aviation market globally. With a daily domestic footprint of 5 lakh passengers, the country is not merely participating in the global aviation landscape; it is leading it. The strategic roadmap for the next two decades is ambitious: India aims to add 50 airports within the next five years and expand the total tally to 350 airports over the next 20 years. This expansion is bolstered by diversification into three critical sub-sectors: regular airport operations, the imminent launch of seaplane services to unlock coastal and riverine potential, and the aggressive modernization of helicopter operations.

However, India's rapid growth does not outpace its commitment to safety. The national strategy is built upon a robust, multi-tier framework overseen by the DGCA. India adheres strictly to the global standards set by the International Civil Aviation Organization (ICAO), ensuring 100% compliance with international safety assessments. By integrating these global circulars into domestic safety plans, the authorities maintain a rigorous cycle of inspection, surveillance, investigation, and enforcement.

To further elevate these standards, India has embraced a "Digital First" approach to safety. The introduction of the Track-by-Tail program has shifted safety monitoring from traditional paper-based systems to a real-time digital ecosystem. This allows for unparalleled compliance tracking of every aircraft in Indian airspace. Furthermore, a double-verification layer has been instituted between ground-level inspections and Central Headquarters to eliminate oversight.

As the nation moves forward, it remains committed to a collaborative safety culture. By integrating feedback from all stakeholders—including airlines, the AAI, BCAS, and the traveling public—India is ensuring its position as one of the safest aviation markets in the world. The journey toward 2047 is not just about flying higher, but about India flying safer and reaching further.

As members of the Foundation for Aviation and Sustainable Tourism (FAST), we must continue to support this momentum through our collective expertise and shared dedication to excellence. Together, we play a vital role in ensuring that India’s aviation success story remains a global benchmark.

Warm regards,  
President, FAST

**Lt Gen KM Seth,**  
PVSM, AVSM (Retd) and  
Former Governor of Tripura and Chhattisgarh

## Wings India 2026 Inaugurated by Union Civil Aviation Minister



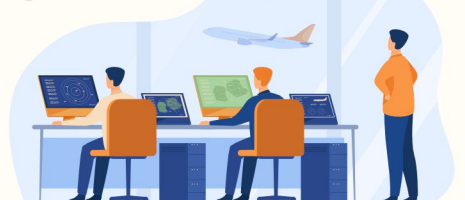
Civil Aviation Minister Ram Mohan Naidu inaugurated Wings India 2026. The four-day event in Hyderabad, features global exhibitors, air shows, and a job fair, attracting over 3,000 delegates from 20 countries to discuss the future of Indian Aviation.

## Govt approved the "Modified UDAN" scheme to develop 100 new airports

The Union Cabinet has approved the "Modified UDAN" scheme (2026-2036) to develop 100 new airports, heliports, and water aerodromes from unserved/underserved airstrips. With an outlay of over ₹28,000 crore, this initiative aims to improve regional connectivity in Tier-2/Tier-3 cities, enhance tourism, and boost economic growth in remote areas. The plan includes 200 modern helipads and 441 total aerodrome infrastructure support (including water aerodromes). The new scheme offers extended viability gap funding (VGF) for airlines, up to 5 years, to ensure the sustainability of new routes.



## 24/7 Control Room Set Up to Assist Air Travelers



MoCA Secretary Samir Kumar Sinha reviewed the 24/7 Passenger Assistance Control Room (PACR) to manage airspace restrictions. The facility ensures real-time coordination and timely updates for travelers. Grievances via social media, Air Sewa, and helplines (011-24604283 / 24632987) are being prioritized to maintain safe, efficient operations. The Ministry remains committed to proactive support and rapid issue redressal.

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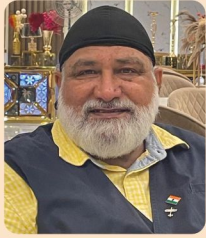
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## The December 2025 Disruption: Transforming a Crisis into a Blueprint for Aviation Resilience



### Introduction: A Moment of Reckoning

For nearly two decades, IndiGo has been the gold standard of operational discipline in India. Since its 2006 launch with just three A320s, the airline has grown into a titan, commanding over 60% of the domestic market share. However, in December 2025, this well-oiled machine encountered a "perfect storm" of regulatory transition and scheduling complexity.

Analysis by **G S Bawa**  
Senior Advisor at Aviation Industry,  
Former General Manager at Airports Authority of India;

The ensuing crisis, characterized by the cancellation of thousands of flights, was not merely an airline failure; it was a systemic stress test. By examining the events of December 2025 through a lens of constructive learning rather than blame, the Indian aviation ecosystem can extract vital lessons to ensure that the nation's journey toward becoming a global aviation hub remains on course.

### The Timeline of Turbulence

The crisis was triggered by the implementation of revised Flight Duty Time Limitations (FDTL) mandated by the Directorate General of Civil Aviation (DGCA). These regulations, designed to prioritize pilot health and flight safety by increasing rest periods, required a massive recalibration of crew rosters.

The friction became public on December 2, 2025, as minor delays began to cascade. By December 3, the system fractured under the weight of the new requirements, resulting in 150 cancellations. The peak of the crisis occurred between December 4 and 5, with over 950 flights grounded in just 48 hours. The sheer scale of the disruption left thousands of passengers stranded, highlighting a critical gap between regulatory intent and operational readiness.

### Strategic Analysis: Why the System Strained

To move forward, we must analyse the "why" behind the "what." The disruption was born from three primary friction points:

1. **The Talent Gap:** While IndiGo holds a record order for 500 Airbus aircraft, the human capital—specifically commanders and first officers—did not have the "buffer"

required to absorb a sudden increase in mandatory rest hours

2. **Predictive Modelling Limits:** Traditional scheduling software often fails to account for the "compounding effect" of delays under strict FDTL rules. When one crew member "times out," it can ground a dozen subsequent flights.

3. **Communication Silos:** During the height of the crisis, the disconnect between operations and customer service desks left passengers in a vacuum, worsening the public perception of the event.

### The Stakeholder Impact

The ripple effects were felt across the board. For the Government, it was a delicate balancing act. The Ministry of Civil Aviation had to ensure safety compliance while simultaneously pressuring the airline to restore public utility. For passengers, the impact was emotional and financial, highlighting the need for more robust Passenger Charters that go beyond basic compensation.

For the aviation industry, it served as a warning: infrastructure and human resources must grow at the same pace as fleet size. A 500-aircraft order is only as strong as the 5,000 pilots available to fly them under the latest safety laws.

**Conclusion: From Fiasco to Foundation:** IndiGo's journey from a three-aircraft startup in 2006 to a global titan has been remarkable. This scheduling crisis is not a sign of failure, but a growth pain of a maturing market.

By addressing these "fault lines" now—through better AI modelling, increased pilot training

### Global Standards vs. The New Indian Mandate

*Understanding the 'Why' behind the DGCA's Pivot*  
To understand the crisis, one must look at the global shift toward fatigue management. The December 2025 crisis was the result of India aligning more closely with International Civil Aviation Organization (ICAO) standards and the European Union Aviation Safety Agency (EASA) frameworks.

Feature	Pre-2025 DGCA Norms	New 2025 Mandate	US FAA Comparison
Weekly Rest	36 Hours	48 Hours	30 Hours (minimum)
Night Duty Definition	0000 to 0500	0000 to 0600	0200 to 0559 (WOCL)
Max Flight Postings	Higher daily limits	Reduced by 15-20%	Strict sliding scale

**The Learning:** While the new Indian rules are among the safest in the world, the transition period lacked the "cushioning" seen in the US or Europe, where such changes are often preceded by a 12-to-18-month hiring surge to offset the reduced "utilization" of each pilot.

capacity, and more empathetic passenger service—the Indian aviation sector can build a more robust system. The December 2025 disruption will then be remembered not as a "fiasco," but as the foundational event that made Indian skies the most resilient in the world.

**"The importance of effective communication lies in bridging the growth and regulation to move forward on the path of reforms: G S Bawa"**

"A record-breaking order for 500 aircraft is only as strong as the human capital infrastructure available to fly them under the latest safety mandates. The December Disruption was not a sign of failure, but a 'growth pain' of a maturing market transitioning from rapid expansion to global safety leadership. In the era of instant information, the disconnect between operations and the passenger desk is the most expensive gap an airline can fail to bridge. Transitioning to stricter pilot rest standards is a marathon, not a sprint; it requires a 'Regulatory Sandbox' where safety and stability can co-exist."

## Israel- USA and Iran War- Impact on Civil Aviation in India



The Escalating Conflict between the USA, Israel and Iran has significantly disrupted civil Aviation in India, Leading to Widespread Flight Cancellations, Longer Travel Times and rising air ticket costs.

The Short-term conflict between India and Pakistan in 2025 had led to Ongoing Closure of Pakistan Airspace wef 24 April 2025 for Indian Carriers, which severely impacted the Indian Carriers flights to Europe, USA and Canada. The flights originating from Indian Airports re-routed their flights through Iranian Airspace, which added about 45 to 60 Minutes of Flying time. In this Scenario Non-Indian Carriers were at advantage as they had access to the Pakistan's Airspace.

With the Shutdown of Iranian airspace and the Partial closure of Gulf region airspace has severely impacted major Air routes/ Corridors for west bound travel from India by Indian Carriers, leading to forced re-routings through North African Airspaces, increasing operating costs, reducing fuel efficiency etc. Non-Indian Carriers are still able to Avoid the Conflict Zone by operating through north of Iranian Airspace and then Using Azerbaijan, Afghanistan and Pakistan Airspace.

These Re- Routings have resulted in increased flight timings from 2 to 4 Hours, leading to additional Fuel expenses up to 20%. The Non-Stop Trans-Atlantic Flights from India to USA and Canada are making technical halts in Europe for refueling, which not only has financial repercussions but also operational constraints with regards to flight crew duty time limitations (FDTL). In such cases Indian carriers are forced to carry additional pilots, thus overstretching the limited resources available.

The corner stone of the Civil Aviation is predictability, which enables better planning and

optimum, efficient use of resources. The Conflict has made the scenario highly un-predictable.

The Flights to Gulf Region were completely shut for some days, On the directive of MoCA limited operations have started to the Region mainly to cater to Indian Nationals stuck in the region and wanting to return to India.

The Indian Airports are also experiencing dip in the Number of Air Traffic Movements (ATM's) and reduced passenger footfalls Impacting the Aeronautical and Non-Aeronautical revenue.

### In the Long-term Outlook and Challenges:

- The Combination of Rising Crude oil prices and a depreciating Rupee, will put Immense Pressure on India's Aviation Sector.
- Continued Conflict could lead to prolonged period of International transit times for Air cargo impacting the Global Supply Chain which was on its way to recovery post COVID era.

**Vineet Gulati,**

Former Member (Air Navigation Services),  
Airports Authority of India



## Union Budget 2026: A Catalyst for Aviation and Tourism Synergy

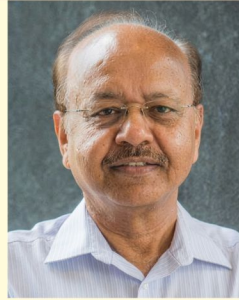


### Civil Aviation: Strengthening the Backbone

The Union Budget 2026 has brought significant cheer to the civil aviation

sector by addressing the entire value chain—from manufacturing to last-mile connectivity. A standout initiative is the government's proposal to incentivize domestic seaplane manufacturing. This is a masterstroke for a nation with vast coastlines and untapped inland water bodies, promising to revolutionize remote connectivity and high-end tourism simultaneously.

Furthermore, the introduction of a new Viability Gap Funding (VGF) Scheme for non-commercially viable routes ensures that the spirit of Ude Desh ka Aam Nagrik remains alive. By allocating Rs 550 crore for the Regional Connectivity Scheme (RCS) and deploying nearly Rs 4,700 crore through the Airports Authority of India for infrastructure upgrades, the government is ensuring that our capacity keeps pace with our ambition. Crucially, the Customs Duty Exemptions on aircraft components will significantly lower input costs, positioning India as an emerging global hub for Aircraft Manufacturing and MRO (Maintenance, Repair, and Overhaul) services.



V.P. Agrawal,

Vice President, FAST, and former Chairman, Airports Authority of India

As we navigate the complexities of India's growth story, the Union Budget 2026 emerges as a beacon of opportunity for the civil aviation and tourism sectors. With its strategic focus on infrastructure, connectivity, and sustainability, this Budget is poised to transform these twin industries into the twin engines of India's economic ascent.

### Tourism: The New Growth Engine

The Budget has rightly positioned tourism as a vital socio-economic multiplier. The proposal for a National Institute of Hospitality and the ambitious pilot program to train 10,000 tourist guides across 20 destinations highlight a focus on "human

infrastructure" and service excellence.

Modernization is also at the forefront with the National Destination Digital Knowledge Grid, which will leverage technology to promote Indian destinations globally. We are also seeing the birth of niche segments, such as Astro-Tourism, through telescope upgrades at key scientific sites, and the strengthening of Religious Tourism through direct international links, such as the Kushinagar-Bangkok flight corridor.

### A Call for Collaboration and Actionable Ideas

In this edition of Aviation & Tourism Pulse, we have intentionally shifted our focus to bring you insights from a wider spectrum of the aviation and tourism domains. We believe that the Budget is an essential roadmap for the full year ahead, and it is worth analyzing its impact from every angle.

To harness these opportunities effectively, stakeholders must move beyond silos. The transition toward a world-class ecosystem requires a seamless partnership between the government, industry players, and local communities. At FAST, we encourage authors, speakers, and content developers to come forward and share their perspectives on actionable thoughts and ideas. By fostering this collaborative dialogue and leveraging the latest budgetary provisions, we can unlock the full potential of these sectors—driving employment, cultural exchange, and a resilient, Viksit Bharat.

## Crisis & Disaster Management

By Failing to Prepare, you are Preparing to Fail. said Benjamin Franklin. It is a philosophy of living that applies to all human endeavours, suggesting that future-focused planning avoids the stress, and damages associated with neglect and last-minute fixes. Being "future ready" refers to the ability to adapt to, anticipate, and navigate rapid, uncertain changes in technology and the workplace. It emphasizes building agile systems, cultivating a growth-oriented mindset, and continuous learning.

It is a tool geared towards averting crises in the first place, be it natural hazards or human-induced disasters; through effective disaster risk management. It largely facilitates to explore the question of how, why, and when to examine and fine-tune the prevalent global systems to arrive at appropriate responses to the ever-growing and ambiguous threats in the events of complex crises. Robust Safety Management Systems (SMS), and comprehensive Emergency Response Plans (ERP) placed are at the core of preparedness and prevention to avoid crises situations in any industry - aviation industry being no exception.

### Proactive Visionary Leadership

There is a very thin line of separation between crises and disasters. A disaster is a "crisis with a bad ending." When a crisis is perceived to have been led to bad consequences, it tends to be a disaster.

The leadership ability to anticipate or recognize a "crisis in the making" relies on a blend of situational awareness, proactive risk-assessment and management. Risk Audits, Predictive Analytics, AI, Data Analysis, leading to data-driven decision-making in accordance with regulatory compliance, via authentic lines of communication is the correct process to follow.

Visionary and strategically thinking leaders look beyond day-to-day operations to anticipate future challenges, such as technological advancements, regulatory shifts, economic turbulence, and the ever-changing global geopolitical dynamics. This foresight enables them to develop resilient strategies and contingency plans.

Know your adversary and be prepared. Any enterprise that underestimates its adversaries, becomes prey to them. Adversaries are becoming more efficient, focused, and businesslike in their approach in many ways; if not more

than the enterprise organizations they prey upon. The 'Art of War' by Sun Tzu, teaches us to rely not on the likelihood of the enemy's not coming, but on our own readiness to receive him; not on the chance of his not attacking, but rather on the fact that we have made our position impregnable

### Disasters in Aviation & Lessons Learned

Incidents and accidents happen at any one of the thousands of airports, around the globe at frequent intervals. They are however, appropriately dealt within the ambit of pre-planned, time-tested, and proven Standard Operating Procedures (SOPs), Contingency Plans, and Disaster Management Plans (DMP).

The largest loss of life in a single aircraft is the 520 fatalities in the 1985 Japan Airlines Flight 123 incident. The largest loss of life involving multiple aircraft in a single incident is the 583 fatalities in the two airplanes that collided in Spain's 1977 Tenerife airport disaster. The deadliest aviation-related disaster of any kind, involving 2,996 fatalities in both the destruction of aircraft and infrastructure on ground, was the terrorist attack on the World Trade Centre (WTC) in New York City on September 11, 2001. These incidents taught many lessons resulting in the improvement, upgradation, and application of aviation safety & security systems, and the air traffic control procedures across-the-board worldwide.

### Cybersecurity Threats to Aviation

Amongst all the threats leading to disastrous consequences, cybersecurity remains highest in today's volatile geopolitical landscape. The aviation industry is a prime target due to the sensitive data it handles and its reliance on interconnected digital systems for everything from flight operations to passenger reservations. As the industry is becoming more reliant on increased digitalization, the attack surface expands, making more systems vulnerable. Conflict among nations and the changing geopolitical tensions are leading to a rise in state-sponsored or militarily related cyberattacks. Threats like phishing, malware, and ransomware are increasingly sophisticated and prevalent, with ransomware alone causing significant disruptions.

### The Last Word

Every crisis is a lesson in disguise; the key is to reflect, adapt, and emerge stronger. The five-p program of "proper planning prevents poor performance" sounds to be the best approach to execute our duties, responsibilities, and obligations.

The adage "a stitch in time saves nine" is as true and relevant today as it was centuries ago. Taking steps to



Dr. Inderjit Singh

is an aviation consultant and former CEO of Indira Gandhi International Airport in New Delhi

The narrative that follows in my title "Crisis & Disaster Management" is my call to be proactive and intentional, highlighting that taking preparatory action is far better than responding to a crisis or disaster situation.

prevent a problem from occurring is more effective and less costly than having to fix the damage afterward. It is wiser to take proactive steps to avoid a problem than to deal with the results of it after it has occurred. It is awareness and mindfulness - termed in the management parlance as consequence management.

"To each there comes in their lifetime a special moment when they are figuratively tapped on the shoulder and offered the chance to do a very special thing, unique to them and fitted to their talents. What a tragedy if that moment finds them unprepared for that which could have been their finest hour" – said Winston Churchill.

It is incumbent on each one of us to find that special moment.

### About the Author

Inderjit Singh is a global aviation consultant. He has served on airport development and operations assignments worldwide, several amongst them under the aegis of ICAO. He was earlier the CEO of IGI Airport, New Delhi; SVP, Dubai Aerospace Enterprise (DAE); and Director, URS Corporation, USA. A graduate of IIT Roorkee, an MBA from Delhi University, he had attachments with University of California, Berkeley, USA and Henley – The Management College, Oxfordshire, UK for specialized studies in aviation and advanced management respectively. He has recently earned his Doctorate from Brazil. He regularly contributes articles in aviation trade journals and is thus abreast with the latest in the industry.



## The Twin Engines of Growth: Synchronizing Aviation and Tourism for the future

Today, the travel and tourism sector stands as an important pillar of the Indian economy: it earns over USD 30 billion in foreign exchange annually and is expected to contribute 10 percent to India's GDP by 2030. It is an important contributor to employment, providing jobs to around 50 million persons across the country. Projections estimate that its contribution to both employment and the national economy will grow significantly in the future. Moreover, India has now emerged as one of the larger tourism economies, ranking 8th in the world in size. The road ahead to a \$3 trillion tourism economy by 2047, lies in the seamless integration of the skies and the ground by exploiting the mutual linkages between aviation and tourism.

Let us examine some recent policy changes that will strengthen these linkages:

### 1. The Policy Pivot: From Circuits to Destinations

The traditional "circuit-based" approach is undergoing a fundamental transformation. Under the revamped Swadesh Darshan 2.0 (SD 2.0), the government has shifted toward a "destination-centric" model. The objective is no longer just that tourists between different locations but to develop 50 plus identified destinations into world-class, sustainable hubs, across the country. This is complemented by the Challenge Based Destination Development (CBDD) initiative, where states compete to develop iconic sites, ensuring that central funding is met with local accountability and innovation. In addition, Special Assistance to States for Capital Investment programme aims to develop important tourist centres to global scale.

### 2. Aviation for the common man

The UDAN (Ude Desh ka Aam Nagrik) scheme has been a success in making air travel accessible to all. What started as a regional connectivity experiment has now operationalised over 650 routes, including 53 dedicated tourism and 48 helicopter routes bringing air travel within reach of the common man, especially in unserved parts of the country.

Moreover, airport expansion vision has proceeded at a rapid pace during the last decade and the stated goal is to expand the number of airports from the current 163 to nearly 350-400 by 2047. The synergy is evident: when a new greenfield airport opens either at Itanagar or Shirdi or Kushinagar, it not only just reduces travel time but boosts the local economy and employment by opening up new possibilities for tourism. The recent policy focus on seaplane operations and VGF (Viability Gap Funding) for remote connectivity, further underscores the



For decades, tourism and aviation have been seen through separate and different prisms. One was seen as a cultural and hospitality endeavour requiring specific skills and the other as a capital intensive infrastructure sector with its own regulatory challenges. However, as India marches toward its centenary of independence, that binary has dissolved and new synergies have emerged. We are now in an era of "Tourism in Mission Mode," where aviation is not merely a means of transport but an important contributor to the tourism economy. Aviation serves as one of the primary enablers for tourism growth while surging tourism demand drives aviation expansion and infrastructure development.

By Arvind Singh, IAS (Retd.)  
Former Secretary of Tourism, GOI

commitment to reaching the "last mile" of India.

### 3. Niche Frontiers: beyond regular sightseeing

To achieve a year-round "365-day" tourism calendar, we must look beyond seasonal sightseeing. The government's strategic roadmaps for niche tourism segments are now yielding results:

- Medical Value Travel: Through the "Heal in India" initiative, India is being positioned as a global healthcare hub, leveraging its top-tier medical expertise and traditional AYUSH systems.
- Cruise Tourism: The Cruise Bharat Mission (2024-2029) aims to make India a leading global cruise destination, with 51 new circuits planned by 2027.
- Eco and Adventure Tourism: From opening 120 new mountain peaks and new trails for trekking to launching the Global Big Cat Summit 2026, India is claiming its spot as a leader in nature-based conservation and travel.
- MICE: The Meet in India campaign has been launched to encourage large meetings and conventions/ conferences to be held in the

country.

### 4. Rapid growth of Indian Aviation:

India is now the world's third largest domestic aviation market and is on track to become the third largest globally, supported by rapid fleet induction and large aircraft orders. India's economic growth will drive air travel demand to about 1.3 billion passenger journeys by 2047. Meeting this demand will require a fundamentally different connectivity architecture. In the future, dense regional connectivity would link smaller cities into the main network, while major hubs would consolidate traffic and enable long haul and transfer connectivity, placing India as a critical node in global aviation. Integrated with road, rail and metro systems this network would reduce transit times, improve reliability and position aviation as an enabler of economic integration, employment and in turn tourism.

### The Way Forward: A Unified Vision

The challenge ahead is not one of potential, but of better coordination and execution of plans / projects. We need:

- **Centre-State Synergy:** The State governments need to complement the national efforts by taking effective steps to develop aviation and tourism infrastructure, provide appropriate incentives, facilitate private sector investment and rationalise taxes.
- **Sustainability:** As we aim for 100 million foreign arrivals, we must guard against "overtourism" by developing new destinations, investing in green infrastructure and carrying-capacity assessments of existing destinations.
- **Skill Development:** Future growth in both aviation and tourism will need a large number of skilled personnel ranging from pilots, air crew and ground personnel to managers, guides and hotel staff. A National Aviation Skilling Mission is called for for proper demand planning and setting capacity targets. Upgrading the National Council for Hotel Management into a National Institute of Hospitality will bridge the gap between academic theory and industry needs in the hospitality sector.

In conclusion, India's aviation and tourism sectors are poised for rapid growth: on both the domestic and international fronts. India's domestic tourism is booming and it is moving away from being a "seasonal stopover" to becoming a high-value year-round global destination for international travellers. The aviation market is also growing by leaps and bounds, backed by infrastructure and policy support. As we fly towards 2047, our airports will be the gateways, but local cultures, communities and attractions will be the destination. Synchronising the expansion in the two critical sectors of the economy will lead to better impact owing to their mutual linkages.

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## Annual Traffic Review of Indian Aviation 2025

Indian aviation sector marked another year of sustained expansion with passenger traffic continuing its upwards trajectory across both domestic and international markets. Capacity additions by airlines, growing regional connectivity and network diversification were the key drivers supporting this growth. These developments were complemented by ongoing airport infrastructure expansion and several regulatory initiatives by MoCA and DGCA to strengthen the operational landscape of the Indian aviation sector.

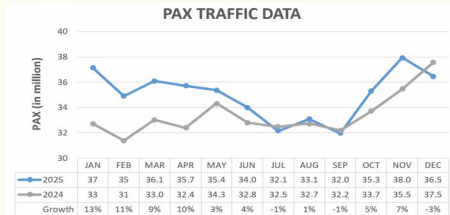
### Pax traffic at a glance

During the year 2025, airports across the country handled ~420 million pax traffic as against ~401 million during 2024, witnessing a growth of 5% in overall traffic. Enhancing the overall traffic profile, international pax traffic demonstrated robust growth of 8% during this year, while the domestic pax traffic experienced a 4% growth.

The following table depicts the international and domestic pax traffic handled at Indian airports during 2025 vs. 2024:

(PAX in million)	2025	2024	% Growth YoY
International	81	75	8%
Domestic	339	325	4%
<b>Total</b>	<b>420</b>	<b>401</b>	<b>5%</b>

Month-wise comparison of total pax traffic handled during the year 2025 and 2024 is shown below:



### Key highlights:

- The top 5 airports in the country continue to handle more than 55% of the total passenger traffic.
- Around 70% of the total international traffic and 52% of domestic traffic is handled by these top 5 airports.
- Delhi's Indira Gandhi International Airport (IGIA) continues to maintain its leadership position with 19% share of the total passenger traffic handled

across India, followed by Mumbai and Bengaluru with 13% and 10% share respectively.

- Delhi Airport alone has handled 27% of the total international pax traffic, followed by Mumbai Airport with 20% share.
- In terms of growth in international pax traffic, Bengaluru Airport reported the highest growth of 28% amongst the top 5 airports, followed by Hyderabad registering an increase of 18%. This surge highlights the emerging role of South Indian hubs in connecting the country to the global network.
- About 65% of the Goa's international pax traffic has been handled by the new airport (MoPA).

### Freight traffic at a glance

During the year 2025, airports across the country handled ~3,873 thousand tonnes freight traffic as against ~3,700 thousand tonnes during 2024, witnessing a growth of 5% in overall freight traffic. The following table depicts the freight traffic handled at Indian airports during 2025 vs. 2024:

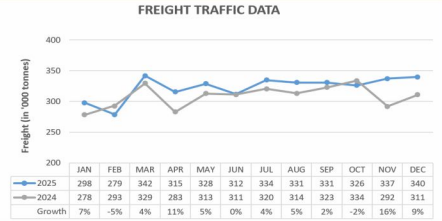
Freight (In, 000 tonnes)	2025	2024	% Growth YoY
International	2,414	2,316	4.2%
Domestic	1,459	1,384	5.4%
<b>Total</b>	<b>3,873</b>	<b>3,700</b>	<b>4.7%</b>

Reinforcing the overall traffic profile, international freight traffic demonstrated 4.2% growth during this year, while the domestic freight traffic experienced a growth of 5.4% resulting in an overall growth of 4.7% in total freight traffic handled during this year.

Month-wise comparison of freight traffic handled during the year 2025 and 2024 is shown in the next table.

### Key highlights of the year 2025:

- The top 5 airports in the country handled more than



81% of the total freight traffic, underscoring the infrastructure reliance on key metropolitan centres.

- More than 90% of the total international and 67% of domestic freight traffic is handled by these top 5 airports.
- Delhi's Indira Gandhi International Airport (IGIA) continues to maintain its leadership position with 29% share of the total freight traffic handled, followed by Mumbai, Bengaluru and Chennai with 24%, 13% and 11% share respectively.
- In terms of growth in international freight traffic, Chennai Airport reported the highest growth of 11% amongst the top 5 airports, closely followed by Hyderabad registering an increase of 10.5%.
- In terms of growth in domestic freight traffic, Chennai Airport reported the highest growth of 10% amongst the top 5 airports, followed by Delhi (IGIA) registering an increase of 8%.
- Other major airports contributing significantly to the expansion of total freight traffic include Ahmedabad, Kochi, Pune, Guwahati and Jaipur.

Overall, this year highlighted both the resilience and evolving complexity of India's aviation sector. While passenger traffic continued to expand and both domestic & global connectivity saw a significant boost, this year also underscored the operational and regulatory challenges associated with rapid growth. As airlines expand fleets, airport infrastructure scales up and regulatory frameworks get more robust, India's aviation ecosystem is expected to remain one of the most strategically significant air travel markets globally.

**Report By:**  
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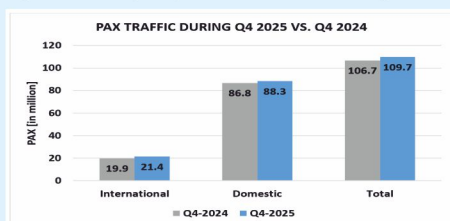


## Quarterly Review of Indian Aviation – Q4-2025

### Pax traffic at a glance

India's aviation sector maintained strong growth momentum through Q4 2025, supported by resilient travel demand and continued capacity expansion across key international & domestic routes. Passenger traffic trends underscore the structural strength of the market and increasing depth of air connectivity across the country. During Q4 2025, airports across the country handled ~109.7 million pax traffic as against ~106.7 million during the same quarter last year, witnessing a growth of ~3% in overall traffic.

Here is a visualization of international and domestic pax traffic handled at Indian airports during Q4 of 2025 vs. 2024: International pax traffic demonstrated a robust growth of around 8% during this quarter, while the domestic pax traffic experienced marginal growth of about ~2%, netting out an



overall growth of ~3% in total pax traffic handled during this period.

### Key highlights:

- The top 10 airports in the country continue to handle over 70% of the total pax traffic, underscoring their criticality to India's aviation ecosystem.
- More than 83% of the total international traffic and ~67% of domestic traffic is handled by these top 10 airports.

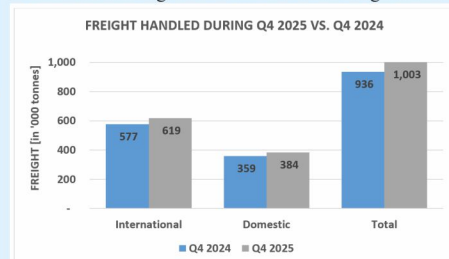
- Delhi's Indira Gandhi International Airport (IGIA) reigns supreme with 19% share of the total pax traffic handled across India, followed by Mumbai and Bengaluru with 13% and 11% share respectively.

- Delhi Airport alone handled more than 26% of the total international pax traffic, followed by Mumbai Airport with 21%.

- In terms of international pax traffic, Bengaluru Airport reported the highest growth of 25% amongst the top 10 airports, followed by Hyderabad which registered an increase of 20%. This surge reinforces the emerging role of South Indian hubs in boosting global connectivity.

### Freight traffic at a glance

The air freight segment continued its growth stride, despite the challenges and global supply chain shifts. During Q4 2025, Indian airports handled a significant volume of 1003 thousand tonnes of freight, compared to 936 thousand tonnes during the same quarter last year. With this, we witnessed a robust growth of 7% in overall freight traffic.



The overall growth in air freight was powered by expansion in both international and domestic segments, with international volumes witnessing a marginally higher growth rate during the quarter. International freight handled increased from 577 to 619 thousand tonnes during this period, registering an increase of 7.3%. Domestic freight increased from 359 to 384 thousand tonnes, registering 6.8% growth during this period.

### Key highlights:

- The top five airports (Delhi, Mumbai, Bengaluru, Chennai and Hyderabad) handled more than 90% of the total international freight. Delhi Airport leads the international market, handling more than 30% of the total international freight, closely followed by Mumbai Airport with a 29% share. Bengaluru (13.5%) and Chennai (13.1%) together account for a significant chunk of the pie.
- In the domestic segment, concentration is slightly lower but still significant, with the top five airports handling over 66% of total domestic freight. Delhi Airport retains the highest share at 28%, followed by Mumbai (~15%) and Bengaluru (~13%).
- In the international segment, Hyderabad Airport reported the highest growth rate among the top 5 airports at 15%, followed by Chennai Airport (9%). Hyderabad's status as a major global pharmaceutical and biotech hub coupled with new dedicated freighter services are the major contributors to this surge in volumes.
- Bengaluru Airport achieved the highest growth in the domestic sector at 11%, followed by Hyderabad Airport (9%).
- Other major airports contributing significantly to the expansion of domestic freight traffic include Ahmedabad, Kochi, Pune, Jaipur, Indore, Patna, Port Blair, Ranchi, Surat and Varanasi.



## Aviation Happenings in BRIEF

- Prime Minister Shri Narendra Modi inaugurated AAI's Purnea Airport in Bihar.
- Union Minister K. Rammohan Naidu Launches Yatri Sewa Diwas to Strengthen Passenger Welfare.
- India's aviation sector has witnessed rapid growth, with air travellers rising from 11 crore in 2014 to nearly 25 crore in 2025.

India's domestic passenger traffic is projected to rise to 172–176 million in FY26. Airlines added 5% capacity, expanding the fleet to 855 aircraft, with 1,600+ new planes on order. Grounded aircraft have reduced to 15–17% of the fleet, showing operational recovery amid financial pressures.

SOURCE : ICRA

## IN REMEMBRANCE

### Aviation Sector Mourns Passing of Shri S Ramanathan, Founding Chairman, IAAI



The stake holders of Aviation sector have expressed deep condolences following the passing of Shri S Ramanathan, IAS the visionary founder Chairman of the International Airports Authority of India. A pioneering leader, Ramanathan is credited with laying the groundwork for the country's modern aviation infrastructure during an era when India managed only four international metro airports.

Under his transformative leadership, the sector evolved into a robust network that bolstered national economic progress and global connectivity. Aviators honored his dedication and wisdom, noting that his legacy remains a cornerstone of India's civil aviation development. The organization extended its heartfelt sympathies to his family member, recognizing his invaluable contributions that continue to inspire future generations of aviation leaders.



### Shri Raman Sidhu, FCA Appointed Chairman of EBG Federation, India

Shri Raman Sidhu, FCA, has assumed the role of Chairman of the Board of Directors of the EBG Federation, India. Addressing a focused gathering of industry leaders and stakeholders recently, Shri Sidhu outlined a strategic vision to strengthen economic ties between European enterprises and the Indian market. The EBG Federation continues to serve as a premier platform for European businesses in India.

## APJ Abdul Kalam Knowledge Centre

Union Minister of Civil Aviation, Shri Ram Mohan Naidu Kinjarapu, inaugurated the Dr. APJ Abdul Kalam Knowledge Center at The Aeronautical Society of India (AeSI) in New Delhi on March 18, 2026. The center aims to foster youth engagement in science, technology, and aerospace, aligning with the vision of a "Viksit Bharat by 2047".



## Dr. R.K. Tyagi Shares Success Mantras at Shri Ram Group

Under the AICTE Distinguished Professional Scheme, Dr. R.K. Tyagi, former CMD of HAL, delivered a guest lecture titled "Success Mantra – Dreams to Discipline" at Shri Ram Group of Colleges, Muzaffarnagar. Addressing 150 students, he emphasized goal clarity, ethical leadership, and discipline as vital pillars for professional excellence and long-term career growth.



## EBG Chairman Raman Sidhu Attends Inauguration of Advanced Railway Component Plant

Mr. Raman Sidhu, Chairman of the European Business Group (EBG) Federation, recently attended the inaugural function of a state-of-the-art manufacturing plant in Baramati as the Guest of Honour. The facility specializes in producing under-sleeper pads specifically designed for Metro and Railway networks.

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