



MAY 2019 EDITION

CAPA INSIDER

South Asia



CAPA
INDIA

Solutions-focused Aviation
Advisory, Research &
Knowledge





Until recently, India was the fastest growing major aviation market in the world. But with one of its largest carriers suspending operations due to financial difficulties, this is creating unanticipated challenges as well as new opportunities.

In such a fluid environment, sound advice - based on a deep understanding of the market, careful analysis and accurate data - is critical. This is CAPA India's strength. We are honoured that some of the leading names in global aviation are turning to us to help them navigate the changing tides in the sector.

In the last few months we have worked on a diverse set of projects ranging from airline restructuring for an African national carrier to airport bid advisory, due diligence in the ground handling sector, route development for an Australian airport, and preparation of a tourism marketing strategy for an ASEAN destination.

We look forward to continuing to expand our portfolio of experience in aviation, travel and tourism; strengthening our analytics, custom research and transaction advisory divisions; and to developing new verticals in aerospace and defence to support the growth of the industry.



PETER HARBISON

Executive Chairman
CAPA – Centre for Aviation



Our Recent Client Engagements And Studies

African flag carrier: Due diligence on business plan and development of new fleet and network strategy.

European network carrier: Business case and strategy to support bilateral air services negotiations.

Privatisation of six airports: End-to-end bid advisory services for the privatisation of six airports.

Aviation regulator: Global benchmarking of skills and resources, and strategy to finance institutional strengthening.

ASEAN airport operator: Benchmarking of non-aero business, and development of plan to maximise revenue.

Global private equity fund: Financial and strategic due diligence of a travel distribution business.

Regional airline: Comprehensive blueprint and financial model for a start-up regional airline.

Airport operator & tourism board: Route development study, and marketing strategy to support new long haul service.

Ground handler: Due diligence to support proposed acquisition of a handling company.

Premium FBO: Strategy to attract increased business jet activity for the operator of a luxury lounge and FBO.

Southeast Asian tourism board: Strategic review and assessment of the destination's customer proposition.

Key Strategic Initiatives

CAPA ANALYTICS IN PARTNERSHIP WITH



CAPA and TransOrg Analytics have joined forces to deliver research-enabled data science (ReDS) solutions to aviation and travel companies. Our offerings enable clients to make superior strategic, operational and tactical decisions, based on a unique combination of data science, applied research and industry expertise.

CAPA AIRCRAFT ADVISORY

CAPA Aircraft Advisory provides a flexible range of services to assist our clients through the process of acquiring, leasing or selling an aircraft, including aircraft evaluation and modelling; OEM and lessor liaison; aircraft placement support; transaction and financing advisory; and asset management and risk monitoring for banks and lessors.

CAPA GLOBAL DELIVERY CENTRE

CAPA Global Delivery Centre (GDC) provides customised research and data analysis, to enable continuous planning and decision support. We can assist with services such as market analysis, benchmarking studies, financial modelling, competitor tracking, opportunity identification and risk assessments.

DID YOU KNOW?

In 2018, India's largest airport, Delhi Indira Gandhi International, was once again the fastest growing of the world's 20 largest airports. It climbed four places in the global rankings, making it the 12th largest airport in the world by passenger traffic.



Source: CAPA India research and analysis; Airports Council International

Latest CAPA Insights

Key highlights of the CAPA India Aviation Outlook 2019/20

The annual CAPA India Aviation Outlook Report has become established as the indispensable guide for companies with exposure to Indian aviation, delivering accurate, timely and in-depth analysis and data. In this summary presentation, we present the key highlights of our 2019/20 outlook covering domestic and international capacity and traffic, industry profitability, fleet orders, policy and regulation and key strategic trends.

Click [here](#) to request a complimentary copy.

Prospects for an Indian Aircraft Leasing Sector

India's airlines have an order book of close to 1000 aircraft, valued at over USD50 billion. By 2050, the country's commercial fleet is expected to exceed 5000 aircraft. In anticipation of the long-term requirements of the country's aviation industry, the Government of India is exploring measures to encourage the establishment of aircraft leasing operations domiciled in India. In this report, CAPA outlines its perspective on the prospects for this initiative.

Click [here](#) to request a complimentary copy.

Indian Aviation – a USD250 billion investment opportunity

Investments in the Indian aviation sector, and the corresponding economic impact, are expected to outperform GDP growth over the next 20 years, and could represent a USD250 billion opportunity by FY2040. In this presentation, CAPA summarises historic and projected investment flows by sector.

Click [here](#) to request a complimentary copy.

Latest CAPA Insights (Cont'd.)

If CAPA can be of any assistance with advisory or research services, please contact us on +91 11 2341 4440 or enquiry@capaindia.com

CAPA India Pilot & Manpower Forecasts

Over the next 10 years, the rapid growth of India's aviation sector will drive demand for 250,000 additional staff across the industry, from pilots to cabin crew, engineers, management, commercial, financial and operational specialists, ground handlers, air traffic controllers etc. This presentation includes CAPA's manpower forecasts and an overview of the key strategic issues facing the industry, such as the availability of education and training infrastructure, labour productivity, competition from other markets and the absence of a long term plan for skills development.

Click [here](#) to request a complimentary copy.

CAPA India 20-year Market & Fleet Forecast

India is currently the fastest growing major aviation market in the world. And optimism about future expansion is reflected in the fact that amongst leading markets, India has the highest ratio of aircraft on order to aircraft in-service. This presentation highlights CAPA's 20-year projections for domestic and international air traffic and fleet size in India.

Click [here](#) to request a complimentary copy.

India Outbound Travel Opportunity

The 2018 CAPA-Expedia Outbound Travel Report shone a spotlight on international leisure travel ex India, quantifying the size of the current market and its growth potential. This presentation provides an update on recent travel trends to key destinations.

Click [here](#) to request a complimentary copy.

CAPA Team Spotlight

CAPA is proud of its team of skilled and dedicated consultants and analysts, who possess a unique combination of aviation experience and a deep understanding of advisory and research methodologies.

Employees of the Quarter



DIPRA DEY
Q1
WINNER



LENISH PATEL
Q1 & Q2
WINNER



ARUN SASIDHARAN
Q1 & Q3
RUNNER-UP



SHRUTI PORWAL
Q1 & Q2
RUNNER-UP



DINESH KUMAR
Q2
WINNER



ABHINANDITA BANERJEE
Q2 & Q4
RUNNER-UP



VARUN KUMAR
Q3 & Q4
WINNER



PAVAN SONI
Q3
WINNER



DIPRA DEY
Q3
RUNNER-UP



SATHYANARA-YANAN
Q4
WINNER



RAAGHUL RAMANI
Q4
RUNNER-UP



JAGGAN SINGH
Q3 & Q4 (SUPPORT)
WINNER



MAHESH CHANDRA
15 YEARS



PARAMPRITH SINGH BAKSHI
7.5 YEARS



DIPRA DEY
3 YEARS

CAPA Presentations at Industry Events

CAPA India is an active member of the aviation community. We regularly welcome industry representatives to our offices and are invited to share our insights at key forums in India and overseas. Presentations have recently been delivered at the following events:



Airport Modernisation Summit,
Bangalore, 2-3 August 2018

Air Mauritius & IATA Aviation Day,
Mauritius, 18 September 2018

India New Zealand Business Council Summit,
Auckland, 28 September 2018

Travel Agents Association of India Annual Summit,
Kunming, 27-29 November 2018

Global Aviation Summit,
Mumbai, 15-16 January 2019

Airports in India Summit,
New Delhi, 5 February 2019

Prabhudas Lilladher Investor Meetings,
Mumbai, 15-16 April 2019

Sabre Travel Leaders Forum,
Mumbai, 16 April 2019

Staff Social Events

1) Annual Corporate Trip to Mauritius

2) Celebrating 15 Years of CAPA India,
Masala House, New Delhi

3) CAPA India team bonding trip,
Sattal, Uttarakhand

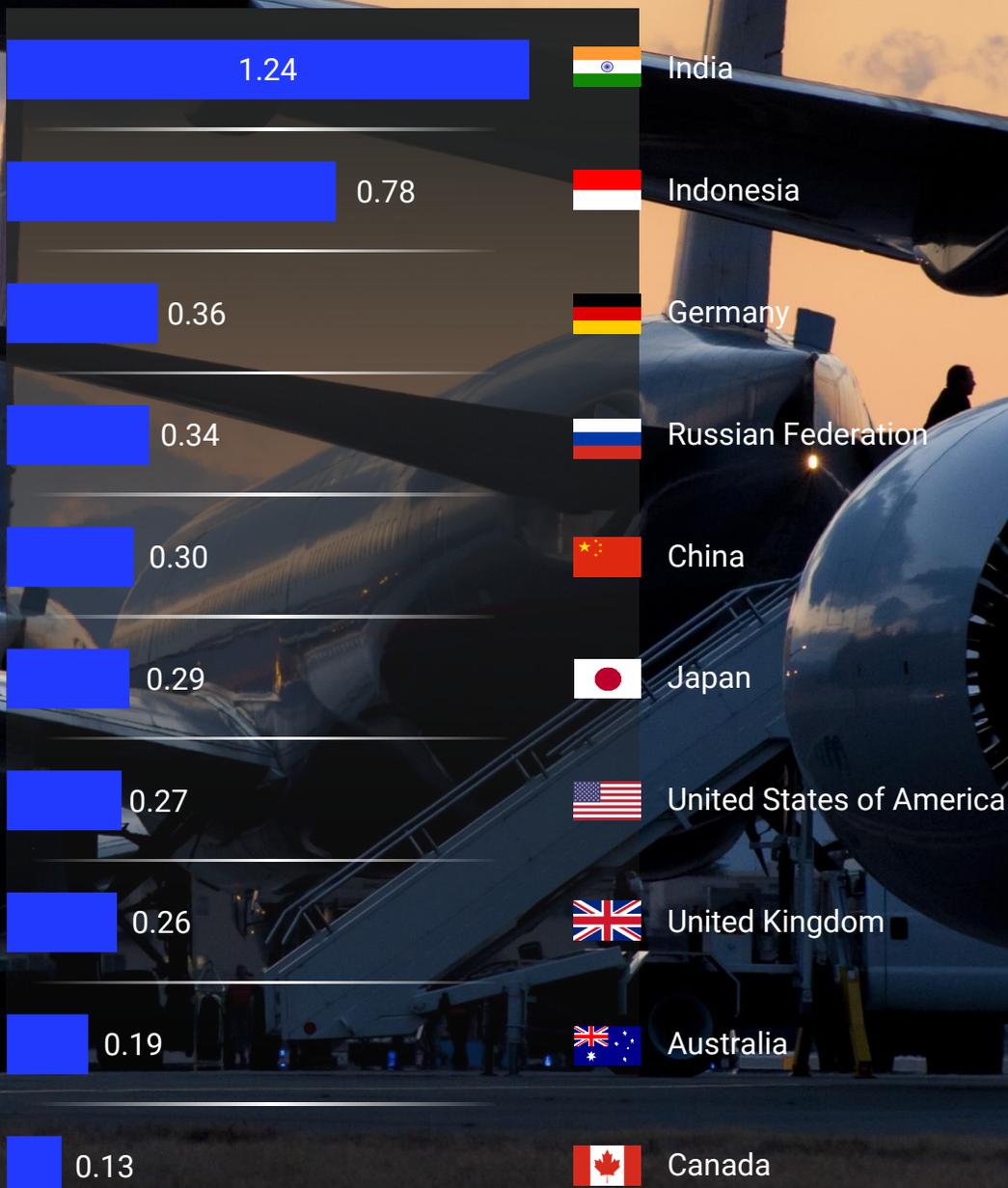
4) Celebrating the Diwali spirit, CAPA
India Office, New Delhi



DID YOU KNOW?

Amongst the 10 largest fleets in the world by country, India has the highest ratio of aircraft on order to aircraft in-service.

Ratio of aircraft on order to aircraft in-service





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