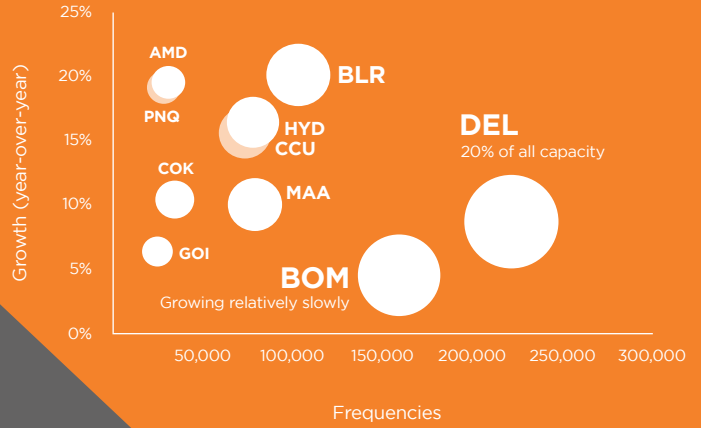


# INDIA ON THE MOVE

## AIRPORTS - CHALLENGE OF RAPID CAPACITY GROWTH

More than 30 airports in India handle >1 million passengers p.a.



## FOREIGN CARRIERS ACTIVE IN INDIAN MARKET

20 additional flights each day being operated by non-Indian airlines to/from India in Sept 2018 (vs Sept 2017).



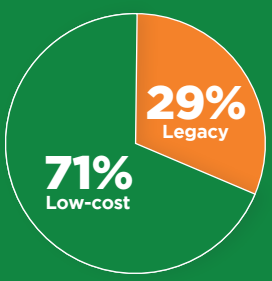
Domicile of foreign airline flights to India

- Middle East: 44%
- South East Asia: 34%
- Europe: 8%
- Other Asia: 5%
- Africa: 4%
- FSU & Central Asia: 4%
- North America: 1%

## LOW-COST DOMINATES DOMESTIC INDIAN AVIATION

Operating almost three quarters of all seats, LCC's now define domestic travel in India.

Domestic capacity Sept 2018



Growth vs Sept 2017

