

INDIA AVIATION

INDUSTRY INTELLIGENCE REPORT

Workforce · Competition · Compensation · Behaviour

2025 – 26

INDIA | AVIATION SECTOR

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₹3,50,000 Cr

Total aviation industry size (est.), growing at 15% YoY with a 12% 3-year CAGR — airlines contribute ~71% of total market revenue.

3,75,000

Total aviation workforce in India (2025–26); airlines dominate at 67% share (2,50,000 heads), with ground operations as the most labour-intensive workstream at 33%.

12,000 vs 37,000

Current pilot count vs projected demand — a 60% gap in senior pilots at metro hubs (Delhi NCR, Mumbai) driven by DGCA licensing backlogs and Middle East poaching.

₹144–180L

Peak annual compensation for captains with 22+ years — type-rating (A320/B737) commands a 50% skill premium; DGCA licensing adds 30% uplift for AMEs.

30% attrition

Airlines lead attrition across sub-industries; 3–7 year experience band is the most volatile cohort — 30% attrition + 50% job-change intent among pilots.

₹36,000 Cr MRO

MRO market size, growing at 10% YoY — yet AME training capacity meets only 50% of demand; Bengaluru & Hyderabad hold 60% of MRO talent.

Tier-2 <10%

Despite Adani's 8-airport expansion, Tier-2 cities hold under 10% of aviation talent — metro concentration creates systemic supply constraints across all sub-industries.

01

INDUSTRY OVERVIEW

Market Size · Talent Pool · Workforce Architecture

1.1 MARKET SIZE & GROWTH

₹3,50,000 Cr

Total Market Size
(est. 2025–26)

15%

YoY Growth
(2025–26)

12%

3-Year CAGR

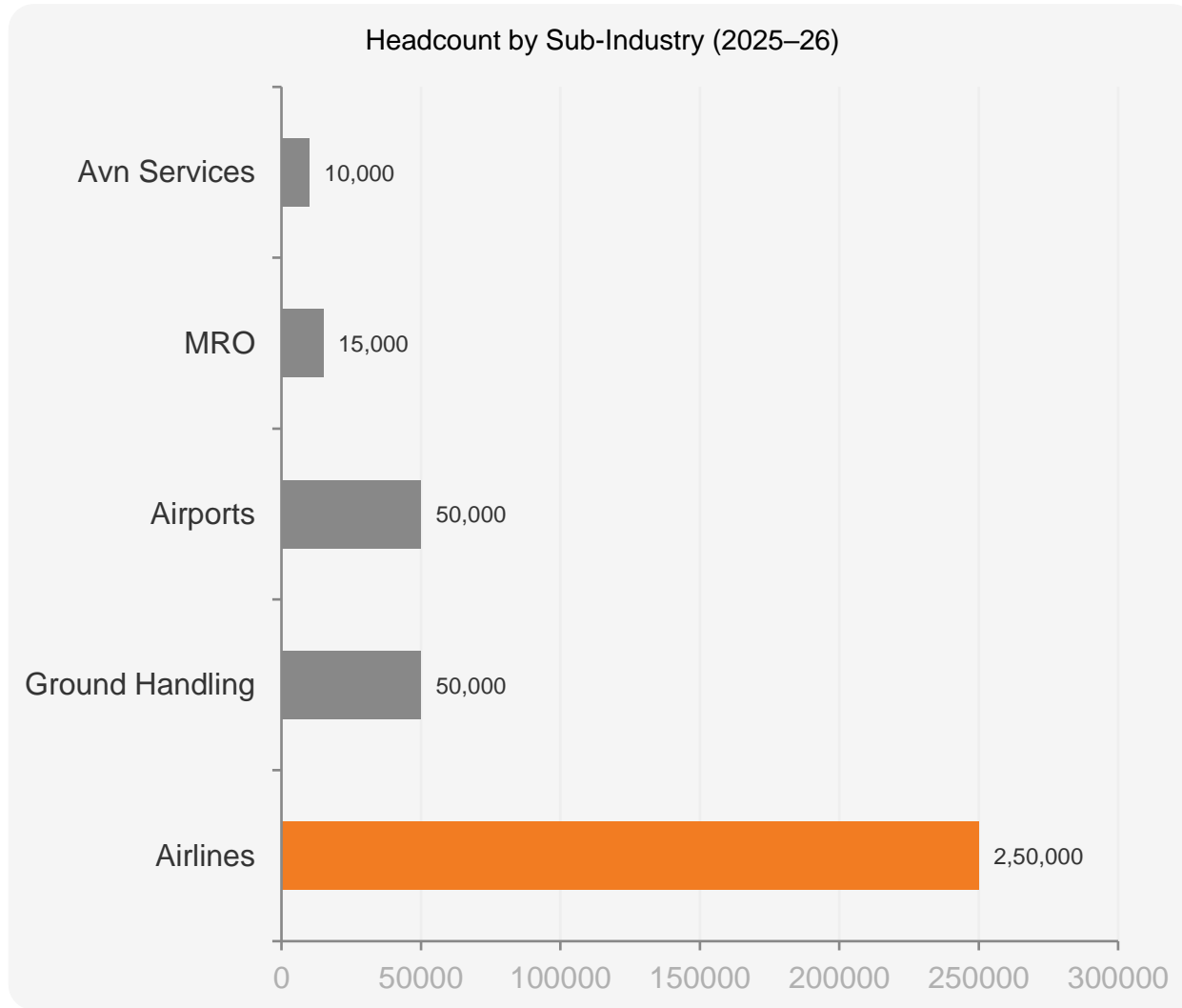
₹36,000 Cr

MRO Market
(est. \$4.4B)

Sub-Industry	Market Size (₹ Cr)	YoY Growth	3-Yr CAGR	Source
Airlines (Total)	2,50,000 (est.)	15%	12%	IBEF 2025
Airports	50,000	20%	18%	PIB 2025
MRO	36,000 (~\$4.4B)	10%	8%	ET 2026
Ground Handling	NA	NA	NA	—
Aviation Services	NA	NA	NA	—
TOTAL (est.)	~3,50,000	15%	12%	Multiple

¹ IBEF ² PIB ³ Economic Times 2026 | Airlines FSC/LCC split not available; grouped total used.

1.2 TALENT POOL SIZE — HEADCOUNT

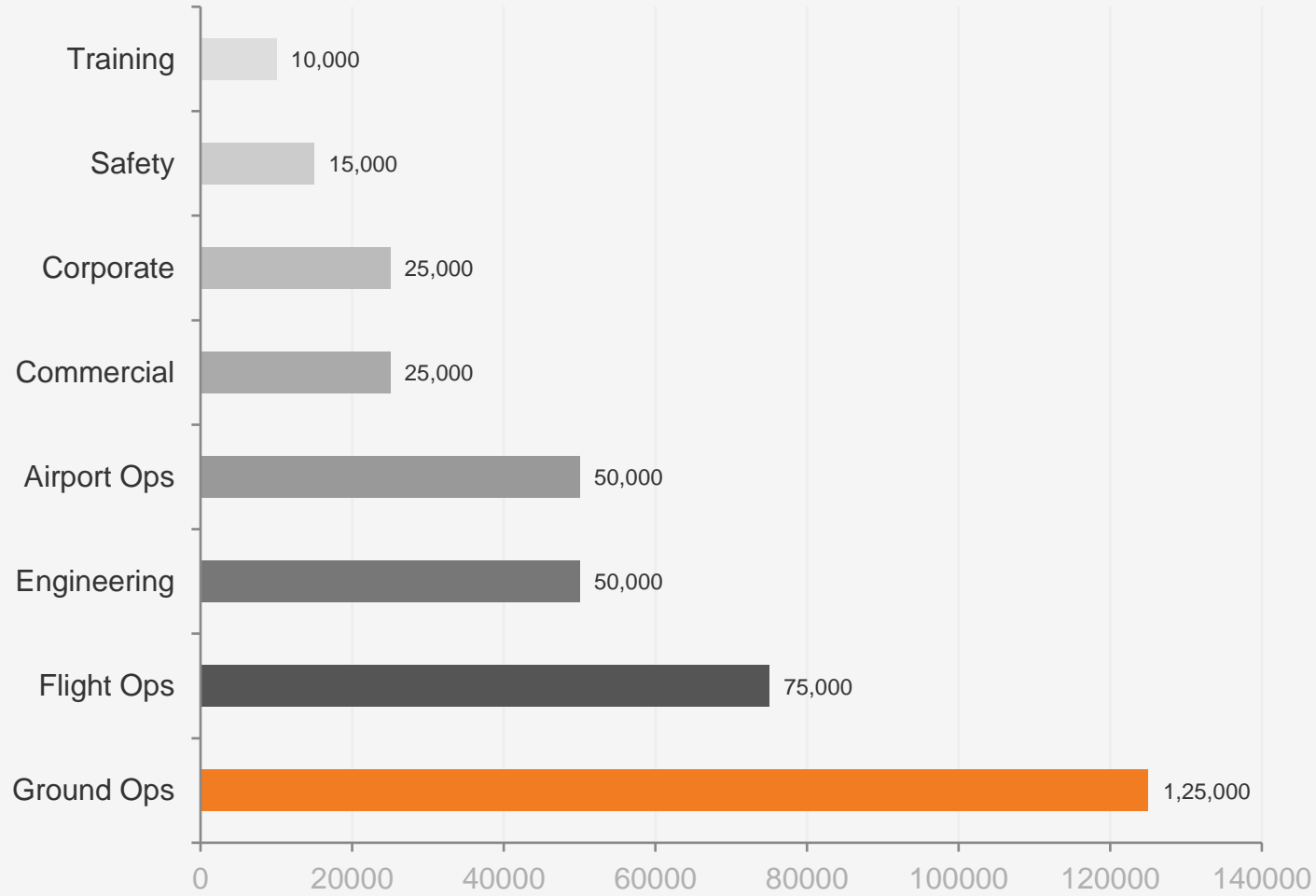


Sub-Industry	Headcount	% Share	Data Type
Airlines	2,50,000	67%	Estimated
Airports	50,000	13%	Direct
Ground Handling	50,000	13%	Estimated
MRO	15,000	4%	Estimated
Aviation Services	10,000	3%	Estimated
TOTAL	3,75,000	100%	Direct (IADB/AMECET)

¹ IADB 2026 ² AMECET 2026 ³ LinkedIn Employee Counts 2025 ⁴ Drishti IAS 2025

1.3 WORKSTREAM DISTRIBUTION

Headcount by Workstream (2025–26)



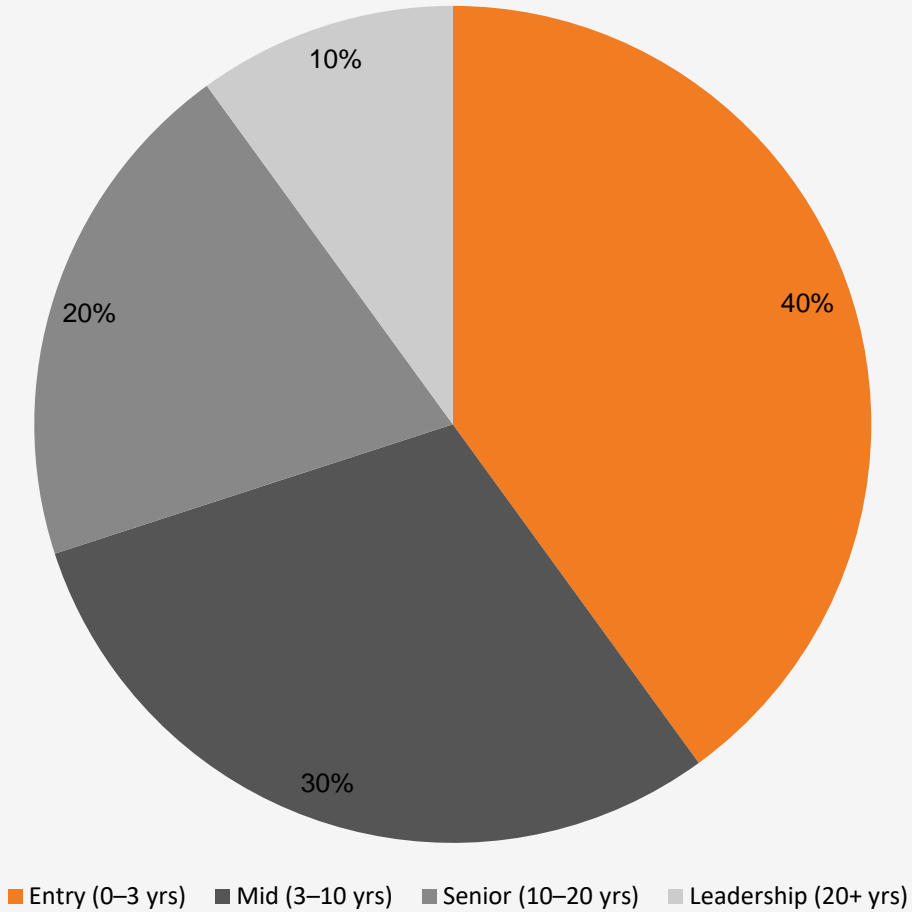
FUNCTIONAL INTENSITY MATRIX (% per sub-industry)

Sub-Industry	Flt	Eng	Gnd	Apt	Cmr
Airlines	35%	15%	25%	5%	10%
Airports	5%	10%	20%	40%	5%
MRO	0%	70%	10%	0%	0%
Ground Hndl	0%	5%	80%	5%	0%
Avn Services	10%	20%	10%	10%	5%

¹ AMECET 2026 ² IADB 2026 ³ PIB 2025 | Proxy-based estimation. Row totals = 100%.

1.4 SENIORITY MIX — TALENT PYRAMID

Workforce by Seniority Level



Level	Headcount	% Share	Typical Roles
Entry (0–3 yrs)	1,50,000	40%	Cabin crew, Ground staff, Technicians
Mid (3–10 yrs)	1,12,500	30%	FO Pilots, AMEs, Ops Managers
Senior (10–20 yrs)	75,000	20%	Senior Pilots, Engg Leads
Leadership (20+ yrs)	37,500	10%	Captains, VPs, C-suite
TOTAL	3,75,000	100%	—

⚠️ STRUCTURAL ALERT

Senior + Leadership cohort = 30% of workforce — well below global benchmarks. Mid-level 3–7yr band shows 30% attrition, creating an upgrade bottleneck that constrains rapid fleet expansion.

¹ IADB 2026 ² Aviation Hiring Landscape Blog 2026 | Proxy-based seniority splits.

1.5 PRODUCTIVITY BENCHMARKS

Sub-Industry	Revenue / Employee (₹ Cr)	Employees / Aircraft	Data Type
Airlines	₹1.0 Cr	250	Estimated
MRO	₹2.4 Cr	NA	Direct
Airports	NA	365 per airport (AAI)	Direct (AAI)
Ground Handling	NA	NA	NA

KEY INSIGHT SNAPSHOT

- Airlines dominate talent pool at 67%, driving ~70% of total hiring demand (LinkedIn 2025).
- Ground Operations is the most talent-intensive workstream (33% share, 1,25,000 headcount) — AMECET 2026.
- Senior/Leadership cohort at 30% signals upgrade bottleneck; mid-layer 3–7yr band is highest attrition risk.
- Pilot gap critical: 12,000 current vs 37,000 demand — 60% shortfall concentrated in Delhi NCR & Mumbai (IADB 2026).
- Tier-2 talent share <10% despite Adani 8-airport expansion — India Briefing 2025.
- MRO revenue/employee (₹2.4 Cr) outperforms Airlines (₹1.0 Cr), reflecting high-skill premium of licensed engineers.

COMPETITION MAPPING

Top Companies · Geographic Presence · Talent Competition

2.1 COMPETITION MAPPING — AIRLINES

Company	Headcount	Position	Delhi NCR	Mumbai	Bengaluru	Hyderabad	Chennai	Kolkata	Tier-2
IndiGo	36,000	Leader	Major	Major	Major	Major	Ops	Ops	Major
Air India	32,000	Leader	Major	Major	Ops	Ops	Ops	Ops	Limited
Vistara (merged)	15,000	Challenger	Major	Major	Ops	Ltd	Ltd	Ltd	Limited
Akasa Air	4,000	Challenger	Ops	Major	Ops	Ops	Ltd	—	Limited
SpiceJet	8,000	Niche	Major	Ops	Ltd	Ltd	Ltd	Ops	Major

TALENT INTENSITY

Company	Emp / Aircraft	Hiring Intensity	Key Roles Hired
IndiGo	250	High	Pilots, Cabin Crew
Air India	300	High	Pilots, Engineers

STRATEGIC NOTES

- IndiGo: 60% workforce in metros vs industry 80% metro skew (IBEF 2026)
- Air India: High training investment — 50k pipeline post-merger (UJA 2025)
- Akasa: Rapid scaling — 30% YoY hires (Captain Aviation Academy 2026)

¹ LinkedIn 2025 ² Facebook 2025 ³ IBEF 2026 ⁴ Captain Aviation Academy 2026

2.2 COMPETITION MAPPING — AIRPORTS · MRO · GROUND HANDLING

AIRPORTS

Company	Headcount	Focus	Key Cities
AAI	50,000	137 airports	Pan-India
GMR Airports	20,000	Delhi/Hyd	Del, Hyd
Adani Airports	15,000	Mumbai +8	Mum, Ahm+
BIAL	10,000	Bengaluru hub	Bengaluru

GROUND HANDLING

Company	Headcount	Focus
Celebi	15,000	Metro airports
Quikjet / AI SATS	10,000	Cargo/handling
GMR Services	8,000	Delhi/Hyderabad

MRO

Company	Headcount	Focus	Hub City
AIESL	5,000	Wide/narrow body	Del, Mum
IndiGo MRO	3,000	In-house fleet	Del, Blr
GMR Aero Technic	2,000	Hyderabad hub	Hyderabad
Airworks India	1,500	Engines/comp.	Mum, Blr

TALENT COMPETITION INTENSITY MATRIX

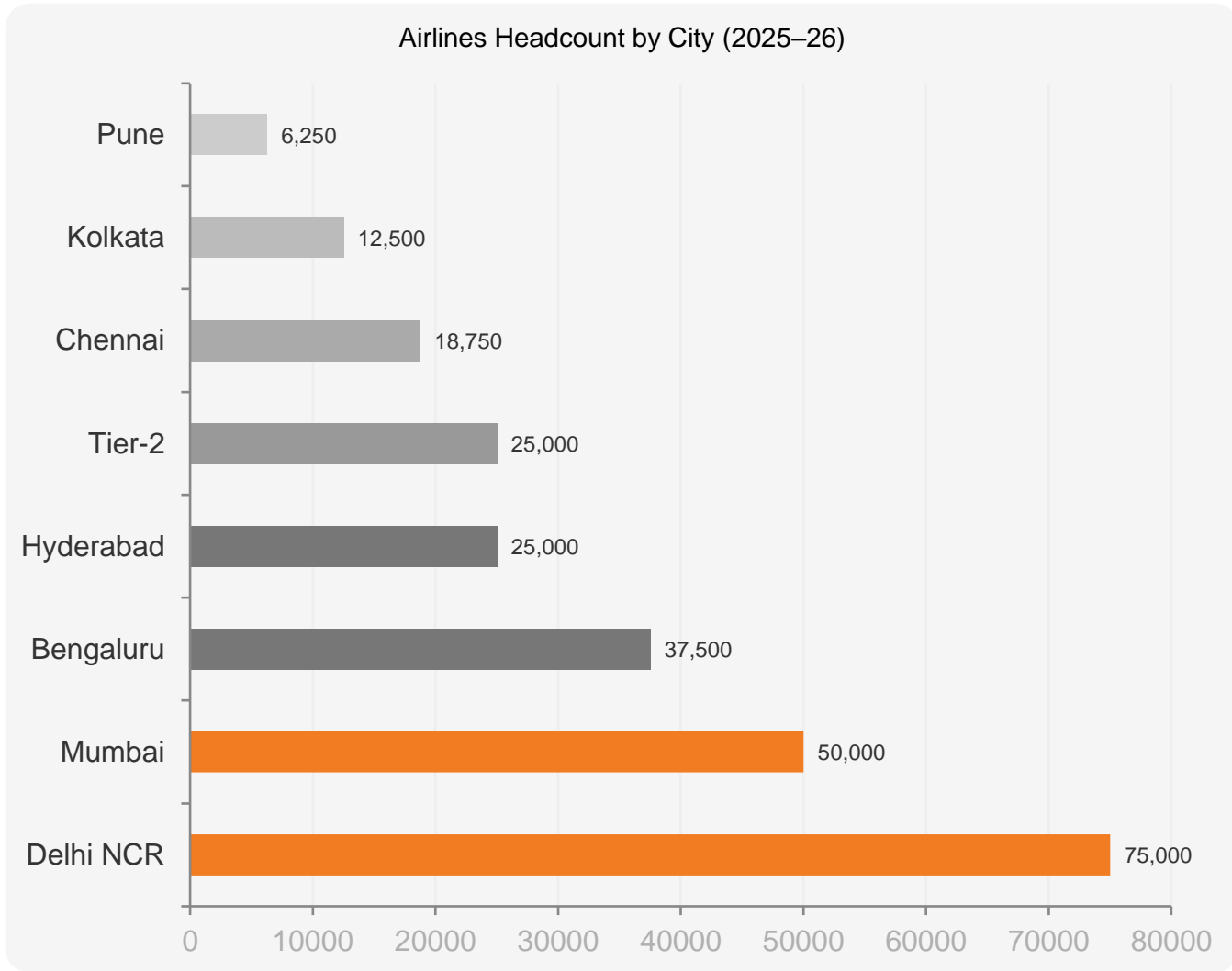
Sub-Industry	Competition	Supply Depth	Bottleneck Role
Airlines	HIGH	Medium	Pilots
Airports	Moderate	High	Security
MRO	HIGH	LOW	AMEs
Ground Handling	Moderate	High	Ramp Staff
Avn Services	Low	Low	Trainers

¹ IBEF 2026 ² AMECET 2026 ³ IADB 2026 ⁴ LinkedIn MRO 2025

TALENT ARCHITECTURE

City Pools · Campus Pipeline · Talent Gaps

3.1 CITY-WISE TALENT POOL — AIRLINES (PRIMARY)



City	Headcount	% Share	Top Roles	Cluster
Delhi NCR	75,000	30%	Pilots, Cabin, Gnd Staff	Ops Hub
Mumbai	50,000	20%	Cabin, Gnd, Pilots, Comm.	Ops Hub
Bengaluru	37,500	15%	Corporate, Tech	Corporate Hub
Hyderabad	25,000	10%	Ops	Ops Hub
Tier-2 (grouped)	25,000	10%	Ground	Regional Ops
Chennai	18,750	7.5%	Ops	Limited
Kolkata	12,500	5%	Ops	Limited
Pune	6,250	2.5%	Limited	NA

¹ IBEF 2026 ² LinkedIn 2025 ³ India Briefing 2025 | Top-down estimate: 30% NCR share of Airlines 2,50,000 = 75k.

3.2 CITY-WISE TALENT POOL — MRO · AIRPORTS · GROUND HANDLING

MRO

City	HC	% Share	Cluster
Bengaluru	6,000	40%	Engg Hub
Hyderabad	3,000	20%	Engg Hub
Delhi NCR	2,250	15%	Ops Hub
Chennai	1,500	10%	Components
Others	2,250	15%	NA

GROUND HANDLING

City	HC	% Share
Delhi NCR	15,000	30%
Mumbai	10,000	20%
Bengaluru	7,500	15%
Tier-2	17,500	35%

AIRPORTS

City	HC	% Share
Delhi NCR	15,000	30%
Mumbai	10,000	20%
Bengaluru	7,500	15%
Hyderabad	6,250	12.5%
Tier-2	6,250	12.5%
Chennai/Kol/Pune	5,000	10%

KEY OBSERVATION

- MRO talent concentrated: Bengaluru (40%) + Hyderabad (20%) = 60% of total.
- Airports: Delhi NCR leads at 30% (GMR + AAI combined).
- Ground Handling: Tier-2 has higher share (35%) vs Airlines (10%).
- Aviation Services: Limited data; Gurugram as primary training hub.

¹ Economic Times 2026 ² LinkedIn MRO 2025 ³ Drishti IAS 2025 ⁴ AMECET 2026

3.3 CAMPUS PIPELINE & TALENT GAP ANALYSIS

CAMPUS HIRING PIPELINE

Institution	City	Program	Grads/yr	% to Aviation
IGRUA	Raebareli (T2)	Pilot	200	90%
IAE Bhopal	Bhopal (T2)	AME	500	70%
Frankfinn	Delhi NCR	Cabin/Ground	10,000	50%

PIPELINE QUALITY

Role	Supply Adequacy	Skill Readiness	Training Req'd
Pilots	LOW	Moderate	18–24 months
AMEs	Moderate	High	6–12 months

TALENT GAP SUMMARY — CRITICAL ROLES

Role	City	Demand	Supply	Gap %	Level
Pilots (Sr)	Delhi NCR	2,000	800	60%	CRITICAL
Pilots	Mumbai	1,500	700	53%	CRITICAL
Cabin Crew	Bengaluru	5,000	4,000	20%	Low
AMEs	Bengaluru	2,000	1,000	50%	HIGH

GAP DRIVERS

- Pilot licensing delays — DGCA backlog (IADB 2026)
- AME training capacity = ~50% of demand (LinkedIn 2025)
- Metro concentration limits Tier-2 supply (India Briefing 2025)
- Middle East poaching: type-rated pilots targeted (IADB 2026)

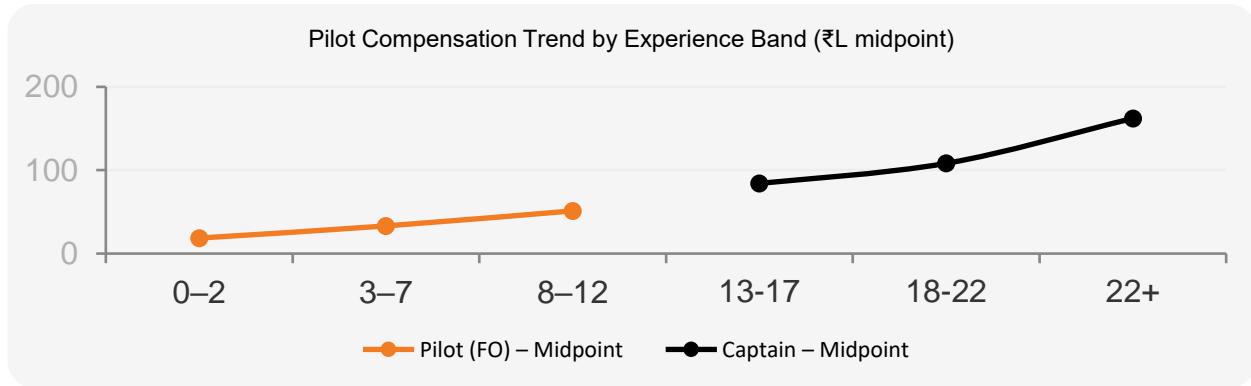
¹ IADB 2026 ² Wings Institute 2026 ³ IAE Bhopal ⁴ Facebook (Frankfinn) 2026

COMPENSATION

Role × Experience Matrix · City & Skill Premiums

4.1 COMPENSATION MATRIX — AIRLINES (₹ Lakhs, Annual Fixed)

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs	Source
Pilot (First Officer)	18–19	30–36	42–60	NA	NA	NA	VFTI 2026; Dunes Aviation 2026
Pilot (Captain)	NA	NA	NA	72–96	96–120	144–180	VFTI 2026
Cabin Crew	3–6	6–12	12–18	18–24	NA	NA	AMECET 2026; Wings 2026
AME	6–7.5	24–36	36–48	NA	NA	NA	Wings 2026
Ground Ops Manager	4–5	8–12	15–20	NA	NA	NA	Glassdoor 2025
Rev Mgmt Analyst	NA	12–15	18–24	NA	NA	NA	NA



Compensation Distribution

Aviation General Median: ₹22L | P25: ₹17L | P75: ₹50L

Pilot FO Median: ₹36L | P25: ₹24L | P75: ₹48L

Source: 6figr Aviation 2026; VFTI 2026

¹ VFTI 2026 ² Dunes Aviation 2026 ³ AMECET 2026 ⁴ Wings 2026 ⁵ Glassdoor 2025 | NA = band not valid for role.

4.2 COMPENSATION MATRICES — MRO · AIRPORTS · GROUND HANDLING (₹ Lakhs, Annual Fixed)

MRO

Role	0–2	3–7	8–12	13–17	18–22	22+
Licensed Acft Engr	6–7.2	24–30	36–48	48–60	NA	NA
Technician	3–4.5	8–12	15–20	NA	NA	NA
Quality Assurance	NA	12–18	24–30	NA	NA	NA

AIRPORTS

Role	0–2	3–7	8–12	13–17	18–22+
Airport Ops Manager	6–7.5	12–18	24–30	30–36	NA
Terminal Ops Staff	3–4.5	6–9	9–12	NA	NA
Security & Safety	4–5	8–10	12–15	15–20	NA

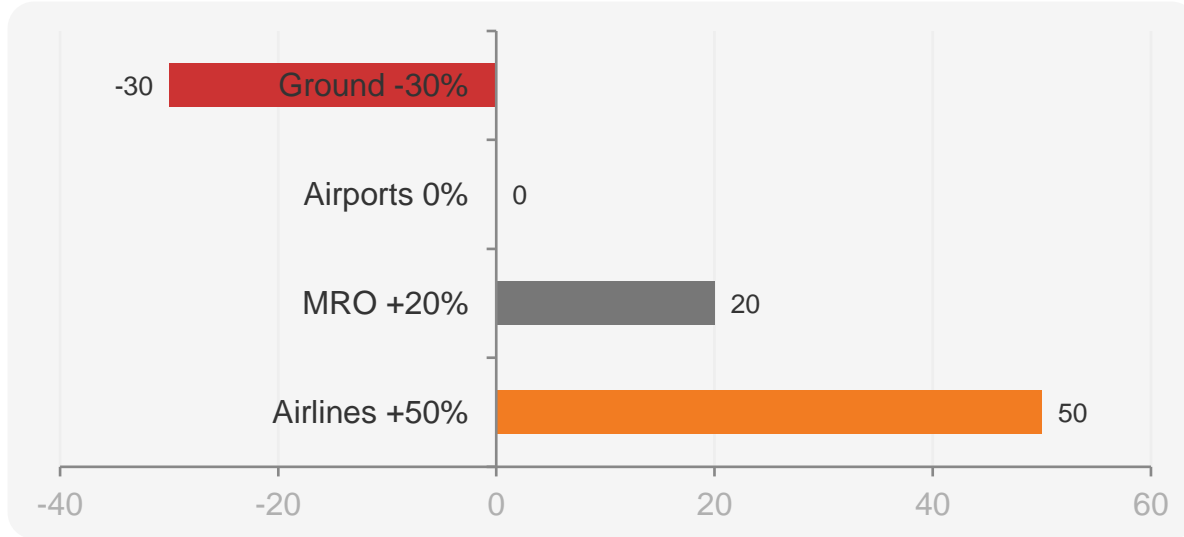
GROUND HANDLING

Role	0–2	3–7	8–12	13+
Ramp Staff	2.4–3.6	4.8–6	NA	NA
Ops Supervisor	4.8–6	9.6–12	14.4–18	NA

¹Wings 2026 ²Glassdoor 2025 ³6figr 2026 ⁴AMECET 2026 | NA = band not valid. Ranges >5% reflect allowances/variability.

4.3 PREMIUM ANALYSIS — SUB-INDUSTRY · CITY · SKILL

SUB-INDUSTRY PREMIUM (vs. National Median ₹22L)



CITY PREMIUM (vs. National Median ₹22L)

City	Premium %	Most Impacted Roles
Delhi NCR	+15%	Pilots, Managers
Mumbai	+10%	Commercial Roles
Bengaluru	+5%	Engineers (MRO)
Hyderabad	+5%	Ops (Airports/MRO)
Chennai	Baseline	Technicians
Kolkata / Pune / Tier-2	-10%	Ground staff

SKILL PREMIUM TABLE

Skill / Certification	Roles	Premium %	Sub-Industry	Availability	Demand Level	Source
Type-rated (A320/B737)	Pilots	+50%	Airlines	Low	High	VFTI 2026
DGCA Licensed	Engineers / AMEs	+30%	MRO / Airlines	Low	High	Wings 2026
Revenue Optimization	Analysts	+25%	Airlines	Medium	High	6figr (proxy)
Safety Compliance Cert.	Safety Officers	+20%	All	Medium	Moderate	Avn Indeed 2026

¹VFTI 2026 ²Wings 2026 ³6figr 2026 ⁴India Briefing 2025 | Premiums vs ₹22L national aviation median.

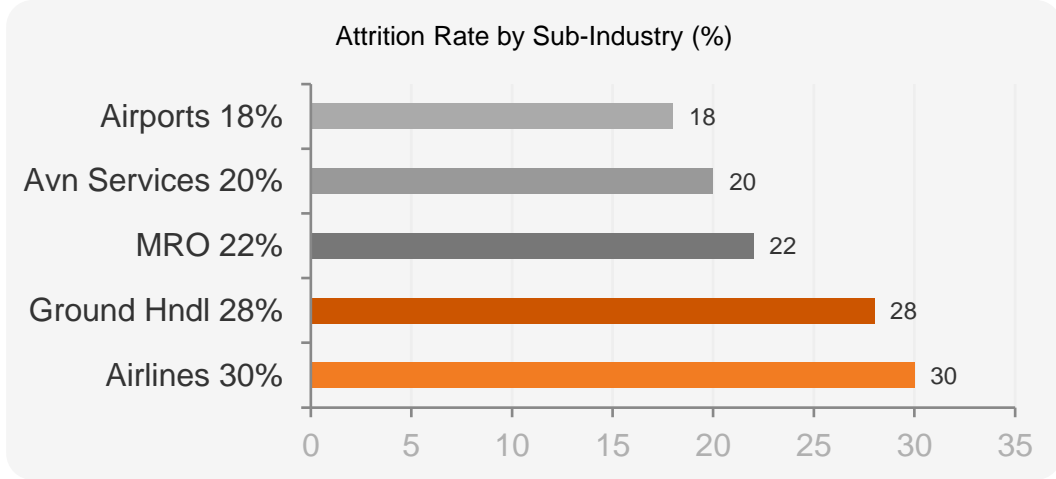
WORKFORCE BEHAVIOUR

Attrition · Job Change Intent · Talent Flight Risk

5.1 ATTRITION ANALYSIS

25%

Total Aviation Attrition Rate
(2025–26 estimated)



Exp Band	Attrition %	Risk
0–2 yrs	25%	Moderate
3–7 yrs	30%	HIGH
8–12 yrs	28%	HIGH
13–17 yrs	22%	Moderate
18–22 yrs	20%	Low
22+ yrs	15%	Low

ATTRITION HEATMAP (Sub-industry × Experience)

Sub-Industry	0–2	3–7	8–12	13–17	18–22	22+
Airlines	Moderate	CRITICAL	High	High	Moderate	Low
Airports	Low	Moderate	Moderate	Low	Low	Low
MRO	High	High	Moderate	Moderate	Low	Low
Ground Handling	High	High	High	Moderate	Low	Low
Avn Services	Moderate	Moderate	Low	Low	Low	Low

¹ IADB 2026 ² AMECET 2026 ³ Taggd 2025 | Thresholds: Low <15%, Mod 15–25%, High 25–35%, Critical >35%

5.2 JOB CHANGE INTENT & TALENT FLIGHT RISK INDEX

15%

Actively Looking

35%

Passively Open

50%

Total Mobility Pool

JOB CHANGE INTENT BY ROLE & CITY

Segment	% Considering Change	Sub-Industry
Pilots	50%	Airlines
Ground Staff	40%	Ground Handling
Delhi NCR	45%	Airlines/Airports
Mumbai	42%	Airlines
Tier-2 Cities	55%	Ground Handling

TALENT FLIGHT RISK INDEX

Segment	Attrition %	Job Change %	Risk Level
Delhi + Pilots + Airlines	35%	50%	CRITICAL
Bengaluru + AMEs + MRO	25%	45%	HIGH
Tier-2 + Ground + GH	32%	55%	HIGH
Senior Pilots 22+	15%	20%	Low

DRIVER MAPPING

Driver	Impact	Roles Affected	Evidence
Compensation gaps (Middle East poaching)	HIGH	Pilots	IADB 2026 — 10.9k shortfall
Workload / fatigue (roster issues)	HIGH	Cabin Crew / Ground	IndiGo ops proxy — Flapone 2026
Career stagnation / training limits	Moderate	Mid-level AMEs	IADB 2026

¹ IADB 2026 ² Aviation Hiring Outlook 2026 ³ AMECET 2026 ⁴ Flapone 2026 | Mobility proxied from hiring surge indicators.

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