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AN EXCLUSIVE MAGAZINE ON CIVIL AVIATION FROM INDIA



STILL STRONG

AMIDST THE UNCERTAINTY DUE TO GULF CRISIS, '26 EDITION OF FARNBOROUGH AIRSHOW PROMISES TO BE YET ANOTHER GOOD ONE. **PAGE 13**



EXCLUSIVE

"LEADERSHIP IN THE TURBOPROP REGIONAL MARKET COMES DOWN TO DELIVERING THE RIGHT BALANCE BETWEEN EFFICIENCY, SUSTAINABILITY, INNOVATION, AND VALUE FOR CUSTOMERS"
— ALEXIS VIDAL,
SENIOR VICE PRESIDENT
COMMERCIAL, ATR

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A GUIDING STAR
A REFERENCE OF ITS OWN KIND

SP'S CIVIL AVIATION YEARBOOK 2023-2024

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Cover:

Farnborough International Airshow (FIA) 2026, from July 20-24, welcomes the industry, delegates and visitors with its largest-ever edition. Commercial aviation is set to dominate, with sharp focus on new technologies and advanced air mobility.

Cover Design: SP's Design

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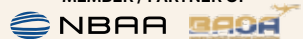


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Farnborough International Airshow 2026 (July 20–24, 2026) returns as its biggest edition yet — sold-out halls, a sixth exhibition space, 28 country pavilions and 1,00,000+ visitors expected. Commercial aviation takes centre stage amid record order backlogs, delivery pressures, tightening SAF mandates, and a landmark debut for electric air taxis and advanced air mobility.



Recently, the European Union Aviation Safety Agency (EASA) issued a directive mandating inspections of 16 Airbus A380 aircraft after cracks were detected in wing mid-spar structural components. Sarthak Baranwal explains that the inspections are precautionary and reflect the aviation industry's rigorous approach to monitoring ageing aircraft rather than an immediate safety concern. The article highlights that the directive underscores the importance of continuous airworthiness oversight, with minimal expected operational disruption and sustained confidence in the A380's long-term service future.

In an exclusive interview with Alexis Vidal, Senior Vice President Commercial, ATR, we explore the growing relevance of turboprop aircraft in regional aviation. Vidal explains how ATR combines lower operating costs, fuel efficiency and sustainability to connect underserved markets, particularly in countries such as India. He discusses the advantages of turboprops over regional jets, technological advancements in engines, avionics and passenger comfort, and ATR's use of AI, 3D printing and Sustainable Aviation Fuel (SAF). The interview also outlines ATR's long-term environmental roadmap, including hybrid-electric propulsion, while highlighting the company's commitment to expanding regional connectivity and supporting aviation's journey towards net-zero emissions.

A preview of the upcoming Farnborough International Airshow (FIA) 2026, highlights its unprecedented scale, record exhibitor participation and expanding international presence. Rohit Goel talks about the show's evolution into a platform that extends beyond aircraft displays to encompass finance, artificial intelligence, sustainability and advanced air mobility. Alongside major announcements from leading aerospace manufacturers, the event is expected to showcase first-time flying demonstrations of eVTOL aircraft, increasing emphasis on Sustainable Aviation Fuel (SAF), and discussions around supply-chain resilience and production challenges. FIA 2026 will serve as a global barometer for the future direction of commercial aviation, aerospace innovation and investment.

In another article, Rohit Goel analyses the continued expansion of India's air cargo industry in 2026, driven by strong exports, booming e-commerce, growing manufacturing and sustained infrastructure investment. It highlights the sector's transformation into a strategic component of India's trade and logistics ecosystem, supported by improved airport infrastructure, digitalisation, expanded airline capacity and dedicated freighter operations. While exports remain the primary growth engine, domestic express logistics and regional connectivity are creating new opportunities.

Also, Rohit Goel reports on the Government of India's expanded UDAN 2.0 scheme, that has evolved from a regional connectivity initiative into a strategic industrial policy for the civil aviation sector. Backed by a ₹28,840 crore allocation over ten years, the programme aims to develop new airports and heliports while creating sustained demand for smaller regional aircraft.

All this and more in this issue of *SP's AirBuz*. Welcome aboard and we wish you many happy landings!

Jayant Baranwal
Publisher & Editor-in-Chief

INDIA'S FIRST PINS INSTRUMENT APPROACH PROCEDURE FOR HELICOPTER OPERATIONS



July 1, 2026 – The Ministry of Civil Aviation is pleased to announce a significant milestone in India's aviation sector with the approval of the country's first Private Point-in-Space (PinS) Instrument Approach Procedure for helicopter operations at Undavalli Heliport.

Developed by the Airports Authority of India (AAI) and approved by the Directorate General of Civil Aviation (DGCA), the PinS procedure has been designed in accordance with DGCA regulations and the International Civil Aviation Organization (ICAO) Standards and Recommended Practices.

PinS (Point-in-Space) procedures use advanced satellite-based navigation technology to enable helicopters to conduct safe and precise instrument approaches to heliports that do not have conventional instrument landing infrastructure. This is particularly beneficial during adverse weather conditions and in areas where ground-based navigation aids are not available.

EMBRAER'S E-JETS FAMILY AWARDED TYPE CERTIFICATION



July 7, 2026 – Embraer's family of E-Jets has received Type Certification from India's Directorate General of Civil Aviation (DGCA). The certification covers multiple aircraft from the E-Jets family, including the E190, E195, and the E195-E2, the world's quietest and most fuel-efficient small narrowbody aircraft.

"We welcome the type certification of Embraer's aircraft and thank the DGCA for its thorough assessment," said Raul Villaron, Senior Vice President Sales & Marketing, Head of Region Asia Pacific, Commercial

APPOINTMENTS



KHAROLA RETURNS TO AIR INDIA AS EXECUTIVE ADVISOR

June 22, 2026 – Former Civil Aviation Secretary Pradeep Singh Kharola has joined Tata Sons and Air India Chairman N. Chandrasekaran as an Executive Advisor and as a full-time member of the airline's management committee, according to an internal communication.

His appointment comes at a time when Air India is searching for a new Chief Executive after MD Campbell Wilson announced his departure in the coming months. The airline is also facing operational and financial challenges.

Kharola had previously served as CMD of Air India from 2017 to 2019 and was later Civil Aviation Secretary, where he was involved in the airline's privatisation process.



INDIGO ANNOUNCES THE APPOINTMENT OF WILLIAM WALSH AS CHIEF EXECUTIVE OFFICER

March 31, 2026 – The Board of InterGlobe Aviation Limited (IndiGo) appointed William Walsh as the Chief Executive Officer, subject to regulatory approvals. Walsh's tenure at IATA comes to a close on the July 31, 2026, and he is expected to join no later than on the August 3, 2026.

William Walsh (popularly known as Willie) is currently the Director General of IATA (International Air Transport Association) and was formerly CEO of British Airways and IAG (International Airlines Group), a holding company which owns Aer Lingus, British Airways, Iberia, Level and Vueling).



HONEYWELL AEROSPACE APPOINTS COUNTRY LEAD FOR INDIA

July 15, 2026 – Honeywell Aerospace announced the appointment of Vijay Yaram as the company's new Country Leader for India, effective immediately.

In the newly created role, Vijay will serve as Honeywell Aerospace's external enterprise leader in India, driving indigenous and decoupled growth, strengthening local partnerships and advancing Honeywell Aerospace's India growth strategy.

Aviation. "With remarkable performance, economics, and passenger comfort, Embraer's E-Jets are set to reshape regional aviation in India and support the Indian government's UDAN vision."

The E-Jets is one of the most successful aircraft programme in commercial aviation with more than 1,900 deliveries and continues to operate worldwide with more than 80 airlines across more than 50 countries. The E195-E2 has low operating cost and is the most fuel-efficient small narrowbody aircraft in operation today. The E175 is already type certified for India and is operated by Star Air. In February 2026, Adani Defence & Aerospace and Embraer announced an enhanced Memorandum of Understanding (MoU) aimed at establishing a Final Assembly Line (FAL) for the E175 regional jet, aligned to India's Regional Transport Aircraft (RTA) programme.

AIR INDIA RANKS AMONG THE WORLD'S TOP 5 MOST ON-TIME GLOBAL AIRLINES

July 9, 2026 – Air India has been ranked the 4th most on-time airline in the

world in June 2026 by aviation analytics firm Cirium, underscoring the airline's continued focus on operational reliability and schedule integrity.



According to Cirium's June 2026 On-Time Performance report, Air India recorded an on-time arrival rate of 86.85 per cent across 15,135 flights tracked during the month. The airline also posted an on-time departure rate of 86.23 per cent and a completion factor of 99.7 per cent, meaning virtually all scheduled flights operated as planned.

The ranking reflects Air India's sustained investments in operational resilience, improved network planning, and enhanced

execution across its domestic and international operations.

As a hub-and-spoke network carrier operating a large number of domestic and international connections through India's two largest airports, Delhi and Mumbai, Air India manages significant operational complexity.

AIR INDIA INKS AGREEMENT WITH SIA ENGINEERING



July 3, 2026 – Air India announced the signing of a Memorandum of Understanding (MoU) with SIA Engineering Company Limited (SIAEC) to explore a collaboration in Maintenance, Repair and Overhaul (MRO) which will contribute to the development of India as a global aviation MRO hub.

The MoU was signed in Mumbai on July 3, 2026 by Air India Chief Executive Officer and Managing Director, Campbell Wilson, and SIAEC Chief Executive Officer, Chin Yau Seng.

This follows Air India's earlier collaborations with SIAEC to strengthen maintenance and component support for its growing fleet and network expansion.

The latest MoU aims to deepen the partnership between both parties by tapping on SIAEC's MRO and technical expertise to bolster Air India's established airline operations network by jointly developing a world-class MRO ecosystem in India. This collaboration could include the potential formation of an MRO Joint Venture in India, serving the increasing needs of the Indian and regional aviation markets.

INDIGO BECOMES THE FIRST AIRLINE TO COMMENCE OPERATIONS FROM JEWAR

June 16, 2026 – IndiGo commenced flight operations from the recently inaugurated Noida International Airport (NIA) in Jewar, Uttar Pradesh, becoming the first airline to operate from the National Capital Region's newest airport. The first flight arrived at NIA from Lucknow, while the first departure was to Bengaluru shortly thereafter. Launching operations to and from NIA marks a significant milestone, for IndiGo, in further strengthening regional connectivity and en-

hancing travel options for customers across Delhi-NCR and western Uttar Pradesh. IndiGo will directly connect the airport to over 16 destinations across India.

ELECTRA AND SAFRAN REACH DEVELOPMENT AND PRODUCTION AGREEMENT



July 15, 2026 – Electra, the global leader in ultra-short hybrid-electric aviation, and Safran Helicopter Engines today announced a life-of-programme production agreement for the TG600 turbo-generator, which will power Electra's ground-breaking EL9 Ultra Short hybrid-electric aircraft.

The agreement marks a significant milestone in the development and certification of Electra's EL9 Ultra Short, with entry to service expected in 2030. Under the agreement, the TG600 turbo-generator will become the heart of the EL9 Ultra Short's hybrid-electric propulsion system. The agreement follows a memorandum of understanding signed in 2023 and includes an initial order for 250 TG600 turbo-generators, allowing for production to scale with demand for the EL9.

Electra's EL9 Ultra Short aircraft is designed using hybrid-electric propulsion and blown-lift technology. This opens new possibilities for air travel by enabling the EL9 to take off and land in just 150 feet, unlocking operations from places that have never supported commercial air service before, including spaces closer to where people live, work, and play.

ATR SEES VIETNAM AS A KEY GROWTH MARKET



June 9, 2026 – ATR, the world's leading manufacturer of regional aircraft, today highlighted Vietnam's significant potential as a market for modern regional aviation, pointing to strong

underlying demand, an expanding airport network and a new generation of turboprop aircraft that is redefining what regional flying can offer in terms of comfort, accessibility and economics across Southeast Asia.

A year on from ATR's joint study with Vietnamese transport consultancy Transport Engineering Design Inc. (TEDI), which identified 87 unserved domestic routes with viable traffic potential, the market context has continued to evolve, with new cross-border services and the arrival of ATR's latest cabin concepts opening up new possibilities for regional connectivity in and around Vietnam.

AKASA AIR WELCOMES 40TH AIRCRAFT



July 4, 2026 – Akasa Air, India's fastest-growing airline welcomed its 40th aircraft, marking a significant milestone in the airline's journey and underscoring the pace and consistency of its growth since commencing operations in August 2022.

Bearing registration number VT-YBQ, the Boeing 737 MAX 8-200 aircraft arrived at Kempegowda International Airport in Bengaluru on July 3, 2026. Within four years of commencing operations, Akasa Air has emerged as a formidable player in the Indian aviation landscape, while establishing a strong foundation for long-term growth. The milestone comes at a time when the airline continues to expand its network, strengthen its operational capabilities, and invest in building an airline for generations.

The aircraft is purpose-built to Akasa's specifications and equipped with Safran Z200 seats, a next-generation seating solution designed to elevate the in-flight experience. The seats feature a generous four-inch recline, an ergonomically contoured backrest, and enhanced cushioning for superior sitting comfort, alongside thoughtfully positioned additional conveniences such as USB-C and USB-A ports to support the needs of today's hyper-connected travellers. ●



EMIRATES IS THE WORLD'S LARGEST AIRBUS A380 OPERATOR WITH A FLEET OF MORE THAN 100 A380

AIRBUS A380 WING INSPECTIONS ORDERED FOLLOWING DISCOVERY OF CRACKS IN STRUCTURAL COMPONENTS



BY **SARTHAK BARANWAL**

THE AIRBUS A380 HAS long occupied a unique place in commercial aviation. As the world's largest passenger aircraft, it transformed long-haul travel, became a flagship for several major airlines, and established one of the strongest operational safety records in modern aviation. Even after production ended in 2021, the aircraft continues to play a crucial role in the fleets of airlines operating high-capacity international routes.

This week, however, the superjumbo found itself back in the

The current directive reflects the normal responsibilities associated with sustaining an ageing but highly capable aircraft fleet and serves as a reminder that commercial aircraft are continuously monitored throughout their service lives

headlines following the issuance of an emergency airworthiness directive by the European Union Aviation Safety Agency (EASA), requiring inspections on a number of Airbus A380 aircraft after cracks were discovered in structural components within the wing.

The directive, issued on June 22 and effective from June 24, affects 16 Airbus A380 aircraft, including 15 operated by Emirates and one operated by Qantas. While the development has attracted considerable attention due to the aircraft involved, regulators and operators have emphasised that the action is

precautionary in nature and forms part of the industry's established approach to monitoring aircraft structures throughout their operational lives.

As inspections begin across affected aircraft, the latest development serves as a reminder of the extensive oversight and engineering effort involved in supporting large commercial aircraft fleets, particularly those approaching two decades of service.

■ **WHAT HAS BEEN FOUND?** According to EASA, cracks were identified within wing mid-spar structures during inspections conducted on certain Airbus A380 aircraft.

The wing spar is one of the most important structural elements of an aircraft. Running through the wing, it serves as a primary load-bearing component responsible for carrying and distributing the aerodynamic forces generated during flight. Given the immense size and weight of the A380, the wing structure experiences substantial loads throughout every flight cycle, particularly during takeoff, turbulence, and landing.

The discovery of cracks does not automatically imply an immediate safety concern. Modern commercial aircraft are designed with multiple layers of structural redundancy, and inspection programmes are specifically intended to identify potential issues long before they can affect operational safety.

While the development has attracted considerable attention due to the aircraft involved, regulators and operators have emphasised that the action is precautionary in nature

Nevertheless, after reviewing inspection findings, regulators determined that additional checks were necessary on a specific group of aircraft. Under the directive, five Emirates A380s must undergo inspections before their next flight, while the remaining affected aircraft are required to be inspected within 25 flight cycles.

The objective is straightforward: determine the extent of the issue, assess whether similar findings exist elsewhere in the fleet, and establish whether any additional corrective actions are required.

■ **EMIRATES AT THE CENTRE OF THE INSPECTION PROGRAMME.** Given its position as the world's largest Airbus A380 operator, it is perhaps unsurprising that Emirates is at the centre of the latest inspection effort.

The Dubai-based carrier operates more than 100 A380s, accounting for roughly half of the active global fleet. Since introducing the type into service in 2008, Emirates has built much of its long-haul network around the aircraft, using it to connect Dubai with major international destinations across Europe, Asia, Australia and North America.

Of the 16 aircraft identified in the directive, 15 belong to Emirates. The airline has confirmed that it will carry out inspections in accordance with regulatory requirements and has indicated that any necessary maintenance work will be completed before affected aircraft return to service.

From an operational perspective, Emirates is uniquely positioned to manage such inspections. Over nearly two decades of A380 operations, the carrier has developed extensive engineering expertise, maintenance infrastructure and spare-parts support dedicated specifically to the aircraft. As a result, industry observers do not currently anticipate significant disruption to the airline's broader network.

Nevertheless, the findings will be closely monitored due to Emirates' central role in the A380 programme and its continued reliance on the aircraft as a cornerstone of its long-haul operations.

■ **QANTAS ALSO INCLUDED.** The directive also affects one Airbus A380 operated by Qantas. Australia's flag carrier was among the earliest customers for the superjumbo and continues to operate the aircraft on selected international routes.

Qantas has indicated that the affected aircraft is already undergoing maintenance and that compliance with the directive is expected to take place within existing maintenance schedules. The airline has not reported any operational issues related to the findings.

For both Emirates and Qantas, the current focus remains on completing inspections and gathering additional information regarding the condition of affected structures.

■ **NOT THE FIRST STRUCTURAL INSPECTION PROGRAMME FOR THE A380.** While the latest directive has generated widespread interest, it is not the first time Airbus and regulators have conducted structural inspections involving the A380. The aircraft has undergone several inspection and modification programmes during its service life, reflecting the normal evolution of a large commercial aircraft programme.

One of the most notable examples occurred in January 2012, when cracks were discovered in wing rib-foot components on a number of A380 aircraft. The findings prompted Airbus to develop repair solutions and introduce design modifications, while regulators mandated inspections across portions of the fleet.

Although the issue received significant media attention at the time, the aircraft continued operating safely while repairs and modifications were implemented. Additional inspection requirements followed in subsequent years as Airbus and regulators continued monitoring structural areas of interest throughout the fleet.

However, such developments are not unique to the A380. Virtually every major commercial aircraft programme undergoes periodic inspection campaigns, service bulletins, modifications and design improvements over the course of its operational life. These actions form a routine part of fleet management and contribute to the exceptionally high safety standards maintained across commercial aviation.

The latest directive therefore represents another step in the ongoing process of monitoring and maintaining an aircraft type that has now accumulated millions of flight hours worldwide.

■ **IMPACT ON AIRLINE OPERATIONS.** For airlines operating the A380, the immediate impact is expected to be limited. Unlike situations involving fleet-wide groundings or operational restrictions, the current directive focuses on inspections rather than changes to aircraft operations. As a result, airlines are expected to incorporate inspection requirements into existing maintenance programmes wherever possible.

However, the A380 occupies a unique role within airline fleets. With seating capacities often exceeding 500 passengers, the aircraft is typically deployed on some of the world's busiest long-haul



AUSTRALIA'S FLAG CARRIER QANTAS WAS AMONGST THE EARLIEST CUSTOMERS OF AIRBUS A380

routes. Services linking cities such as Dubai, London, Sydney, Singapore, Los Angeles, New York and Paris frequently rely on the aircraft's ability to transport large numbers of passengers efficiently.

Because of this, any aircraft temporarily removed from service for inspection can present scheduling challenges. Fortunately for operators, the number of aircraft currently affected remains relatively small when compared with the active global fleet. For now, airlines appear confident that inspections can be completed without significant impact on passengers or network operations.

■ **WHAT IT MEANS FOR AIRBUS.** Although Airbus ended A380 production in 2021, the manufacturer continues to provide technical support to operators around the world. The latest inspection programme highlights the long-term commitment required to support a fleet of large commercial aircraft that is expected to remain in service for many years.

Many airlines have invested heavily in extending the operational lives of their A380 fleets. Emirates, in particular, has repeatedly stated that it intends to operate the aircraft well into the 2030s. Supporting these aircraft requires ongoing engineering analysis, maintenance planning and collaboration between manufacturers, airlines and regulators.

In that sense, the current directive reflects the normal responsibilities associated with sustaining an ageing but highly capable aircraft fleet. Airbus will now work alongside operators and regulators to review inspection results and determine whether any additional maintenance actions or inspection requirements are necessary. The company has not indicated that broader operational measures are required at this stage.

■ **THE A380'S CONTINUED IMPORTANCE.** Despite predictions of its decline following the pandemic and the end of production, the Airbus A380 continues to play a significant role in global aviation. Several major airlines have returned their aircraft to service over the past few years as international travel demand recovered. In

many markets, the aircraft remains one of the most efficient ways to transport large numbers of passengers through slot-constrained airports. Passengers also continue to view the aircraft favourably. Its spacious cabins, quieter interior environment and premium cabin offerings have helped maintain its popularity across multiple airlines.

The aircraft's longevity has also surprised many industry observers. When Airbus announced the end of production, some analysts predicted a relatively rapid decline in fleet numbers. Instead, many operators have invested in cabin upgrades and life-extension programmes, reflecting continued confidence in the aircraft's capabilities. As a result, developments involving the A380 continue to attract attention far beyond the relatively small number of aircraft currently in service.

■ **LOOKING AHEAD.** For now, the focus remains on inspections. Regulators, Airbus and affected airlines will continue gathering data from the aircraft covered by the latest directive. The results of those inspections will help determine whether additional actions are necessary and whether the issue extends beyond the currently identified aircraft.

At present, there is no indication of wider operational restrictions, and airlines continue to operate their A380 fleets under established maintenance and airworthiness requirements.

The latest directive serves as a reminder that commercial aircraft are continuously monitored throughout their service lives. Inspection programmes evolve as fleets age, new data becomes available and operators accumulate additional experience.

For the Airbus A380, an aircraft that has become one of the most recognisable symbols of modern air travel, the current inspections represent another chapter in that ongoing process.

As airlines, regulators and Airbus work through the latest findings, the world's largest passenger aircraft continues to do what it has done since entering service nearly two decades ago—connect major cities across the globe while remaining a key part of international aviation. SP

PHOTOGRAPH: Qantas Airways

EXCLUSIVE

ALEXIS VIDAL,
SENIOR VICE PRESIDENT
COMMERCIAL, ATR



PHOTOGRAPHS: ATR

THE FUTURE OF REGIONAL AVIATION WITH ATR

Alexis Vidal, Senior Vice President Commercial, ATR talks to **Jayant Baranwal, Editor-in-Chief, SP's Airbuz** on how ATR is driving regional connectivity and unlocking the underserved markets through the turboprop advantage, powered by economics, SAF, and AI.

Jayant Baranwal (Baranwal): What it does it take to be the leader in the Turboprop Regional Aircraft market?

Alexis Vidal (Vidal): Leadership in the turboprop regional market comes down to delivering the right balance between efficiency, sustainability, innovation, and value for customers. ATR has built its position by offering aircraft with the lowest operating costs in the regional segment, combined with strong reliability and global support. At the same time, the ability to connect underserved regions and operate in challenging environments has made turboprops essential to regional connectivity.

Continuous innovation also plays a critical role, whether through more efficient engines, advanced avionics or future-focused concepts. Ultimately, being the leader means providing airlines with an aircraft that is both economically viable and aligned with the industry's long-term environmental goals. ATR's position is built on over four decades of experience, with more

than 1,900 aircraft sold and over 1,700 delivered worldwide, serving around 200 operators across 100 countries.

Leadership in today's market also means understanding and anticipating the needs of high-growth regions such as India. With one of the world's most ambitious aviation expansion plans, including the target to reach around 230 airports by 2030, the country illustrates how regional aviation is becoming a central pillar of economic development. In such environments, the ability to provide efficient, adaptable aircraft that can support rapid network expansion is essential.

Baranwal: Why do you think Turboprop Engine Aircraft is a better option compared to the Jet Engine Aircraft for the regional aviation market?

Vidal: Turboprops are optimised for short sectors, typically between 100 and 400 nautical miles, where they deliver significantly better performance in terms of fuel efficiency and operating costs.

ATR aircraft are not only more efficient and more reliable, but also significantly more advanced in terms of technology, operating performance and passenger experience



On these missions, the benefits in terms of economics and sustainability are substantial. For instance, on a typical short sector, the ATR 72-600 achieves 45 per cent lower fuel burn compared to similarly sized regional jets. This efficiency directly translates into lower operating costs, with turboprops offering the lowest cost per trip in the regional market and generating up to \$2 million in annual savings per aircraft compared with regional jets.

Another key advantage is accessibility. Turboprops are designed to operate from shorter, narrower or more challenging runways, which allows airlines to serve airports and communities that are not accessible to jets. This capability plays a critical role in developing regional connectivity, particularly in underserved or remote areas.

This is particularly relevant in markets such as India, where travel patterns strongly align with turboprop capabilities. According to ATR's MobilityMonitor, more than 90 per cent of inter-city journeys in India are within 740 km, precisely the range where turboprops deliver optimal efficiency. Yet air transport today represents only around 3 per cent of this mobility market, indicating significant untapped potential. As regional connectivity expands, turboprops are naturally positioned to support this growth by enabling economically viable services on short sectors and connecting cities that are not currently linked by direct flights.

Baranwal: What all are the key advantages for the Operators and for the passengers?

Vidal: From an airline perspective, this translates into lower operating costs and the ability to run profitable services on routes with lower passenger demand. It also enables airlines to expand their networks more flexibly, opening new routes or increasing frequencies without requiring high load factors.

For passengers, the benefits are equally tangible. Turboprops make it possible to offer more direct point-to-point connections, reducing travel times overall by avoiding lengthy layovers. At the same time, modern aircraft such as the ATR -600 series offer a level of comfort that is comparable to single-aisle jets, with improved cabin design, reduced noise levels and onboard features that meet today's expectations.

In India, this flexibility is particularly important. Despite rapid infrastructure development, ATR's MobilityMonitor shows that

“ATR aircraft are specifically designed and structurally sized to operate safely and comfortably in the atmospheric conditions encountered at their typical cruise altitudes”



Being the leader, for ATR, means providing airlines with an aircraft that is both economically viable and aligned with the industry's long-term environmental goals

only around 30 per cent of the population currently lives within 90 minutes of an airport, which is a key threshold for regular air travel usage. This means a significant share of mobility demand still relies on rail or road transport. By enabling operations from smaller airports and shorter runways, turboprops can help bridge this accessibility gap, bringing air travel within reach of hundreds of millions of additional travellers and supporting the objectives of regional connectivity initiatives such as UDAN.

The opportunity for network expansion is particularly visible in India's secondary markets. Analysis from ATR's MobilityMonitor identifies more than 900 potential new domestic routes, the majority involving Tier 2 and Tier 3 cities. If realised, these could generate an additional 90 million passengers annually. This highlights how turboprops can enable airlines to profitably develop thinner routes, while giving passengers access to more direct connections between cities that are currently underserved or not connected at all.

Baranwal: Do you agree that your aircraft flies within weather (under or below clouds at times – usually a jet engine aircraft flies above the weather or above clouds) and hence causes little discomfort to the passengers (as a result passengers do face turbulence at times while a jet engine aircraft does not get affected because it flies above the clouds/ above the weather)?

Vidal: These operating conditions are fully taken into account at the aircraft design stage. ATR aircraft are specifically designed and structurally sized to operate safely and comfortably in the atmospheric conditions encountered at their typical cruise altitudes. This has no impact whatsoever on safety.

Additionally, the aerodynamic loads experienced by an aircraft depend not only on turbulence intensity, but also on airspeed. While jets generally encounter fewer gusts, they fly at higher speeds. As a result, the structural loads are not necessarily higher on a turboprop than on a jet.

In short, occasional turbulence is a normal aspect of flight for all aircraft types. ATR aircraft are designed, certified and operated to the same rigorous safety standards as jet aircraft, and there is no difference in safety levels.



By enabling operations from smaller airports, turboprops bridge the accessibility gap, bringing air travel and supporting the objectives of regional connectivity initiatives such as UDAN

Baranwal: It is believed that technology is really evolving very fast. Can you give us some sense of the technological differences between your aircraft as old as about 10-12 years versus the new ones manufactured within a year or so?

Vidal: Over the past decade, ATR aircraft have evolved significantly through continuous upgrades, with clear, measurable improvements in performance, efficiency and onboard technology.

One of the most notable advancements is in engine performance. The latest-generation PW127XT engine delivers at least a 3 per cent reduction in fuel burn compared to the previous PW127M engine, alongside a 15 per cent reduction in NOx emissions and 20 per cent lower maintenance costs. It also offers a 40 per cent increase in time on wing, extending intervals between overhauls to up to 20,000 hours. These improvements translate directly into lower operating costs and improved aircraft availability for airlines.

The cockpit and onboard systems have also seen major evolution. ATR aircraft cockpits now include advanced navigation capabilities and performance-based navigation systems. More recent upgrades such as the new generation multi-functional computer enable future avionics evolution while reducing maintenance costs.

“Today's ATR -600 series offers passenger comfort that is comparable to single-aisle jets, with improved ergonomics, reduced noise levels and modern features such as in-flight entertainment solutions and USB connectivity”

Cabin technology has also progressed considerably. Today's ATR -600 series offers passenger comfort that is comparable to single-aisle jets, with improved ergonomics, reduced noise levels and modern features such as in-flight entertainment solutions and USB connectivity. ATR has also introduced its New Air Management System (NAMS), which enhances cabin comfort while improving overall system reliability and reducing maintenance requirements. Looking ahead, Additionally, high-speed internet solutions have now been certified on both 42-600 and 72-600, responding to growing passenger expectations for seamless connectivity in flight.

Overall, while the aircraft may appear similar externally, the cumulative impact of these improvements means that today's ATR aircraft are not only more efficient and more reliable, but also significantly

more advanced in terms of technology, operating performance and passenger experience than those produced a decade ago.

Baranwal: May we ask you what is average production rate of your aircraft a year?

Vidal: ATR delivered 32 aircraft in 2025 and is working towards increasing deliveries in the coming years, with the aim to assemble and deliver 60 aircraft a year by the end of the decade.

Baranwal: 3D printing, off-lately, has been one of the evolving processes of industrial production. Does this figure and contribute at any level of production in your aircraft/ your engines?

Vidal: Today, the most significant contribution of 3D printing at ATR is in prototyping, testing and industrial support. It is widely used to accelerate development cycles, enabling engineers to rapidly produce and iterate components for cockpit ergonomics, system integration, and installation checks directly on aircraft. This brings substantial time and cost savings compared with traditional manufacturing.

In parallel, 3D printing is also used to produce tooling and temporary parts in the final assembly line, helping maintain production continuity when standard parts are not yet available.

While some 3D-printed components have been flown on test aircraft for evaluation purposes, the technology is still maturing for certified applications. ATR continues to monitor industry developments closely and is working with partners and authorities to prepare for future certified use, starting with less critical components before potentially expanding further.

Baranwal: How do you perceive AI (Artificial Intelligence)? What all benefits do you believe that AI can bring to the aviation industry?

Vidal: AI has the potential to bring significant benefits across the aviation industry, primarily by enhancing safety, efficiency and sustainability. At ATR, we have already started exploring a wide range of applications to understand where AI can create the most value, whether in engineering, customer support, access to infor-

mation, data management or internal processes. Beyond the aircraft itself, AI can help us become more efficient, more responsive and ultimately better serve our customers.

Importantly, the potential of AI goes far beyond aircraft operations. We are also looking at how it can help us as a manufacturer work smarter, whether through improved access to technical information and archives, faster data analysis, or more efficient internal processes. By combining many small improvements across different functions, AI has the potential to increase productivity, speed up decision-making and help us better support our customers.

At aircraft level, it will also enable the rapid analysis of large volumes of flight and operational data, helping to detect anomalies and anticipate risks before they materialise. This supports safer operations and more informed decision-making.

In maintenance, AI will allow for predictive approaches by identifying patterns in historical and real-time data, reducing unexpected failures, lowering costs and minimising operational disruption. It could also give technicians faster access to the right technical information.

AI could further optimise air traffic management and flight operations, helping to reduce congestion, delays and fuel consumption, contributing directly to more sustainable aviation.

Across operations and supply chains, it can improve logistics, spare parts availability and inventory management, reducing aircraft-on-ground situations.

Baranwal: Please tell us something about SAF.

Vidal: ATR sees SAF as a key enabler of aviation's decarbonisation. Today, ATR aircraft are already compatible with up to 50 per cent SAF, and the objective is to achieve full, 100 per cent SAF capability by 2030, following international fuel standard validation. This ambition is supported by a clear roadmap, which includes milestone flights such as the first successful flight of a commercial aircraft using 100 per cent SAF in both engines in 2022.

Beyond compatibility, ATR is also actively integrating SAF into its operations. Since 2023, all production test flights have been performed with a minimum of 35 per cent SAF blends, contributing to a measurable reduction in emissions and demonstrating the immediate impact this solution can deliver.

a: Will this really make difference in lowering the carbon emission?

Vidal: Yes, SAF has the potential to make a significant difference. Compared to conventional jet fuel, it can reduce lifecycle carbon emissions by up to 80 per cent, depending on the production pathway. Because it can be deployed using today's aircraft and infrastructure, it represents one of the most effective short-term levers to cut aviation emissions while longer-term technologies continue to develop.

b. How about the cost factor of SAF versus the traditional aviation fuel?

Vidal: Today, SAF remains more expensive than conventional jet fuel, mainly due to limited production capacity and the early stage

of industrial scaling. However, costs are expected to decrease as production increases and technologies mature. At the same time, regulatory frameworks and decarbonisation policies are likely to increasingly support SAF adoption. In this context, more fuel-efficient aircraft, such as turboprops, play an important role in optimising overall fuel use and helping mitigate the cost impact for operators.

Baranwal: What all environmental benefits ATR is working towards holistically?

Vidal: ATR's environmental approach is built on combining immediate impact with long-term innovation across its aircraft, operations and future technologies.

Today, continuous improvements to its aircraft already contribute to lower emissions and fuel consumption. I mentioned earlier our latest-generation engine, the PW127XT, directly supporting airlines in reducing their environmental footprint.



ATR aircraft are already compatible with up to 50 per cent SAF, and the objective is to achieve full, 100 per cent SAF capability by 2030

Another pillar of our environmental strategy is eco-design. Environmental considerations are now integrated into the majority of engineering developments, with a full lifecycle approach used to identify and reduce impact from design through to end-of-life. This ensures that sustainability is built into the product from the outset, not added afterwards.

Looking ahead, innovation is central. Through the European Union's Clean Aviation programme, ATR is advancing hybrid-electric propulsion and next-generation systems, helping to shape the future of low-emission regional flight. This work will feed into the ATR 'EVO' concept, which aims to deliver a new generation of aircraft with significantly improved efficiency, reduced emissions and enhanced performance. As part of this roadmap, ATR is preparing to fly a hybrid-electric regional aircraft demonstrator by the end of 2029, marking a key milestone in bringing these technologies closer to commercial reality.

All of these efforts are aligned with a clear roadmap supporting the aviation industry's objective of reaching net-zero carbon emissions by 2050, combining concrete action today with the technologies needed for tomorrow. **SP**



Commercial Aviation remains a Central Pillar of Farnborough International Airshow, spanning the entire ecosystem, including the Industry and the Airlines

FIA 2026: BIGGER THAN EVER

BY ROHIT GOEL

THE FARNBOROUGH INTERNATIONAL AIRSHOW (FIA 2026) returns to UK from July 20-24 2026, marking the show's 78th year. Organised by Farnborough International Limited (FIL), the biennial event is held at the Farnborough International Exhibition & Conference Centre, roughly 50 kilometres southwest of London.

■ SHOW OVERVIEW, SCALE AND GROWTH. Despite global headwinds due to the ongoing crisis in the Middle East, Farnborough Airshow Chief Executive Gareth Rogers confirmed that exhibition space had sold out twice over, forcing the addition of a sixth exhibition hall with an extra 5,000 square metres of space — something not seen in recent editions of the show. Organisers expect well over 1,00,000 visitors across the week, with the first three days reserved for trade and the final two open to a wider audience, including a dedicated family and STEM-focused

A record number of exhibitors and national pavilions plus a first-ever finance summit underline the show's scale, yet with a 17,000-aircraft backlog, tightening SAF mandates and eVTOLs flying for the first time, Farnborough International Airshow 2026 will test the industry's ability to deliver.

'Pioneers of Tomorrow' day on July 24. That closing day alone is projected to draw around 45,000 visitors, up from roughly 30,000 at the equivalent day in 2024, helped by free entry for everyone under the age of 21.

By every headline measure, FIA 2026 is set to surpass its predecessors. FIA2022 drew around 1,200 exhibitors from 38 countries and roughly 76,000 visitors. FIA2024 built on that significantly, attracting 1,500 exhibitors from more than 60 countries, over 1,00,358 visitors (a 33 per cent increase on 2022), 90 aircraft on show, and more than 390 official delegations — a year that also generated \$105.8 billion in commercial aircraft and engine orders, worth an estimated £13 billion to the UK economy. For 2026, organisers are projecting 1,400–1,500-plus exhibitors from 41 or more countries, 1,00,000-plus visitors, six exhibition halls (up from five), 28 confirmed country pavilions (up from around 26 in 2024), and well over 100 aircraft on the flight line, with 33 already

confirmed a week before the show opened. More than 100 exhibitors rebooked their space for 2026 on the final day of the 2024 show, and a waiting list of over 50 additional organisations formed once the main halls and the new sixth hall had sold out, underlining the sustained year-on-year growth in demand for space at the event.

Internationalisation is one of the defining features of FIA 2026. Approximately 64 per cent of exhibitors are travelling from outside the UK, and the show will host 28 confirmed national pavilions, including participation from India, Japan, Australia, Mexico, Brazil and Switzerland, alongside long-standing US, European and Gulf pavilions. Canada is coordinating a dedicated national presence through its Trade Commissioner Service in partnership with the Aerospace Industries Association of Canada, targeting companies working across aerostructures, propulsion, avionics and sustainable aviation technologies. UK Government representation is also expected to exceed previous shows, with a dedicated 'UK Government Hub' in Hall 3 hosting departments such as the Department for Business and Trade, UK Export Finance and the Department for Transport.

■ COMMERCIAL AVIATION PRESENCE, MAJOR EXHIBITORS AND DISPLAYS.

Farnborough has traditionally split its exhibition floor roughly 60/40 between commercial aviation and defence. For 2026, organisers and industry commentators note that balance is shifting closer to 50/50, driven by a wave of European defence and security investment. Even so, commercial aviation remains a central pillar of the show, spanning airliner manufacturers, engine makers, lessors, MRO providers, airlines, business aviation OEMs, and — increasingly — finance, digital and supply-chain specialists. The show arrives at a pivotal moment for the sector. Airbus posted its strongest first-half deliveries since 2019 (351

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(Top and Above): Sustainability and decarbonisation, including hybrid-electric propulsion, remain among the most closely watched themes at FIA 2026

aircraft to June), while Boeing continued ramping up 737 MAX production. With the global order backlog reportedly exceeding 17,000 aircraft and persistent engine-supply bottlenecks, expect discussion to focus as much on manufacturers' ability to actually deliver aircraft as on new headline order announcements. Farnborough is also, for the first time, hosting a dedicated finance and investment summit, bringing together more than 600 capital markets and investment leaders to connect funding with aerospace, defence, space and security programmes — a signal of how central financing and supply-chain resilience have become to commercial aviation conversations at the show.

The commercial halls will once again be anchored by the industry's largest airframers, engine makers and system suppliers. Airbus is showcasing its A350-1000 widebody, among other commercial types, with customer deliveries and order activity a key focus, while Boeing has confirmed its attendance, with its 737, 787 and 777X programmes under close industry scrutiny amid ongoing production ramp-up. Embraer is displaying its E195-E2 regional jet and has already confirmed a firm order from US lessor Azorra for 15 E195-E2 aircraft with options for more, while Bombardier is bringing its new Global



(Top and Above): Advanced air mobility (AAM) will have a genuinely elevated profile at the Airshow, with Air Taxis expected to fly for the first time

8000 — described by the manufacturer as the fastest civil aircraft since Concorde — for its flying debut. GE Aerospace, Rolls-Royce, Pratt & Whitney and Safran (CFM) are represented across engine display, sustainable propulsion research and testbed aircraft, DHL Air UK is displaying a Boeing 777-200LR freighter conversion reflecting continued strength in air cargo, and General Atomics AeroTec Systems is showing the Do228 NXT, a multi-role aircraft aimed at surveillance, maritime patrol and regional transport. COMAC, the Chinese air-

Farnborough is also, for the first time, hosting a dedicated finance and investment summit, bringing together more than 600 capital markets and investment leaders

framer, is again confirmed as an exhibitor, following its Middle East debut at the 2025 Dubai Airshow, though a Western static or flying debut of its aircraft remains unconfirmed. Notably, roughly 22 per cent of all exhibitors are attending Farnborough for the first time, and rather than traditional airframe or component manufacturers, many of these newcomers work in artificial intelligence, emerging technology, aviation finance and supply-chain logistics — underscoring how the show's commercial ecosystem is broadening beyond hardware.

FIA2024 featured 90 aircraft in total, with 46 in the flying display and the remainder static; as of one week before FIA 2026, 33 aircraft had been confirmed, with more expected before the gates opened. On the commercial side, the flying programme is expected to include the Airbus A350-1000, Bombardier Global 8000 and Embraer C-390 Millennium, while confirmed static aircraft include the Embraer E195-E2, DHL's 777-200LRMF, and GE Aerospace's Boeing 747-400 flying testbed. Qatar Airways had planned to display a Boeing 777-300ER and a Gulfstream G700, though the carrier announced it was withdrawing from the show following the death of the former Qatari Emir. Vintage aircraft, including a Rolls-Royce-operated Supermarine Spitfire and a P-51D Mustang, will fly alongside the modern commercial line-up — a signature Farnborough contrast between aviation heritage and its cutting edge.

■ ADVANCED AIR MOBILITY AND NEW TECHNOLOGIES: EVTOLS AND AIR TAXIS.

Advanced air mobility (AAM) has a genuinely elevated profile at FIA 2026, with organisers describing this year's flying display as one of the largest and most diverse in decades. BETA Technologies is flying its all-electric CX300 conventional take-off and landing aircraft for the first time at Farnborough, with both daily flight demonstrations and static display, while its MV250 will also be on static display. Vertical Aerospace, the UK eVTOL developer, is working to clear final regulatory hurdles in time to fly its VX4/VA-1X electric air taxi, which would mark a significant milestone given the aircraft is being developed only a few hundred miles from the showground. Eve Air Mobility, the Embraer-backed air taxi developer, will showcase a full-scale eVTOL mock-up and an immersive flight simulator at a dedicated pavilion adjacent to the flight line, while GE Aerospace's Saab 340B hybrid-electric testbed will fly daily as part of the NASA Electrified Powertrain Flight Demonstration (EPFD) programme, developed with Boeing subsidiary Aurora Flight Sciences to trial megawatt-class hybrid-electric propulsion. Other AAM and advanced-technology developers such as Joby Aviation, Lilium, Supernal and Wisk Aero are expected to use the show to provide updates on certification and commercialisation progress, even where they are not flying aircraft on-site. Collectively, this represents a marked shift from



(Representative Image): FIA's ecosystem continues to evolve with participation of newcomers from emerging technologies, finance and supply-chain logistics.

earlier Farnborough editions, when eVTOL participation was largely confined to static mock-ups; in 2026, air taxis are, for the first time, sharing runway time with mainline commercial jets.

■ **SUSTAINABILITY AND SUSTAINABLE AVIATION FUEL (SAF).** Sustainable aviation fuel (SAF) and broader decarbonisation remain among the most closely watched themes at FIA 2026, continuing discussions from Farnborough's own Sustainable Skies World Summit held earlier in the year. The UK's Sustainable Aviation Fuel Mandate — which requires SAF blending to rise from 2 per cent to 10 per cent by 2030 — is a central reference point, alongside a UK Government-backed Revenue Certainty Mechanism designed to unlock private investment and a £63 million Advanced Fuels Fund intended to accelerate production. Industry body Sustainable Aviation has also introduced an Advanced Market Signal initiative aimed at scaling the greenhouse gas offset market. Expect exhibitors and conference sessions to address the practical bottlenecks in scaling SAF: feedstock availability, production capacity, cost,

and the parallel development of hydrogen and hybrid-electric propulsion. Legal and industry advisers covering the show note that sustainability is increasingly shaping investment strategy and regulatory decisions across aerospace, rather than being treated as a standalone environmental initiative. Supply chain resilience is a closely linked theme, with exhibitors and delegations expected to focus on diversifying sourcing, improving transparency, and building more flexible supplier networks in response to recent geopolitical and logistical disruption.

■ **OTHER KEY THEMES AND ATTRACTIONS.** A number of other threads are expected to run through the week. With a combined order backlog above 17,000 aircraft, conversations are expected to focus heavily on whether Airbus and Boeing can convert existing orders into deliveries, given ongoing engine-supply constraints. A significant share of first-time exhibitors are technology and data companies rather than traditional aerospace manufacturers, reflecting AI's growing role in design, MRO and airline operations, while Bombardier's Global 8000 debut is expected to be one of the week's biggest business-aviation talking points. The Pioneers of Tomorrow programme, careers hub and STEM activities on the final day are aimed at addressing a well-documented industry skills shortage, and the show's first dedicated aerospace finance summit reflects how central capital access has become to scaling both traditional production and emerging technologies like SAF and AAM.

Together, these threads point to a show that remains a pivotal barometer for commercial aviation: a venue where airframers, engine makers, financiers, regulators and a new generation of electric and autonomous aircraft developers converge to set the direction for the next two years of civil aerospace. **SP**

Advanced air mobility (AAM) has a genuinely elevated profile at FIA 2026, with organisers describing this year's flying display as one of the largest and most diverse in decades

PHOTOGRAPH: FIA



As India strengthens its position in global supply chains, air cargo is emerging as a strategic enabler of trade rather than simply a mode of transport

INDIAN AIR CARGO – SUSTAINING GROWTH

BY ROHIT GOEL

INDIA'S AIR CARGO INDUSTRY has carried its momentum from a landmark 2025 into the first half of 2026, reinforcing its position as one of the world's fastest-growing aviation markets. Supported by resilient exports, booming e-commerce, expanding airline networks, and sustained infrastructure investments, the sector is steadily evolving from a volume-driven business into a strategic pillar of India's trade and logistics ecosystem. While growth has moderated from the extraordinary post-pandemic surge, the industry's fundamentals remain stronger than ever, laying the foundation for another year of sustainable expansion.

Strong export demand, expanding e-commerce, rising manufacturing activity and sustained infrastructure investments have together created a more resilient cargo ecosystem than ever before, laying the foundation for another year of sustainable expansion.

■ **FROM THE 2025 INFLECTION TO 2026 MOMENTUM.** The first half of 2026 has reinforced a trend building over the past two years: Indian air cargo is no longer growing simply because global supply chains have recovered. Instead, its expansion is driven by deeper structural changes in the economy. Official traffic statistics from the Directorate General of Civil Aviation (DGCA) indicate that cargo volumes during January-June 2026 continued to outperform the corresponding period of 2025 across both international and domestic markets. Although passenger traffic dominates headlines, cargo has quietly emerged as one of the strongest-performing segments of India's aviation industry,

PHOTOGRAPH: IndiGo/E/X



From pharmaceuticals and electronics to perishables and express parcels, India's cargo mix has never been more diverse or more valuable

benefiting from higher export volumes, expanding airline capacity, and significant infrastructure improvements.

This growth has come against a much higher base. The sharp post-pandemic rebound has given way to a stable and predictable growth cycle, underpinned by manufacturing, exports, and logistics. Exports remain the principal driver of international cargo demand. Pharmaceuticals, electronics, engineering products, automotive components, and specialised chemicals rely heavily on air freight for speed-sensitive supply chains, while domestic cargo is increasingly powered by India's flourishing e-commerce and express logistics sectors. The combination of stronger manufacturing, expanding airline networks, and improving airport infrastructure has transformed air cargo into an essential enabler of India's global trade ambitions.

The foundations for today's performance were laid during 2025—a year that marked a genuine turning point. Unlike the rebound years immediately after the pandemic, when demand was driven by supply chain disruptions, 2025 reflected structural growth. According to the Ministry of Civil Aviation's Annual Report 2025, India handled 3.72 million metric tonnes (MMT) of air cargo during FY2024-25, compared with 2.53 MMT a decade earlier in FY2014-15. Cargo operations were conducted through 74 airports, highlighting the steady expansion of India's cargo network beyond traditional metropolitan hubs. Air cargo has evolved from being a support function for passenger airlines into an essential component of India's export competitiveness, enabling

manufacturers to connect with global markets through faster and more reliable supply chains.

■ **DUAL DRIVERS: INTERNATIONAL EXPORTS AND DOMESTIC E-COMMERCE.** International cargo remained the principal engine of growth throughout 2025 and continues to underpin the market in 2026. India's pharmaceutical industry retained its position as one of the world's largest users of air freight, supported by exports of temperature-sensitive medicines, vaccines, and healthcare products. At the same time, electronics manufacturing emerged as an increasingly important contributor, aided by Production Linked Incentive (PLI) schemes that have accelerated investment in domestic manufacturing. Engineering goods, semiconductors, automotive components, precision machinery, textiles, and perishables also generated healthy cargo volumes, reflecting India's growing integration into global manufacturing supply chains.

The country's emergence as an alternative production base has further strengthened demand for reliable air freight connectivity with North America, Europe, the Middle East, and South-east Asia. Unlike low-value bulk commodities, these high-value products require shorter transit times, predictable delivery schedules, and specialised handling—areas where air cargo enjoys a clear competitive advantage. The global environment has also remained favourable. According to the International Air Transport Association (IATA), worldwide air cargo demand reached a record level during 2025, with Asia-Pacific carriers recording the strongest regional growth, providing a supportive backdrop for Indian exporters.

While exports have driven international volumes, the domestic market has undergone an equally significant transformation. The rapid expansion of e-commerce has fundamentally altered cargo movement across India. Same-day and next-day delivery commitments have encouraged logistics companies to rely increasingly on air transport, creating sustained demand across

The rapid expansion of e-commerce has fundamentally altered air cargo movement across India

PHOTOGRAPH: BLR Airport / X



Regional airports are no longer peripheral players; they are steadily becoming the next frontier in India's air cargo growth story

major metropolitan centres and Tier-II and Tier-III cities. Express logistics providers have responded by expanding networks, investing in automated sorting facilities, digital shipment tracking, and multimodal distribution systems. As a result, domestic air cargo now carries a far more diversified mix of consignments, ranging from online retail shipments and consumer electronics to healthcare products and specialised industrial components. Faster delivery expectations, growing consumer demand, and the decentralisation of manufacturing have all increased the need for efficient domestic air freight services, while stronger passenger networks have expanded belly-hold cargo capacity across the country.

■ **EXPANDING ASSETS: INFRASTRUCTURE MODERNISATION AND FLEET CAPACITY.** Perhaps the most significant difference between today's cargo market and that of five years ago is the improvement in infrastructure. Long recognised as a major constraint, cargo handling facilities across India's leading airports have undergone steady modernisation. Investments in larger terminals, mechanised handling systems, cold-chain infrastructure, and digital cargo processing are gradually improving operational efficiency while reducing bottlenecks. Government policy has complemented these developments by placing cargo at the centre of India's broader logistics and manufacturing strategy. Major projects at Noida International Airport (Jewar) and Navi Mumbai International Airport are expected to create significant additional cargo capacity over the coming

years, while the AAI Cargo Logistics and Allied Services Company (AAICLAS) continues to strengthen infrastructure at several regional airports.

Digitalisation is emerging as an equally important enabler. Electronic documentation, automated cargo handling, improved customs processing, and integrated logistics platforms are reducing processing times and improving shipment visibility throughout the supply chain. Collectively, these investments are creating a more efficient cargo ecosystem capable of supporting India's rapidly expanding trade volumes.

Indian airlines also strengthened their cargo capabilities, reflecting the sector's growing commercial importance. Fleet expansion has naturally increased belly-hold cargo capacity across domestic and international routes, while dedicated freighter operations continue to expand. IndiGo Cargo, for example, carried 4,38,147 tonnes during 2025, an increase of 11 per cent over the previous year, supported by additional freighter aircraft and higher belly-hold capacity. Meanwhile, Delhi retained its position as India's largest cargo gateway, handling more than 1.1 million tonnes during FY2024-25 for the second consecutive year. Mumbai, Bengaluru, Hyderabad, and Chennai also continued strengthening their positions through investments in modern cargo terminals, specialised pharmaceutical facilities, and improved international connectivity. Together, these airports now form the backbone of India's air freight ecosystem, handling the overwhelming majority of international cargo while serving as critical distribution hubs for the domestic market.

■ **THE OPERATIONAL SHIFT: TECHNOLOGY, EFFICIENCY, AND FLEET BALANCE.** As the industry moves through 2026, the emphasis is gradually shifting from capacity creation to operational excellence. The objective is no longer simply to move more freight but to build a smarter, faster, and more resilient logistics ecosystem. This transition is evident across the value chain. Airlines are focusing on yield optimisation rather

As the industry moves through 2026, the emphasis is gradually shifting from capacity creation to operational excellence

PHOTOGRAPH: Boeing

than merely adding capacity, airport operators are investing in automation and digital infrastructure, while logistics providers are integrating air cargo more closely with road, rail, and warehousing networks to offer seamless end-to-end supply chain solutions. The industry's next phase will therefore be defined less by headline cargo volumes and more by efficiency, connectivity, and reliability.

Major airports have introduced advanced cargo management systems, automated handling equipment, and expanded cold-chain facilities to cater to high-value and temperature-sensitive commodities. Electronic documentation, integrated customs procedures, and digital cargo platforms are steadily reducing turnaround times while improving shipment visibility. Technology is becoming an increasingly important competitive advantage. Artificial intelligence-based warehouse management, RFID-enabled cargo tracking, and predictive analytics are enabling operators to optimise warehouse utilisation, improve handling efficiency, and reduce operational costs. These improvements are gradually bringing Indian cargo handling practices closer to international standards, strengthening the country's attractiveness as a manufacturing and export destination.

Despite rapid market growth, India's air cargo sector continues to rely predominantly on the belly-hold capacity of passenger aircraft. This model has expanded significantly as airlines have inducted larger fleets and increased international connectivity.

The industry's future success, however, will depend less on handling ever-larger volumes and more on building a world-class cargo ecosystem

However, belly cargo alone cannot meet the requirements of specialised freight such as pharmaceuticals, perishables, oversized industrial equipment, and express shipments. Dedicated freighters therefore continue to play a vital complementary role. Indian carriers have responded by gradually strengthening their freighter operations, while international operators including FedEx, DHL, UPS, Emirates SkyCargo, Qatar Airways Cargo, Turkish Cargo, and Ethiopian Cargo continue to enhance connectivity between India and major global markets. Rather than replacing belly cargo, dedicated freighters are expected to complement passenger aircraft, providing the flexibility required to handle specialised cargo and respond to seasonal demand surges. Achieving the right balance between the two will remain essential as India's export volumes continue to grow.

REGIONAL FRONTIERS AND NAVIGATING STRUCTURAL CHALLENGES. While Delhi, Mumbai, Bengaluru, Hyderabad, and Chennai dominate international cargo, the next phase of expansion is expected to come from regional India. Improved airport infrastructure, better road connectivity, and the development of multimodal logistics parks are enabling Tier-II and Tier-III cities to participate more actively in the national cargo network. This is particularly important for exporters of agricultural produce, seafood, floriculture products, and specialised manufacturing

goods, who can now access air freight facilities closer to their production centres. Projects under the Regional Connectivity Scheme (UDAN), coupled with cargo infrastructure upgrades at several regional airports, are gradually broadening India's cargo footprint beyond traditional metropolitan gateways. This decentralisation is expected to improve supply chain efficiency while reducing transportation costs for exporters located away from major cities.

Notwithstanding the sector's impressive progress, several structural challenges continue to demand attention. Infrastructure outside major metro airports remains uneven, particularly with respect to cold-chain facilities, mechanised cargo handling, and warehousing. Dedicated freighter capacity is still relatively modest compared with the size of the market, limiting flexibility during periods of peak demand. Procedural improvements have shortened cargo processing times, but further simplification of customs and regulatory processes will be essential if India is to compete with the world's leading logistics hubs. External factors also continue to influence market performance. Geopolitical tensions, fluctuating fuel prices, changing trade policies, and volatility in international freight rates all have the potential to affect cargo demand and airline profitability. As the market matures, maintaining healthy yields while controlling costs will become as important as increasing cargo volumes.

STRATEGIC OUTLOOK: A SUSTAINABLE PATH FOR THE DECADE. The outlook for the remainder of 2026 remains positive. India's export-oriented sectors—including pharmaceuticals, electronics, engineering goods, and precision manufacturing—are expected to continue generating strong demand for air freight. At the same time, sustained expansion in e-commerce, express logistics, and domestic consumption should support healthy growth in the domestic market. Ongoing investments in airport infrastructure, digital cargo systems, and multimodal logistics networks are expected to improve operational efficiency further, while new cargo facilities at airports such as Jewar and Navi Mumbai will provide additional capacity for future growth.

Industry forecasts suggest that annual growth will moderate from the exceptional levels witnessed during the immediate post-pandemic period. However, this moderation should be viewed as a sign of market maturity rather than slowing momentum. Growth is becoming increasingly broad-based and sustainable, supported by structural improvements in manufacturing, logistics, and global trade integration.

In conclusion, Indian air cargo has entered a defining phase in its evolution. The sector is no longer driven primarily by cyclical recovery or temporary disruptions in global supply chains. Instead, it is benefiting from enduring structural strengths: expanding manufacturing, resilient exports, rising e-commerce demand, improving airport infrastructure, and greater digital integration across the logistics ecosystem. As India strengthens its position as a global manufacturing and trading hub, air cargo will play an increasingly strategic role in connecting businesses with international markets and supporting high-value, time-sensitive supply chains. The industry's future success, however, will depend less on handling ever-larger volumes and more on building a world-class cargo ecosystem characterised by efficient infrastructure, smarter technology, streamlined regulation, and balanced capacity growth. If the momentum built over the past two years is sustained, Indian air cargo is well positioned to emerge as one of the country's most significant aviation success stories during the remainder of this decade. **SP**

UDAN 2.0 GIVES INDIA'S AIRCRAFT MANUFACTURING AMBITIONS A NEW RUNWAY

BY ROHIT GOEL

The government's expanded regional connectivity programme is fast emerging as a long-term catalyst for domestic civil aviation growth

INDIA'S CIVIL AVIATION SECTOR may be on the cusp of a structural transformation, and the latest expansion of the UDAN scheme could well be the policy lever that drives it. With the Union Cabinet approving a ₹28,840 crore outlay for the modified UDAN framework for the period FY 2026–27 to FY 2035–36, the government has signalled that regional connectivity is no longer merely a public service objective. Instead, it is increasingly being positioned as a strategic instrument for industrial growth, infrastructure expansion and the development of a domestic aircraft manufacturing ecosystem.

For years, India has been recognised as one of the world's fastest-growing aviation markets. Passenger traffic has risen sharply, new airports have been built at an unprecedented pace and airline fleet sizes have expanded consistently. Yet, despite this growth, the country has largely remained dependent on imported aircraft platforms. The revised UDAN framework introduces a new possibility — that India's role in the aviation value chain may begin to evolve from being predominantly an operator and consumer market into a credible hub for regional aircraft manufacturing and associated aerospace capabilities. This shift is significant not just for civil aviation, but for India's broader industrial ambitions.

FROM REGIONAL CONNECTIVITY TO INDUSTRIAL STRATEGY. When UDAN was first launched, its principal aim was straightforward: make flying accessible to the common citizen by connecting underserved and un-served airports to the national network. The programme succeeded in opening up routes to smaller cities and remote regions that had long remained outside India's mainstream aviation map. The modified version, however, represents a more ambitious policy evolution.

With a decade-long financial commitment of ₹28,840 crore, the scheme now moves well beyond route subsidies

and short-term connectivity goals. The scale of the allocation itself changes the nature of the programme. A long-term budgetary commitment of this magnitude provides visibility to airlines, airport developers, infrastructure companies and, crucially, manufacturers looking at India's regional aviation market.

Aircraft manufacturing decisions are fundamentally long-cycle investments. Companies do not establish production lines, supplier networks or assembly facilities on the basis of temporary demand spikes. They require sustained market certainty, and that is precisely what the revised UDAN framework begins to offer. By committing capital over a ten-year horizon and planning the development of 100 new airports and 200 helipads, the government is effectively creating a durable demand pipeline for smaller aircraft.

THE MINISTER'S MANUFACTURING SIGNAL. The clearest articulation of this industrial vision has come directly from Civil Aviation Minister Kinjarapu Rammohan Naidu, who

The government appears to be pursuing a more market-oriented approach — building demand at the route level so that manufacturing becomes commercially viable



PHOTOGRAPH: RemMNK / X

has explicitly linked the enhanced allocation with the potential for domestic manufacturing. As the Minister stated, “the six-fold increase in UDAN allocation will improve access to smaller towns and drive demand for smaller aircraft, which could potentially spur local manufacturing.” He further added that the increased demand would make “more business sense in local manufacturing in India for regional aircraft.”

These remarks are important because they move the conversation beyond connectivity and place the scheme firmly within the framework of industrial policy. Rather than merely incentivising manufacturers through direct fiscal benefits, the government appears to be pursuing a more market-oriented approach — building demand at the route level so that manufacturing becomes commercially viable in its own right. This is a far stronger and more sustainable proposition.

■ BUILDING DEMAND FOR THE RIGHT AIRCRAFT SEGMENT. The expansion of regional connectivity naturally creates demand for a very different class of aircraft than those deployed on India’s metro trunk routes. Flights connecting tier-II and tier-III cities, remote districts, hill states and smaller economic centres require aircraft that are optimised for short-haul sectors, thinner passenger loads and often shorter runways. These are not routes suited to larger narrow-body jets. Instead, they depend on commuter aircraft, regional turboprops and smaller short-haul platforms.

As more airports and heliports become operational under UDAN 2.0, the need for such aircraft is expected to rise steadily. This is where the manufacturing story begins to gather real momentum. Sustained route expansion in these sectors provides precisely the kind of recurring demand that can justify local assembly, component sourcing and eventually indigenous production. Once the economics begin to support manufacturing at scale, the impact is not limited to the aircraft itself. It extends across the entire aerospace supply chain.

■ A WIDER AEROSPACE ECOSYSTEM. The emergence of a regional aircraft manufacturing ecosystem in India would inevitably stimulate demand across multiple segments, including aerostructures, avionics, interiors, landing gear systems, electrical harnesses, maintenance services, pilot training and simulator support.

This wider ecosystem is where the real economic multiplier lies. A single production line can create demand for hundreds of suppliers, engineering firms and service providers. For India’s industrial landscape, this means opportunities not only for large aerospace players but also for a wide network of MSMEs and Tier-1 suppliers.

The Minister has also emphasised in recent statements that India is moving towards becoming a country that not only flies

By committing capital over a ten-year horizon and planning the development of 100 new airports and 200 helipads, the government is effectively creating a durable demand pipeline for smaller aircraft

REGIONAL CONNECTIVITY SCHEME – MODIFIED UDAN



FY 2026-27 TO FY 2035-36
TOTAL OUTLAY: ₹28,840 CRORE

MAJOR COMPONENTS

- **100 Airports Development:** Upgrading unserved air-strips to boost regional connectivity
- **200 Modern Helipads:** ₹3,661 crore investment over 8 years (₹15 crore each)
- **Operation & Maintenance Support:** ₹2,577 crore for around 441 aerodromes (3-year support with capped annual costs)
- **Viability Gap Funding support:** ₹10,043 crore over 10 years to support airline operators.

IMPACT

- Enhanced regional connectivity, boosting trade, tourism & local economies
- Improved healthcare access & emergency services in remote areas
- Stronger, self-reliant aviation ecosystem with sustainable regional operations

Source: JM_Scindia / X

aircraft but also designs, manufactures, maintains and finances them. That broader vision aligns closely with the national objective of strengthening self-reliance in advanced manufacturing sectors. For the civil aerospace sector, this could be a defining inflection point.

■ A NEW CHAPTER FOR INDIA’S CIVIL AVIATION STORY. For much of the past decade, India’s civil aviation story has been defined by market size and traffic growth. The revised UDAN framework introduces a deeper strategic dimension. It positions regional connectivity as a catalyst for industrial capability.

If the projected route expansion materialises as planned and traffic demand scales across emerging regional centres, the coming decade could see India evolve from being primarily an aviation consumer market into a meaningful manufacturing and assembly hub for smaller aircraft. That would mark a defining shift in the country’s civil aviation narrative.

The latest allocation, therefore, is not just about connecting smaller towns to the national map. It is about creating the commercial and policy conditions necessary for India’s aircraft manufacturing ambitions to take flight.

In that sense, UDAN 2.0 may ultimately be remembered not only for bringing aviation closer to the common citizen, but also for giving India’s civil aerospace sector a credible and much-needed runway for long-term growth. **SP**



The successful maiden flight of the megawatt-class hydrogen fuel turboprop engine AEP100, on a 7.5-tonne-class unmanned transport aircraft

HYDROGEN TAKES FLIGHT

China tests Hydrogen-Powered Cargo Aircraft, signalling shift from Concept to Application



BY ROHIT GOEL

CHINA HAS TAKEN A notable step forward in next-generation aviation with the successful test flight of a hydrogen-powered cargo aircraft—marking a transition from experimental research to early-stage operational validation.

The flight, conducted in Zhuzhou in early April 2026, involved a 7.5-tonne unmanned cargo aircraft powered by a hydrogen-fuelled turboprop engine. While the sortie lasted just over a quarter of an hour, its significance lies less in duration and more in what it represents: the first real-world demonstration of a megawatt-class hydrogen propulsion system integrated into an aircraft platform.

■ MOVING BEYOND DEMONSTRATION. Unlike earlier hydrogen aviation efforts globally—many of which remain confined to ground testing or small-scale demonstrators—this programme reflects a more integrated approach. The aircraft is pow-

ered by a domestically developed engine in the megawatt class, indicating that China is not only advancing propulsion technology but also aligning it with practical airframe applications.

Equally important is the ecosystem underpinning the test. Chinese developers have emphasised the creation of a full

The development signals China’s intent to take a leading role in next-generation, low-carbon aviation technologies while shaping future industry standards

PHOTOGRAPH: China Aero Engine Corporation / WeChat

technological chain, covering engine design, fuel systems, and aircraft integration. This level of vertical integration reduces reliance on external suppliers and positions the programme for more rapid iteration and scaling.

■ WHY CARGO LEADS THE WAY. The choice of an unmanned cargo platform is strategic. Hydrogen propulsion, while promising, still faces substantial technical and operational constraints—particularly around storage, infrastructure, and certification. Cargo operations offer a more flexible entry point, with fewer regulatory hurdles and greater tolerance for design trade-offs.

In this context, low-altitude logistics, regional freight, and specialised operations such as emergency supply delivery are likely to serve as initial deployment segments. The model mirrors broader global thinking, where cargo and regional aviation are expected to act as proving grounds for alternative propulsion technologies before any transition to passenger transport.

■ STRATEGIC UNDERCURRENTS. Beyond the technical milestone, the development carries wider industrial and strategic implications. China’s push into hydrogen aviation aligns with its broader ambitions in clean energy and advanced manufacturing. By moving early in hydrogen-powered flight, the country is positioning itself in a domain where global standards and supply chains are still taking shape.

There is also a clear linkage to the hydrogen economy more broadly. Aviation applications could act as a catalyst for investments in hydrogen production, storage, and distribution—particularly as governments and industries seek scalable use cases for green hydrogen.

At the same time, the unmanned nature of the platform leaves open potential dual-use applications, ranging from



Megawatt-class Hydrogen fuel cell Turboshaft Engine

remote logistics to disaster response and potentially strategic operations.

■ CONSTRAINTS REMAIN. Despite the progress, the gap between demonstration and deployment remains significant. Hydrogen’s low volumetric energy density continues to pose design challenges, requiring larger storage systems that impact payload and range. Infrastructure is another critical constraint; dedicated refuelling networks are still largely absent, even in advanced markets.

Economic viability is equally uncertain. The cost of producing and distributing green hydrogen remains high, and without substantial reductions, widespread adoption in aviation will be difficult to justify commercially.

Certification pathways, particularly for crewed aircraft, will add another layer of complexity, potentially extending timelines well into the next decade.

■ A MEASURED BUT MEANINGFUL STEP. The significance of China’s hydrogen cargo aircraft test lies not in the headline metrics, but in the direction of travel. By focusing on cargo and unmanned operations, the programme reflects a pragmatic approach—prioritising achievable use cases while continuing to refine underlying technologies.

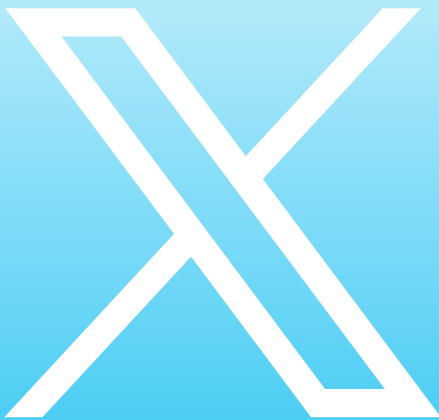
For the global aviation industry, the message is clear: hydrogen propulsion is beginning to move out of theory and into application. The pace of that transition—and whether it can scale economically—will determine how central it becomes to aviation’s long-term decarbonisation strategy.

For now, China’s test serves as an early indicator that the race is no longer just about feasibility. It is increasingly about execution. 

PHOTOGRAPH: AECC

AIRCRAFT SNAPSHOT	
Type	Unmanned cargo aircraft
Maximum Takeoff Weight	~7.5 tonnes
Propulsion	Hydrogen-fuelled turboprop (megawatt-class)
Power Output	>1 MW
Test Flight Duration	~16 minutes
Estimated Range (test profile)	~36 km
Cruise Speed	~220 km/h
Operating Altitude	~300 m
Payload	Not disclosed (cargo UAV class)

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