

ANNUAL
CONCLAVE
2025

AIR CARGO FORUM INDIA

Air Cargo Leadership in a Changing World



India at the Forefront of Global Transformation

CONCEPT NOTE



11 07 2025

Taj Palace, New Delhi



INTRODUCTION

The global air cargo industry is evolving rapidly, driven by digitalization, climate goals, shifting economies, consumer trends, and geopolitical shifts. In this landscape of uncertainty, air cargo is emerging as a strategic growth enabler, not just a mode of transport. With its ambitious trade agenda, dynamic private sector, and supportive policies, India is poised to lead this transformation globally.

The ACFI Annual Conclave 2025, themed ***“Air Cargo Leadership in a Changing World: India at the Forefront of Global Transformation,”*** brings together stakeholders to foster collaboration, innovation, and leadership.

As supply chains grow more complex, air cargo is becoming a critical, tech-enabled logistics pillar. Initiatives like PM Gati Shakti and the National Logistics Policy are building a synchronized, data-driven logistics ecosystem. Air cargo now plays a vital role in just-in-time trade and high-value, time-sensitive sectors such as pharma, perishables, electronics, and e-commerce.

ACFI Annual Conclave 2025 will spotlight the core pillars shaping India's air cargo future, offering a strategic platform for industry leaders, policymakers, technologists, and investors to shape the global cargo landscape—with India at its heart.

INDUSTRY LANDSCAPE: GROWTH AND TRANSFORMATION

HISTORIC GROWTH: India's air cargo industry has seen steady growth over the past decade, driven by rising capacity and demand. Total cargo throughput grew from 3.5 million metric tonnes in 2018 to 3.8 million metric tonnes in 2023, despite pandemic disruptions. The number of operational airports doubled from 74 in 2014 to 148 in 2023, enhancing national connectivity. In FY 2023 alone, scheduled airlines carried nearly 698,000 tonnes of domestic cargo.



Today, Indian airports can handle about 6.5 million tonnes annually, with capacity rapidly expanding. Upcoming greenfield airports like Noida and Navi Mumbai will further enhance cargo infrastructure. Investments in integrated cargo terminals and transshipment hubs are propelling India's air logistics toward a transformative leap.

FUTURE OUTLOOK: India aims to handle 10 million tonnes of air cargo annually by 2030—nearly triple current volumes. This target is backed by strategies to improve infrastructure, streamline processes, and foster innovation. Boeing projects a 6.3% annual growth in India's air freight demand, requiring 80+ new freighters over the next 20 years.

The market is expected to reach \$17+ billion by 2028, driven by strong sectors like e-commerce (set to hit \$350 billion by 2030) and pharmaceuticals (growing from \$50 billion to \$130 billion by

2030). Agriculture is also turning to air logistics for exporting perishables efficiently. This surge positions air cargo as a vital engine for trade and economic growth.

INTERNATIONAL CONNECTIVITY: India's growing aviation network is enhancing global cargo connectivity. Major airports like Delhi and Mumbai are upgrading capacity (Delhi to reach 2.5 million tonnes), while Bengaluru, Hyderabad, and Kolkata strengthen regional reach.

New international routes and dedicated freighter services are linking India with Africa, Latin America, and other key markets. Schemes like Krishi UDAN support agri-exports, while liberalized air service agreements attract more cargo flights.



India's strategic location in the Indo-Pacific positions it as a crucial transshipment hub and logistics bridge between Asia, Europe, and Africa—reinforcing its role in global supply chains.

STRATEGIC POLICY INITIATIVES: ENABLING A LOGISTICS LEAP

India's policy landscape is focused on transforming logistics efficiency and capacity, with air cargo playing a central role in enhancing trade competitiveness. Key initiatives like the PM Gati Shakti National Master Plan and the National Logistics Policy aim to reduce logistics costs, improve infrastructure, and foster digital integration for real-time data exchange across transport modes. The Civil Aviation Vision 2030 targets handling 10 million tonnes of air cargo by 2030, supported by investments in infrastructure, regulatory reforms, and sustainability efforts like Sustainable Aviation Fuel (SAF) and carbon-neutral airports. These efforts are designed to boost India's global logistics competitiveness, attract investment, and create jobs, positioning the country as a key player in international supply chains.

TALENT DEVELOPMENT AND EMPLOYMENT OPPORTUNITIES

India's air cargo and logistics sector, which already employs over 22 million people, is poised for further growth. The key to success lies in upskilling the workforce to adapt to emerging technologies and global standards. With a young demographic and increasing demand for tech-savvy professionals, industry and government initiatives under the Skill India mission and logistics skill councils are expanding training programs in areas like supply chain management, air transport, and e-commerce logistics. Upskilling current professionals through certifications in specialized areas such as dangerous goods handling and cold chain management is equally crucial.

The government's push for digital platforms and paperless systems means that digital literacy is now essential for logistics jobs. At the upcoming Conclave, talent development will be a focal point, with discussions on creating job opportunities across the logistics value chain, from warehouses to high-tech roles. Highlighting workforce empowerment and industry commitments to training programs, the event will emphasize how investing in human capital will drive India's air cargo growth, making it inclusive, sustainable, and future-ready.

THE INDIA OPPORTUNITY FOR GLOBAL STAKEHOLDERS

India is emerging as one of the world's most attractive growth markets, with a rapidly expanding economy, set to become the 3rd largest by 2027. Driven by strong domestic consumption and innovation, India is seeing a rise in its middle class, which will greatly boost demand for consumer products, electronics, healthcare, and food imports/exports. The country's strategic geopolitical position and stable democratic environment make it an ideal partner for global businesses seeking reliable supply chain diversification. India's robust digital infrastructure, with over 800 million internet users and platforms like UPI, provides an advanced environment for logistics investments, particularly in AI, IoT, and blockchain. The government's commitment to infrastructure development, including airport modernization and new free trade zones, offers significant opportunities for foreign direct investment. India's vision to become a leading air cargo hub is supported by initiatives that encourage global collaboration, making the ACFI 2025 Conclave a prime opportunity for international delegates, investors, and partners to engage in this transformative journey.

CONCLAVE AGENDA HIGHLIGHTS – STRATEGIC THEMES AND SESSIONS

ACFI Annual Conclave 2025 is structured around four key thematic pillars that capture the sector's priorities and future direction. These strategic themes will shape the panel discussions, workshops, and case studies at the event, ensuring a holistic exploration of challenges and opportunities. Each theme is carefully chosen to empower India's journey from an active participant to a global leader in air cargo. The sessions under these themes will bring together experts from industry, government, and academia to share insights and drive actionable strategies. The core discussion pillars are:

RESILIENCE THROUGH INNOVATION: Fostering agile and shock-proof supply chains by leveraging technology and innovation. This theme will spotlight how the Indian air cargo industry can build resilience proactively (not just reactively) by embracing digital tools, automation, and data-driven decision-making. From AI-driven demand forecasting to IoT-based tracking and robotics in warehouses, discussions will center on making supply chains smarter and more predictive. Recent global disruptions – whether geopolitical (trade wars, conflicts) or health-related – have underscored the value of resilience. Sessions will examine how India can turn volatility into opportunity, for example by strengthening regional cargo hubs and improving coordination between private players, customs, and regulators. Key questions: How can real-time data and AI help reroute cargo during crises? What investments in innovation yield the highest resilience ROI? What can India learn from global best practices in building resilient logistics networks?

SUSTAINABLE & GREEN CARGO INFRASTRUCTURE: Charting a course for environmentally responsible growth in air logistics. This pillar addresses the urgent need to reduce the carbon footprint of air cargo and align with global climate goals. India's air cargo expansion must go hand-in-hand with sustainability – from adopting green energy solutions at airports to incentivizing low-emission transportation. Sessions will delve into initiatives like the use of Sustainable Aviation Fuel (SAF) for freighter aircraft, electrification of ground handling equipment, and investment in energy-efficient warehouses and cold chain facilities. We will highlight success stories such as Delhi and Mumbai airports achieving carbon neutrality and explore the roadmap to net-zero emissions in aviation. Policy measures (e.g. carbon credits, green tariffs) and industry commitments will be

discussed to ensure that growth is not at odds with environmental responsibility. Key questions: How can India balance rapid cargo growth with its 2070 net-zero pledge? What partnerships are needed to develop and supply SAF at scale? In what ways can design and technology make new logistics infrastructure green by default?

EXPRESS LOGISTICS & E-COMMERCE ACCELERATION: Embracing the boom in e-commerce and express delivery that is reshaping logistics. With India's digital economy surging, the air cargo sector is experiencing a paradigm shift towards just-in-time delivery expectations. This theme will examine the ecosystem needed to support 24/7 express operations from modernizing customs for swift clearances to upgrading infrastructure at Tier-2 and Tier-3 city airports for overnight logistics. The growth of Direct-to-Consumer (D2C) brands, online retail giants, and e-marketplaces has led to a spike in air shipments for parcels and consumer goods. We will discuss the role of initiatives like ONDC (Open Network for Digital Commerce) and how integrating India's digital commerce platforms with logistics providers can create a seamless supply chain. Additionally, the theme covers the increasing integration of cross-border e-commerce, requiring efficient international freight and returns handling. Key questions: What are the bottlenecks in express cargo that need urgent attention (e.g. airport slot availability, workforce)? How can India develop its own integrators or attract global integrators to base more operations here? What does the future of last-mile delivery (drones, EVs, hyperlocal hubs) mean for air cargo feeders?

CARGO SECURITY, REGULATION & RISK MANAGEMENT: As cargo volumes increase, ensuring secure and compliant movement is critical. This theme will focus on adopting tech-driven security measures, such as AI-based screening, smart X-ray systems, and blockchain for tamper-proof documentation. Sessions will explore global best practices in risk-based screening and discuss how India can implement these to enhance security and efficiency. The theme will also address cyber security in logistics, protecting the digital infrastructure managing cargo. Panelists will debate how to build security systems that enable smooth cargo flow, covering trusted trader programs, secure supply chain corridors, and risk mitigation strategies. Key questions include: How can public and private stakeholders collaborate on cargo security? What training is needed for new security technologies? How can data security and privacy be maintained as logistics digitalize?

These themes collectively cover the spectrum of issues and opportunities facing air cargo today. The Conclave's agenda will feature high-level keynotes addressing each pillar, panel discussions with diverse experts, and interactive sessions to brainstorm solutions. By structuring the event around these pillars, ACFI 2025 ensures that every participant gains a 360-degree view of the industry's direction – from innovation and sustainability to market dynamics and security imperatives. The insights and ideas generated in these sessions will feed into a post-conclave report and action plan, aligning with national objectives and global best practices.



WHY ATTEND ?

The ACFI Annual Conclave 2025 offers a one-of-a-kind platform for stakeholders across the air cargo and logistics value chain. Participants will gain tremendous value from attending, including:

VISIONARY INSIGHTS: Hear from industry veterans, global experts, and policymakers on the latest trends shaping air cargo. From future technology to policy direction, get a front-row view of where the industry is headed in the next 5–10 years. These insights will help attendees anticipate change and identify new opportunities in the market.

NETWORKING & PARTNERSHIPS: Engage with a high-profile gathering of cargo airlines, airport operators, freight forwarders, e-commerce companies, tech providers, and government officials. The conclave facilitates networking at the highest level – enabling delegates to forge partnerships, client relationships, and collaborations that can drive their business forward. Whether you are looking for investors, seeking logistics partners, or exploring joint ventures, this is the place to connect.

INFLUENCE & COLLABORATION: Participate in policy dialogues and collaborative workshops that can shape industry outcomes. Attendees will have the chance to voice their perspectives and contribute to discussions that may influence national logistics policies, regulatory reforms, and infrastructure plans. By attending, you become part of the conversation with government and industry leaders to remove bottlenecks and catalyze growth.

KNOWLEDGE & SKILL BUILDING: Gain exposure to best practices and case studies from India and around the world. From successful implementation of airport cargo community systems to cutting-edge cold chain solutions, the knowledge shared at the conclave will enrich your understanding and could be applied in your organization. Additionally, the event will update you on skill requirements and training avenues, helping organizations plan their talent development strategies.

MARKET OPPORTUNITY SPOTLIGHT: International participants will particularly benefit from deep dives into the “India opportunity” – understanding market entry strategies, investment opportunities, and reliable local partners. For domestic participants, the conclave sheds light on new global markets and export opportunities. In essence, why attend? – because this forum equips you with information and connections that translate into competitive advantage in one of the fastest-growing cargo markets in the world.

In sum, whether you are a policy maker, a cargo airline executive, a supply chain manager, a technology entrepreneur, or an investor, the ACFI 2025 Conclave will provide valuable insights and strategic connections. The ideas exchanged here can directly inform your strategies and empower your role in the ecosystem. This is not just a conference; it is a catalyst for meaningful collaboration and change, ensuring you stay ahead in the evolving air cargo landscape.

CONCLUSION & WAY FORWARD

ACFI Annual Conclave 2025 is not just an event, but a transformative platform set to shape the future of global cargo with India at its core. By uniting leading experts and decision-makers, the conclave will turn discussions into actionable plans, advancing competitiveness, sustainability, and innovation in air logistics. Focused on resilience, green infrastructure, e-commerce enablement, and security, the conclave will guide both industry strategies and government policies, producing outcomes such as white papers, task force initiatives, and pilot projects. As India embarks on its journey to become a global logistics hub, this conclave is a pivotal opportunity to refine that vision and secure commitments. With cooperation across public and private sectors, ACFI Annual Conclave 2025 will turn ideas into investments and projects.

We invite global leaders, innovators, and investors to join us in July 2025 to share knowledge, forge partnerships, and commit to strategies that will define the future of air cargo with India leading the way.

The ACFI Annual Conclave 2025 will be a landmark event, driving collaboration and leadership for a new era in air cargo.

