

INDIGO STRENGTHENS ITS DOMINANCE

India's domestic aviation market softened in July —
but IndiGo's share increased to **67.4%**.



JULY 2026

AVIATION MARKET UPDATE

67.4%



“ When the market slows,
who gains share? ”



1.20 Cr

DOMESTIC PASSENGERS
IN JULY 2026



-4.8% YoY

DECLINE IN DOMESTIC
TRAFFIC (JULY 2026)



+0.64% YoY

GROWTH IN TRAFFIC
JAN-JUL 2026

THE MARKET SOFTENED



Domestic air traffic fell **4.8%** YoY in July 2026, though Jan-Jul traffic remains marginally higher YoY.



JULY 2026

1.26 Cr

DOMESTIC PASSENGERS

July 2025



-4.8%
YoY

1.20 Cr

DOMESTIC PASSENGERS

July 2026



JAN-JUL 2026 (CUMULATIVE)

977.79 Lakh

DOMESTIC PASSENGERS

Jan-Jul 2025



JAN FEB MAR APR MAY JUN JUL

+0.64%
YoY

984.03 Lakh

DOMESTIC PASSENGERS

Jan-Jul 2026



JAN FEB MAR APR MAY JUN JUL



KEY TAKEAWAY

July witnessed a sharp YoY contraction in domestic air traffic. However, cumulative traffic for the first seven months of 2026 remained marginally higher than last year.



INDIGO GAINS SHARE

The market shrank, but IndiGo's market share increased from **66.3%** to **67.4%**.



DOMESTIC MARKET SHARE (%)		JUNE 2026	JULY 2026	CHANGE
IndiGo		66.3%	67.4%	↑ +1.1 pp
AIR INDIA GROUP		23.9%	24.0%	↑ +0.1 pp
Akasa Air		6.4%	5.5%	↓ -0.9 pp
SpiceJet		1.9%	1.6%	↓ -0.3 pp
Others		1.5%	1.5%	— 0.0 pp

IMPORTANT NUANCE: PASSENGER VOLUME FELL, BUT MARKET SHARE **INCREASED**

INDIGO PASSENGERS (DOMESTIC)

89.20 Lakh
JUNE 2026

80.82 Lakh
JULY 2026

IndiGo's passenger volume fell by **8.38 lakh** from June to July 2026.

WHY DID INDIGO'S SHARE INCREASE?

- Overall domestic air traffic contracted **4.8%** YoY in July 2026.
- IndiGo's decline in passenger volume was smaller compared to the overall market decline.
- Result: IndiGo captured a larger portion of a shrinking pie.

IndiGo **strengthened its relative position** even in a declining traffic environment.

KEY INSIGHT

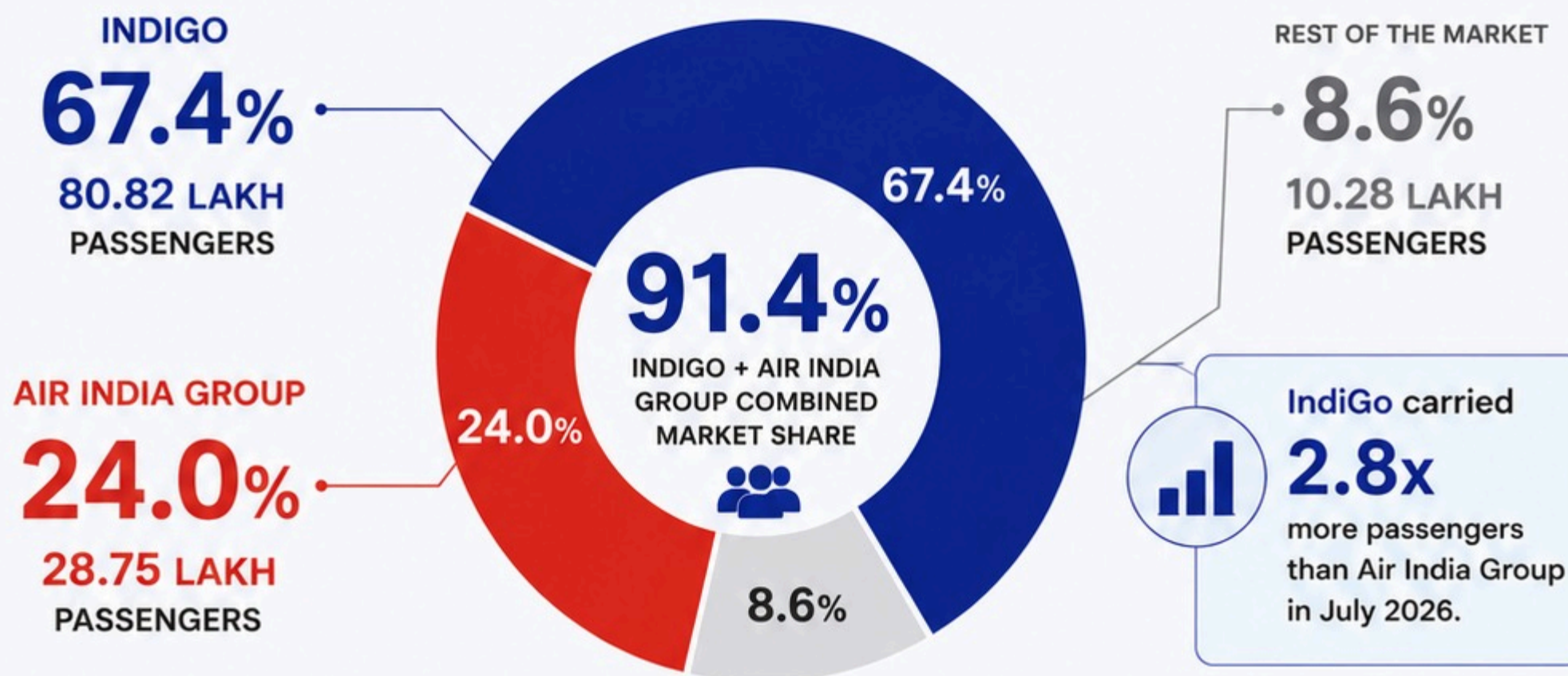
IndiGo increased its market share from **66.3%** to **67.4%** despite a fall in its own passenger numbers, highlighting its market leadership.

TWO AIRLINE GROUPS DOMINATE

IndiGo and Air India Group together controlled **91.4%** of India's domestic passenger market in July 2026.



MARKET SHARE BY PASSENGERS – JULY 2026



TOP 2 GROUPS ACCOUNT FOR OVER 9 OUT OF 10 PASSENGERS



KEY TAKEAWAY

The domestic aviation market is becoming increasingly concentrated, with IndiGo and Air India Group together accounting for more than **91%** of total passenger traffic.



EVERY MINUTE COUNTS

On-time performance is more than punctuality — it's the result of precision, coordination and planning.



JULY 2026 AT A GLANCE



91.2%

On-Time Performance (OTP)



80.82

Lakh Passengers



67.4%

Market Share



WHAT POWERS OUR PUNCTUALITY



REAL-TIME MONITORING

Advanced systems track every flight, every moment.



SEAMLESS COORDINATION

Ground teams, crew and partners work as one.



SMART PLANNING

Optimized scheduling minimizes delays and maximizes reliability.



CONSISTENT EXECUTION

Disciplined execution ensures we deliver, every single time.



It's not just about reaching on time.
It's about earning trust, every day.



THE NARRATIVE

WHAT IT MEANS

July was a test of resilience.
IndiGo emerged stronger.



Leadership That Compounds

IndiGo continues to widen the gap, turning scale into lasting advantage.



Market Concentration Deepens

Two airline groups now dominate Indian skies, leaving limited room for others.



Operational Discipline Wins

High on-time performance reflects strong execution and dependable operations.



Built for the Long Run

With a robust network and sharp execution, IndiGo is best positioned for India's aviation growth.



India's aviation future will be shaped by **scale, efficiency** and **execution**.

IndiGo has **all three**.