

# Ground and Cargo Handling Services Market - Global Outlook and Forecast 2020-2025

<https://marketpublishers.com/r/G2632C4CCB5EN.html>

Date: March 2020

Pages: 256

Price: US\$ 3,500.00 (Single User License)

ID: G2632C4CCB5EN

## Abstracts

The ground and cargo handling services market is expected to grow at a CAGR of over 5% during the period 2019–2025.

The global ground and cargo handling services market has been witnessing continuous growth in the last few decades. The increase in the number of air passengers directly drives the demand for effective ground and cargo handlers. For airlines to provide in-house ground handling services at airports can become a costly affair due to fluctuation in currency values and regulations across geographies. The global air cargo tonnage grew by 25% in 2019 compared to 2010. Also, according to the IATA, the air tonnage is growing at a higher rate and is likely to maintain its growth in the coming years. The booming e-commerce industry and the increasing number of people ordering merchandise via online platforms from overseas have to strengthen freight services. As the majority of e-commerce companies are pushing for one or two day guaranteed deliveries, they employ an increasing number of shipment services to meet their promises. Hence, the growing tonnage of freight through passenger airlines is boding well for the ground and cargo handling services market.

The following factors that are expected to contribute to the growth of the ground and cargo handling services market during the forecast period:

Innovations in Ground and Cargo Handling Systems and Equipment

Increased Freight in Passenger Airlines

Increase in Seat Capacity and Airlines fleet

## Establishment of New Airports

The study considers the present scenario of the ground and cargo handling services market and its dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report covers both the demand and supply sides of the market. It profiles and examines leading companies and other prominent companies operating in the market.

### Ground and Cargo Handling Services Market: Segmentation

This research report includes a detailed segmentation by service type, airline type, and geography. With the increase in the number of scheduled passengers, the amount of cargo being transported through the air is growing at a significant rate. The ground handling services market is expected to grow at a CAGR of over 6% and is likely to account for an incremental revenue of \$1.84 billion during the forecast period. The growth in scheduled international passengers, the development of new airports, and an increase in retrofitting activities at airports are expected to boost the ground handling segment. North America leads the passenger and baggage handling service market due to the presence of several international as well as domestic airports. The segment is likely to expand in APAC on account of an increase in domestic and international passengers in China and India.

The cargo handling services segment is expected to grow at a CAGR of over 6% during the forecast period. According to IATA, the global demand for air freight increased by approximately 3% in 2018. The overall demand for air cargo is expected to resonate well in the coming years. The highly competitive air freight industry is projected to continue the growth curve in the coming years. The freight handling segment is likely to generate increased revenues during the forecast period. A number of airlines generate additional revenues from extra luggage per passenger. Airlines are also focusing on carrying more freight in their bellies. Not only passenger airlines, but cargo airlines also reported resilient growth in revenues in 2019. Europe leads the freight handling market, followed by North America.

Passenger airlines account for the largest share of the ground and cargo handling services market. As passenger airlines carry the largest number of passengers and baggage, they are the main revenue generators for services providers. One of the factors driving the revenue generation is the ongoing trend of combination airlines. A majority of airlines are primarily passenger airlines; however, they partner with several e-

commerce companies to offer belly cargo space to carry express shipment, including perishable items, time-sensitive, and temperature-controlled products.

Cargo airlines primarily focus on carrying the air freight from one place to another both on domestic and international routes. APAC is the largest export center for air freight, western countries remain the largest importer. Europe and APAC constitute high revenues due to currency valuation and the presence of several busiest cargo airports.

## Market Segmentation by Service Type

### Ground Handling

Passengers & Baggage Handling

Airplane & Apron Handling

### Cargo Handling

Freight Handling

Logistics

## Market Segmentation by Airline Type

Passenger

Cargo

Charter

## Insights by Geography

Europe dominates the global ground and cargo handling services market. The region has well-developed airports with state-of-the-art infrastructure to accommodate a large number of passengers. Passenger travel plays a major role in the economic operations of airports. Further, the growing number of LCC airlines is also fueling the growth of the airport ground service industry. The steadiness in the economy bodes well for the

development of new airports as well as capacity increment within existing airlines to cater to the growing number of people preferring to travel by air. The growing economy of European countries allows for a high propensity of international travel per person as well.

North America is one of the largest markets for ground and cargo handling services. In terms of standalone countries, the US accounts for the largest market in 2019. The demand for North American airlines increased by 4.4% in June 2019. According to the IATA, the comparatively robust economic backdrop in North America is expected to continue to support passenger departures. However, inbound travel is being affected by additional security measures in place to travel to the US. The ground and cargo handling services market in North America is expected to grow at a CAGR of over 5% during the forecast period. The US has the largest airports in the world in terms of passenger traffic.

## Market Segmentation by Geography

### APAC

China

Japan

South Korea

India

Australia

### Europe

UK

Germany

France

Italy

Spain

Latin America

Brazil

Mexico

Argentina

MEA

UAE

South Africa

Turkey

North America

US

Canada

## Key Vendor Analysis

The global ground and cargo handling services market witnesses both monopoly and fair competition. The entry to the market is generally based on regulations set by airport managing authorities. The entry barriers for multinational ground and cargo handling service providing companies are often placed by state or federal governments to safeguard local airline subsidiaries. The marketplace is highly fragmented. The four largest handlers account for approximately 24% of the ground handling market. In 2019, over 35 million flight turnarounds were carried out globally, of which an estimated 10 million were outsourced by the airlines. By 2021, it is expected there will be approximately 44 million flight turnarounds undertaken globally, of which 45% will be outsourced, thus presenting rising opportunities for independent ground and cargo handling service providers.

## Key Vendors

Swissport

Dnata

Menzies Aviation

Worldwide Flight Services (WFS)

## Other Prominent Market

Bird Group

Celebi Aviation

SATS

Aviapartner

BBA Aviation

DHL

Fraport

Glamco Aviation

Primeflight Aviation

Hava?

Transworld Aviation

Qatar Aviation Services

Jardine Aviation Services

Gategroup

POS Aviation

Goldair Handling

Aeromexico Services

Airline Assistance Switzerland

Acciona

## Key Market Insights

The report provides the following insights into the ground and cargo handling services market for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market

Includes a detailed analysis of growth drivers, challenges, and investment opportunities

Delivers a complete overview of segments and the regional outlook of the market

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage

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