

Global Airport Pet Ground Handling Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Airport Pet Ground Handling Services market size is expected to reach \$ 217 million by 2032, rising at a market growth of 6.4% CAGR during the forecast period (2026-2032).

Airport Pet Ground Handling Services refer to professional airport-side services provided for dogs, cats and other companion animals transported as manifest cargo, checked baggage or cabin-accompanied pets. The service scope focuses on operational activities performed at airport cargo terminals, airside areas, dedicated pet lounges and licensed animal reception centers, covering pet acceptance, travel document and transport-container verification, security and quarantine coordination, temporary holding, environmental control, feeding and watering, welfare observation, airside transfer, aircraft loading and unloading, transit care, irregular-flight handling and arrival delivery. Service products are differentiated by transport acceptance mode, journey stage, facility configuration and welfare capability. The primary applications include origin departure handling, hub transfer handling, destination arrival handling and care associated with delays, cancellations or missed connections. Market value is measured from airport-side service revenue generated by ground handling companies, cargo terminal operators, airline cargo divisions, animal reception centers and specialist pet-service operators.

Key Findings

Global paid airport pet-handling activity reached approximately 1.08 million service touchpoints in 2025

Average airport-side service revenue was approximately US\$126.5 per paid handling touchpoint in 2025

North America and Europe remained the principal demand markets while Asia-Pacific accelerated specialist facility development

The verified competitive base comprises 44 core service providers across ground handling cargo terminals airlines and animal centers

Market Trends

Airport Pet Ground Handling Services are shifting from basic cargo acceptance and physical transfer toward integrated welfare-oriented service packages. Dedicated pet lounges, animal reception centers, temperature-controlled holding areas and specialized airside vehicles are becoming more common at major international hubs. Customers increasingly expect documented feeding and watering, environmental monitoring, status updates, photographs, traceable handover records and contingency care during delays. Digitalization is also extending beyond shipment tracking to include pet-specific milestone communication, facility monitoring and coordination among airlines, cargo terminals, veterinary teams and relocation agents. Over the longer term, service differentiation is expected to depend less on basic handling availability and more on welfare standards, facility quality, operational transparency and the ability to manage complex international transit and border-control procedures.

Market Dynamics

Drivers

Market demand is supported by rising international pet mobility, increasing household expenditure on companion-animal welfare and the growing number of owners relocating or travelling with pets. Airlines and airports are also under greater pressure to reduce stress, heat exposure, missed connections and communication gaps during animal transport. The expansion of international cargo networks, specialized pet transport products and dedicated animal facilities increases the number of airports capable of offering paid professional handling. Regulatory requirements covering transport containers, documentation, acceptance procedures and animal welfare further encourage airlines and cargo terminals to use trained personnel, controlled facilities and

standardized workflows rather than treating pets as ordinary cargo.

Restraints

Growth is constrained by the limited number of airports with dedicated animal facilities, uneven service standards across regions and the difficulty of separating pet-handling charges from broader airfreight, terminal and relocation fees. Demand can also be affected by airline restrictions on breeds, seasonal temperature embargoes, aircraft-type limitations and temporary suspensions of pet acceptance. Specialized facilities require trained staff, climate control, airside vehicles, cleaning systems and veterinary coordination, creating relatively high fixed costs for airports with low animal volumes. Complex import rules and inconsistent documentation requirements may also discourage cross-border pet travel or shift demand toward routes with more established animal-handling infrastructure.

Opportunities

The strongest opportunities are emerging in dedicated pet terminals, premium transit care, irregular-flight accommodation, digital welfare monitoring and integrated airport-to-door coordination. Asia-Pacific airports are expanding pet lounges and specialized cargo facilities, while Middle Eastern hubs can develop high-value transit services for long-haul journeys. Service providers can increase revenue through differentiated packages that combine priority acceptance, controlled holding, feeding, exercise, photo updates, veterinary support and rapid arrival delivery. Additional opportunities exist in airline outsourcing, airport concession contracts and partnerships with pet relocation companies, particularly where airports have sufficient pet traffic but lack an established specialist operator.

Challenges

The industry faces persistent challenges in service standardization, data transparency and operational accountability. Similar commercial terms such as pet lounge, animal hotel and animal reception center can represent substantially different levels of care, making customer comparison difficult. Responsibility may also be divided among airlines, cargo terminals, ground handlers, government inspection bodies and external animal centers, increasing the risk of fragmented communication and duplicated charges. Operators must maintain consistent welfare performance during peak

seasons, extreme temperatures, flight disruptions and long transfer times. Reputational risk is significant because individual handling failures can quickly affect airline and airport brands even when the operational responsibility lies with a third-party contractor.

Value Chain Analysis

The upstream portion of the Airport Pet Ground Handling Services value chain consists of airport infrastructure, cargo terminal space, temperature-control equipment, animal holding units, airside vehicles, digital monitoring systems, cleaning supplies, trained labor and veterinary or quarantine support. These inputs determine the service provider's ability to maintain safe environmental conditions, comply with airport security requirements and respond to irregular operations. Capital intensity is highest for standalone animal reception centers and dedicated pet terminals, while conventional cargo terminals can enter the market through designated animal rooms and trained operational teams.

The midstream segment includes global ground handling groups, airport cargo terminal operators, airline cargo divisions, licensed animal reception centers and specialist pet-service operators. Value is created through acceptance accuracy, reduced airside exposure, welfare supervision, reliable transfer execution and communication with customers and authorities. Downstream customers include airlines, freight forwarders, pet relocation companies, government border-control agencies and pet owners. Profitability is generally stronger in premium care, transit accommodation, veterinary-supported services and complex import handling than in basic cargo acceptance and physical transfer.

Segment Insights

Manifest Cargo Pet Ground Handling represents the largest service product segment because it covers the widest range of chargeable airport activities, including cargo acceptance, document verification, terminal storage, airside transfer and arrival release. Excess Baggage Pet Ground Handling remains important on passenger routes where pets travel on the same flight as their owners, while In-Cabin Pet Interface Service forms a smaller airport-service segment because the owner retains direct custody for most of the journey. By application, origin departure and destination arrival services form the core recurring demand base, whereas hub transfer and irregular-operations handling generate higher service intensity and greater revenue per case.

By facility type, designated animal zones within general cargo terminals remain the most widely available configuration, but dedicated pet facilities and standalone animal reception centers provide stronger differentiation and higher-value service potential. Basic environmental holding continues to account for a substantial portion of activity, while active welfare care and veterinary-supported care are expanding at major international hubs. Growth opportunities are concentrated in facilities that combine controlled environments, transparent status communication, rapid airside transfer and the ability to support overnight or disrupted journeys.

Downstream Market Opportunities

The largest downstream demand comes from international pet owners, relocation companies and airlines requiring compliant airport handling for manifest cargo and checked-baggage pets. Premium opportunities are concentrated in long-haul international journeys, multi-airport transfers, complex import destinations and routes exposed to extended waiting times or temperature risk. Airlines increasingly require reliable outsourced partners that can protect service quality without building independent animal facilities at every station. Airports with growing pet traffic can also introduce specialist concessions or joint operating models covering pet lounges, animal holding, inspection coordination and irregular-flight accommodation.

Regional Insights

North America and Europe remain the largest regional markets because of established pet ownership, mature air cargo networks, licensed animal reception centers and relatively high willingness to pay for professional animal care. The United States, the United Kingdom, Germany, France and the Netherlands support a broad mix of airline-operated products, independent animal centers and specialist cargo-terminal services. Europe has particular strength in border inspection, transit accommodation and dedicated airport animal facilities, while North America benefits from large domestic travel flows and established airline pet-cargo programs.

Asia-Pacific is expected to record the strongest expansion as airports in China, Southeast Asia, India and China Taiwan invest in pet lounges, animal rooms and specialized handling procedures. Japan and South Korea retain strong airline-led operating models, while China is developing airport-based pet terminals and professional third-party operating platforms. The Middle East represents a high-value

transit market because of its position in long-haul intercontinental networks. Australia remains a specialized market shaped by strict biosecurity requirements and strong demand for professional relocation and arrival handling.

Competitive Landscape Analysis

The competitive landscape is fragmented and consists of global ground handling groups, airport cargo terminal operators, airline cargo subsidiaries, independent animal reception centers and specialist pet-service companies. Global handling groups compete through airport network coverage, airline contracts and standardized operating systems, while airline cargo divisions benefit from direct control over booking, flight operations and customer communication. Airport cargo terminals hold advantages in facility access, security clearance and airside transfer, whereas independent animal centers differentiate through dedicated holding capacity, veterinary support and premium welfare services. Competition is increasingly focused on compliance credentials, facility quality, response capability during disruptions and digital visibility rather than basic handling alone. Consolidation among global ground handlers and airline groups is reducing some corporate duplication, but local operating licenses, airport concessions and border-control requirements continue to preserve a significant role for regional specialists.

Report Scope

This report studies the global Airport Pet Ground Handling Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Airport Pet Ground Handling Services, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Airport Pet Ground Handling Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Airport Pet Ground Handling Services total market, 2021-2032, (USD Million)

Global Airport Pet Ground Handling Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Airport Pet Ground Handling Services total market, key domestic companies, and share, (USD Million)

Global Airport Pet Ground Handling Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Airport Pet Ground Handling Services total market by Type, CAGR, 2021-2032, (USD Million)

Global Airport Pet Ground Handling Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Airport Pet Ground Handling Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include dnata, Swissport International AG, SATS Ltd., Menzies Aviation Limited, Çelebi Havacılık Holding A.Ş., Havaalanlar Yer Hizmetleri A.Ş., Hong Kong Air Cargo Terminals Limited, Cathay Pacific Services Limited, Shanghai Pudong International Airport Cargo Terminal Co., Ltd., Qatar Aviation Services Company W.L.L., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Airport Pet Ground Handling Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Airport Pet Ground Handling Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Airport Pet Ground Handling Services Market, Segmentation by Type:

Manifest Cargo Pet Ground Handling

Excess Baggage Pet Ground Handling

In-Cabin Pet Interface Service

Other

Global Airport Pet Ground Handling Services Market, Segmentation by Animal Welfare Capability:

Basic Environmental Holding

Active Welfare Care

Veterinary Supported Care

Other

Global Airport Pet Ground Handling Services Market, Segmentation by Application:

Origin Departure Handling

Hub Transfer Handling

Destination Arrival Handling

Irregular Operations Handling

Other

Companies Profiled:

dnata

Swissport International AG

SATS Ltd.

Menzies Aviation Limited

Çelebi Havacılık Holding A.Ş.

Havaalanları Yer Hizmetleri A.Ş.

Hong Kong Air Cargo Terminals Limited

Cathay Pacific Services Limited

Shanghai Pudong International Airport Cargo Terminal Co., Ltd.

Qatar Aviation Services Company W.L.L.

Air General, Inc.

Alliance Ground International

AAI Cargo Logistics and Allied Services Company Limited

Evergreen Air Cargo Services Corp.

Taiwan Air Cargo Terminal Limited

Farglory Free Trade Zone Co., Ltd.

Guangzhou Baiyun International Airport Co., Ltd.

Shenzhen Airport Co., Ltd.

Guangxi Civil Aviation Industry Development Co., Ltd.

ARK Import Export Center, LLC

City of London Corporation

Animal Aircare Company Ltd.

Jet Pets Animal Transport Pty Ltd

Shenzhen Feimiaomiao Technology Co., Ltd.

Lufthansa Cargo AG

Air France-KLM S.A.

Air Canada

Korean Air Lines Co., Ltd.

ANA HOLDINGS INC.

Japan Airlines Co., Ltd.

Air China Cargo Co., Ltd.

China Southern Air Logistics Co., Ltd.

China Eastern Air Logistics Co., Ltd.

MAB Kargo Sdn Bhd

PT Garuda Indonesia Persero Tbk

Thai Airways International Public Company Limited

Air India Limited

Etihad Airways PJSC

Qantas Airways Limited

Turkish Airlines Inc.

IAG Cargo Limited

American Airlines Group Inc.

Alaska Air Group, Inc.

LATAM Airlines Group S.A.

Key Questions Answered

1. How big is the global Airport Pet Ground Handling Services market?
2. What is the demand of the global Airport Pet Ground Handling Services market?
3. What is the year over year growth of the global Airport Pet Ground Handling Services market?
4. What is the total value of the global Airport Pet Ground Handling Services market?
5. Who are the Major Players in the global Airport Pet Ground Handling Services market?
6. What are the growth factors driving the market demand?

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