

Global Airport Pet Ground Handling Services Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Airport Pet Ground Handling Services market size was valued at US\$ 141 million in 2025 and is forecast to a readjusted size of US\$ 217 million by 2032 with a CAGR of 6.4% during review period.

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 is a detailed and comprehensive analysis for global Airport Pet Ground Handling Services market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Airport Pet Ground Handling Services market size and forecasts, in consumption

value (\$ Million), 2021-2032

Global Airport Pet Ground Handling Services market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Airport Pet Ground Handling Services market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Airport Pet Ground Handling Services market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Airport Pet Ground Handling Services

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key 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.

Airport Pet Ground Handling Services market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

Manifest Cargo Pet Ground Handling

Excess Baggage Pet Ground Handling

In-Cabin Pet Interface Service

Other

Market segment by Animal Welfare Capability

Basic Environmental Holding

Active Welfare Care

Veterinary Supported Care

Other

Market segment by Application

Origin Departure Handling

Hub Transfer Handling

Destination Arrival Handling

Irregular Operations Handling

Other

Market segment by players, this report covers

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.

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Airport Pet Ground Handling Services product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Airport Pet Ground Handling Services, with revenue, gross margin, and global market share of Airport Pet Ground Handling Services from 2021 to 2026.

Chapter 3, the Airport Pet Ground Handling Services competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape

contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Airport Pet Ground Handling Services market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Airport Pet Ground Handling Services.

Chapter 13, to describe Airport Pet Ground Handling Services research findings and conclusion.

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