

Ground Support Equipment Market Report by Type (Powered Ground Support Equipment, Non-Powered Ground Support Equipment), Power Source (Electric, Non-Electric, Hybrid), Application (Aircraft Handling, Passenger Handling, Cargo Handling), and Region 2024-2032

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Abstracts

The global ground support equipment market size reached US\$ 15.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 31.1 Billion by 2032, exhibiting a growth rate (CAGR) of 7.8% during 2024-2032. The growing demand for air travel necessitating efficient tools for aircraft servicing, growing integration of modern technology, such as automation and robotics in airport operations, and rapid expansion and modernization of airport facilities, coupled with the growth in air cargo transportation represent some of the factors that are propelling the market.

Ground support equipment (GSE) refers to the specialized tools and devices employed at airports to support the smooth operation of aircraft between flights. These tools are essential in the servicing of aircraft when they are on the ground, encompassing functions such as refueling, loading and unloading cargo, passenger transportation, and the maintenance of vital systems. GSE's characteristics include its ability to perform various functions that are integral to flight preparation, maintenance, and safety. This equipment ensures timely departure and arrival, the seamless transfer of passengers and goods, and the proper functioning of aircraft components. Whether it involves towing aircraft to and from gates, supplying electric power, or managing waste and water services, GSE plays a critical role in the aviation industry by fulfilling diverse and essential tasks that enable the aircraft to operate efficiently and safely.

The global market is primarily driven by the growing demand for air travel, which necessitates more advanced and efficient tools for aircraft servicing. In line with this, the continual developments and growing integration of modern technology, such as automation and robotics in airport operations, are also providing an impetus to the market. Moreover, the rigorous regulations concerning safety and environmental sustainability are acting as significant growth-inducing factors for the market. In addition to this, the rapid expansion and modernization of airport facilities, coupled with the growth in air cargo transportation, are resulting in higher investment in quality support equipment. The market is further driven by the emergence of low-cost carriers, the rising demand for customized solutions tailored to specific needs, and the ongoing expansion of regional airports. Apart from this, the increase in the number of aircraft being operated globally and the market's embrace of innovative, eco-friendly solutions, are propelling the market. Some of the other factors contributing to the market include the cultural shift towards more open dialogues about aviation efficiency and safety, the growing demand for cost-effective support equipment, and extensive research and development (R&D) activities.

Ground Support Equipment Market Trends/Drivers:

Rapid expansion of aviation industry

The continual growth and expansion of the aviation industry worldwide are integral to the demand for ground support equipment. As airlines extend their services to new destinations, connecting various regions and cities, the requirements for support and servicing multiply. The addition of new routes necessitates further planning, coordination, and support at both ends of each flight. Moreover, emerging markets are witnessing an uptick in air travel, leading to the creation of new airports and the expansion of existing ones. All of these factors require robust support equipment that can manage the complexity of modern aviation. The globalization of business and leisure travel is a phenomenon that shows no sign of abating, leading to a consistent demand for efficient, reliable, and technologically advanced tools and devices to support this intricate network of global connectivity.

Favorable government initiatives and investment in infrastructure

Government investment in airport infrastructure is another critical factor driving the market. Around the world, governments recognize the importance of efficient airports as hubs of commerce, travel, and connectivity. The creation of new airports and the modernization of existing ones are often part of broader economic development and infrastructure improvement strategies. These investments not only enhance the quality

and efficiency of airports but also stimulate the surrounding economy through job creation and increased commercial activity. The direct support for state-of-the-art ground support equipment ensures that airports can handle growing passenger numbers and cargo volumes, meet stringent safety standards, and contribute positively to environmental sustainability goals. This combination of factors highlights the essential role of government support in shaping the market landscape.

Rising consumer expectations and the emphasis on timely service

The growing expectations of air-travelers are higher than ever, with a strong emphasis on seamless and timely service. This demand necessitates the use of efficient and reliable equipment to ensure rapid turnaround times and an enhanced passenger experience. From the moment an aircraft lands to the time it takes off again, every second counts. Efficient ground support enables airlines to minimize delays, reduce costs, and maximize customer satisfaction. The focus on operational efficiency also extends to the way cargo is handled, ensuring that goods reach their destinations on time and in perfect condition. Airports and airlines investing in state-of-the-art ground support tools and technology acknowledge that customer satisfaction is paramount. Meeting and exceeding these expectations is not merely a matter of good business practice; it is an essential factor propelling the market forward, aligning with the broader trends of personalization, efficiency, and convenience that define modern consumer behavior.

Ground Support Equipment Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global ground support equipment market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on type, power source and application.

Breakup by Type:

Powered Ground Support Equipment

Non-Powered Ground Support Equipment

Powered ground support equipment represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the type. This includes powered and non-powered ground support equipment. According to the report, powered ground support equipment represented the largest segment.

Powered ground support equipment plays a vital role in modern aviation, allowing for more efficient and faster servicing of aircraft. These include vehicles and tools that are motor-driven, such as tow tractors, loaders, and fueling trucks. They are essential for towing aircraft, loading luggage, and other functions that require substantial power. The innovation and advancement in powered equipment are contributing to reduced operational times and enhanced efficiency. Their vital role in daily airport operations underscores the growing market for these essential tools.

On the other hand, non-powered ground support equipment includes manual tools and devices that do not require a motor or external power source. These pieces of equipment, such as chocks, ladders, and baggage carts, are necessary for various ground handling tasks. Despite being manual, they are integral to the safe and efficient operation of airports, assisting in activities ranging from aircraft maintenance to passenger boarding. The market for non-powered equipment remains robust, reflecting the ongoing need for versatile and reliable tools. These instruments continue to be essential complements to their powered counterparts.

Breakup by Power Source:

Electric

Non-Electric

Hybrid

The report has provided a detailed breakup and analysis of the market based on the power source. This includes electric, non-electric and hybrid.

The electric segment represents a growing segment in the industry, driven by the global emphasis on sustainability and energy efficiency. These tools, powered by electric batteries, offer an environmentally friendly alternative to traditional fuel-powered equipment. They contribute to reduced emissions and lower operating costs over time. The shift towards electric options aligns with global efforts to mitigate climate change and promotes greener airport operations. This segment's growth is indicative of a broader trend towards sustainable solutions within the aviation industry.

On the other hand, the non-electric segment includes both powered and non-powered tools that do not utilize electric energy. They may be fueled by diesel, gasoline, or other energy sources, or may be manually operated. Though they may not offer the same environmental benefits as electric equipment, they remain essential in many airport

operations. Continued reliance on non-electric equipment in various parts of the world sustains this segment's demand. Investment in new technologies may lead to more efficient and cleaner non-electric options in the future.

Also, the hybrid segment combines the benefits of electric power with traditional fuel sources, offering a compromise between environmental sustainability and operational power. These tools are increasingly being adopted by airports looking to reduce emissions without sacrificing performance. Hybrid options provide flexibility, allowing for more extended operation without the need for frequent recharging. They represent a growing trend towards more versatile and responsible choices. This segment reflects an industry adapting to both environmental concerns and practical operational needs.

Breakup by Application:

Aircraft Handling

Passenger Handling

Cargo Handling

Passenger handling accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes aircraft handling, passenger handling, and cargo handling. According to the report, passenger handling represented the largest segment.

Passenger handling involves equipment and services focused on the movement and comfort of passengers within the airport. This includes boarding bridges, buses, baggage handling, and assistance for passengers with special needs. The emphasis on enhancing the passenger experience drives continual innovation and investment in this segment. As air travel continues to grow, the need for efficient and effective passenger handling becomes even more critical. The market for passenger handling equipment and services reflects the airline industry's focus on customer satisfaction and operational efficiency.

On the other hand, aircraft handling encompasses a wide range of equipment and tools required for servicing aircraft between flights. This includes towing, refueling, cleaning, and maintenance activities. Effective aircraft handling is essential for ensuring that flights depart and arrive on schedule, maintaining the efficiency of airline operations. The market for aircraft handling equipment is substantial, reflecting the complexity and importance of these tasks. Investments in new technologies and processes are

continually enhancing the effectiveness and efficiency of aircraft handling, maintaining this segment's vitality.

Furthermore, the cargo handling segment of the market holds significant importance due to the continual increase in global trade and commerce. As international business continues to grow, the demand for efficient cargo transportation via air has seen a steady rise. This calls for advanced and reliable ground support equipment that can handle various types of cargo with precision and care. Investments in state-of-the-art devices for cargo loading, unloading, and management are reflecting the growing need for speed, efficiency, and safety in this segment.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest ground support

equipment market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

The North America region is a significant market for ground support equipment, because the region is home to some of the world's busiest airports and largest airlines. This region has been at the forefront of technological innovation, leading to the adoption of advanced powered, electric, and hybrid equipment.

The emphasis on sustainability and environmental stewardship further drives the push towards greener solutions within the region. Robust economic growth, coupled with the presence of major aviation hubs, ensures continual investment in ground support infrastructure. Government regulations and initiatives, focused on safety and efficiency, contribute to the region's leadership in the industry.

Furthermore, continual developments in airport modernization and expansion projects across North America signal a strong and growing market for ground support equipment. The integration of new technologies, customer-centric strategies, and an overall emphasis on efficient airport operations make the North America region a vital and influential part of the global market.

Competitive Landscape:

The key players in the market are actively employing a multifaceted approach to ensure continued market growth. These strategies encompass technological innovation, enhanced product offerings, collaboration with airports and airlines, and alignment with sustainability goals. Many companies are focusing on research and development to introduce state-of-the-art equipment that not only meets current requirements but anticipates future needs as well. Partnerships and collaborations with other industry stakeholders are facilitating shared growth, while acquisitions are expanding market reach and capabilities. Some firms are also focusing on providing tailored solutions to different regions, considering local regulations, climate conditions, and specific airport needs. Moreover, the shift towards environmentally friendly options is attracting customers who are keen on aligning with global sustainability goals.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Aero Specialties Inc.
Aeroservices Ltd.
Cavotec SA
Curtis Instruments Inc.
ITW GSE
Jalux Inc.
John Bean Technologies Corporation
Mallaghan
Rheinmetall Aktiengesellschaft
Textron Ground Support Equipment Inc. (Textron Inc.)
TLD Group (Alvest Group)
Weihai Guangtai Airport Equipment Co. Ltd

Recent Developments:

In January 2021, AERO Specialties announced that their JetGo 900 has been named as a winner of the Good Design Award for 2020. This award is given from the most innovative and cutting-edge industrial, product, and graphic designs produced around the world.

In July 2022, Cavotec SA completed the sale of its airport business, Dabico Airport Solutions, to the US-based Fernweh Group LLC. The deal, announced in February 2022 and expected to close in summer 2022, accounted for around 25% of Cavotec's 2021 revenue. The transaction was finalized for a total cash consideration of EUR 13 million.

In January 2022, Curtis Instruments Inc., headquartered in Mount Kisco, New York, was acquired by Kohler Co.'s Power Group. The acquisition expands and diversifies Kohler's power portfolio by leveraging Curtis' electrification expertise with Kohler's well-established gasoline and diesel engine business to best serve off-highway OEM customers. Curtis Instruments will operate as a standalone entity within the Kohler Power Group.

Key Questions Answered in This Report

1. What was the size of the global ground support equipment market in 2023?
2. What is the expected growth rate of the global ground support equipment market during 2024-2032?

3. What are the key factors driving the global ground support equipment market?
4. What has been the impact of COVID-19 on the global ground support equipment market?
5. What is the breakup of the global ground support equipment market based on the type?
6. What is the breakup of the global ground support equipment market based on the application?
7. What are the key regions in the global ground support equipment market?
8. Who are the key players/companies in the global ground support equipment market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL GROUND SUPPORT EQUIPMENT MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY TYPE

- 6.1 Powered Ground Support Equipment
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Non-Powered Ground Support Equipment
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast

7 MARKET BREAKUP BY POWER SOURCE

7.1 Electric

7.1.1 Market Trends

7.1.2 Market Forecast

7.2 Non-Electric

7.2.1 Market Trends

7.2.2 Market Forecast

7.3 Hybrid

7.3.1 Market Trends

7.3.2 Market Forecast

8 MARKET BREAKUP BY APPLICATION

8.1 Aircraft Handling

8.1.1 Market Trends

8.1.2 Market Forecast

8.2 Passenger Handling

8.2.1 Market Trends

8.2.2 Market Forecast

8.3 Cargo Handling

8.3.1 Market Trends

8.3.2 Market Forecast

9 MARKET BREAKUP BY REGION

9.1 North America

9.1.1 United States

9.1.1.1 Market Trends

9.1.1.2 Market Forecast

9.1.2 Canada

9.1.2.1 Market Trends

9.1.2.2 Market Forecast

9.2 Asia-Pacific

9.2.1 China

9.2.1.1 Market Trends

9.2.1.2 Market Forecast

9.2.2 Japan

9.2.2.1 Market Trends

- 9.2.2.2 Market Forecast
- 9.2.3 India
 - 9.2.3.1 Market Trends
 - 9.2.3.2 Market Forecast
- 9.2.4 South Korea
 - 9.2.4.1 Market Trends
 - 9.2.4.2 Market Forecast
- 9.2.5 Australia
 - 9.2.5.1 Market Trends
 - 9.2.5.2 Market Forecast
- 9.2.6 Indonesia
 - 9.2.6.1 Market Trends
 - 9.2.6.2 Market Forecast
- 9.2.7 Others
 - 9.2.7.1 Market Trends
 - 9.2.7.2 Market Forecast
- 9.3 Europe
 - 9.3.1 Germany
 - 9.3.1.1 Market Trends
 - 9.3.1.2 Market Forecast
 - 9.3.2 France
 - 9.3.2.1 Market Trends
 - 9.3.2.2 Market Forecast
 - 9.3.3 United Kingdom
 - 9.3.3.1 Market Trends
 - 9.3.3.2 Market Forecast
 - 9.3.4 Italy
 - 9.3.4.1 Market Trends
 - 9.3.4.2 Market Forecast
 - 9.3.5 Spain
 - 9.3.5.1 Market Trends
 - 9.3.5.2 Market Forecast
 - 9.3.6 Russia
 - 9.3.6.1 Market Trends
 - 9.3.6.2 Market Forecast
 - 9.3.7 Others
 - 9.3.7.1 Market Trends
 - 9.3.7.2 Market Forecast
- 9.4 Latin America

9.4.1 Brazil

9.4.1.1 Market Trends

9.4.1.2 Market Forecast

9.4.2 Mexico

9.4.2.1 Market Trends

9.4.2.2 Market Forecast

9.4.3 Others

9.4.3.1 Market Trends

9.4.3.2 Market Forecast

9.5 Middle East and Africa

9.5.1 Market Trends

9.5.2 Market Breakup by Country

9.5.3 Market Forecast

10 SWOT ANALYSIS

10.1 Overview

10.2 Strengths

10.3 Weaknesses

10.4 Opportunities

10.5 Threats

11 VALUE CHAIN ANALYSIS

12 PORTERS FIVE FORCES ANALYSIS

12.1 Overview

12.2 Bargaining Power of Buyers

12.3 Bargaining Power of Suppliers

12.4 Degree of Competition

12.5 Threat of New Entrants

12.6 Threat of Substitutes

13 PRICE ANALYSIS

14 COMPETITIVE LANDSCAPE

14.1 Market Structure

14.2 Key Players

- 14.3 Profiles of Key Players
 - 14.3.1 Aero Specialties Inc.
 - 14.3.1.1 Company Overview
 - 14.3.1.2 Product Portfolio
 - 14.3.2 Aeroservices Ltd.
 - 14.3.2.1 Company Overview
 - 14.3.2.2 Product Portfolio
 - 14.3.3 Cavotec SA
 - 14.3.3.1 Company Overview
 - 14.3.3.2 Product Portfolio
 - 14.3.3.3 Financials
 - 14.3.3.4 SWOT Analysis
 - 14.3.4 Curtis Instruments Inc.
 - 14.3.4.1 Company Overview
 - 14.3.4.2 Product Portfolio
 - 14.3.5 ITW GSE
 - 14.3.5.1 Company Overview
 - 14.3.5.2 Product Portfolio
 - 14.3.6 Jalux Inc.
 - 14.3.6.1 Company Overview
 - 14.3.6.2 Product Portfolio
 - 14.3.6.3 Financials
 - 14.3.7 John Bean Technologies Corporation
 - 14.3.7.1 Company Overview
 - 14.3.7.2 Product Portfolio
 - 14.3.7.3 Financials
 - 14.3.8 Mallaghan
 - 14.3.8.1 Company Overview
 - 14.3.8.2 Product Portfolio
 - 14.3.9 Rheinmetall Aktiengesellschaft
 - 14.3.9.1 Company Overview
 - 14.3.9.2 Product Portfolio
 - 14.3.9.3 Financials
 - 14.3.10 Textron Ground Support Equipment Inc. (Textron Inc.)
 - 14.3.10.1 Company Overview
 - 14.3.10.2 Product Portfolio
 - 14.3.11 TLD Group (Alvest Group)
 - 14.3.11.1 Company Overview
 - 14.3.11.2 Product Portfolio

14.3.12 Weihai Guangtai Airport Equipment Co. Ltd

14.3.12.1 Company Overview

14.3.12.2 Product Portfolio

14.3.12.3 Financials

List Of Tables

LIST OF TABLES

Table 1: Global: Ground Support Equipment Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Ground Support Equipment Market Forecast: Breakup by Type (in Million US\$), 2024-2032

Table 3: Global: Ground Support Equipment Market Forecast: Breakup by Power Source (in Million US\$), 2024-2032

Table 4: Global: Ground Support Equipment Market Forecast: Breakup by Application (in Million US\$), 2024-2032

Table 5: Global: Ground Support Equipment Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 6: Global: Ground Support Equipment Market: Competitive Structure

Table 7: Global: Ground Support Equipment Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Ground Support Equipment Market: Major Drivers and Challenges

Figure 2: Global: Ground Support Equipment Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Ground Support Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Ground Support Equipment Market: Breakup by Type (in %), 2023

Figure 5: Global: Ground Support Equipment Market: Breakup by Power Source (in %), 2023

Figure 6: Global: Ground Support Equipment Market: Breakup by Application (in %), 2023

Figure 7: Global: Ground Support Equipment Market: Breakup by Region (in %), 2023

Figure 8: Global: Ground Support Equipment (Powered Ground Support Equipment) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 9: Global: Ground Support Equipment (Powered Ground Support Equipment) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 10: Global: Ground Support Equipment (Non-Powered Ground Support Equipment) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Ground Support Equipment (Non-Powered Ground Support Equipment) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Ground Support Equipment (Electric) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Ground Support Equipment (Electric) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Ground Support Equipment (Non-Electric) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Ground Support Equipment (Non-Electric) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Ground Support Equipment (Hybrid) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Ground Support Equipment (Hybrid) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Ground Support Equipment (Aircraft Handling) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 19: Global: Ground Support Equipment (Aircraft Handling) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Ground Support Equipment (Passenger Handling) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 21: Global: Ground Support Equipment (Passenger Handling) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 22: Global: Ground Support Equipment (Cargo Handling) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 23: Global: Ground Support Equipment (Cargo Handling) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 24: North America: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 25: North America: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 26: United States: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 27: United States: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 28: Canada: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 29: Canada: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: Asia-Pacific: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 31: Asia-Pacific: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: China: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: China: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: Japan: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: Japan: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: India: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: India: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: South Korea: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 39: South Korea: Ground Support Equipment Market Forecast: Sales Value (in

Million US\$), 2024-2032

Figure 40: Australia: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 41: Australia: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: Indonesia: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: Indonesia: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: Others: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: Others: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: Europe: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: Europe: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: Germany: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: Germany: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: France: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: France: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: United Kingdom: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: United Kingdom: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: Italy: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: Italy: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: Spain: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: Spain: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: Russia: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: Russia: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 60: Others: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: Others: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Latin America: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Latin America: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: Brazil: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: Brazil: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: Mexico: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: Mexico: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: Others: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: Others: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Middle East and Africa: Ground Support Equipment Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: Middle East and Africa: Ground Support Equipment Market: Breakup by Country (in %), 2023

Figure 72: Middle East and Africa: Ground Support Equipment Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 73: Global: Ground Support Equipment Industry: SWOT Analysis

Figure 74: Global: Ground Support Equipment Industry: Value Chain Analysis

Figure 75: Global: Ground Support Equipment Industry: Porter's Five Forces Analysis

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