

Ground Support Equipment Market Size, Share, Trends and Forecast by Type, Power Source, Application, and Region, 2026-2034

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Abstracts

The global ground support equipment market size reached USD 18.1 Billion in 2025. Looking forward, IMARC Group expects the market to reach USD 32.9 Billion by 2034, exhibiting a growth rate (CAGR) of 6.85% during 2026-2034. North America currently dominates the market, holding a significant share of 33.8% in 2025. The market is driven by growing air traffic, accelerating airport modernization, and stringent environmental requirements shaping the creation of next-generation ground operations. The market is experiencing significant growth due to increased air traffic, airport development, and the growing demand for sustainable solutions, thereby further propelling ground support equipment market share.

Ground Support Equipment Market Trends:

Rising Integration of Advanced Technologies

The integration of advanced technologies, including automation, telematics, and IoT, in ground support equipment is transforming airport operations, which is acting as a significant growth-inducing factor. For example, in May 2024, the International Air Transport Association (IATA) aimed to accelerate the introduction of enhanced ground support equipment (GSE) technologies into daily operations with a new program. This initiative is expected to streamline processes, boost sustainability, and enhance the overall passenger experience. Leading companies such as Siemens and Honeywell are at the forefront of these technological advancements, providing innovative solutions that integrate seamlessly with airport operations management systems. This shift towards smart, connected equipment is transforming ground handling into a more efficient and sustainable industry.

Growing Focus on Sustainability

The rising emphasis on sustainability among ground support equipment manufacturers is driving the adoption of eco-friendly practices and products. Airports and airlines are further extensively prioritizing sustainable operations to minimize their environmental footprint and comply with stringent environmental regulations by government bodies. This includes the use of electric and hybrid GSE, recycling programs, and sustainable materials. Companies like Goldhofer are developing equipment with lower emissions and energy-efficient technologies. The trend also encompasses the widespread adoption of greener manufacturing processes and the reduction of hazardous substances in equipment production. Various initiatives are in place to focus on sustainability. A plan for reaching net-zero carbon dioxide (CO₂) emissions in the aviation industry by 2050 is laid forth by the 'Destination 2050' program. By 2050, the plan wants all flights operating inside and outside of the EU, UK, and EFTA to have net-zero CO₂ emissions. It expands upon pledges made in the European Green Deal and the Paris Agreement. The increasing use of net-zero emission strategies is fueling research and development on sustainable ground support equipment technologies. Government-backed projects, such as Destination 2050, are increasing regulatory requirements and financial support across Europe. Manufacturers are expanding their capacity for producing electric and hybrid vehicles to meet projected future demand spikes. This advancement is creating strategic opportunities for global expansion and market consolidation.

Increasing Safety Regulations

Compliance with stringent regulations is escalating the ground support equipment market demand. Airlines and airports are prioritizing ground operations to ensure the well-being of personnel and passengers and prevent accidents. According to an industry report, the overall number of accidents in U.S aviation increased by 33.3% between 2021 and 2022. More stringent controls are needed for this. This includes adopting GSE with advanced safety features, such as ergonomic designs, collision avoidance systems, enhanced visibility, etc. Regulatory bodies like the EASA in Europe and the FAA in the United States are imposing stricter standards and guidelines for GSE safety, thereby pushing manufacturers to innovate and improve their products. Companies like Mallaghan and Tronair are leading the way by integrating sophisticated safety technologies into their equipment. This trend towards heightened safety and regulatory compliance fosters a culture of continuous improvement and ensures safer airport operations.

Ground Support Equipment Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with the ground support equipment market forecast at the global, regional, and country levels for 2026-2034. The market has been categorized based on the type, power source, and application.

Analysis by Type:

Powered Ground Support Equipment

Non-Powered Ground Support Equipment

Powered ground support equipment leads the market with around 80.2% of market share in 2025. Powered ground support equipment (GSE) plays a vital role in airports' efficient operation by providing the necessary power and functionality to service aircraft between flights. According to ground support equipment market statistics, this category includes equipment such as aircraft tugs, ground power units (GPUs), and air conditioning units. For example, electric aircraft tugs from companies like JBT and TLD Group are designed to tow aircraft to and from gates, reducing the reliance on aircraft engines and saving fuel.

Analysis by Power Source:

Electric

Non-Electric

Hybrid

Non-electric leads the market with around 76.6% of market share in 2025. This significant share reflects the ongoing reliance on traditional fuel-powered GSE, such as aircraft tugs, pushback tractors, and fuel trucks, which remain widely used across airports worldwide. Non-electric GSE offers advantages in terms of operational capacity, longer endurance, and reliability, especially in high-demand environments. The robust performance of diesel, gas-powered, and other fuel-driven equipment ensures they

continue to meet the heavy-duty requirements of ground handling operations. Despite the increasing push for sustainability and electric alternatives, non-electric GSE remains the backbone of airport ground support due to its cost-effectiveness and established infrastructure.

Analysis by Application:

Aircraft Handling

Passenger Handling

Cargo Handling

Aircraft handling lead the market with around 53.3% of the market share in 2025. This dominant position is driven by the essential role aircraft handling plays in airport operations, including the safe and efficient movement, servicing, and maintenance of aircraft. Equipment used in this segment includes aircraft tugs, pushback tractors, and de-icing vehicles, all crucial for ensuring aircraft are properly prepared for takeoff and arrival. With the increasing volume of air travel and growing fleet sizes, the demand for aircraft handling equipment continues to rise. Despite the emergence of newer technologies, traditional aircraft handling equipment remains critical due to its proven performance, reliability, and scalability in airport operations worldwide.

Regional Analysis

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

In 2025, North America accounted for the largest market share of over 33.8%. According to the report, North America accounted for the largest market share. The market is thriving, driven by the region's high air traffic volume, advanced airport

infrastructure, and the push for technological innovation. Major airports in the United States and Canada, such as Los Angeles International Airport (LAX) and Toronto Pearson International Airport, rely heavily on diverse GSE to maintain efficient operations. Companies like JBT AeroTech and TLD Group are key players in this market, providing a wide range of equipment, including electric aircraft tugs, ground power units, and baggage handling systems.

Key Regional Takeaways:

United States Ground Support Equipment Market Analysis

US accounts for 88.5% share of the market in 2025. The factors that drive the GSE market in the US are mainly increasing air travelers, better airport infrastructure, and more emphasis on reducing carbon emissions. According to the Federal Aviation Administration, the Air Traffic Organisation serves around 45,000 flights and 2.9 million airline passengers spread over more than 29 million square miles of airspace. This requires efficient ground operations that add a greater demand for ground support equipment like power units, baggage carts, and tugs. To raise operational capacity, multimillion-dollar major modernization projects are also undertaken at airports like Los Angeles International Airport and Atlanta's Hartsfield-Jackson. With the help of government incentives and rules like the EPA's emissions restrictions, the drive for sustainability has accelerated the adoption of electric and hybrid GSE. Textron GSE and JBT Corporation, the major manufacturers, are investing heavily in R&D for the development of autonomous and energy-efficient machinery. The growth in cargo-handling equipment has been further driven by the expansion of UPS and FedEx and the rise in e-commerce. Further, the market growth is supported by the opportunity of GSE purchase at regional airports that have developed with the help of funding from FAA programs.

Europe Ground Support Equipment Market Analysis

Europe is the GSE industry driving force in the following ways: increased aviation traffic, environmental rules becoming stricter, and improvements in automation. Statistics from the European Commission show that there was a 19.3% increase in air travel in 2023 compared to 2022. 973 million EU citizens took flights in 2023. The most passengers in 2023 were in Paris Charles de Gaulle, which recorded 67 million, followed by Amsterdam Schiphol with 62 million. Airports are increasingly adopting electric GSE to reach the European Union's 'Fit for 55' strategy to reduce emissions by 55% by 2030. Nations such as Germany, France, and the Netherlands set a pace to achieve a carbon-

neutral airport for 2050. Not only that, but investment in futuristic automation technologies like robotic refueling systems and autonomous baggage tractors are increasing efficiency while reducing operating costs. The growth of low-cost airlines, now almost 40% of European air traffic, has dramatically escalated the demand for ground handling. Large-scale modernization such as that at Munich or Schiphol airports also places a demand for contemporary GSE.

Asia Pacific Ground Support Equipment Market Analysis

Asia-Pacific is the region with the fastest growth rate for ground support equipment due to government investments in aviation infrastructure, growing air travel, and rapid airport expansion. The leading markets are China and India; China, alone, plans to build more than 216 new airports by 2035, according to media reports as part of its national aviation policy. A new GSE is needed because of India's UDAN initiative, which seeks to improve regional connectivity through small airports. In ten years, the region is expected to deal with over 8.7 billion passengers by 2042, which means it will have a huge need for ground handling systems. Low-cost carriers' expansion adds to the GSE's needs because they are now conducting most of the flights in countries such as Malaysia and Indonesia. The region's environmental targets also align with the incorporation of electric and hybrid GSE, especially in urban airports such as Tokyo Narita and Singapore Changi.

Latin America Ground Support Equipment Market Analysis

The main drivers of the GSE market in Latin America are growing tourism, airport privatization, and fleet expansions. The market is dominated by nations like Brazil and Mexico with São Paulo Guarulhos International Airport (GRU) in Brazil alone handles more than 40 million passengers per year, as per an industry report. Also, Brazil boasts the second most airports worldwide, with 4,093, followed by Mexico (1,714), further bolstering the ground support equipment market growth. It is being necessitated by the new airport constructions as well as the expansions of existing ones, including Mexico City International Airport. With growing tourism in countries like Colombia and Costa Rica, effective ground operations are also required. Greater investments in modernizing airport infrastructure brought about by airport privatization have been supporting the adoption of sophisticated GSE, especially in Brazil. Furthermore, the air freight industry, fueled by agricultural exports, increases demand for cargo-handling equipment.

Middle East and Africa Ground Support Equipment Market Analysis

The primary drivers of the Middle East and Africa GSE market are the region's significant role in international aviation, rising passenger volume, and airport expansions. Middle East that's dominated by United Arab Emirates, Qatar, and Saudi Arabia, is characterized by hubs like Dubai International and Hamad International. Accordingly, OAG Aviation estimates 2030 Vision aiming for reaching 300 million passengers by 2030; in the course of which, there are 100 million to be tourists. Large infrastructures development such as in the case of the NEOM Airport project in Saudi Arabia have become a fueler to demand for GSEs. The need for Contemporary technology is enhanced by measures to improve African national airports such as in South Africa, Ethiopia, and Kenyan and to establish connectivity through various regions. Moreover, in those developing regions, electricity-assisted GSE helps promote sustainable objectives.

Competitive Landscape:

The competitive landscape of the ground support equipment (GSE) market is characterized by the presence of numerous global and regional players striving for market share through technological innovation, product diversification, and strategic partnerships. Key players focus on developing energy-efficient and low-emission equipment to align with rising environmental standards. The ground support equipment market dynamics are further intensified by the growing demand for automated and digitized solutions, prompting companies to invest in research and development. Market participants also engage in mergers, acquisitions, and collaborations to expand their geographical presence and enhance product portfolios. Increasing competition encourages innovation, driving advancements in the global GSE market. For instance, in 2024, Mallaghan unveiled its electric GSE vehicles, such as electric tanker and CT6000E catering truck, featuring zero emissions, reduced noise, enhanced operations, 3000L capacity, 3-meter lift, and 80V Lithium-Ion batteries.

The report provides a comprehensive analysis of the competitive landscape in the ground support equipment market with detailed profiles of all major companies, including:

AERO Specialties, Inc.

Aeroservices

ITW GSE

Mallaghan

Oshkosh AeroTech, LLC

Rheinmetall AG

TCR International

Textron Specialized Vehicles

TLD

Tronair Inc

Weihai Guangtai Airport Equipment Co., Limited

Key Questions Answered in This Report

- 1.How big is the ground support equipment market?
- 2.What is the future outlook of the global ground support equipment market?
- 3.What are the key factors driving the ground support equipment market?
- 4.Which region accounts for the largest ground support equipment market share?
- 5.Which are the leading companies in the global ground support equipment market?

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