

Airport Ground Support Equipment Market Forecasts to 2034 – Global Analysis By Equipment Type (Powered Ground Support Equipment, and Non-Powered Ground Support Equipment), Power Source (Non-Electric, Electric, and Hybrid Systems), Ownership, Application, and By Geography

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Abstracts

According to Statistics MRC, the Global Airport Ground Support Equipment Market is accounted for \$7.6 billion in 2026 and is expected to reach \$13.4 billion by 2034 growing at a CAGR of 7.2% during the forecast period. The airport ground support equipment includes vehicles and machinery used to service aircraft on the ground, such as baggage tractors, loaders, passenger stairs, refuelers, de-icing units, and ground power systems. It serves airports, airlines, and ground handling companies. Growth is driven by increasing aircraft movements, fleet expansion, airport infrastructure investments, a shift toward electric and low-emission equipment, safety regulations, and operational efficiency requirements in high-traffic airport environments.

According to the International Air Transport Association, global commercial aircraft departures exceeded 38 million flights in 2023.

Market Dynamics:

Driver:

Fleet expansion and rising aircraft movements

Airports must modernize their ground operations to maintain efficient turnaround times

as airlines integrate next-generation aircraft to meet surging passenger demand. This surge in flight frequency necessitates a higher volume of reliable support units, ranging from tugs to de-icers, to ensure operational continuity. Consequently, the demand for advanced ground support equipment is accelerating, as operators prioritize high-throughput solutions that can handle the increased complexity of modern, high-density flight schedules globally.

Restraint:

Long lifecycle of existing diesel equipment slowing fleet turnover

Many ground handlers and regional airports continue to utilize these robust, depreciated assets to avoid the high capital expenditure associated with newer electric or hybrid alternatives. This longevity creates a significant barrier to fleet turnover, as the financial incentive to replace working machinery is often outweighed by immediate cost savings. Consequently, the industry faces a staggered transition toward sustainable technologies, with legacy internal combustion equipment tethering operators to traditional, less efficient maintenance cycles.

Opportunity:

Growth of Equipment-as-a-Service (EaaS) and leasing models

The emergence of Equipment-as-a-Service (EaaS) and flexible leasing models represents a transformative opportunity for the ground support sector, particularly for cash-constrained operators. By shifting from a capital-intensive ownership model to an operational expenditure-based framework, airports can access cutting-edge, eco-friendly technology without massive upfront investments. These 'pay-per-use' arrangements allow for better scalability during peak seasons and reduce the long-term risks associated with asset depreciation and technical obsolescence.

Threat:

Economic volatility impacting airline and airport capital expenditure

Fluctuating fuel prices, inflationary pressures on raw materials, and shifting geopolitical landscapes can lead to sudden freezes in procurement cycles as stakeholders prioritize liquidity over fleet renewal. When profit margins are squeezed, discretionary spending on non-critical ground equipment upgrades is often the first to be deferred. This cyclical

financial instability creates an unpredictable demand environment for manufacturers, potentially delaying long-term infrastructure projects and slowing the overall pace of technological integration within the global aviation ecosystem.

Covid-19 Impact:

The COVID-19 pandemic induced an unprecedented liquidity crisis across the aviation value chain, leading to a near-total halt in ground support equipment procurement as flight volumes plummeted. Initial lockdowns forced operators to mothball existing fleets, shifting the industry focus from growth to survival and basic maintenance. However, the post-pandemic recovery has acted as a catalyst for digital transformation, with airports now investing in leaner, more automated solutions to combat labor shortages and enhance operational resilience against future global disruptions.

The non-electric segment is expected to be the largest during the forecast period

The non-electric segment is expected to account for the largest market share during the forecast period due to the deep-rooted infrastructure already in place at most global airports. While the push for sustainability is growing, the sheer volume of existing diesel- and gasoline-powered tractors, loaders, and tankers ensures their continued dominance in terms of total units. These systems offer proven reliability in extreme weather conditions where battery performance may still be unproven. Furthermore, the lack of widespread high-speed charging infrastructure in emerging markets necessitates a continued reliance on conventional internal combustion engines for heavy-duty ground tasks.

The passenger handling segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the passenger handling segment is predicted to witness the highest growth rate as airports prioritize the optimization of the traveler journey and terminal efficiency. The integration of smart boarding bridges, automated baggage systems, and advanced shuttle buses designed to handle record-breaking passenger volumes fuel this rapid expansion. As 'smart airport' initiatives gain traction, there is a heightened demand for IoT-enabled equipment that reduces wait times and improves safety. The continuous surge in international tourism and the expansion of low-cost carriers globally remain the primary catalysts driving this segment's impressive momentum.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, anchored by a mature aviation industry and a high density of major international hubs. The presence of leading equipment manufacturers and early adoption of stringent environmental regulations drive continuous fleet modernization across the United States and Canada. Furthermore, significant government funding for airport infrastructure renewal and the high volume of domestic flight operations sustain a consistent demand for both replacement and new equipment. This established ecosystem, combined with a strong focus on technological integration, ensures the region maintains its dominant position in the global market.

Region with highest CAGR:

During the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, propelled by massive investments in greenfield airport projects across China, India, and Southeast Asia. The rapid rises of the middle class and increasing air connectivity are driving air traffic at rates that outpace more developed regions. This explosive growth necessitates the procurement of entirely new ground support fleets, often emphasizing the latest electric and autonomous technologies from the outset. As governments in the region implement aggressive aviation expansion policies, the Asia Pacific market is set to become the primary engine of global industry growth.

Key players in the market

Some of the key players in Airport Ground Support Equipment Market include TLD Group, Textron Inc., Oshkosh Corporation, Mallaghan Engineering Ltd., Cavotec SA, Tronair, Inc., Weihai Guangtai Airport Equipment Co., Ltd., ITW GSE, Dabico Airport Solutions, Cobus Industries GmbH, MULAG Fahrzeugwerk, AERO Specialties, Inc., Gate GSE, Kalmar Motor AB, and Lektro, Inc.

Key Developments:

In January 2026, Textron Ground Support Equipment launched an electric tow tractor line, supporting airports' sustainability goals.

In November 2025, JBT AeroTech introduced autonomous baggage tractors, piloted at Atlanta International Airport.

In August 2025, TLD Group rolled out hydrogen-powered ground support vehicles, targeting European airports.

Equipment Types Covered:

Powered Ground Support Equipment

Non-Powered Ground Support Equipment

Power Sources Covered:

Non-Electric

Electric

Hybrid Systems

Ownerships Covered:

Airport-Owned

Airline-Owned

Ground Handling Service Providers (Third-Party)

Leased/Equipment-as-a-Service (EaaS) Models

Applications Covered:

Passenger Handling

Aircraft Handling

Cargo Handling

Regions Covered:**North America**

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free

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customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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