

Ground Support Equipment Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Powered Ground Support Equipment and Non-Powered Ground Support Equipment), By Power Source (Electric, Non-Electric and Hybrid), By Application (Aircraft Handling, Passenger Handling and Cargo Handling), By Region, Competition

<https://marketpublishers.com/r/GFEE0191B7A6EN.html>

Date: October 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: GFEE0191B7A6EN

Abstracts

The Global Ground Support Equipment Market reached USD 11,117 million in 2022 and is projected to reach USD 29,027 million by 2028, with a CAGR of 6.7% during the forecast period (2023 - 2030). GSE plays a crucial role in supporting aircraft operations at airports, encompassing tasks such as powering, towing, and servicing. This includes airplane pushback and hook-up, forklifts and lifts, carts, vehicles, air-conditioning tugs, belt & container loaders, and light-duty trucks. GSE also facilitates passenger handling, baggage management, aircraft movement, as well as repairs, services, and maintenance. Airlines often opt for full-service leasing from equipment management companies or maintain their own GSE fleet. Factors driving the ground support equipment market include high service standards, airport focus on operational efficiency, increasing air traffic and cargo demand, and the popularity of GSE leasing. Moreover, the market shows growth potential through the adoption of greener GSE, outsourcing MRO services, and the emergence of wireless technologies.

Key Market Drivers:

The Rise in Focus of Airports on Enhancing Operational Efficiency.

Airports are implementing significant upgrades to enhance operational effectiveness and reduce turnaround times. The introduction of subsurface GSE has expedited operations and alleviated congestion of airport equipment. To improve overall operational effectiveness, various tools are being developed. For instance, airports across Caribbean have been utilizing the Collaborative Decision Making (CDM) tool since June 2019 to enhance operational efficiency. By improving planning quality and increasing situational awareness through real-time information exchange, Airport-CDM promotes operational predictability. Enhancing operational efficiency offers the advantage of reducing operating costs and increasing profitability. Hence, the availability of reliable ground support equipment is crucial for airport officials, contributing to the expansion of the market.

Growing Cargo Transportation, Air Traffic, and Air Travel to Enable Growth.

Increased air travel, air traffic, and cargo transportation have highly contributed to the market's growth. Additionally, airports' rising adoption of next-generation GSE adds to market growth globally. The International Air Transport Association data states that the global air freight markets followed the demand for air cargo increased by 18.7% in 2021 compared to 2020. As per the reports stated by the IATA, total air traffic in November 2022 (measured in revenue passenger kilometers or RPKs) rose 41.3% compared to November 2021. Globally, traffic is now at more than 75% of November 2019. This implies that growth in air travel leads to air traffic, ultimately leading to the market's growth.

Key Market Challenges

Adoption of WheelTug System

WheelTug, a company established in 2005, has developed an innovative solution: in-wheel electric wheels or powered nose-wheels. This groundbreaking technology allows aircraft to maneuver on the ground without the need for tow tractors or pushback equipment vehicles. The WheelTug system is currently available for narrow-body aircraft such as the Boeing 737 variants and Airbus A321. It can be retrofitted and utilizes high torque motors powered by the aircraft's auxiliary power unit. Equipped with multiple cameras, the system assists pilots in both forward and reverse movements. Made of lightweight titanium components, including the wheel, motor, and cameras, the entire system weighs only 300 pounds. The WheelTug system offers significant fuel cost savings, with potential savings ranging from USD 300 to USD 2,500 per flight and

up to USD 6 million per aircraft annually, according to the manufacturer. This innovative system also reduces taxi time, saving approximately seven minutes during hard times and 15 minutes during scheduled-block time. As airlines worldwide strive for increased sustainability, the WheelTug system not only provides operational benefits but also helps achieve environmental targets by reducing emissions. Over 25 airlines, including IndiGo, KLM, and Fly Dubai, have already reserved the WheelTug system for more than 2,000 aircraft. AlbaStar of Spain is the first airline to implement the WheelTug system, planning to utilize it on their Boeing 737 Next Generation aircraft, with the option to extend its use to their Airbus fleet. The widespread adoption of systems like WheelTug in the aviation industry is expected to impact the demand for ground support equipment.

Inadequate Charging Infrastructure for Electric Ground Support Equipment

The shift from conventional diesel ground support equipment to electric ground support equipment has led to a growing need for charging facilities at airports. However, as this is a recent trend, the availability of infrastructure for deploying electric ground support equipment remains limited. Consequently, airports must increasingly invest in the development of dedicated charging stations in parking bays, as well as at the aprons and gates. These infrastructure modifications require substantial capital investments, which can be challenging for airports, even with government funding and incentives. As a result, there is a rising demand for a large number of charging facilities at airports to accommodate baggage tractors, pushback tractors, passenger buses, forklifts, and other equipment. Multiple port chargers can handle up to 16 electric ground support equipment simultaneously, but their high cost poses challenges for airports in terms of accommodation.

Key Market Trends

Increasing adoption of greener variants of GSE

Aviation regulatory authorities are working on implementing improved guidelines for the development of eco-friendly processes and technologies in all facets of the industry. Increasing awareness about environmental concerns will create a significant demand for eco-friendly and greener variants of GSE in the aviation sector. For example, Bahrain Airport Services Company recently announced its plans to transition to greener operations with a key focus on acquiring a new product that will be powered by solar energy or electricity to replace diesel and petrol-powered ground vehicle fleets at airports in the next five years. Several states in the US, as well as Spain, Germany, and the Netherlands, have passed legislation to ban the use of diesel ground support

equipment, resulting in the replacement of this equipment with electric ones, thereby fueling the demand for electric ground support equipment. For example, Charlotte Douglas International Airport started converting its diesel ground support equipment to electric ground support equipment in 2010, which resulted in transforming 75% of the GSE deployed at this airport to battery-powered equipment. In the Netherlands, efforts are being made to replace every piece of equipment with zero-emission variants at Schiphol Airport. This means that if equipment deployed at the airport currently runs on fossil fuels and if there is an alternative available for it, the airport will replace it. The airport has already replaced its fleet of passenger buses and baggage tractors with zero-emission alternatives. The increasing number of countries adopting this trend will lead to increased demand for electric ground support equipment.

Increased Focus towards Procurement of Greener GSE

A clean and sustainable environment is imperative in today's world. Authorities are currently emphasizing the acquisition of environmentally friendly Ground Support Equipment (GSE) that adheres to stringent government emission standards. By adopting greener GSE, airports can effectively reduce their carbon footprint. Implementing measures such as utilizing powder coating paint instead of liquid paint for GSE, designing equipment that can be easily folded or disassembled to optimize shipping size, promoting the use of electric vehicles, and implementing equipment recycling programs are all examples of how airports can prioritize sustainability in their GSE practices. Substantial investments in research and development are being made to achieve these objectives.

Segmental Insights

Type Insights

The powered GSE segment is projected to be the dominant segment throughout the forecast period. Powered ground support comprises various equipment such as refuelers, ground power equipment, tugs & tractors, portable water trucks, generators, baggage conveyor/belt loader, passenger buses, catering trucks, passenger boarding stairs, air compressors, portable floodlights, air conditioners, container loaders, lavatory service vehicles, and de-icing vehicles. The market for powered GSE is driven by the adoption of energy-efficient ground support equipment. For example, Plug Power, Inc., a leading provider of reliable and clean energy products, has implemented GenFuel hydrogen infrastructure for GSE at Memphis Airport in the United States. Hydrogen fuel cells produce only heat and water as byproducts, making them environmentally benign.

Application Insights

The aircraft handling segment is projected to dominate during the forecast period. Ground Support Equipment (GSE) used for aircraft handling includes deicers, fuel trucks, ground power units, pre-conditioned air (PCA) units, and hydrant trucks. Aircraft handling encompasses the servicing of aircraft while parked at a terminal gate, fulfilling their service requirements from arrival to departure. The increasing number of aircraft and flight frequencies worldwide is driving the market for aircraft handling. Moreover, the outsourcing of GSE among airlines and significant investments in efficient GSE are expected to fuel market growth. The prompt provision of services to reduce turnaround time contributes to the overall market expansion.

Regional Insights

During the forecast period, North America is projected to emerge as the dominant region, encompassing countries like the U.S., Canada, and Mexico. North America leads in the manufacturing of GSE, exporting equipment to Southeast Asia, Africa, South America, and other regions. Emphasizing eco-friendly practices, North America has undertaken initiatives to convert GSE fleets to electrical power, thereby reducing carbon footprints. Notably, the U.S. takes the lead in the GSE market, with key players such as JBT Corporation and Tug Technologies Corporation operating within its borders. Stricter environmental standards in the U.S., coupled with initiatives like VALE (Voluntary Airport Low-Emission) and ARB (California Air Resources Board) by the Federal Aviation Administration (FAA), promote the production of high-quality, scientifically advanced products aimed at reducing carbon footprints. These factors collectively contribute to the growth of the market.

Key Market Players

Aero Specialties Inc.

Aeroservices Ltd.

Cavotec SA

Curtis Instruments Inc.

ITW GSE

Jalux Inc.

John Bean Technologies Corporation

Rheinmetall Aktiengesellschaft

Textron Ground Support Equipment Inc. (Textron Inc.)

TLD Group (Alvest Group)

Report Scope:

In this report, the Global Ground Support Equipment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Ground Support Equipment Market, By Type:

Powered Ground Support Equipment

Non-Powered Ground Support Equipment

Global Ground Support Equipment Market, By Power Source:

Electric

Non-Electric

Hybrid

Global Ground Support Equipment Market, By Application:

Aircraft Handling

Passenger Handling

Cargo Handling

Global Ground Support Equipment Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Ground Support Equipment Market.

Available Customizations:

Global Ground Support Equipment Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Baseline Methodology
- 2.2. Key Industry Partners
- 2.3. Major Association and Secondary Sources
- 2.4. Forecasting Methodology
- 2.5. Data Triangulation & Validation
- 2.6. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL GROUND SUPPORT EQUIPMENT MARKET

5. VOICE OF CUSTOMER

6. GLOBAL GROUND SUPPORT EQUIPMENT MARKET OVERVIEW

7. GLOBAL GROUND SUPPORT EQUIPMENT MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type (Powered Ground Support Equipment and Non-Powered Ground Support Equipment)
 - 7.2.2. By Power Source (Electric, Non-Electric and Hybrid)

- 7.2.3. By Application (Aircraft Handling, Passenger Handling and Cargo Handling)
- 7.2.4. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
- 7.2.5. By Company (2022)
- 7.3. Market Map

8. NORTH AMERICA GROUND SUPPORT EQUIPMENT MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By Power Source
 - 8.2.3. By Application
 - 8.2.4. By Country
 - 8.2.4.1. United States Ground Support Equipment Market Outlook
 - 8.2.4.1.1. Market Size & Forecast
 - 8.2.4.1.1.1. By Value
 - 8.2.4.1.2. Market Share & Forecast
 - 8.2.4.1.2.1. By Type
 - 8.2.4.1.2.2. By Power Source
 - 8.2.4.1.2.3. By Application
 - 8.2.4.2. Canada Ground Support Equipment Market Outlook
 - 8.2.4.2.1. Market Size & Forecast
 - 8.2.4.2.1.1. By Value
 - 8.2.4.2.2. Market Share & Forecast
 - 8.2.4.2.2.1. By Type
 - 8.2.4.2.2.2. By Power Source
 - 8.2.4.2.2.3. By Application
 - 8.2.4.3. Mexico Ground Support Equipment Market Outlook
 - 8.2.4.3.1. Market Size & Forecast
 - 8.2.4.3.1.1. By Value
 - 8.2.4.3.2. Market Share & Forecast
 - 8.2.4.3.2.1. By Type
 - 8.2.4.3.2.2. By Power Source
 - 8.2.4.3.2.3. By Application

9. EUROPE GROUND SUPPORT EQUIPMENT MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Type

9.2.2. By Power Source

9.2.3. By Application

9.2.4. By Country

9.2.4.1. Germany Ground Support Equipment Market Outlook

9.2.4.1.1. Market Size & Forecast

9.2.4.1.1.1. By Value

9.2.4.1.2. Market Share & Forecast

9.2.4.1.2.1. By Type

9.2.4.1.2.2. By Power Source

9.2.4.1.2.3. By Application

9.2.4.2. France Ground Support Equipment Market Outlook

9.2.4.2.1. Market Size & Forecast

9.2.4.2.1.1. By Value

9.2.4.2.2. Market Share & Forecast

9.2.4.2.2.1. By Type

9.2.4.2.2.2. By Power Source

9.2.4.2.2.3. By Application

9.2.4.3. United Kingdom Ground Support Equipment Market Outlook

9.2.4.3.1. Market Size & Forecast

9.2.4.3.1.1. By Value

9.2.4.3.2. Market Share & Forecast

9.2.4.3.2.1. By Type

9.2.4.3.2.2. By Power Source

9.2.4.3.2.3. By Application

9.2.4.4. Italy Ground Support Equipment Market Outlook

9.2.4.4.1. Market Size & Forecast

9.2.4.4.1.1. By Value

9.2.4.4.2. Market Share & Forecast

9.2.4.4.2.1. By Type

9.2.4.4.2.2. By Power Source

9.2.4.4.2.3. By Application

9.2.4.5. Spain Ground Support Equipment Market Outlook

9.2.4.5.1. Market Size & Forecast

9.2.4.5.1.1. By Value

9.2.4.5.2. Market Share & Forecast

- 9.2.4.5.2.1. By Type
- 9.2.4.5.2.2. By Power Source
- 9.2.4.5.2.3. By Application

10. SOUTH AMERICA GROUND SUPPORT EQUIPMENT MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Type
 - 10.2.2. By Power Source
 - 10.2.3. By Application
 - 10.2.4. By Country
 - 10.2.4.1. Brazil Ground Support Equipment Market Outlook
 - 10.2.4.1.1. Market Size & Forecast
 - 10.2.4.1.1.1. By Value
 - 10.2.4.1.2. Market Share & Forecast
 - 10.2.4.1.2.1. By Type
 - 10.2.4.1.2.2. By Power Source
 - 10.2.4.1.2.3. By Application
 - 10.2.4.2. Colombia Ground Support Equipment Market Outlook
 - 10.2.4.2.1. Market Size & Forecast
 - 10.2.4.2.1.1. By Value
 - 10.2.4.2.2. Market Share & Forecast
 - 10.2.4.2.2.1. By Type
 - 10.2.4.2.2.2. By Power Source
 - 10.2.4.2.2.3. By Application
 - 10.2.4.3. Argentina Ground Support Equipment Market Outlook
 - 10.2.4.3.1. Market Size & Forecast
 - 10.2.4.3.1.1. By Value
 - 10.2.4.3.2. Market Share & Forecast
 - 10.2.4.3.2.1. By Type
 - 10.2.4.3.2.2. By Power Source
 - 10.2.4.3.2.3. By Application

11. MIDDLE EAST & AFRICA GROUND SUPPORT EQUIPMENT MARKET OUTLOOK

- 11.1. Market Size & Forecast

- 11.1.1. By Value
- 11.2. Market Share & Forecast
 - 11.2.1. By Type
 - 11.2.2. By Power Source
 - 11.2.3. By Application
 - 11.2.4. By Country
 - 11.2.4.1. Saudi Arabia Ground Support Equipment Market Outlook
 - 11.2.4.1.1. Market Size & Forecast
 - 11.2.4.1.1.1. By Value
 - 11.2.4.1.2. Market Share & Forecast
 - 11.2.4.1.2.1. By Type
 - 11.2.4.1.2.2. By Power Source
 - 11.2.4.1.2.3. By Application
 - 11.2.4.2. UAE Ground Support Equipment Market Outlook
 - 11.2.4.2.1. Market Size & Forecast
 - 11.2.4.2.1.1. By Value
 - 11.2.4.2.2. Market Share & Forecast
 - 11.2.4.2.2.1. By Type
 - 11.2.4.2.2.2. By Power Source
 - 11.2.4.2.2.3. By Application
 - 11.2.4.3. South Africa Ground Support Equipment Market Outlook
 - 11.2.4.3.1. Market Size & Forecast
 - 11.2.4.3.1.1. By Value
 - 11.2.4.3.2. Market Share & Forecast
 - 11.2.4.3.2.1. By Type
 - 11.2.4.3.2.2. By Power Source
 - 11.2.4.3.2.3. By Application

12. ASIA PACIFIC GROUND SUPPORT EQUIPMENT MARKET OUTLOOK

- 12.1. Market Size & Forecast
 - 12.1.1. By Value
- 12.2. Market Share & Forecast
 - 12.2.1. By Type
 - 12.2.2. By Power Source
 - 12.2.3. By Application
 - 12.2.4. By Country
 - 12.2.4.1. China Ground Support Equipment Market Outlook
 - 12.2.4.1.1. Market Size & Forecast

- 12.2.4.1.1.1. By Value
- 12.2.4.1.2. Market Share & Forecast
 - 12.2.4.1.2.1. By Type
 - 12.2.4.1.2.2. By Power Source
 - 12.2.4.1.2.3. By Application
- 12.2.4.2. India Ground Support Equipment Market Outlook
 - 12.2.4.2.1. Market Size & Forecast
 - 12.2.4.2.1.1. By Value
 - 12.2.4.2.2. Market Share & Forecast
 - 12.2.4.2.2.1. By Type
 - 12.2.4.2.2.2. By Power Source
 - 12.2.4.2.2.3. By Application
- 12.2.4.3. Japan Ground Support Equipment Market Outlook
 - 12.2.4.3.1. Market Size & Forecast
 - 12.2.4.3.1.1. By Value
 - 12.2.4.3.2. Market Share & Forecast
 - 12.2.4.3.2.1. By Type
 - 12.2.4.3.2.2. By Power Source
 - 12.2.4.3.2.3. By Application
- 12.2.4.4. South Korea Ground Support Equipment Market Outlook
 - 12.2.4.4.1. Market Size & Forecast
 - 12.2.4.4.1.1. By Value
 - 12.2.4.4.2. Market Share & Forecast
 - 12.2.4.4.2.1. By Type
 - 12.2.4.4.2.2. By Power Source
 - 12.2.4.4.2.3. By Application
- 12.2.4.5. Australia Ground Support Equipment Market Outlook
 - 12.2.4.5.1. Market Size & Forecast
 - 12.2.4.5.1.1. By Value
 - 12.2.4.5.2. Market Share & Forecast
 - 12.2.4.5.2.1. By Type
 - 12.2.4.5.2.2. By Power Source
 - 12.2.4.5.2.3. By Application

13. MARKET DYNAMICS

13.1. Drivers

13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

15.1. Aero Specialties Inc.

- 15.1.1. Business Overview
- 15.1.2. Key Revenue and Financials
- 15.1.3. Recent Developments
- 15.1.4. Key Personnel
- 15.1.5. Key Product/Services Offered

15.2. Aeroservices Ltd.

- 15.2.1. Business Overview
- 15.2.2. Key Revenue and Financials
- 15.2.3. Recent Developments
- 15.2.4. Key Personnel
- 15.2.5. Key Product/Services Offered

15.3. Cavotec SA

- 15.3.1. Business Overview
- 15.3.2. Key Revenue and Financials
- 15.3.3. Recent Developments
- 15.3.4. Key Personnel
- 15.3.5. Key Product/Services Offered

15.4. Curtis Instruments Inc.

- 15.4.1. Business Overview
- 15.4.2. Key Revenue and Financials
- 15.4.3. Recent Developments
- 15.4.4. Key Personnel
- 15.4.5. Key Product/Services Offered

15.5. ITW GSE

- 15.5.1. Business Overview
- 15.5.2. Key Revenue and Financials
- 15.5.3. Recent Developments
- 15.5.4. Key Personnel
- 15.5.5. Key Product/Services Offered

15.6. Jalux Inc.

- 15.6.1. Business Overview
- 15.6.2. Key Revenue and Financials
- 15.6.3. Recent Developments

- 15.6.4. Key Personnel
- 15.6.5. Key Product/Services Offered
- 15.7. John Bean Technologies Corporation
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel
 - 15.7.5. Key Product/Services Offered
- 15.8. Rheinmetall Aktiengesellschaft
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel
 - 15.8.5. Key Product/Services Offered
- 15.9. Textron Ground Support Equipment Inc. (Textron Inc.)
 - 15.9.1. Business Overview
 - 15.9.2. Key Revenue and Financials
 - 15.9.3. Recent Developments
 - 15.9.4. Key Personnel
 - 15.9.5. Key Product/Services Offered
- 15.10. TLD Group (Alvest Group)
 - 15.10.1. Business Overview
 - 15.10.2. Key Revenue and Financials
 - 15.10.3. Recent Developments
 - 15.10.4. Key Personnel
 - 15.10.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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