SCOTTS INTERNATIONAL

Airport Ground Support Vehicles - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 128 pages | Mordor Intelligence

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Report description:

The Airport Ground Support Vehicles Market size is estimated at USD 8.27 billion in 2024, and is expected to reach USD 11.60 billion by 2029, growing at a CAGR of 6.99% during the forecast period (2024-2029).

The global aviation sector has faced unprecedented challenges due to the COVID-19 pandemic. The pandemic has significantly affected the commercial aviation sector, resulting in a drastic reduction in passenger traffic, which has negatively affected aircraft demand. According to the International Air Transport Association (IATA) report 2020, nearly 1.8 billion passengers flew in 2020 which showed a decline of 60.2% compared to 4.5 billion flew in 2019. Moreover, the commercial aviation sector is expected to recover slowly, as travel demand is projected to normalize to pre-COVID levels by 2023.

Ground support vehicles are normally used at the airport for various operations between aircraft flights. The towbarless tractors used at airports tow aircraft on the aircraft. Furthermore, passenger stairs are used for onboarding and off-boarding of passengers to and from the aircraft. The market is driven by the increasing demand for such systems to enhance the operational efficiency of the airports witnessing an increase in cargo and passenger traffic. The rapid expansion of the aviation sector, increasing investments in airport infrastructure, and growing demand for greener and eco-friendly airport ground support vehicles will drive the market growth. Major airlines and GSE suppliers focus on refurbishing old equipment to increase lifespan and saves operational cost.

Airport Ground Support Vehicles Market Trends

Technological Advancements in Tugs and Tractors Will Drive the Segmental Growth During the Forecast Period

Airport constructions/expansion activities are now in progress in almost every region around the world, with huge investments flowing into the same. In 2019, the year before the advent of the pandemic, investments of over USD 100 billion went into airport construction and expansions. Although the investments decreased post-pandemic, the ongoing projects and the revival in investments in the last few months are expected to drive the growth of the market studied.

Advancements in mechatronics and robotics and electrical and mechanical innovations play a vital role in driving the aircraft ground handling industry. Modernization in ground handling systems improves the reliability, safety, and efficiency of ground operations and aircraft handling. The technology could prove very useful in optimizing the process too. Well-integrated, technology-driven ground-handling processes create an overview of all actions happening around the aircraft, helping reduce turnaround times and delays.

The demand for electric ground handling is increasing due to lower noise, no emissions, and higher efficiency. Compliance with stringent regulatory norms and reduced maintenance requirements are driving the adoption. Airport operators continuously replace their aging fleet with advanced and efficient electric vehicles.

Changi Airport, Singapore, opened its Terminal 4 in 2017 with a plan of using its smallest and newest facility to test and develop automation. Services, such as maintenance, cargo, and other related services, employ some 21,000 people. In an attempt to increase airport functionality, the Civil Aviation Authority of Singapore and government-controlled companies, such as the ground-handling and in-flight catering firm SATS Ltd, are banding together to automate the terminal.

The Asia Pacific is Estimated to Lead the Market During the Forecast Period

The Asia Pacific held the highest market share in 2021 and is expected to lead the market during the forecast period. The growth is due to the presence of a well-flourished aviation industry, the highest number of airports, and increased spending on the modernization of airports. The Asia-Pacific will showcase remarkable growth during the forecast period. Growing urbanization, an increasing number of air travelers, and rising spending on the development of new airports boost the market growth across the region. Indian government allocated a budget of USD 23.7 billion in 2020-2021 for the improvement of the region's transport infrastructure. The country is planning to build 100 new airports by 2024.

With the increasing number of passengers and the projected increase to pre-pandemic levels by the year 2024, major airports have been gearing up with new equipment to serve the needs of on-ground services. India has a largely untapped market of passengers that are yet to travel frequently by air. Owing to this huge market potential, major airports across India have been expanding their capabilities. For instance,

In June 2022, Delhi's Indira Gandhi International Airport announced that it is planning to reduce airside operations emissions by inducting a total of 62 electric vehicles over a course of 4 months. The vehicles will serve multiple purposes from cleaning to transporting passengers between the aircraft and the terminals.

Several airport construction and expansion projects are currently underway in countries, like India, China, the Philippines, Vietnam, and Australia. The expansion of airports in major cities with huge passenger traffic has created an opportunity for the manufacturers to introduce and offer their advanced ground support vehicles. Also, the airport operators are procuring and testing new support vehicles that may allow them to simplify airport operations. In March 2022, Menzies Aviation renewed its contract with Thai airways in Australia to provide passenger and ramp services at Melbourne and Sydney airports.

Airport Ground Support Vehicles Industry Overview

The airport ground support vehicles market is fragmented in nature and is characterized by several suppliers who provide various types of vehicles like passenger buses and stairs, refuelers, deicers, tugs, tractors, etc. However, some of the prominent airport ground support vehicle market players are John Bean Technologies Corp, Textron Inc. (Textron Ground Support Equipment Inc.), Vestergaard Company, Tronair Inc., and Mallaghan Engineering Ltd.

Companies are focused on the development of new technologies, like electric aircraft tugs and electric GPUs, among others, and are anticipated to support the companies and attract new customers (airlines as well as airport operators). For instance, In October 2021, Taylor-Dunn launched a new lithium-ion powered tow tractor at International GSE Expo. It provides zero vehicle emissions, decreased maintenance costs, and increased safety benefits.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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