

Ground Support

JUNE/JULY 2024

2024

GSE Maintenance Report



2024 Ground Support Worldwide GSE Maintenance Report

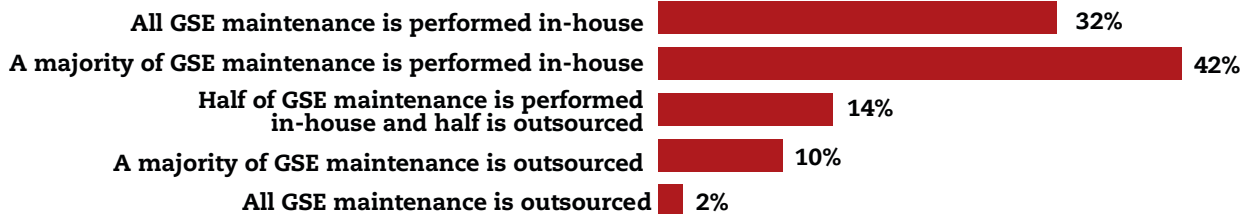
Data collected in the 2024 Ground Support Worldwide GSE Maintenance Report shed light on ground support equipment trends in maintenance departments across the industry.

JOSH SMITH

Ground Support Worldwide recently surveyed members of the industry to gauge their approach to ground support equipment (GSE) maintenance, inquire about current challenges and the average age of GSE fleets, as well as gather input on anticipated changes coming to this segment of the market.

More than three-fourths of those surveyed perform a portion of their GSE maintenance in-house. Approximately one-third of the respondents said they performed all GSE maintenance themselves. Another 42 percent said the majority of their GSE maintenance is done in-house, while 14 percent said half of their GSE maintenance tasks are done in-house and half is outsourced.

How does your company address GSE maintenance?



Increasingly performed in-house by GSE users 60%
Increasingly outsourced to GSE maintenance providers 22%
Increasingly performed by third-party GSE distributors/lessors/providers 14%
Other 4%

How does your company foresee the role of GSE maintenance evolving in the next five years?

By another entity at the airport 26%
By another entity at a different airport 4%
By the GSE manufacturer 20%
By a third-party GSE distributor/lessor/provider 28%
Other / not applicable 22%

If your company's GSE maintenance is outsourced, is that work performed:

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Just 12 percent of all survey respondents said they rely heavily on outsourced GSE maintenance, and only 2 percent of those who took the survey indicated all GSE maintenance activities are outsourced.

When GSE maintenance is outsourced, 28 percent of survey respondents stated they utilize a third-party GSE distributor or

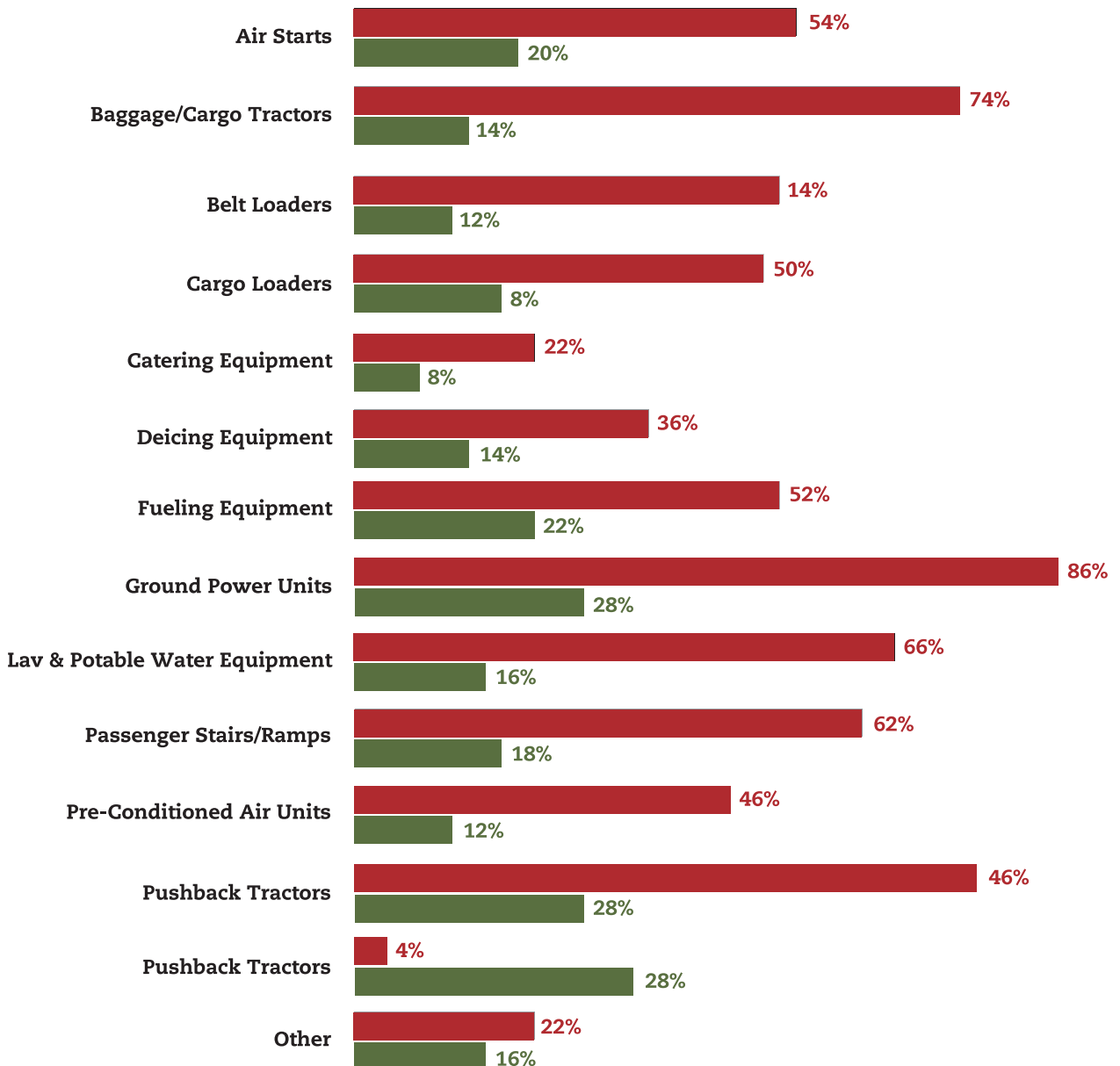
equipment service provider. Another 26 percent reported using the maintenance services of another entity at the airport while 20 percent noted the GSE manufacturer provides required maintenance.

However, the majority of survey respondents indicated of most GSE maintenance is done in-house, including preventative maintenance

(PM), daily equipment inspections and checklist reviews and repairing out-of-service units.

Moving forward, 60 percent of the respondents say they believe GSE will be increasingly performed in-house by GSE users, while another 22 percent believe more GSE maintenance will be outsourced to companies providing maintenance services.

What type of ground support equipment does your company currently maintain in-house? What type of ground support equipment does your company outsource maintenance?



GSE Fleet Composition

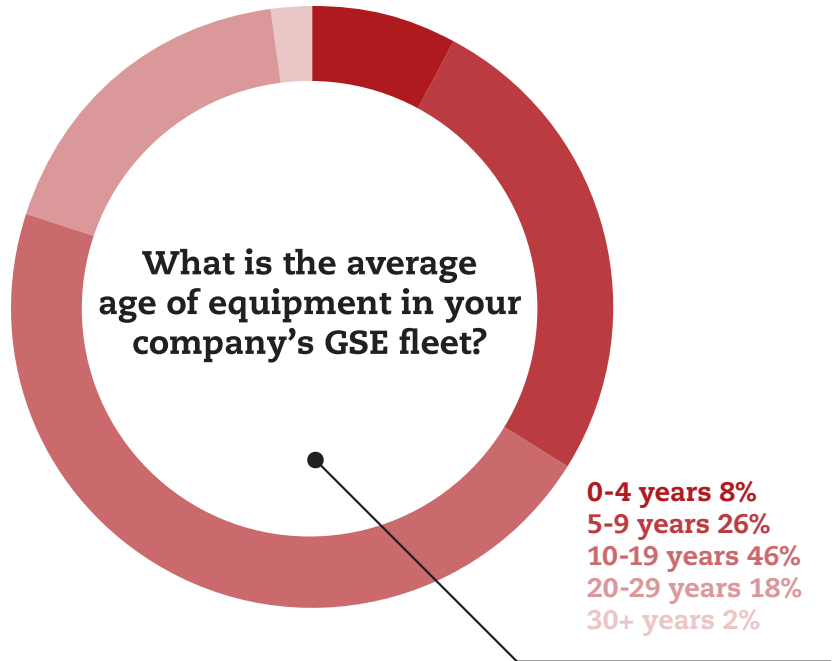
GSE maintenance is likely to evolve as older equipment is retired from fleets and new equipment – including electric GSE (eGSE) and other alternative power sources – is utilized.

The average age of ground support equipment in GSE fleets is 10-19 years, according to 46 percent of Ground Support Worldwide’s survey respondents.

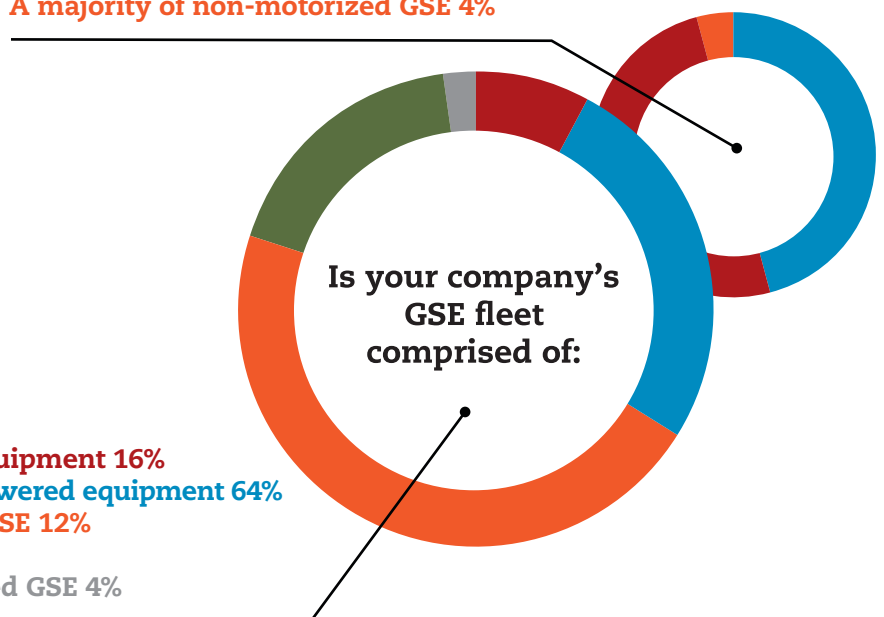
Another third of those polled, reported owning newer equipment. A total of 8 percent indicated the average age of equipment in their fleet is 0-4 years while 26 percent said their average equipment age is 5-9 years old.

Another 18 percent of those surveyed stated their equipment’s average age is between 20 and 29 years.

A total of 80 percent of those surveyed indicated their GSE fleet is comprised of either all diesel/gasoline-powered GSE or a majority of GSE equipped with internal combustion engines (ICE). Meanwhile, 12 percent of those who took the survey said their fleets are comprised of mostly eGSE and 4 percent said their GSE fleets are all electric.



A majority of motorized GSE 46%
Half motorized, half non-motorized GSE 50%
A majority of non-motorized GSE 4%



All diesel / gasoline-powered equipment 16%
A majority of diesel / gasoline-powered equipment 64%
A majority of electric-powered GSE 12%
All electric GSE 4%
Other alternative energy-powered GSE 4%

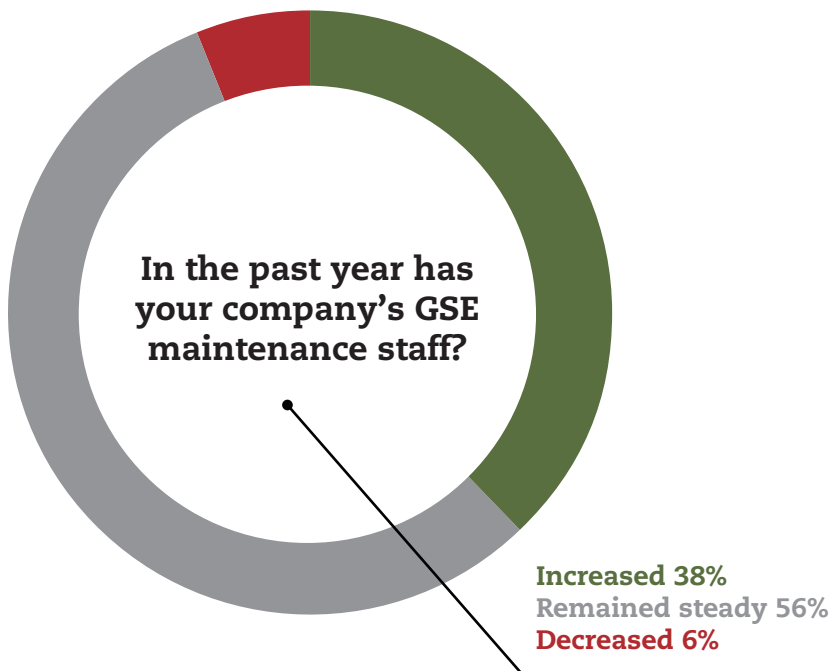
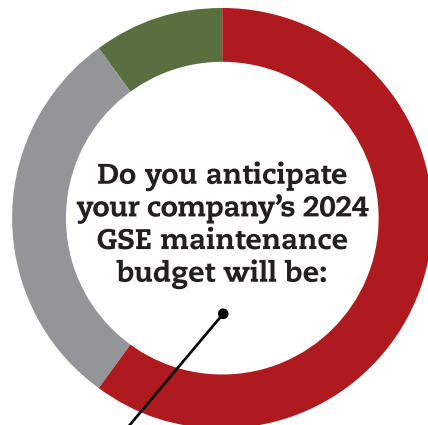
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Budget / Staff

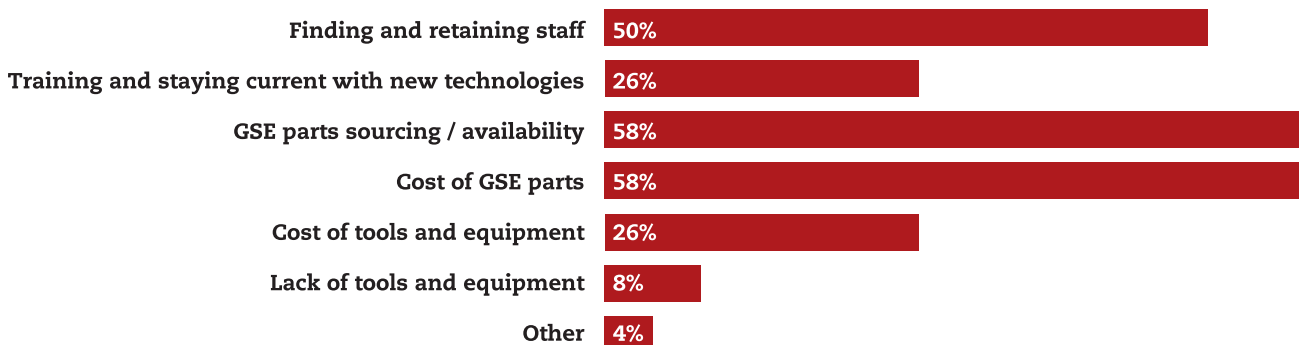
With GSE maintenance responsibilities being predominantly addressed by the company who owns the equipment, there are associated challenges and budget strains.

The greatest challenges reported by survey respondents are sourcing GSE parts and part availability, finding and retraining staff, training and staying current with new technologies, and the cost of GSE parts.

While personnel challenges exist, 56 percent of survey respondents stated the size of their GSE maintenance staff remained steady, and 38 percent managed to increase the size of their staff over the last year.



What factors put the biggest strain on your company's GSE maintenance budget?



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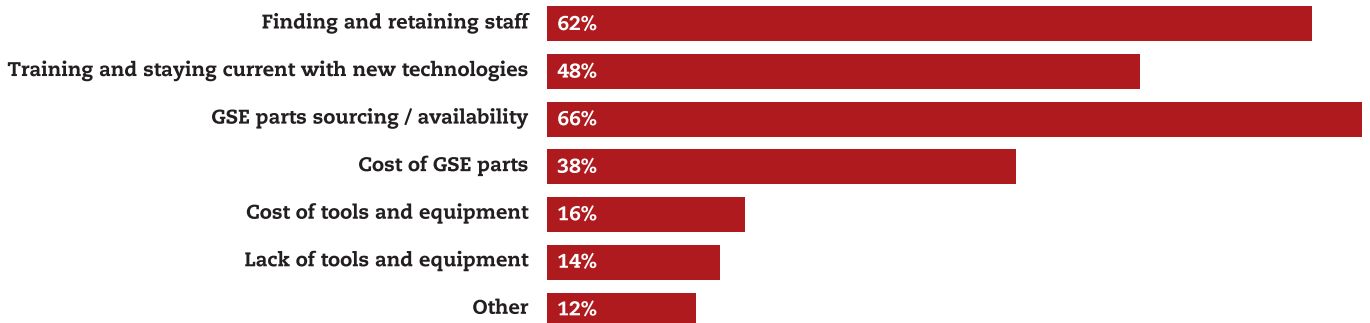
The size of GSE maintenance departments vary based on the size of the operation. Nearly 40 percent of those surveyed said they have 1-5 GSE maintenance personnel members on staff, and 32 percent indicated they have more than 21 maintenance professionals.

The cost of GSE parts, sourcing parts and the availability of parts put the greatest strain on GSE maintenance budgets, according to those surveyed. The cost of personnel turnover also takes a toll on budgets as does the cost of tools and equipment.

About 60 percent of survey respondents indicated 2024 maintenance budgets were expected to be higher than in 2023, while another 30 percent reported their budgets were likely to remain the same as last year.



What are your company's greatest challenges regarding GSE maintenance?



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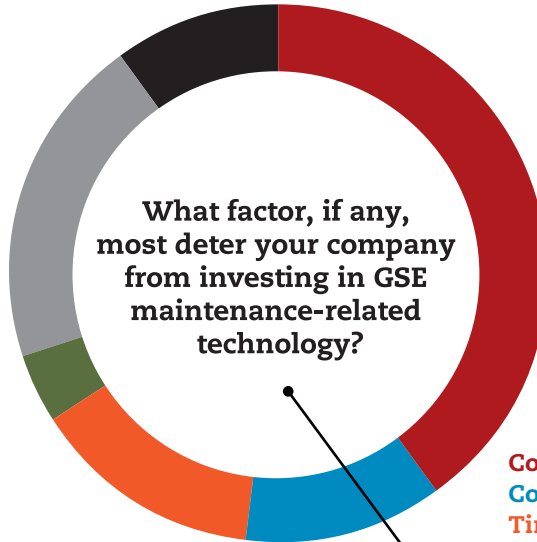
Technology

Technology has played a role in enhancing GSE maintenance tasks and will continue to impact the industry.

The most commonly used technology for GSE maintenance includes electronic inspection/checklist solutions (48 percent), electronic GSE maintenance planning (44 percent) and asset management solutions (38 percent).

Survey respondents reported a large investment in personal/hand-held devices and the use of mobile apps to improve GSE maintenance. Cloud-based services and Bluetooth-connected equipment has also been accepted by more members of the industry.

What factor, if any, most deter your company from investing in GSE maintenance-related technology?



Cost of equipment 40%
Cost of training 12%
Time for training 14%
Complexity of training 4%
None of the above 20%
Other 10%

How does your company anticipate more eGSE in the market will impact maintenance operations?



There will be less GSE maintenance tasks to perform 38%
There will be the same amount of GSE maintenance tasks 36%
There will be more GSE maintenance tasks required 26%

What technology does your company use to enhance GSE maintenance?

Electronic inspection/checklist solutions 48%

Electronic GSE maintenance planning 44%

Asset management solutions 38%

User accountability solutions 18%

Other 14%

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When asked what deters the adoption of new technologies, 40 percent of survey respondents said the cost of equipment. Time of training (14 percent) and cost of training (12 percent) were also selected. It is worth noting that 20 percent of those surveyed selected none of the above, indicating the necessity of technology solutions and enhanced tools to perform

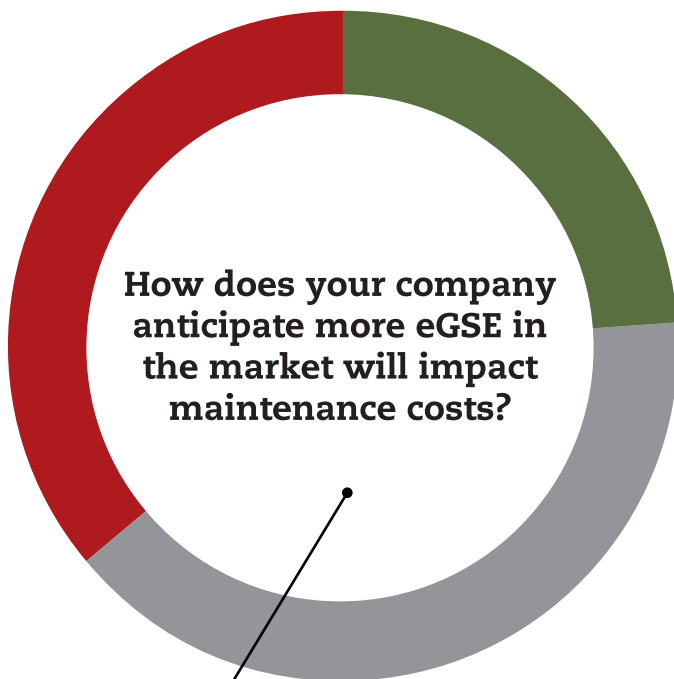
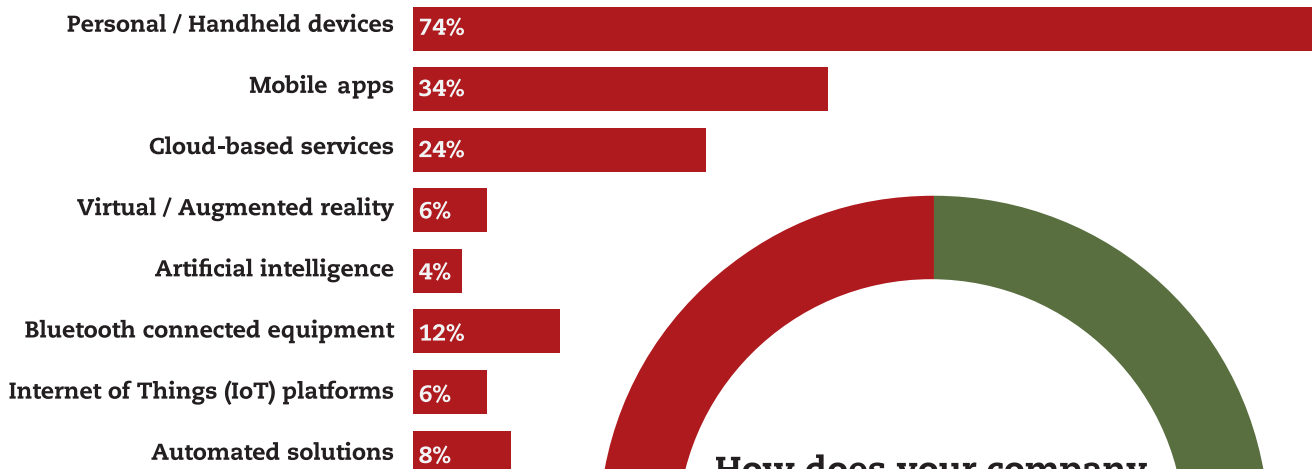
effective GSE maintenance.

As previously noted, more electric and alternative-powered equipment is entering the GSE market. With this influx of eGSE and fewer moving parts, 38 percent of those who responded believe there will be less GSE maintenance to perform. However, 36 percent believe maintenance requirements will remain

steady and 26 percent actually believe more GSE maintenance tasks will need to be addressed.

In all, 40 percent of those polled said GSE maintenance costs will likely remain the same, even as more eGSE enters the market. Another 36 percent anticipate more maintenance costs while 24 percent believe GSE maintenance costs will be reduced. **GSW**

What solutions has your company invested in to enhance GSE maintenance?



There will be less GSE maintenance costs 24%
GSE maintenance costs will remain the same 40%
There will be more GSE maintenance costs 36%