

Groundhandling Service Challenges in Europe - CLECAT Survey Findings and Recommendations

In response to ongoing concerns about groundhandling services in Europe, CLECAT launched a survey among its members and freight forwarders between December 2024 and February 2025. The aim was to gather first-hand insights into the key operational challenges affecting the industry and to support evidence-based advocacy for improvements in service quality and efficiency.

This paper summarises the survey results and offers the following recommendations to air transport supply chain actors and policymakers.

This paper presents the key findings of the survey and outlines CLECAT's recommendations to policymakers and air transport stakeholders. Based on the feedback from freight forwarders, CLECAT proposes three key measures to enhance efficiency, competition, and service quality in groundhandling services across the EU:

1. Accelerate Digitalisation, Implement Cargo Community Systems, real-time tracking, and digital platforms to increase transparency, reduce delays, and enhance collaboration.
2. Foster Greater Competition in Groundhandling Services – Revise the EU Groundhandling Directive to facilitate increased market access and reduce restrictive practices that limit competition.
3. Introduce harmonised service quality benchmarks as a prerequisite for granting groundhandling licenses. Regular performance monitoring based on key performance indicators (KPIs) should be mandated to ensure accountability and consistency across European airports.

By implementing these measures, CLECAT aims to address long-standing industry concerns, enhance service reliability, and strengthen the overall competitiveness of the European air freight sector.

Respondents Profiles

Respondents were well-distributed across Europe, representing freight forwarders from fourteen different European countries, with a strong presence in Southern, Central, and Western Europe. Regarding company size:

- 22% of respondents worked for medium-sized companies, with 50 to 250 employees
- 32% worked for large companies, with over 250 employees
- 46% worked for small enterprises, with fewer than 50 employees.

Shortcomings in service quality

- 70% indicated that the **quality of groundhandling services fails to meet their operational needs**. Challenges include long waiting times, limited opening hours, and delays caused by **inadequate staffing and outdated equipment**.
- 80% reported **inadequate communication from groundhandling providers** during disruptions or delays. Proactive updates and timely responses remain rare, complicating logistics planning and reducing efficiency.
- 65% indicated that **the time allocated by groundhandling services for picking up goods is insufficient** to ensure smooth operations and avoid delays or additional costs.
- **Service quality was reported as inconsistent**, with large hubs frequently experiencing congestion and inefficiencies, while smaller airports providing better value.
- 55% of respondents noted quality of groundhandling services was inconsistent across EU airports.
- Nearly 65% observed no improvements in quality in the past five years with the rapid growth of e-commerce increasing the pressure, creating bottlenecks and highlighting the need for dedicated facilities.

Resilience and Cargo handling

- More than 65% **groundhandling services fail to ensure timely cargo handling** and are **unable to promptly resolve issues related to cargo mishandling**.
- 60% indicated that these **services are not equipped to handle disruptions** such as strikes, severe weather conditions, or infrastructure issues – so resilience is not satisfactory.
- 68% noted that **groundhandling services do not quickly adapt to changes** in demand and volume and **fail to provide adequate customer support**.
- 78% considered the value/costs **of groundhandling services is disproportionate**
- 79% indicated that **competitive pricing is often achieved at the expense of service quality**.
- 56% considered that **groundhandling services comply with safety standards** and regulations.

Transparency, Digitalisation and Flexibility

- 50% reported that **groundhandling companies do not transparently share their performance data or KPIs**.

Further complications include **limited free storage periods**, **restrictive warehouse hours**, and **inadequate infrastructure**. These challenges are particularly pronounced during peak periods, underscoring the **need for improved staffing, enhanced facilities**, and **more flexible scheduling** to support efficient supply chain management.

Addressing challenges

When asked about discussions or initiatives involving groundhandling companies to address challenges, 37% of respondents reported no such efforts. Among the 33% who indicated otherwise, respondents highlighted actions taken by national and local freight forwarder associations. These initiatives include **developing mandatory KPI standards**, **advocating concerns to national authorities**, **implementing booking systems** to reduce waiting times, and **organising meetings with stakeholders** to exchange views and finding solutions. However, progress was often hindered by resistance of ground handlers, leading to limited transparency and collaboration.

Persistent challenges faced by freight forwarders include resistance to innovation, as well as a lack of accountability and transparency among other stakeholders in the supply chain. These issues result in **delays and lower service quality, leaving freight forwarders frustrated**. Some respondents referred to initiatives to streamline operations and enhance transparency, such as the [Digital Green Lane project](#) at Brussels International Airport, the [Smart City of Goods project](#) at Milan Malpensa Airport or the [Smart Cargo Mainport Program](#) at Amsterdam Schiphol Airport. However, achieving meaningful progress will require greater commitment from groundhandling companies to embrace these changes and adapt to evolving industry needs.

Recommendations

Based on the feedback from freight forwarders and their perspectives on the current state of groundhandling services in Europe, several recommendations can be made to improve service:

- **Digitalisation and Technology:**

CLECAT encourages the implementation of Cargo Community Systems, real-time tracking, and digital booking systems and ‘green-lane’ initiatives to enhance transparency and reduce delays. The [Digital Green Lane](#) operational at Brussels International Airport standardises the digital handover and pickup processes between freight forwarders and groundhandling agents. This has led to greater efficiency, transparency, and paperless operations, benefiting all stakeholders involved.

Looking ahead, it is important to **leverage best practices** that aim to digitalise remaining paper operations to enhance transparency and integrate AI technology for automated decision-making processes.

- **Enhancing competition**

Competition at airports remains limited, with most airports allowing access to only two groundhandling operators. CLECAT would support the revision of the Groundhandling Directive with the aim to incentivise growth and efficiency in air transport operations. As outlined in our [feedback paper](#) to the European Commission’s fitness check to the EU airport legislation, CLECAT has long supported the gradual opening of the groundhandling market to competition, starting with the

adoption of the Groundhandling Directive in 1996, which marked the end of monopolies at EU airports.

- **Mandating Quality Standards at European level**

Currently, service quality is defined solely through contractual agreements between GHAs and airlines, typically outlined in Service Level Agreements (SLAs). As a result, GHAs adhere only to the minimum performance standards set in these SLAs, leading to significant variations in service quality. Since freight forwarders contract with airlines rather than groundhandling operators, they have no direct influence over quality standards or the enforcement of best practices.

CLECAT would propose to the European Commission that **quality standards should be a condition for granting licenses to groundhandling services providers**. Compliance to these standards, based on KPIs should be monitored and reported on a regular basis at shipment level.

CLECAT believes that the industry – including shippers, forwarders, airlines, handlers and trucking companies – should play a significant role in setting the objectives that should be achieved for these minimum quality standards. This would require clear and open communication of performance data and operational changes to foster trust among stakeholders. These objectives could include, inter alia, minimum delays, reliable service, and efficient handling.

Conclusion

CLECAT continues to call all actors involved to collaborate in improving service quality, fostering transparency, enhancing communication, and driving greater efficiency to strengthen the competitiveness of the air freight sector in Europe. The survey responses highlight the **need for minimum quality standards, improved operational reliability, and a more competitive groundhandling market** to address persistent challenges. **Ensuring resilience is equally critical**, particularly in light of the current geopolitical landscape, which underscores the importance of a robust and adaptable air freight sector.

While CLECAT recognises that such changes will not happen overnight, it is essential for stakeholders and policymakers to prioritise these issues. **The revision of the Groundhandling Directive offers a key opportunity in ensuring a more competitive, efficient, and resilient groundhandling sector in Europe.**