

Global Air Freight Unit Load Device (ULD) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Air Freight Unit Load Device (ULD) market size is expected to reach \$ 645 million by 2032, rising at a market growth of 4.6% CAGR during the forecast period (2026-2032).

Air Freight Unit Load Devices (ULDs) are standardized loading units specifically designed for the belly holds of commercial freighters and passenger aircraft. They are used to consolidate loose cargo into modular cargo units that can be quickly loaded, unloaded, and securely locked. ULDs primarily consist of two categories: one is aviation pallets/air cargo trays, which secure cargo using netting, straps, and side rails; the other is aviation containers, which use metal or composite material structures for closed or semi-closed loading. The core design principle of ULDs is to match them with the aircraft's door dimensions, cargo hold cross-section, cargo hold locking system, and ground handling equipment, meeting requirements for strength, flame retardancy, static electricity, corrosion resistance, weight, and maintainability, thereby improving turnaround efficiency and reducing loading and unloading errors. In 2025, global production of Air Freight Unit Load Devices (ULDs) reached 426.3 k units, with an average price of approximately US\$1,072.93 per unit and a gross profit margin of approximately 34.43%.

The largest share is taken by TransDigm (Nordisk & AAR Cargo) , Satco, Inc. and Safran (Zodiac Aerospace), which together account for a share close to 37 % of Air Freight Unit Load Devices market globally. In terms of regions, the Asia-Pacific area represents the largest piece of global ULD market with 39% of the world total, followed by Europe at 33% and North America at 23%. In the forecast, more new investment will be attracted into this field. Driven by cross-border e-commerce, small-batch, high-frequency replenishment, pharmaceutical cold chain logistics, and high-value manufacturing supply chains, air cargo continues to rely heavily on standardized loading units. The value of ULDs lies not only in the loading unit itself but also in the efficiency

benefits brought by their compatibility with aircraft models, rapid turnaround, and synergy with ground handling systems. With fleet structure upgrades and optimized cargo hold loading density, lightweight composite materials, maintainable modular structures, and product solutions compatible with multiple aircraft models in both the main and lower cargo holds are becoming major directions for manufacturers to differentiate themselves. A long-standing pain point in the industry is the hidden costs associated with loss, mismatch, and damage. IATA explicitly states that the annual costs related to loss, damage, and repair of ULDs exceed \$330 million, directly driving airlines and cargo terminals to increase investment in tracking, turnaround management, and maintenance networks, but also implying increased supply chain and operational complexity. On the other hand, as airworthiness-related equipment, ULDs need to meet multiple technical standards and consistency requirements. Certification cycles, material consistency, and batch delivery quality control can amplify delivery risks when demand fluctuates rapidly. The Chinese market is also advancing updates to its airworthiness system and standardization. For example, CAAC has released relevant technical standards such as CTSO C90e, driving the industry towards a clearer technical and compliance framework. Future structural increases in demand will mainly come from three scenarios: First, the transportation of temperature-controlled pharmaceuticals and biological products will drive the configuration and leasing turnover of high-value temperature-controlled ULDs, whose asset value is significantly higher than that of standard ULDs; second, cross-border e-commerce and express delivery networks will drive large-scale procurement of high-turnover durable container pallets, netting, and rapid loading and unloading equipment; third, digital and visualized turnover management will drive RFID and sensor configurations to become standard requirements for mid-to-high-end customers. Overall, the market will shift from simply selling equipment to a combination of equipment and services, forming new competitive barriers around maintenance networks, pooled operations, and digital management capabilities.

This report studies the global Air Freight Unit Load Device (ULD) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Air Freight Unit Load Device (ULD) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Air Freight Unit Load Device (ULD) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Air Freight Unit Load Device (ULD) total production and demand, 2021-2032, (K Units)

Global Air Freight Unit Load Device (ULD) total production value, 2021-2032, (USD

Million)

Global Air Freight Unit Load Device (ULD) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Air Freight Unit Load Device (ULD) consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Air Freight Unit Load Device (ULD) domestic production, consumption, key domestic manufacturers and share

Global Air Freight Unit Load Device (ULD) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Air Freight Unit Load Device (ULD) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Air Freight Unit Load Device (ULD) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Air Freight Unit Load Device (ULD) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include TransDigm (Nordisk & AAR Cargo), Satco, Inc., Safran (Zodiac Aerospace), PalNet GmbH, VRR Aviation, ACL Airshop, DoKaSch GmbH, Unilode, Taiwan Fylin Industrial, Jettainer, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Air Freight Unit Load Device (ULD) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Air Freight Unit Load Device (ULD) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Air Freight Unit Load Device (ULD) Market, Segmentation by Type:

Pallets

Containers

Global Air Freight Unit Load Device (ULD) Market, Segmentation by Material:

Aluminum Alloy

Composite Sandwich

Hybrid Metal And Polymer

Others

Global Air Freight Unit Load Device (ULD) Market, Segmentation by Sales:

Direct To Airlines And Handlers

ULD Pool Operators

MRO And Repair Network

Others

Global Air Freight Unit Load Device (ULD) Market, Segmentation by Application:

Cargo Air Transport

Civil Air Transport

Other

Companies Profiled:

TransDigm (Nordisk & AAR Cargo)

Satco, Inc.

Safran (Zodiac Aerospace)

PalNet GmbH

VRR Aviation

ACL Airshop

DoKaSch GmbH

Unilode

Taiwan Fylin Industrial

Jettainer

Shanghai Avifit

Wuxi Aviation

Key Questions Answered:

1. How big is the global Air Freight Unit Load Device (ULD) market?
2. What is the demand of the global Air Freight Unit Load Device (ULD) market?
3. What is the year over year growth of the global Air Freight Unit Load Device (ULD) market?

4. What is the production and production value of the global Air Freight Unit Load Device (ULD) market?
5. Who are the key producers in the global Air Freight Unit Load Device (ULD) market?
6. What are the growth factors driving the market demand?

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