

Global Air Freight Unit Load Device (ULD) Market Growth 2026-2032

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Abstracts

The global Air Freight Unit Load Device (ULD) market size is predicted to grow from US\$ 448 million in 2025 to US\$ 623 million in 2032; it is expected to grow at a CAGR of 4.9% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Air Freight Unit Load Device (ULD) Industry Forecast" looks at past sales and reviews total world Air Freight Unit Load Device (ULD) sales in 2025, providing a comprehensive analysis by region and market sector of projected Air Freight Unit Load Device (ULD) sales for 2026 through 2032. With Air Freight Unit Load Device (ULD) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Air Freight Unit Load Device (ULD) industry.

This Insight Report provides a comprehensive analysis of the global Air Freight Unit Load Device (ULD) landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Air Freight Unit Load Device (ULD) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Air Freight Unit Load Device (ULD) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Air Freight Unit Load Device (ULD) and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Air Freight Unit Load Device (ULD).

This report presents a comprehensive overview, market shares, and growth opportunities of Air Freight Unit Load Device (ULD) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Pallets

Containers

Segmentation by Material:

Aluminum Alloy

Composite Sandwich

Hybrid Metal And Polymer

Others

Segmentation by Sales:

Direct To Airlines And Handlers

ULD Pool Operators

MRO And Repair Network

Others

Segmentation by Application:

Cargo Air Transport

Civil Air Transport

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Air Freight Unit Load Device (ULD) market?

What factors are driving Air Freight Unit Load Device (ULD) market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Air Freight Unit Load Device (ULD) market opportunities vary by end market size?

How does Air Freight Unit Load Device (ULD) break out by Type, by Application?

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