

# Refrigerated Trucking Market in the US and Canada - Industry Outlook and Forecast 2020-2025

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## Abstracts

Get an in-depth analysis of COVID-19 impact on refrigerated trucking market in the US and Canada.

The refrigerated trucking market in the US and Canada is expected to grow at a CAGR of over 4% during the period 2019–2025.

The challenge of perishability and the need to preserve food and non-food categories at optimal temperatures to prevent spoilage are the major growth enablers for the refrigerated trucking market in the US and Canada. The growth in refrigerated warehouse capacities in the US and Canada has a positive impact on the refrigerated logistics market. Being geographically vast countries, the US and Canada need to have refrigerated truck transport and trailers for long haul transportation to avoid food spoilage, thereby influencing the market. The demand for temperature-controlled logistics continues to grow upward trajectory as perishable food items and medicines need to be maintained at optimal temperatures throughout the cold chain until they reach end-consumers. This demand pushes more opportunities for vendors to increase their investments that could benefit both refrigerated trucking companies and perishable food manufacturers as well.

Pharmaceutical products need to be maintained at a precise temperature to maintain their efficiency. Time and temperature are two vital factors to be taken into consideration when transporting medicines. Transporting biological materials such as blood, tissue samples, reproductive material, etc. must be carriage at a cryogenic temperature less than -150°C. Therefore, it is critical to transport clinical products under temperature-controlled trailers over a long distance. The pharmaceutical market in the US and Canada continues to grow at a steady rate of YOY. Hence, refrigerated trucking

companies are exploring to deliver advanced solutions for biological researches, needing transportation of specimens, or even entire research labs at times. Therefore, pharmaceutical products are mandatory to be transported in temperature-controlled trucks becomes a driving force for the refrigerated trucking market.

The following factors are likely to contribute to the growth of the refrigerated trucking market in the US and Canada during the forecast period:

Growing Organic Food Market

Increasing Multi-Temperature Trucking

Usage of Freight Optimization Software

Increasing Multi-Temperature Trucking

The study considers the present scenario of the refrigerated trucking market in the US and Canada and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

### Refrigerated Trucking Market in US and Canada: Segmentation

This research report includes a detailed segmentation by service, temperature compartment, end-users, vehicle, and geography. The refrigerated trucking market by less than truckload (LTL) is growing at a steady pace driven by end-users such as F&B and pharmaceuticals. The (LTL) industry in North America is composed of numerous vendors. The industry has high entry barriers across the region on account of the complexity of operating thousands of depots, driver shortage, and intricacy with respect to the spoke hub system used for pickup and deliveries. The growth of e-commerce has a high positive impact on the overall LTL industry. However, dry freight has a higher share compared to refrigerated freight. LTL carriers commonly employ covered or enclosed van trailers. The usage of LTL refrigerated trailers is less compared to dry freight LTL carriers. The majority of temperature-controlled transporting through LTL is limited to regional levels compared to inter-regional or national levels. Online retail is a major driver for the LTL segment. Also, several start-up companies are trying to disrupt the LTL, consolidate the market with new technology-based solutions to address the

complexity associated with the LTL segment.

The single temperature and multi-temperature logistics segments supplement each other's growth. Currently, single temperature refrigerated trucking services dominate the industry. However, the growth of multi-temperature refrigerated trucking services has been higher. Reduced weight and improved fuel economy are the characteristics of single-temperature refrigerated truck trailers. Local manufacturers meet a large part of the demand for transportation refrigeration units in the US. However, low-cost imports from China and Mexico are also available in the market.

The food & beverage industry dominates the reefer truck market. The logistics cost in the food industry accounts for 7-10% of the total product cost. The increasing number of quick-service restaurants and retail outlets has fueled food consumption, which has increased the demand for chilled and frozen food and beverages. Foods that are expected to see high demand for packaging include organic foods, dairy, and meat. Scaling up of tier 2 brands in the US food industry is expected to bring high volumes, while larger food corporations will drive the steady need for refrigerated transportation. Canada is one of the most potential markets for launching new and innovative products due to its multi-ethnic society. Food consumption differs significantly across the country. Also, a vast majority of people are health-conscious, and hence, the market has observed an increased demand for organic food products that require refrigeration in their supply chain.

While refrigerated trailers reduce operating expenses by reducing fuel and/or power consumption, they are complex to manage. Vendors boost the trailer revenue by charging for loading and unloading, detention of tractors and trailers, fuel surcharges, and other services. The market for trailers is also dependent on inventory levels, customer needs, trucking capacity, and availability of the driver. The availability of long-haul drivers is a major concern both in the US and Canada. The FTL and LTL segment use trailers for delivering cargo. However, the utilization of vans is limited to the LTL segment. Since the FTL demand is currently high, and also the regional LTL demand is growing, the usage of the trailer is growing.

## Market Segmentation by Service

FTL

LTL

## Market Segmentation by Temperature Compartment

Single

Multiple

## Market Segmentation by End-users

Food

Poultry, Meat, and Seafood

Dairy and Beverages

Bakery, Confectionery, and Others

Pharmaceutical

Others

## Insights by Geography

Chilled or perishable food items have multiple challenges in transportation; therefore, cold chain management is increasing its complexity significantly. Due to technical advancements, refrigerated trucks that can hold goods with multiple segments at different temperatures are gaining popularity in recent years in North America. Multi segmented refrigerated trucks can maintain different optimum temperature levels. Multiple temperature trucks are more particularly used for the retail application, where temperature-controlled models are required to replenish store stock with relatively small quantities from regional distribution centers.

Canada stands out to be on top as the largest country both in the production and consumption of food and beverages. Canadian organic food products are at the highest demand being exported across all major countries of the world. The agriculture and food and beverage processing industries in Canada contributes around 6.8% toward GDP annually. Quebec and Ontario hold leading two positions in agriculture and food and beverage processing industries.

## Key Profiled Countries

US

Canada

## Insights by Vendors

The US and Canada refrigerated trucking industry is large, fragmented, and highly competitive with thousands of FTL and LTL carriers. No single vendor dominates the market. The three major factors on which the competition is dependent include – tariff, capacity, and customer service. The competitive factors change as and when the market conditions change. For instance, in the low demand market scenario, the tariff for hire refrigerated trucking company becomes significant, while in the times of high customer demand, the capacity and service quality make become more vital. The pricing of a truckload refrigerated carrier in North America depends mainly on supply and demand factors.

## Vendors

H. Robinson Worldwide

Americold Logistics

B Hunt

Knight-Swift Transportation

FedEx

DB Schenker

U.S Xpress

DHL

Lineage Logistics

ABF Freight

Marten

KLLM Logistics

Prime Inc

Covenant Transportation Services

Stevens Transport

Burris Logistics

Total Quality Logistics

Henningsen Cold Storage

Expeditors

XPO Logistics

Trenton Cold Storage

RLS Logistics

Matson Logistics

Conestoga Cold Storage

Agro Merchants Group

Congebec Logistics

Hanson Logistics

Confederation Freezers

Ruan Transport

Penske

Atlanta Bonded Warehouse Corporation

Alliance Shippers

Midwest Refrigerated Services

Estes

### Key Market Insights

The analysis of the refrigerated trucking market in the US and Canada provides sizing and growth opportunities for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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