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Global Healthcare Cold Chain Third Party Logistics Market Size, Share, and Regional Forecasts 2022-2032

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Abstracts

The global healthcare cold chain third-party logistics market is valued at USD 39.72 billion in 2023 and is expected to grow at a CAGR of 7.64% from 2024 to 2032, reaching USD 77.05 Billion by 2032. The growing demand for temperature-sensitive pharmaceuticals, biologics, vaccines, and medical devices, along with stringent regulatory requirements for storage and transportation, has significantly driven the expansion of third-party cold chain logistics solutions globally. Increasing outsourcing of logistics services by pharmaceutical and biotech companies has further strengthened market growth, as companies focus on cost optimization and operational efficiency.

The surge in personalized medicine, biologics, and cell & gene therapies has intensified the need for specialized cold chain logistics services that provide ultra-low temperature storage, real-time monitoring, and secure transportation. Biologics and mRNA-based vaccines, requiring stringent temperature control at -20°C, -80°C, and even cryogenic storage (-150°C or lower), are fueling investments in advanced cold storage infrastructure. Logistics providers are enhancing capabilities by integrating IoT-enabled sensors, blockchain-based supply chain tracking, and AI-driven route optimization to ensure temperature integrity and regulatory compliance throughout the supply chain.

The industry is witnessing significant technological advancements in automated cold storage warehouses, temperature-sensitive drone delivery, and AI-powered risk management solutions. For instance, in May 2023, DHL invested USD 1.5 million in developing temperature-controlled air freight services for biologics and pharmaceuticals, strengthening the industry's logistics capabilities for ultra-sensitive products.

Regional Insights-North America dominated the market in 2024, holding 33.1% of the global market share, primarily due to the highly developed pharmaceutical industry,

strict FDA regulations, and widespread adoption of IoT-driven cold chain logistics solutions. The U.S. market is projected to grow further with the expansion of biologics production and increased reliance on third-party logistics (3PL) providers for temperature-sensitive product distribution.

Asia-Pacific is set to exhibit the highest CAGR during the forecast period, fueled by expanding pharmaceutical manufacturing in China and India, increasing vaccine exports, and improving cold chain infrastructure. Government-led investments in GDP-compliant cold storage solutions and high-tech logistics networks are propelling market growth.

Europe is another key regional player, with Germany, the UK, and France leading in automated cold storage facilities, blockchain-integrated supply chains, and AI-powered logistics optimization. Germany, in particular, is focusing on sustainable logistics, investing in hydrogen-powered refrigerated trucks and green warehouses.

Latin America and the Middle East & Africa (MEA) are witnessing steady growth, supported by rising pharmaceutical demand, vaccine distribution efforts, and increasing regulatory enforcement for cold chain logistics compliance. Countries like Brazil, Mexico, Saudi Arabia, and South Africa are actively investing in cold storage warehouses and temperature-controlled transportation networks.

Major Market Players

DHL Group

UPS

FedEx

Cardinal Health

Kuehne + Nagel

DB Schenker

Agility

SF Express

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- Barrett Distribution Centers
- AmerisourceBergen
- Kinesis

Market Segmentation

By Service:

- Transportation
- Air Freight
- Sea Freight
- Overland
- Warehousing & Storage
- Packaging Solutions
- Monitoring & Visibility Solutions
- Inventory Management
- Others

By Product:

- Biopharmaceuticals
- Pharmaceuticals
- Medical Devices

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Others

By Temperature Range:

Frozen (-20°C to -80°C)

Ultra-frozen/Deep Frozen (-80°C to -150°C)

Cryogenic (

By End Use:

Pharmaceutical & Biopharmaceutical Companies

Medical Device Companies

Others

By Region:

North America:

U.S.

Canada

Mexico

Europe:

UK

Germany

France

Italy

Spain

Denmark

Sweden

Norway

Asia Pacific:

Japan

China

India

South Korea

Australia

Thailand

Latin America:

Brazil

Argentina

Middle East & Africa:

South Africa

Saudi Arabia

UAE

Kuwait

Years Considered for the Study:

Historical Data: 2022

Base Year: 2023

Forecast Period: 2024-2032

Key Takeaways:

Market Estimates & Forecasts for 10 years (2022-2032)

Annualized revenues and regional-level analysis for each market segment

Detailed analysis of geographical landscape with country-level insights

Competitive landscape with key market players and strategies

Analysis of demand-side and supply-side market trends

Regulatory framework assessment for compliance and growth opportunities

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