

Global Passive Temperature-Controlled Box Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Passive Temperature-Controlled Box competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, the global production of passive temperature control chambers was 21 million units, with an average price of US\$38.4 per unit. A passive temperature-controlled box is an insulated container that uses a cooling medium (such as wet ice, dry ice, or liquid gas) to control the temperature. It does not rely on mechanical or electronic refrigeration/heating systems, but rather maintains the required temperature environment for the goods during transport through the cooling medium. The upstream components of passive temperature-controlled boxes mainly include high-performance insulation materials, injection-molded boxes, EPP/EPS/PU foam materials, vacuum insulation panels, PCM phase change materials, refrigerant ice plates, sealing strips, and locking mechanisms. Among these, insulation materials and vacuum insulation panels determine the insulation duration and constitute the largest portion of the cost. Downstream applications are concentrated in pharmaceutical cold chain transportation, vaccine distribution, blood product circulation, clinical laboratory sample turnover, short-distance fresh food delivery, e-commerce cold chain, outdoor sampling, and emergency supplies transportation. Pharmaceutical cold chain applications have the largest usage and the most stringent requirements for temperature control levels, holding time, compliance certification, and reliability. The increasing demand for vaccine and blood transportation is driving up the proportion of high-end passive temperature-controlled boxes. Food and fresh food delivery volumes are large but sensitive to the unit price of the box, favoring mid-to-low-end products; outdoor emergency and scientific research scenarios emphasize lightweight design and reusability. Industry trends include longer temperature holding time, lighter weight, more composite insulation structures, and

stricter temperature control standards. Vacuum insulation panels combined with PCM (Polymerized Thermal Management) solutions are rapidly gaining popularity, and high-performance materials are driving the continued replacement of traditional foam boxes by passive temperature-controlled boxes in short- and medium-distance cold chain logistics. Driving factors include increased transportation of biological agents, the normalization of vaccine cold chain demand, the expansion of fresh food e-commerce, stricter government regulations on pharmaceutical cold chain logistics, and end-user preferences for electricity-free operation and cost control. Obstacles include the still high cost of high-performance insulation materials, limited recycling and reuse rates due to box lifespan and impact resistance, large volume required for transportation and storage, and the reliance on PCM for temperature control, which can easily lead to temperature control failure if not properly prepared, resulting in high dependence on user operation. Single-line annual production capacity is typically 50,000-100,000 units, with gross profit margins generally between 15% and 28%.

The global Passive Temperature-Controlled Box market size was estimated at USD 806.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 3.50% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Passive Temperature-Controlled Box market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Passive Temperature-Controlled Box market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Passive Temperature-Controlled Box

market.

Global Passive Temperature-Controlled Box Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Sonoco
Cold Chain Technologies
Pelican Products
CSafe Global
va-Q-tec
Sofrigam
Intelsius
Cryopak Industries
Inmark Packaging
Tower Cold Chain Solutions
Tempack Packaging Solutions
EcoCool
Snyder Industries
Saeplast Americas
Topa Thermal Packaging
TPC Packaging Solutions
GEBHARDT Logistic Solutions
Aeris Dynamics
Inno Cool
Atlas Roofing Corporation

Avery Dennison Corporation
3M
Ampcor
BASF
Honeywell
Chevron Phillips Chemical Company
DS Smith
Biotempak
IGH Holdings
AmerisourceBergen Corporation

Market Segmentation (by Type)

Phase Change Material (PCM) Type
Dry Ice Type
Ice Pack/Gel Pack Type
Vacuum Insulated Type
Composite Type

Market Segmentation (by Application)

Healthcare
Food Cold Chain
Industry & Electronics
Others

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance

Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Passive Temperature-Controlled Box Market
Overview of the regional outlook of the Passive Temperature-Controlled Box Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Passive Temperature-Controlled Box Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application,

covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Passive Temperature-Controlled Box, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and

acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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