

Refrigerated Trailer Market Size, Share & Trends Analysis Report By Trailer (Single-Temperature, Multi-Temperature), By Axle (Single Axle, Tandem Axle, Triple Axle), By Power Source, By End Use, By Region, And Segment Forecasts, 2025 - 2030

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Abstracts

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Refrigerated Trailer Market Size & Trends

The global refrigerated trailer market size was estimated at USD 7.24 billion in 2024 and is projected to grow at a CAGR of 6.3% from 2025 to 2030. The market is gaining momentum, driven by increasing demand for perishable goods and the growing expansion of e-commerce and online grocery.

However, the high upfront costs of refrigerated trailers remain a key challenge. The growing technological advancements in refrigeration and the rising stringency of environmental regulations present a major growth opportunity for the market.

In addition, the ongoing shift towards electric and energy-efficient refrigeration systems is expected to accelerate the adoption of refrigerated trailers further, enhancing sustainability and reducing operational costs for fleet operators.

The increasing demand for perishable goods is a major driver of growth in the refrigerated trailer industry. With the rise in e-commerce, particularly online grocery shopping, consumers now expect fresh, organic, and frozen food to be delivered quickly and in optimal condition. For example, supermarkets like Walmart and Tesco have expanded their online grocery services, leading to an uptick in demand for refrigerated

trailers to transport products such as fruits, vegetables, dairy, meat, and frozen goods. In addition, the food service industry, including restaurants and catering companies, also depends on refrigerated transport to ensure freshness. This heightened demand for cold chain logistics drives the need for more advanced refrigerated trailers.

As consumer preferences shift toward the convenience of shopping online, demand for fast, fresh, and reliable delivery services has surged. For instance, in India, the e-commerce industry, valued at USD 125 billion in 2024, is projected to grow to USD 345 billion by 2030, with a CAGR of 15%, according to the India Brand Equity Foundation (IBEF). Similarly, in the U.S., e-commerce sales are expected to grow by 8.1% in 2024, making up 16.1% of total retail sales, as per the Census Bureau of the Department of Commerce. This growth has led to an increased need for refrigerated trailers to ensure the safe transport of perishable goods, including fresh produce, dairy, and frozen items, for these online grocery services.

Governments across key markets are enforcing stricter emission norms, prompting a shift toward zero-emission transport solutions. In the U.S., the California Air Resources Board (CARB) mandates that all new trailer Transport Refrigeration Units (TRUs) meet Ultra-Low Emission TRU (ULETRU) standards from 2023 onward and is advancing rules to transition TRUs to zero-emission technologies. In the EU, Regulation (EU) 2024/573 limits fluorinated greenhouse gases used in refrigeration. These policies are accelerating the demand for cleaner technologies. For instance, in September 2024, Trailer Dynamics and THE REEFER Group partnered to launch the eCool Trailer, a fully electric refrigerated trailer that powers both propulsion and refrigeration systems, helping fleets meet regulatory compliance while reducing long-term emissions and operating costs.

The high upfront costs of refrigerated trailers present a significant challenge, particularly for smaller fleet operators. Advanced models, such as electric or hybrid trailers with battery systems or energy recovery technology, can cost significantly more than traditional diesel units. For instance, Carrier's all-electric Vector eCool trailer can cost approximately USD 30,000 more than a standard diesel refrigeration unit due to its advanced features. In addition, solar-powered refrigerated trailers, like those from TIP Group and Valoe in Finland, involve substantial investments, with projects valued at around USD 20 million for retrofitting hundreds of trailers. While these technologies promise long-term savings, the initial high costs remain a barrier for many businesses looking to adopt them.

Global Refrigerated Trailer Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2018 to 2030. For this study, Grand View Research has segmented the global refrigerated trailer market report based on trailer, axle, power source, end use, and region.

Trailer Outlook (Revenue, USD Million, 2018 - 2030)

Single-Temperature

Multi-Temperature

Axle Outlook (Revenue, USD Million, 2018 - 2030)

Single Axle

Tandem Axle

Triple Axle

Power Source Outlook (Revenue, USD Million, 2018 - 2030)

Diesel-Powered

Electric-Powered

Solar-Assisted

End Use Outlook (Revenue, USD Million, 2018 - 2030)

Food & Beverage

Healthcare

Retail & E-Commerce

Logistics & Transportation

Regional Outlook (Revenue, USD Million, 2018 - 2030)

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Asia Pacific

China

India

Japan

Australia

South Korea

Latin America

Brazil

Middle East & Africa (MEA)

UAE

Kingdom of Saudi Arabia (KSA)

South Africa

Companies Mentioned

Wabash National Corporation
Schmitz Cargobull AG
Great Dane LLC
Utility Trailer Manufacturing Company
CIMC Vehicles Group Co., Ltd.
K?gel Trailer GmbH & Co. KG
Lamberet SAS
Fahrzeugwerk Bernard Krone GmbH & Co. KG
Hyundai Translead, Inc.
Gray & Adams Ltd.

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