

# Mexico Cold Chain Market Size, Share, Trends and Forecast by Type, Temperature Range, Application, and Region, 2026-2034

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## Abstracts

The Mexico cold chain market size reached USD 5.7 Billion in 2025 . Looking forward, IMARC Group expects the market to reach USD 25.7 Billion by 2034 , exhibiting a growth rate (CAGR) of 17.78% during 2026-2034 . The market is primarily driven by rising demand for perishable food, pharmaceutical distribution growth, increasing cross-border trade with the U.S., expansion of organized retail, and evolving food safety regulations. Additionally, advancements in refrigeration technologies and rising e-commerce penetration are supporting infrastructure modernization and investment in temperature-controlled logistics.

### MEXICO COLD CHAIN MARKET TRENDS:

#### Expansion of Cold Chain Infrastructure in Border States

Cold chain infrastructure development in Mexico's northern states has accelerated, especially in Baja California, Sonora, Chihuahua, and Nuevo Le?n, due to their proximity to U.S. trade routes. These regions serve as key export hubs for perishable goods like berries, avocados, and seafood. As export volumes grow, demand for cold storage warehouses and temperature-controlled transport rises. Investments from both private firms and public-private partnerships have focused on enhancing intermodal connectivity, integrating refrigerated rail and truck fleets. Cross-border compliance requirements with U.S. standards have also prompted upgrades in facility certifications and digital monitoring systems. This localized infrastructure growth is enabling producers to reduce spoilage, improve transit efficiency, and meet stringent international quality benchmarks, thereby strengthening Mexico's position in the North American cold chain ecosystem. For instance, as per industry reports, the demand for

Mexico's cold chain logistics sector is rising due to e-commerce, pharmaceuticals, and agri-food exports, which totaled USD 51.87 Billion in 2023. With only 6.9% of Mexico's fleet (92,256 trucks) refrigerated, investment is accelerating. Emergent Cold LatAm expanded in Nuevo Le?n and raised USD 500 Million, while Lineage Logistics invested USD 79 Million in Texas. These moves, alongside digital upgrades and cross-border infrastructure enhancements, align with the trend of cold chain growth in Mexico's northern export-focused states.

### Pharmaceutical Sector Driving Specialized Cold Chain Solutions

The pharmaceutical industry is increasingly shaping Mexico's cold chain market by demanding ultra-reliable temperature-controlled logistics for vaccines, biologics, and specialty drugs. With the expansion of domestic manufacturing and global pharma firms establishing distribution bases in Mexico, secure storage and transport protocols have become critical. Regulatory alignment with global standards, including COFEPRIS and WHO-GSDP, has encouraged third-party logistics providers to invest in validated cold rooms, real-time monitoring, and contingency response capabilities. Urban centers like Mexico City, Guadalajara, and Monterrey have seen a surge in pharmaceutical-grade warehouse development. The rise of biologics and personalized medicine is also spurring demand for more granular control over temperature bands (2°C–8°C, -20°C, -70°C), reinforcing the need for flexible, technology-integrated cold chain networks tailored to healthcare logistics. For instance, in February 2025, UPS Healthcare opened new CEIV Pharma-certified cold chain cross-dock facilities in Mexico City, Milan, and Frankfurt to meet rising global demand for temperature-sensitive pharmaceutical logistics. These sites handle ambient to frozen shipments, with Milan offering over 20,000 pallet positions. Located near major transport hubs, the facilities ensure rapid, compliant delivery for clinical trial and healthcare products.

### Integration of Digital Technologies for Real-Time Monitoring

Digitalization is becoming a defining trend in the Mexico cold chain market, with real-time monitoring and predictive analytics improving operational reliability and product integrity. IoT-enabled sensors now provide end-to-end visibility across temperature-sensitive shipments, reducing risks of deviation and supporting immediate corrective action. Cloud platforms are being adopted to centralize control of multi-point cold storage facilities and transport fleets, enabling stakeholders to streamline inventory management, automate compliance reporting, and optimize route planning. These innovations are especially vital for high-value exports such as seafood, berries, and dairy, which are highly perishable and subject to international quality controls. As cyber-

physical systems become mainstream, they are also helping to attract multinational clients who demand globally harmonized cold chain standards and seamless data traceability. For instance, in December 2024, Canadian Pacific Kansas City (CPKC) and Americold announced plans to expand their cold chain partnership into Mexico. The initiative aims to offer an alternative to trucking for moving temperature-controlled freight between Mexico and the U.S. CPKC emphasized leveraging its North American rail network to strengthen cold storage supply chains. Americold currently operates 239 temperature-controlled warehouses across North America, Europe, Asia-Pacific, and South America, and this expansion would further enhance its presence in Latin America.

#### MEXICO COLD CHAIN MARKET SEGMENTATION:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the country and regional levels for 2026-2034. Our report has categorized the market based on type, temperature range, and application.

#### Type Insights:

##### Storage

Facilities/Services Refrigerated Warehouse Cold Room

##### Equipment

Blast Freezer

Walk-in Cooler and Freezer

Deep Freezer

Others

##### Transportation

By Mode Road Sea Rail Air

By Offering Refrigerated Vehicles Refrigerated Containers

## Packaging

Crates

Insulated Containers and Boxes Large (32 to 66 liters) Medium (21 to 29 liters) Small (10 to 17 liters) X-small (3 to 8 liters) Petite (0.9 to 2.7 liters)

Cold Chain Bags/Vaccine Bags

Ice Packs

Others

## Monitoring Components

Hardware Sensors RFID Devices Telematics Networking Devices Others

Software On-premises Cloud-based

## Facilities/Services

Refrigerated Warehouse

Cold Room

## By Mode

Road

Sea

Rail

Air

## By Offering

Refrigerated Vehicles

## Refrigerated Containers

### Insulated Containers and Boxes

Large (32 to 66 liters)

Medium (21 to 29 liters)

Small (10 to 17 liters)

X-small (3 to 8 liters)

Petite (0.9 to 2.7 liters)

### Hardware

Sensors

RFID Devices

Telematics

Networking Devices

Others

### Software

On-premises

Cloud-based

The report has provided a detailed breakup and analysis of the market based on the type. This includes storage [facilities/services (refrigerated warehouse and cold room), equipment (blast freezer, walk-in cooler and freezer, deep freezer, and others)], transportation [by mode (road, sea, rail, and air), by offering (refrigerated vehicles and refrigerated containers)], packaging [crates, insulate containers and boxes (large (32 to 66 liters), medium (21 to 29 liters), small (10 to 17 liters), x-small (3 to 8 liters), petite

(0.9 to 2.7 liters), cold chain bags/vaccine bags, ice packs, and others], and monitoring components [ hardware (sensors, RFID devices, telematics, networking devices, and others) and software (on-premises and cloud-based)].

#### Temperature Range Insights:

Chilled (0°C to 15°C)

Frozen (-18°C to -25°C)

Deep-frozen (Below -25°C)

A detailed breakup and analysis of the market based on the temperature range have also been provided in the report. This includes chilled (0°C to 15°C), frozen (-18°C to -25°C), and deep-frozen (below -25°C).

#### Application Insights:

Food and Beverages

Fruits and Vegetables

Fruit Pulp and Concentrates

Dairy Products Milk Butter Cheese Ice Cream Others

Fish, Meat, and Seafood

Processed Food

Bakery and Confectionary

Others

Pharmaceuticals

Vaccines

Blood Banking

Others

Dairy Products

Milk

Butter

Cheese

Ice Cream

Others

A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes food and beverages [fruits and vegetables, fruit pulp and concentrates, dairy products (milk, butter, cheese, ice cream, and others), fish, meat, and seafood, processed food, bakery and confectionary, and others], pharmaceuticals (vaccines, blood banking, and others), and others.

Regional Insights:

Northern Mexico

Central Mexico

Southern Mexico

The report has also provided a comprehensive analysis of all the major regional markets, which include Northern Mexico, Central Mexico, Southern Mexico, and others.

**COMPETITIVE LANDSCAPE:**

The market research report has also provided a comprehensive analysis of the competitive landscape. Competitive analysis such as market structure, key player

positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided.

## KEY QUESTIONS ANSWERED IN THIS REPORT

How has the Mexico cold chain market performed so far and how will it perform in the coming years?

What is the breakup of the Mexico cold chain market on the basis of type?

What is the breakup of the Mexico cold chain market on the basis of temperature range?

What is the breakup of the Mexico cold chain market on the basis of application?

What is the breakup of the Mexico cold chain market on the basis of region?

What are the various stages in the value chain of the Mexico cold chain market?

What are the key driving factors and challenges in the Mexico cold chain market?

What is the structure of the Mexico cold chain market and who are the key players?

What is the degree of competition in the Mexico cold chain market?

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