

Refrigerated Transport Market Report by Mode of Transportation (Refrigerated Road Transport, Refrigerated Sea Transport, Refrigerated Rail Transport, Refrigerated Air Transport), Technology (Vapor Compression Systems, Air-Blown Evaporators, Eutectic Devices, Cryogenic Systems), Temperature (Single-Temperature, Multi-Temperature), Application (Chilled Food Products, Frozen Food Products, and Others), and Region 2024-2032

<https://marketpublishers.com/r/R137CA7168A0EN.html>

Date: January 2024

Pages: 147

Price: US\$ 3,899.00 (Single User License)

ID: R137CA7168A0EN

Abstracts

The global refrigerated transport market size reached US\$ 18.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 28.5 Billion by 2032, exhibiting a growth rate (CAGR) of 4.6% during 2024-2032. The increasing need for more advanced, reliable, and eco-friendly refrigeration technologies, the rising demand for organic produce, hormone-free meat, and other specialty foods, and the liberalization of trade policies are some of the major factors propelling the market.

Refrigerated transport is a specialized form of shipping that involves the use of temperature-controlled vehicles to safely move perishable goods. It is equipped with advanced cooling systems that allow for the precise regulation of internal temperatures, ensuring that the products being shipped remain fresh and safe for consumption. Commonly transported items include food such as fruits, vegetables, meat, and dairy, as well as pharmaceutical products like vaccines that require specific temperature ranges for preservation. The use of refrigerated transport has revolutionized the supply chain, enabling suppliers to deliver high-quality, perishable goods across long distances without the risk of spoilage. This mode of transportation plays a crucial role in today's

global economy, supporting industries from grocery retail to healthcare. Effective refrigerated transport is essential for meeting consumer demands for fresh, high-quality products while adhering to safety regulations and reducing waste.

The significant growth in the food and beverage industry majorly drives the global market. This can be supported by the rising population numbers, increased per capita income, and a greater demand for fresh and processed foods. Refrigerated transport has become vital in facilitating this global exchange, adhering to stringent safety regulations and quality standards. Therefore, the expansion of the global food and beverage industry serves as a significant driver for the refrigerated transport sector, pressing the need for more advanced, reliable, and eco-friendly refrigeration technologies. In addition, the growing trend in e-commerce requires a parallel increase in specialized logistics and refrigerated transport services to ensure these goods arrive at customers' doorsteps in excellent condition. As online retail continues to flourish, the demand for reliable and efficient refrigerated transport solutions is accelerating. Apart from this, the escalating demand for organic produce, hormone-free meat, and other specialty foods that require stringent quality controls is contributing to the market. Moreover, the liberalization of trade policies and the formation of economic unions have facilitated smoother cross-border movement of goods, including perishables, creating a positive market outlook.

Refrigerated Transport Market Trends/Drivers:

Increasing Regulatory Compliance and Quality Standards

As consumer awareness about food safety and quality increases, so does the need for stringent regulatory compliance in the transport of perishable goods. Governments and international organizations are tightening rules regarding the handling, storage, and transportation of temperature-sensitive items, including pharmaceuticals and food products. This has led to a rise in demand for refrigerated transport services that can adhere to these high standards. The industry is, therefore, investing in advanced technologies such as real-time temperature monitoring, GPS tracking, and data analytics to ensure compliance and mitigate risks associated with spoilage or contamination. Meeting these regulatory requirements prevents potential losses due to spoilage and helps in building trust and reputation among consumers and stakeholders. Consequently, the need for compliance with evolving quality standards is a strong market driver for the refrigerated transport industry.

Rise in Pharmaceutical and Healthcare Needs

The pharmaceutical and healthcare sectors are other significant contributors to the growth of the refrigerated transport industry. With an aging global population and the increasing prevalence of chronic illnesses, the demand for temperature-sensitive pharmaceutical products, such as vaccines, biologics, and insulin is soaring. The COVID-19 pandemic has further emphasized the importance of reliable refrigerated transport for the rapid distribution of vaccines and other essential medical supplies. Hospitals, pharmacies, and healthcare centers require timely and secure delivery of these critical items, making it imperative for transport services to maintain stringent temperature controls. The robust growth in the healthcare and pharmaceutical industries, therefore, serves as a potent market driver, necessitating specialized refrigerated transportation solutions to meet these critical needs.

Technological Advancements in Refrigeration Systems

The advent of innovative technologies is propelling the refrigerated transport industry to new heights. Advancements in refrigeration systems, including electric and solar-powered units, are not only more efficient but also more environmentally friendly than traditional diesel-powered systems. In addition, smart technologies enable real-time monitoring of temperature, humidity, and the vehicle's location, thereby ensuring that the goods are transported under optimal conditions. These advancements significantly reduce the risk of spoilage, contamination, or non-compliance with regulations. The trend toward automation and data analytics allows for predictive maintenance, route optimization, and other efficiencies that lower operational costs. As a result, technology acts as a major driver for the industry, attracting more service providers to adopt modern solutions for a competitive edge.

Key Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global refrigerated transport market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on mode of transportation, technology, temperature and application.

Breakup by Mode of Transportation:

- Refrigerated Road Transport
- Refrigerated Sea Transport
- Refrigerated Rail Transport
- Refrigerated Air Transport

Refrigerated road transport dominates the market

The report has provided a detailed breakup and analysis of the market based on the mode of transportation. This includes refrigerated road transport, refrigerated sea transport, refrigerated rail transport, and refrigerated air transport. According to the report, refrigerated road transport represented the largest segment.

The market for refrigerated road transport is experiencing significant growth, propelled by the rise in e-commerce. As more consumers are ordering perishable goods online, reliable road transportation facilitates last-mile delivery. Rapid urbanization and lifestyle changes contribute to the increased demand for convenience foods, like frozen items and ready-to-eat meals, which often require refrigerated road transport to reach urban and suburban markets. Regulatory compliance is another vital driver; heightened food safety standards necessitate the use of advanced, temperature-controlled vehicles to meet quality and safety norms. Additionally, consumer awareness has led to an uptick in demand for high-quality, specialty foods, which must be transported under specific temperature conditions to maintain their quality. Moreover, advancements in refrigeration technologies, such as real-time monitoring systems, have made road transport more efficient and reliable.

Breakup by Technology:

Vapor Compression Systems

Air-Blown Evaporators

Eutectic Devices

Cryogenic Systems

Air-blown evaporators hold the largest share in the market

A detailed breakup and analysis of the market based on the technology has also been provided in the report. These include vapor compression systems, air-blown evaporators, eutectic devices, and cryogenic systems. According to the report, air-blown evaporators accounted for the largest market share.

The adoption of air-blown evaporators technology in the refrigerated transport industry is being propelled by the growing need for rapid and efficient cooling systems capable of maintaining precise temperature control, especially for perishable goods, including pharmaceuticals and specialty foods. Air-blown evaporators offer faster cooling rates and improved temperature uniformity compared to traditional systems, meeting stringent

regulatory requirements and consumer expectations for quality and safety. In addition, technological advancements in this field have led to more energy-efficient and eco-friendly solutions, aligning with industry efforts to reduce carbon footprint. Along with this, the escalating demand for international trade of perishables necessitates advanced cooling systems that can maintain optimal conditions over long distances, further driving the adoption of air-blown evaporators. The compatibility of this technology with real-time monitoring systems also allows for better compliance and traceability, ensuring that products are transported under optimal conditions. As a result, air-blown evaporators are increasingly becoming a preferred technology in the refrigerated transport industry.

Breakup by Temperature:

Single-Temperature

Multi-Temperature

Single-temperature dominates the market

The report has provided a detailed breakup and analysis of the market based on the temperature. This includes single-temperature and multi-temperature. According to the report, single-temperature represented the largest segment.

The single-temperature technology in the refrigerated transport industry is experiencing steady growth due to the demand for transporting a uniform category of goods, such as frozen foods or pharmaceuticals requiring a single temperature range. It has led to the increased adoption of single-temperature systems. These systems offer ease of use and operational efficiency, making them cost-effective for businesses that specialize in specific types of perishable goods. In addition, stricter regulatory guidelines are encouraging the use of specialized transport modes that can maintain a consistent temperature throughout the journey, thereby enhancing the compliance factor for single-temperature units. The growth in specific sectors, such as frozen food markets and specialty pharmaceuticals, that require a constant temperature for product integrity, has further driven the need for this technology. Also, advancements in insulation materials and energy-efficient cooling systems have made single-temperature refrigerated transport more effective and eco-friendly.

Breakup by Application:

Chilled Food Products

Dairy Products

Bakery and Confectionery Products

Fresh Fruits and Vegetables

Others

Frozen Food Products

Frozen Dairy Products

Processed Meat Products

Fish and Seafood Products

Others

Others

Chilled food products holds the largest share in the market

A detailed breakup and analysis of the market based on the application has also been provided in the report. These include chilled food products (dairy products, bakery and confectionery products, fresh fruits and vegetables, and others), frozen food products (frozen dairy products, processed meat products, fish and seafood products, and others), and others. According to the report, chilled food products accounted for the largest market share.

The market for refrigerated transport in the chilled food products segment is expanding, fueled by the rising consumer demand for fresh and quality foods, such as fruits, vegetables, dairy, and ready-to-eat meals. As consumers become increasingly health-conscious and aware of food safety, the requirement for reliable, temperature-controlled transport solutions for chilled items gains prominence. Along with this, the growth of organized retail and e-commerce platforms has also elevated the demand for efficient refrigerated transport services, particularly for last-mile deliveries. Additionally, urbanization and changing lifestyle patterns contribute to the consumption of convenience foods that require chilled transportation to maintain their quality and freshness. Regulatory standards, enforcing strict guidelines on food safety and quality, further compel the industry to adopt specialized refrigerated transport solutions. Advances in technology, including real-time temperature monitoring, also add to the sector's robustness.

Breakup by Region:

North America

United States

Canada

Europe

Germany
France
United Kingdom
Italy
Spain
Russia
Others
Asia Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Latin America
Brazil
Mexico
Argentina
Colombia
Chile
Peru
Others
Middle East and Africa
Turkey
Saudi Arabia
Iran
United Arab Emirates
Others

Asia Pacific exhibits a clear dominance, accounting for the largest refrigerated transport market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, Argentina, Colombia, Chile, Peru, and Others); and Middle East and Africa (Turkey, Saudi Arabia, Iran, United Arab Emirates, and Others). According to the

report, Asia Pacific exhibits the largest segment.

The refrigerated transport industry in the Asia Pacific region is experiencing substantial growth, propelled by rapid urbanization and rising disposable incomes. This has led to increased consumer demand for perishable goods, such as fresh produce, dairy, and meat products, requiring efficient and reliable refrigerated transport. Along with this, the expansion of organized retail and the booming e-commerce sector further drive the need for specialized cold chain logistics, particularly for last-mile deliveries.

Additionally, Asia Pacific nations are becoming significant players in the global trade of perishable goods, necessitating robust refrigerated transport solutions for both domestic and international markets. Stringent food safety regulations are also coming into effect across various countries in the region, boosting the demand for compliant, temperature-controlled transportation services. Advances in refrigeration technology, coupled with increasing investment in infrastructure development, further fuel this market growth.

Competitive Landscape:

The global market is experiencing significant growth due to the introduction of various strategies and initiatives to meet the growing demands of transporting temperature-sensitive goods. These companies are focusing on improving efficiency, reducing environmental impact, and enhancing the overall reliability of their services. One prominent trend is the integration of advanced refrigeration technologies to ensure precise temperature control throughout the transportation process. In addition, companies are adopting innovative solutions such as smart sensors and data analytics to monitor and regulate temperature conditions in real-time. This enhances the quality and safety of transported goods, particularly perishable items like food and pharmaceuticals. Additionally, sustainability is a key concern for companies in this sector. Key players are investing in eco-friendly refrigerants and energy-efficient transportation methods to reduce their carbon footprint. Furthermore, collaborations and partnerships within the industry are on the rise. Companies are forming alliances with cold chain logistics providers, suppliers of refrigeration equipment, and technology companies to leverage each other's expertise and resources. These collaborations contribute to an improved and seamless refrigerated transportation experience for clients.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

C. H. Robinson Worldwide, Inc.
Daikin Industries Limited
FedEx Corporate Services, Inc.
DB Schenker AG
General Mills Inc.
Hyundai Motor Company
Ingersoll Rand Inc.
Krone Commercial Vehicle Group
LAMBERET SAS
United Technologies Corporation
Utility Trailer Manufacturing Company
Schmitz Cargobull AG
Singamas Container Holdings Limited
Wabash National Corporation

Recent Developments:

In January 2023, Daikin Industries Limited's Daikin Active CA technology was tested statically by the Taiwan Floriculture Exports Association and Taiwan Agricultural Research Institute in order to export cut Oncidium flowers from Taiwan.

In February 2023, DB Schenker AG negotiated a deal with MSC Mediterranean Shipping Company to employ 12,000 tonnes of biofuel components for all of its consolidated cargo, less-than-container load (LCL), full-container load (FCL), and refrigerated containers (reefer containers).

In July 2020, Hyundai Motor Company transported its first 10 units of XCIENT Fuel Cell, the world's first fuel cell heavy-duty truck to Switzerland. The 190-kW hydrogen fuel cell technology in the XCIENT Fuel Cell allows it to go 400 kilometres on a single charge.

Key Questions Answered in This Report

1. How big is the global refrigerated transport market?
2. What is the expected growth rate of the global refrigerated transport market during 2024-2032?
3. What are the key factors driving the global refrigerated transport market?
4. What has been the impact of COVID-19 on the global refrigerated transport market?
5. What is the breakup of the global refrigerated transport market based on the mode of transportation?
6. What is the breakup of the global refrigerated transport market based on the technology?
7. What is the breakup of the global refrigerated transport market based on the

temperature?

8. What is the breakup of the global refrigerated transport market based on the application?

9. What are the key regions in the global refrigerated transport market?

10. Who are the key players/companies in the global refrigerated transport market?

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