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Global Passive Temperature-Controlled Box Market Growth 2026-2032

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Abstracts

The global Passive Temperature-Controlled Box market size is predicted to grow from US$ 820 million in 2025 to US$ 1047 million in 2032; it is expected to grow at a CAGR of 3.6% from 2026 to 2032.

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

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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%.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Passive Temperature-Controlled Box Industry Forecast” looks at past sales and reviews total world Passive Temperature-Controlled Box sales in 2025, providing a comprehensive analysis by region and market sector of projected Passive Temperature-Controlled Box sales for 2026 through 2032. With Passive Temperature-Controlled Box sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Passive Temperature-Controlled Box industry.

This Insight Report provides a comprehensive analysis of the global Passive Temperature-Controlled Box landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Passive Temperature-Controlled Box portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Passive Temperature-Controlled Box market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Passive Temperature-Controlled Box and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Passive Temperature-Controlled Box.

This report presents a comprehensive overview, market shares, and growth opportunities of Passive Temperature-Controlled Box market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Phase Change Material (PCM) Type

Dry Ice Type

Ice Pack/Gel Pack Type

Vacuum Insulated Type

Composite Type

Segmentation by Temperature Range:

-80?--40?

-40?-0?

2?-8?

15?-30?

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30?-60?

Segmentation by Accuracy:

±0.1?

±0.5?

±1?

±2?

Segmentation by Capacity:

0.5-5L

5-30L

30-100L

100-300L

300-1000L

Segmentation by Application:

Healthcare

Food Cold Chain

Industry & Electronics

Others

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This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa

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Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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

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Snyder Industries

Saeplast Americas

Topa Thermal Packaging

TPC Packaging Solutions

GEBHARDT Logistic Solutions

Aeris Dynamics

Inno Cool

Atlas Roofing Corporation

Avery Dennison Corporation

3M

Amcor

BASF

Honeywell

Chevron Phillips Chemical Company

DS Smith

Biotempak

IGH Holdings

AmerisourceBergen Corporation

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Key Questions Addressed in this Report

What is the 10-year outlook for the global Passive Temperature-Controlled Box market?

What factors are driving Passive Temperature-Controlled Box market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Passive Temperature-Controlled Box market opportunities vary by end market size?

How does Passive Temperature-Controlled Box break out by Type, by Application?

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