

Cold Chain Logistics Market Assessment, By Type [Refrigerated Warehouses, Refrigerated Transportation], By Temperature [Frozen, Chilled], By Application [Dairy and Frozen Desserts, Meat, Fish and Seafood, Fruits and Vegetables, Pharmaceuticals, Others], By Region, Opportunities and Forecast, 2016-2030

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Abstracts

Global cold chain logistics market size was valued at USD 265.28 billion in 2022, expected to reach USD 803.07 billion in 2030. Owing to the rising globalization, free-trade agreements, and growth of e-commerce, the market is expected to register a CAGR of 14.85% during the forecast period 2023-2030.

The cold chain logistics market is a vital component of global supply chain, encompassing the transportation and storage of temperature-sensitive goods. With the increasing demand for perishable products like pharmaceuticals, fresh produce, and frozen foods, the market has experienced significant growth. Technological advancements, such as IoT-enabled sensors and RFID tracking, have enhanced the efficiency and visibility of cold chain operations, ensuring the integrity of products during transit. For instance, in 2023, Maersk launched an API-integrated reefer solution with a shareable datalog, enabling the company to track conditions inside the reefers while moving thousands of refrigerator containers via connection with a remote container management system.

Furthermore, the market is driven by stringent regulations and standards in the food and pharmaceutical industries, mandating temperature-controlled transportation, and storage. Additionally, globalization and international trade have expanded the need for

seamless cold chain logistics, leading to increased investments and collaborations among logistics providers.

However, challenges faced by the cold chain logistics industry include high operational costs, complex supply chain networks, and the need for sustainable practices to reduce environmental impact. Despite these challenges, the market continues to evolve, driven by innovations in refrigeration technologies and the growing demand for specialized cold chain solutions, particularly in emerging economies.

Globalization Sparks Cold Chain Logistics Market

As businesses expand globally, supply chains have become intricate networks spanning continents. This globalization trend has led to a surge in international trade, contributing to increase in number of organized retail stores. These stores are majorly involved in trading perishable goods like fresh produce and pharmaceuticals. Thus, the expansion of retail networks, including convenience stores, hypermarkets, and supermarkets, stands as a primary driver for market growth. Additionally, trade liberalization, governmental initiatives to curb food wastage, and the growth of organized retail sectors in emerging economies are expected to fuel market expansion in the forecast years.

Furthermore, major players in the food retail industry, such as 7-Eleven, Spar, Tesco, and Walmart Inc., are extending their presence in developed countries like Germany, the United States, China, and the United Kingdom, as well as in developing markets such as Argentina and Brazil. For example, Walmart Inc., a prominent United States based retail corporation, operates nearly 10,526 stores and clubs under 48 banners across 24 countries, including e-commerce platforms. The emergence of these large wholesalers and organized retailers, coupled with their global expansion efforts, is creating new avenues for growth in the refrigerated transportation and warehousing market.

Rising Regional and Free Trade Agreements Across Globe Contribute to the Demand

The global rise in regional and free trade agreements (FTAs) has significantly boosted the demand for cold chain logistics. These agreements facilitate international trade by reducing or eliminating trade barriers like tariffs and quotas among participating nations. As FTAs continue to expand, businesses gain broader market access, allowing them to connect with a more extensive customer base on a global scale. The expanded market access leads to increased trade volumes, demanding reliable and efficient transport methods. Cold Chain Logistics, the linchpin of international trade, are in high demand to

accommodate the growing cross-border trade activities.

Furthermore, FTAs facilitate the smooth flow of goods between countries, attracting manufacturers and exporters to explore new markets. Reduced trade barriers enable businesses to competitively price their products, making them more appealing to foreign consumers. Consequently, there is a heightened reliance on cold chain logistics for efficient and cost-effective international transportation.

For instance, India entered multiple FTAs with Asian countries in 2021 and 2022 and signed trade agreements worth USD 40 billion in 2023 with UAE and Turkey. This environment fosters increased international trade, broader market access, and enhanced global supply chain integration, thereby fueling the demand for cold chain logistics and contributing to the growth of the global cold chain logistics market.

Surging Demand for Refrigerated Warehouses

Many warehouses with refrigeration systems are specifically engineered to maintain optimal storage and transportation environments for products sensitive to temperature fluctuations. Several export industries rely heavily on these crucial links provided by refrigerated solutions. Enterprises allocate substantial financial resources, amounting to billions of dollars, towards their cold chain operations, aiming to establish efficient and dependable processes. Significant investment is imperative due to the cold chain's integrity, from start to finish, as the system has a vulnerable point. A single disruption in cold chain logistics can result in substantial losses of both products and capital.

For example, in September 2021, Pasarnow, an e-commerce company, secured funding totaling USD 3.3 billion to enhance its fragmented and inefficient supply chain. This enhancement includes upgrading temperature-controlled warehouses and other facilities, thereby enhancing the company's overall productivity. Consequently, the proliferation of refrigerated warehouses is anticipated to propel the growth of the refrigerated warehousing market in the foreseeable future.

Government Initiatives

Governments worldwide have introduced various initiatives to support the growth of the cold chain logistics market. In the United States, programs like the Food Safety Modernization Act (FSMA) focus on ensuring the safe transportation of perishable goods and promoting investment in advanced cold storage technologies. In India, the Pradhan Mantri Kisan SAMPADA Yojana provides financial assistance to modernize

and create infrastructure facilities in the food processing sector, including cold storage chains. China's Belt and Road Initiative includes investments in cold chain infrastructure to facilitate international trade in perishable goods. The European Union's Horizon 2020 program also funds research and innovation projects, fostering advancements in cold chain technologies. Such global initiatives play a vital role in enhancing the cold chain logistics market's efficiency, safety, and sustainability.

Impact of COVID-19

The cold chain logistics market worldwide was heavily impacted by the COVID-19 pandemic, causing disruptions in both economic activities and supply chains. The lockdowns enforced in the United States and China, and other countries disrupted the cold supply chain. It led to a 3% contraction in the global economy in 2020, affecting port handling by 1.1%. However, in 2021, there was a sharp rise in consumer demand, causing a 7.1% increase in global port handling, surpassing the available supply and shipping capacity by 4.5%. In 2022, the cost of living increased, reducing consumer purchasing power. However, despite these hurdles, the industry adapted to the changing demands, highlighting the resilience of the cold chain logistics market in the face of the pandemic.

Impact of Russia-Ukraine War

The Russia-Ukraine conflict has significantly impacted the global cold chain logistics market, leading to supply chain disruptions, trade restrictions, increased costs, and volatility. The conflict affected the transportation and distribution of temperature-sensitive products, causing delays and increased transit times. Geopolitical tensions led to trade restrictions, affecting the flow of goods across borders. Cold chain logistics providers faced challenges in navigating new regulations and customs procedures. Escalating geopolitical tensions increased costs, while straining low margins. Companies need to diversify their supply chains to reduce risk. Key industries like pharmaceuticals and agriculture rely heavily on cold chain logistics for temperature-sensitive products, and disruptions in these chains affect the availability of critical medications, vaccines, and food supplies.

Key Players Landscape and Outlook

Cold chain logistics companies are expanding globally due to increasing demand for perishable goods and pharmaceuticals worldwide. Advancements in technology and transportation enable efficient international operations. Globalization and rising

international trade offer opportunities to serve diverse markets. Strict food safety regulations and pharmaceutical supply chain standards drive the need for expansion to comply with varying regulations. Strategic global expansion diversifies revenue streams and reduces dependency on specific regions. Moreover, entering emerging markets ensures long-term sustainability and growth for these companies in a competitive industry.

For instance, in March 2023, the United States based, Americold announced facility expansion in Barcelona, Spain. The expansion adds 11 loading bays and 12,000 pallet positions adding greater capacity in refrigerated-controlled products and services to customers in the region.

In March 2023, Americold announced strategic investment in Dubai cold storage company, RSA cold chain. Americold acquired a 49% stake in RSA cold chain for USD 3.9 million. The collaboration offers a flexible and viable operational foundation for entering and expanding into the Middle East and India markets.

In June 2021, Lineage Logistics revealed its intention to purchase the cold storage division of Claus Sorensen, a cold storage company based in Denmark. The acquisition was designed to enhance Lineage's warehouse network and bolster its supply chain services for customers in Nordic.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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