

ASEAN Cold Chain Logistics Industry Research Report 2026-2030

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Abstracts

Cold chain logistics refers to a supply chain management model that uses temperature control technology to maintain a specific low-temperature environment to ensure the stable quality of perishable and highly sensitive goods throughout the entire process of production, storage, transportation, and distribution.

Cold chain logistics primarily serves the aquatic products, fresh agricultural products, pharmaceuticals, biological products, and chemical materials sectors. Food cold chain logistics is currently one of the largest application areas of cold chain logistics.

Cold chain logistics mainly includes upstream cold chain equipment and infrastructure supply, midstream cold chain logistics operation, and downstream application demand.

ASEAN, established in Jakarta, Indonesia in 1967, is the most influential regional cooperation organization in Southeast Asia. ASEAN currently has 11 member states, with a total population of over 690 million and an economic output of over US\$ 4.0 trillion. In recent years, urbanization has accelerated, residents' incomes have increased, and digital penetration has risen.

The ASEAN Cold Chain Logistics market is one of the fastest-growing emerging Cold Chain Logistics markets globally. Market demand is primarily driven by regional economic growth, population expansion, increased spending power of the middle class, tourism development, cross-border trade growth, and the internationalization of the industrial chain.

The ASEAN cold chain logistics market is in a phase of rapid development, mainly driven by factors such as the upgrading of food consumption, the growth of agricultural

product exports, the expansion of modern retail, the increase in demand for pharmaceutical cold chain, and the growth of cross-border trade.

According to CRI's estimates, the ASEAN cold chain logistics market will be worth approximately US\$ 21.0 billion in 2026. The compound annual growth rate (CAGR) is projected to be approximately 5.5% from 2026 to 2030, reaching a market size of approximately US\$ 26.0 billion in 2030.

CRI recommends that global cold chain logistics companies, food processing companies, agricultural companies, private equity (PE) funds and venture capital (VC) firms conduct timely market research on the ASEAN region to prepare for their strategic entry into the ASEAN cold chain logistics market.

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What is the projected revenue for cold chain logistics market in ASEAN during the forecast period of 2026–2030?

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