

# **Cold Chain for Seafood and Perishables Market Forecasts to 2032 – Global Analysis By Component (Storage, Transportation, Monitoring Components and Other Components), Temperature Type, Technology, Application, End User and By Geography**

<https://marketpublishers.com/r/CF2A14E8F830EN.html>

Date: July 2025

Pages: 150

Price: US\$ 4,150.00 (Single User License)

ID: CF2A14E8F830EN

## **Abstracts**

According to Statistics MRC, the Global Cold Chain for Seafood and Perishables Market is accounted for \$22.6 billion in 2025 and is expected to reach \$34.4 billion by 2032 growing at a CAGR of 6.2% during the forecast period. Cold chain for seafood and perishables refers to a temperature-controlled supply chain system that ensures the safe handling, storage, and transportation of temperature-sensitive products from harvest or production to the final consumer. This system maintains consistent low temperatures—typically between 0°C and 4°C for perishables and below -18°C for frozen seafood—to prevent spoilage, bacterial growth, and quality degradation. The cold chain involves refrigeration equipment, insulated containers, and real-time monitoring technologies across all stages, including processing, warehousing, shipping, and retail. A reliable cold chain is critical for preserving freshness, ensuring food safety, extending shelf life, and complying with health and export regulations.

Market Dynamics:

Driver:

**Rising Demand for Fresh and Frozen Seafood**

The rising demand for fresh and frozen seafood is significantly driving the Cold Chain for Seafood and Perishables Market. Consumers increasingly seek high-quality, hygienic, and longer-lasting seafood products, fueling the need for efficient cold storage

and transportation solutions. Globalization of seafood trade and expanding urban consumption patterns further accelerate cold chain infrastructure investments. As a result, cold chain service providers are enhancing technologies and logistics to ensure freshness, safety, and compliance, thus boosting market growth and operational scalability.

Restraint:

### High Capital and Operating Costs

High capital and operating costs pose a significant hindrance to the Cold Chain for Seafood and Perishables Market. Establishing and maintaining temperature-controlled storage, transportation, and infrastructure require substantial investment, which deters small and mid-sized businesses. Additionally, ongoing expenses like energy consumption, equipment maintenance, and skilled labor add to the financial burden. These high costs limit market expansion, reduce profitability, and hinder widespread adoption of efficient cold chain solutions across regions.

Opportunity:

### Growth in International Trade

The growth in international trade has significantly propelled the Cold Chain for Seafood and Perishables Market. Increasing cross-border demand for fresh and high-quality seafood and perishable goods has intensified the need for efficient cold storage and transportation infrastructure. As global consumers seek year-round availability of exotic and temperature-sensitive products, exporters and importers invest in advanced cold chain solutions to ensure freshness, safety, and regulatory compliance. This trend fosters market expansion and innovation across logistics, packaging, and refrigeration technologies.

Threat:

### Complex Logistics and Handling Requirements

Complex logistics and handling requirements negatively impact the Cold Chain for Seafood and Perishables Market by increasing operational challenges and costs. Maintaining precise temperature control, coordinating multi-modal transportation, and managing time-sensitive deliveries demand advanced infrastructure and skilled labor.

Any lapse in handling can lead to product spoilage and regulatory non-compliance. These complexities hinder efficiency, limit market access for smaller players, and reduce overall profitability across the cold chain ecosystem.

### Covid-19 Impact

The Covid-19 pandemic significantly disrupted the Cold Chain for Seafood and Perishables Market, causing delays in transportation, labor shortages, and reduced processing capacity. Lockdowns and border restrictions strained international supply chains, leading to spoilage and increased costs. However, the crisis also accelerated digitalization and investment in automation and cold storage infrastructure, highlighting the critical role of resilient cold chain systems in maintaining food quality, safety, and uninterrupted supply during health emergencies.

The storage segment is expected to be the largest during the forecast period

The storage segment is expected to account for the largest market share during the forecast period as it ensures consistent temperature control and product integrity throughout the supply chain. Advanced cold storage facilities minimize spoilage, extend shelf life, and maintain food safety standards, meeting regulatory and consumer demands. Innovations such as automated storage systems and energy-efficient refrigeration boost operational efficiency and scalability. As global seafood trade and perishable consumption rise, robust storage infrastructure becomes increasingly vital, fostering market expansion and reliability.

The dairy products segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the dairy products segment is predicted to witness the highest growth rate, due to increasing demand for efficient temperature-controlled logistics. Dairy items like milk, cheese, and yogurt are highly perishable and require strict cold chain protocols to maintain safety and quality. This necessitates the use of advanced refrigeration technologies and robust distribution networks, which in turn enhance infrastructure and practices across the entire cold chain industry. As dairy consumption grows, it stimulates broader cold chain development and innovation.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market

share due to rising seafood consumption, expanding urban populations, and increasing demand for fresh and quality food products. Government initiatives supporting infrastructure development, along with growing investments in refrigerated storage and transportation technologies, are fueling market expansion. Additionally, the region's strong export-oriented seafood industry, especially in countries like China, India, and Vietnam, is accelerating the adoption of efficient cold chain systems to maintain product integrity and safety.

#### Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to demand for fresh, high-quality seafood and perishable goods. Advanced logistics infrastructure, strict food safety regulations, and rising health consciousness are encouraging investments in temperature-controlled storage and transportation. Technological innovations such as IoT-enabled tracking and automated cold storage systems are enhancing operational efficiency. Additionally, the booming e-commerce grocery sector is further fueling demand for reliable cold chain networks across the region.

#### Key players in the market

Some of the key players profiled in the Cold Chain for Seafood and Perishables Market include Americold Logistics LLC, Lineage Logistics Holdings, LLC, Nichirei Corporation, United States Cold Storage, Inc., AGRO Merchants Group, VersaCold Logistics Services, Swire Cold Storage, Burriss Logistics, NewCold, Congebec Logistics, Henningsen Cold Storage Co., Frialsa Frigorificos, DHL Supply Chain, A.P. Moller – Maersk, OOCL Logistics, Kuehne + Nagel International AG, DB Schenker, Blue Star Limited and GAC Group.

#### Key Developments:

In April 2025, Lineage, Inc. strengthens its U.S. cold-storage network through a definitive agreement with Tyson Foods. Under the deal, Lineage will acquire four existing Tyson-owned cold-storage facilities—in locations such as Pennsylvania, Kansas, Illinois, and Arizona—for \$247 million, transferring operations and more than 1,000 Tyson employees.

In March 2021, Lineage Logistics LLC has entered into a five-year tyre management agreement with Michelin's Services & Solutions team for its UK fleet. This strategic

collaboration is designed to enhance fleet uptime, improve sustainability through fuel savings, and reduce overall operational costs.

#### Components Covered:

Storage

Transportation

Monitoring Components

Other Components

#### Temperature Types Covered:

Chilled

Frozen

#### Technologies Covered:

Blast Freezing

Vapor Compression

Cryogenic Systems

Other Technologies

#### Applications Covered:

Seafood

Meat & Poultry

Dairy Products

Fruits & Vegetables

Bakery & Confectionery

Other Applications

End Users Covered:

Food Service Providers

Supermarkets & Hypermarkets

Online Retailers

Food Processing Industries

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

#### Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

#### South America

Argentina

Brazil

Chile

Rest of South America

#### Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Technology Analysis
- 3.7 Application Analysis
- 3.8 End User Analysis
- 3.9 Emerging Markets
- 3.10 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL COLD CHAIN FOR SEAFOOD AND PERISHABLES MARKET, BY COMPONENT**

- 5.1 Introduction
- 5.2 Storage
- 5.3 Transportation
- 5.4 Monitoring Components
- 5.5 Other Components

## **6 GLOBAL COLD CHAIN FOR SEAFOOD AND PERISHABLES MARKET, BY TEMPERATURE TYPE**

- 6.1 Introduction
- 6.2 Chilled
- 6.3 Frozen

## **7 GLOBAL COLD CHAIN FOR SEAFOOD AND PERISHABLES MARKET, BY TECHNOLOGY**

- 7.1 Introduction
- 7.2 Blast Freezing
- 7.3 Vapor Compression
- 7.4 Cryogenic Systems
- 7.5 Other Technologies

## **8 GLOBAL COLD CHAIN FOR SEAFOOD AND PERISHABLES MARKET, BY APPLICATION**

- 8.1 Introduction
- 8.2 Seafood
- 8.3 Meat & Poultry
- 8.4 Dairy Products
- 8.5 Fruits & Vegetables
- 8.6 Bakery & Confectionery
- 8.7 Other Applications

## **9 GLOBAL COLD CHAIN FOR SEAFOOD AND PERISHABLES MARKET, BY END USER**

- 9.1 Introduction
- 9.2 Food Service Providers
- 9.3 Supermarkets & Hypermarkets
- 9.4 Online Retailers
- 9.5 Food Processing Industries
- 9.6 Other End Users

## **10 GLOBAL COLD CHAIN FOR SEAFOOD AND PERISHABLES MARKET, BY GEOGRAPHY**

- 10.1 Introduction
- 10.2 North America
  - 10.2.1 US
  - 10.2.2 Canada
  - 10.2.3 Mexico
- 10.3 Europe
  - 10.3.1 Germany
  - 10.3.2 UK
  - 10.3.3 Italy
  - 10.3.4 France
  - 10.3.5 Spain
  - 10.3.6 Rest of Europe
- 10.4 Asia Pacific
  - 10.4.1 Japan
  - 10.4.2 China
  - 10.4.3 India
  - 10.4.4 Australia
  - 10.4.5 New Zealand
  - 10.4.6 South Korea
  - 10.4.7 Rest of Asia Pacific
- 10.5 South America
  - 10.5.1 Argentina
  - 10.5.2 Brazil
  - 10.5.3 Chile
  - 10.5.4 Rest of South America
- 10.6 Middle East & Africa
  - 10.6.1 Saudi Arabia
  - 10.6.2 UAE

- 10.6.3 Qatar
- 10.6.4 South Africa
- 10.6.5 Rest of Middle East & Africa

## **11 KEY DEVELOPMENTS**

- 11.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 11.2 Acquisitions & Mergers
- 11.3 New Product Launch
- 11.4 Expansions
- 11.5 Other Key Strategies

## **12 COMPANY PROFILING**

- 12.1 Americold Logistics LLC
- 12.2 Lineage Logistics Holdings, LLC
- 12.3 Nichirei Corporation
- 12.4 United States Cold Storage, Inc.
- 12.5 AGRO Merchants Group
- 12.6 VersaCold Logistics Services
- 12.7 Swire Cold Storage
- 12.8 Burris Logistics
- 12.9 NewCold
- 12.10 Congebec Logistics
- 12.11 Henningsen Cold Storage Co.
- 12.12 Frialsa Frigorificos
- 12.13 DHL Supply Chain
- 12.14 A.P. Moller – Maersk
- 12.15 OOCL Logistics
- 12.16 Kuehne + Nagel International AG
- 12.17 DB Schenker
- 12.18 Blue Star Limited
- 12.19 GAC Group

## List Of Tables

### LIST OF TABLES

Table 1 Global Cold Chain for Seafood and Perishables Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Cold Chain for Seafood and Perishables Market Outlook, By Component (2024-2032) (\$MN)

Table 3 Global Cold Chain for Seafood and Perishables Market Outlook, By Storage (2024-2032) (\$MN)

Table 4 Global Cold Chain for Seafood and Perishables Market Outlook, By Transportation (2024-2032) (\$MN)

Table 5 Global Cold Chain for Seafood and Perishables Market Outlook, By Monitoring Components (2024-2032) (\$MN)

Table 6 Global Cold Chain for Seafood and Perishables Market Outlook, By Other Components (2024-2032) (\$MN)

Table 7 Global Cold Chain for Seafood and Perishables Market Outlook, By Temperature Type (2024-2032) (\$MN)

Table 8 Global Cold Chain for Seafood and Perishables Market Outlook, By Chilled (2024-2032) (\$MN)

Table 9 Global Cold Chain for Seafood and Perishables Market Outlook, By Frozen (2024-2032) (\$MN)

Table 10 Global Cold Chain for Seafood and Perishables Market Outlook, By Technology (2024-2032) (\$MN)

Table 11 Global Cold Chain for Seafood and Perishables Market Outlook, By Blast Freezing (2024-2032) (\$MN)

Table 12 Global Cold Chain for Seafood and Perishables Market Outlook, By Vapor Compression (2024-2032) (\$MN)

Table 13 Global Cold Chain for Seafood and Perishables Market Outlook, By Cryogenic Systems (2024-2032) (\$MN)

Table 14 Global Cold Chain for Seafood and Perishables Market Outlook, By Other Technologies (2024-2032) (\$MN)

Table 15 Global Cold Chain for Seafood and Perishables Market Outlook, By Application (2024-2032) (\$MN)

Table 16 Global Cold Chain for Seafood and Perishables Market Outlook, By Seafood (2024-2032) (\$MN)

Table 17 Global Cold Chain for Seafood and Perishables Market Outlook, By Meat & Poultry (2024-2032) (\$MN)

Table 18 Global Cold Chain for Seafood and Perishables Market Outlook, By Dairy

Products (2024-2032) (\$MN)

Table 19 Global Cold Chain for Seafood and Perishables Market Outlook, By Fruits & Vegetables (2024-2032) (\$MN)

Table 20 Global Cold Chain for Seafood and Perishables Market Outlook, By Bakery & Confectionery (2024-2032) (\$MN)

Table 21 Global Cold Chain for Seafood and Perishables Market Outlook, By Other Applications (2024-2032) (\$MN)

Table 22 Global Cold Chain for Seafood and Perishables Market Outlook, By End User (2024-2032) (\$MN)

Table 23 Global Cold Chain for Seafood and Perishables Market Outlook, By Food Service Providers (2024-2032) (\$MN)

Table 24 Global Cold Chain for Seafood and Perishables Market Outlook, By Supermarkets & Hypermarkets (2024-2032) (\$MN)

Table 25 Global Cold Chain for Seafood and Perishables Market Outlook, By Online Retailers (2024-2032) (\$MN)

Table 26 Global Cold Chain for Seafood and Perishables Market Outlook, By Food Processing Industries (2024-2032) (\$MN)

Table 27 Global Cold Chain for Seafood and Perishables Market Outlook, By Other End Users (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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