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Cold-chain & Last-mile Food Logistics Market Forecasts to 2034 - Global Analysis By Service Type (Refrigerated Storage, Refrigerated Transportation, Value-added Services and Last-mile Delivery Services), Temperature Range, Food Category, Delivery Mode, Vehicle Type, End User and By Geography

https://marketpublishers.com/r/CF27157B6334EN.html
Date: August 2026
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: CF27157B6334EN

Abstracts

According to Stratistics MRC, the Global Cold-chain & Last-mile Food Logistics Market is accounted for $11.2 billion in 2026 and is expected to reach $22.6 billion by 2034 growing at a CAGR of 9.2% during the forecast period. Cold-chain and last-mile food distribution focus on preserving temperature-sensitive goods throughout transit until they reach end users. It combines chilled warehousing, monitored transport systems, and streamlined delivery operations to protect freshness, hygiene, and usability. Rising online food retail, expanding cities, and higher consumer standards are accelerating adoption of digital tracking, smarter routing, and advanced packaging solutions. Effective final delivery reduces losses, limits wastage, and enhances supply reliability, helping companies maintain consistent quality. Such logistics frameworks support compliance requirements and environmental objectives while ensuring dependable access to safe, fresh food products in modern supply networks across regions and varied consumer segments.

According to the Food and Agriculture Organization (FAO), around 526 million tonnes of food (about 12% of global production) are lost annually due to lack of adequate refrigeration and cold-chain infrastructure, highlighting the critical role of temperature-controlled logistics.

Market Dynamics:

Driver:

Rising demand for fresh and perishable food products

Growing consumer inclination toward fresh and less processed perishable foods is significantly boosting the cold-chain and last-mile food logistics market. Increasing urbanization has led to higher demand for consistent access to items like fruits, vegetables, dairy, and meat that require controlled temperature environments. This trend is motivating businesses to adopt advanced cooling technologies, tracking systems, and streamlined distribution networks. The rapid expansion of online grocery services further strengthens the importance of efficient last-mile delivery. Maintaining product quality and safety throughout transportation is essential, driving continuous improvements and broader development of cold-chain systems in global markets.

Restraint:

High infrastructure and operational costs

One of the key limitations in the cold-chain and last-mile food logistics market is the substantial expense involved in building and maintaining infrastructure. Setting up cold storage facilities, refrigerated transport, and digital monitoring technologies demands heavy upfront investment. Continuous costs related to electricity, repairs, and trained workforce further increase financial pressure. Smaller businesses find it difficult to manage these expenditures, restricting their ability to compete effectively. Variability in fuel and energy prices also creates operational uncertainty. Such economic challenges reduce expansion opportunities and delay the implementation of advanced cold-chain systems, especially in cost-sensitive and emerging markets worldwide.

Opportunity:

Adoption of advanced technologies and automation

The growing integration of modern technologies and automation offers substantial growth potential for the cold-chain and last-mile food logistics market. Tools like connected sensors, live temperature tracking, artificial intelligence for route planning, and blockchain systems for tracking goods are improving efficiency and visibility. These advancements minimize losses, enhance delivery precision, and support regulatory compliance. Automation in storage and distribution also reduces reliance on manual labour and lowers the risk of mistakes. With rapid digital transformation, businesses can enhance scalability, manage costs more effectively, and deliver consistent services, strengthening the overall development of advanced cold-chain logistics systems worldwide.

Threat:

Supply chain disruptions and temperature excursions

A major threat to the cold-chain and last-mile food logistics market arises from disruptions in supply chains and fluctuations in temperature control. Issues such as delivery delays, mechanical breakdowns, electricity failures, and transport constraints can interrupt required temperature conditions, causing product damage and losses. Factors like severe weather, political instability, and health crises add further unpredictability. Small temperature variations can impact food quality and compliance standards significantly. Although companies invest in backup systems and tracking technologies, ongoing disruptions still affect operational consistency, making it difficult to maintain dependable and efficient cold-chain logistics performance on a global scale.

Covid-19 Impact:

The COVID-19 outbreak strongly influenced the cold-chain and last-mile food logistics market by boosting demand and revealing system weaknesses. Restrictions on mobility and lockdown measures increased dependence on online food purchases and doorstep delivery, intensifying the need for reliable cold logistics. Businesses enhanced storage facilities, adopted advanced monitoring technologies, and improved distribution efficiency to cope with demand. At the same time, issues such as workforce shortages, transport delays, and supply disruptions affected operations. The situation emphasized the need for robust infrastructure, real-time visibility, and risk management strategies, encouraging sustained investment and modernization of cold-chain logistics across global supply networks.

The refrigerated transportation segment is expected to be the largest during the forecast period

The refrigerated transportation segment is expected to account for the largest market share during the forecast period because of its essential function in preserving controlled temperatures during delivery. It enables efficient distribution of perishable items over extended distances while maintaining product freshness and safety standards. This segment caters to a wide range of food products such as dairy, meat, seafood, and fruits, making it a backbone of cold supply chains. Increasing demand for fast deliveries, expanding global trade, and higher consumption of fresh foods support its leading position. Technological improvements in vehicles and monitoring systems continue to strengthen its operational effectiveness.

The e-commerce grocery platforms segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the e-commerce grocery platforms segment is predicted to witness the highest growth rate as consumers increasingly prefer digital shopping options. Growth in mobile usage, secure payment systems, and the need for doorstep delivery are accelerating this trend. These platforms depend heavily on reliable cold-chain systems to preserve product quality and meet delivery timelines. Investments in localized storage facilities, automated fulfillment, and real-time tracking are enhancing operational efficiency. With rising urbanization and evolving consumer expectations, e-commerce grocery services are rapidly expanding, positioning them as the most dynamic and fastest-growing segment within the cold-chain logistics landscape.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, supported by its large population base and fast-paced urban development. Growing income levels and evolving consumer preferences are increasing the demand for perishable and high-quality food items. Significant investments in refrigerated storage, transport systems, and advanced logistics technologies are enhancing market capacity. The expansion of online grocery services and better distribution networks contribute to its leading position. Furthermore, active participation in global food trade increases the reliance on efficient cold-chain solutions, reinforcing the region’s prominence in the overall market landscape.

Region with highest CAGR:

Over the forecast period, the Rest of the World (RoW) region is anticipated to exhibit the highest CAGR, supported by growing infrastructure investments and increasing demand for temperature-sensitive foods. Urban growth, rising populations, and shifting dietary habits are accelerating the need for advanced cold logistics networks. Authorities are prioritizing food security and waste reduction, promoting the development of storage and transportation systems. Growth in organized retail and online grocery services is also contributing to this trend. With continuous improvements in supply chain capabilities, the region is becoming a key high-growth area for cold-chain logistics development.

Key players in the market

Some of the key players in Cold-chain & Last-mile Food Logistics Market include Agro Merchants Group, Americold Logistics, Burris Logistics, ColdEX Logistics, Crystal Logistic Cool Chain Ltd, CWT Limited, DHL, GK Cold Chain Solutions, Gubba Cold Storage, Kloosterboer, Lineage Logistics, Mahindra Logistics, NewCold, Nichirei Logistics Group, RK Foodland, Snowman Logistics, TCI Cold Chain and VersaCold Logistics.

Key Developments:

In July 2026, Americold and Feed the Children, a global movement working to end childhood hunger, today recognized 10 years of partnership focused on expanding access to food and essential resources for families experiencing food insecurity across the United States.

In June 2023, Honor Foods, the Burris Logistics foodservice redistribution company, has agreed to purchase Sunny Morning Foods, a foodservice redistributor with dairy expertise located in Fort Lauderdale, FL. This acquisition is another step towards fulfilling our longstanding strategy to build upon our dairy expertise as a way to provide competitive differentiation within the foodservice redistribution channel while satisfying customers’ product needs.

Service Types Covered:

- Refrigerated Storage
- Refrigerated Transportation
- Value-added Services
- Last-mile Delivery Services

Temperature Ranges Covered:

- Chilled (0-5°C)
- Frozen (-18°C and below)
- Ambient Controlled (5-25°C)

Food Categories Covered:

- Dairy & Ice Cream
- Meat, Poultry & Seafood
- Fruits & Vegetables
- Bakery & Confectionery
- Ready-to-Eat Meals
- Packaged Grocery Items
- Beverages

Delivery Modes Covered:

- Home Delivery
- Store Pickup & Click-and-Collect
- Third-party Aggregators

Vehicle Types Covered:

- Two-wheelers

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Light Commercial Vehicles (LCVs)

Electric Vehicles (EVs)

Drones & Autonomous Delivery Units

End Users Covered:

Food Manufacturers

Retailers & Supermarkets

Foodservice Operators

E-commerce Grocery Platforms

Households

Institutional Buyers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

- Italy
- Spain
- Netherlands
- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore
- Vietnam

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- Rest of Asia Pacific
- South America
  - Brazil
  - Argentina
  - Colombia
  - Chile
  - Peru
  - Rest of South America
- Rest of the World (RoW)
  - Middle East
    - Saudi Arabia
    - United Arab Emirates
    - Qatar
    - Israel
    - Rest of Middle East
  - Africa
    - South Africa
    - Egypt
    - Morocco
    - Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- 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

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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