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Cold Chain Logistics for Agri Produce Market Forecasts to 2032 – Global Analysis By Component (Refrigerated Storage, Refrigerated Transport, Monitoring & Tracking Solutions, Packaging Solutions and Other Components), Temperature Range, Mode of Transport, Storage Infrastructure, Technology, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Cold Chain Logistics for Agri Produce Market is accounted for $14.2 billion in 2025 and is expected to reach $24.4 billion by 2032 growing at a CAGR of 8% during the forecast period. Cold chain logistics for agri produce refers to the temperature-controlled handling, storage, and transportation of fruits, vegetables, dairy, meat, and other perishables from farm to consumer. It involves maintaining a consistent low-temperature environment across every stage—pre-cooling, cold storage, refrigerated transport, processing, and retail display to preserve freshness, reduce microbial spoilage, and extend shelf life. This system uses specialized infrastructure such as packhouses, reefer trucks, cold rooms, and monitoring technologies that track temperature and humidity. Effective cold chain logistics minimizes post-harvest losses, ensures food safety and quality, and supports farmers, processors, and retailers by enabling longer market reach and higher value realization.

Market Dynamics:

Driver:

Growing demand for fresh perishable foods

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Consumers are increasingly prioritizing fruits, vegetables, dairy, and meat products that retain nutritional value and freshness. Cold chain systems ensure temperature-controlled storage and transport, directly addressing this need. Rising urbanization and expanding retail networks are amplifying demand for reliable cold chain infrastructure. Export-oriented agriculture also benefits from cold chain logistics, enabling longer transit times without compromising quality. Governments and private players are investing in cold chain facilities to strengthen food security and reduce wastage. As a result, demand for fresh perishables is emerging as a primary driver of market growth.

Restraint:

Limited rural cold storage availability

Many farming regions lack access to modern refrigerated warehouses, restricting the ability to preserve produce post-harvest. Small-scale farmers are particularly affected, as they cannot afford private cold storage facilities. This gap leads to significant food losses, especially in developing economies. Infrastructure challenges such as unreliable electricity and high maintenance costs further exacerbate the issue. Limited rural cold storage also reduces farmers' ability to participate in export markets. Consequently, inadequate rural infrastructure remains a significant restraint to widespread adoption of cold chain logistics.

Opportunity:

Rising adoption of temperature-controlled storage

Modern refrigerated warehouses and distribution centers are increasingly being deployed to handle diverse agri-produce. These facilities enable longer shelf life, reduce spoilage, and support compliance with food safety standards. Advances in IoT and automation are enhancing monitoring and efficiency of cold storage systems. Retailers and exporters are investing in temperature-controlled facilities to meet consumer expectations for quality. Government subsidies and public-private partnerships are accelerating infrastructure development in emerging markets. As a result, adoption of temperature-controlled storage is expected to unlock substantial growth opportunities for the market.

Threat:

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Poor last-mile refrigerated transport connectivity

While large-scale warehouses and distribution centers are expanding, many regions lack reliable refrigerated trucks and delivery systems. This gap undermines the integrity of cold chains, leading to spoilage during final delivery stages. Rural and semi-urban areas are particularly affected, limiting access to fresh produce. High costs of refrigerated vehicles discourage small logistics providers from investing in last-mile solutions. Inconsistent connectivity reduces consumer trust in cold chain systems, thereby hampering the market growth.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the Cold Chain Logistics for Agri Produce market. Supply chain disruptions and mobility restrictions slowed transport of perishable goods, leading to losses in several regions. Farmers and distributors faced financial uncertainty, reducing investment in cold chain infrastructure during the crisis. However, the pandemic highlighted the importance of resilient food supply chains, driving renewed interest in cold storage and transport solutions. Online grocery and e-commerce platforms accelerated demand for reliable cold chain systems. Governments emphasized food security, supporting investments in refrigerated logistics.

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

The refrigerated storage segment is expected to account for the largest market share during the forecast period , driven by its critical role in preserving perishable produce. Cold storage warehouses provide controlled environments that extend shelf life and reduce spoilage. Farmers, retailers, and exporters rely on refrigerated storage to maintain quality across supply chains. Rising demand for fresh fruits, vegetables, and dairy products reinforces adoption of storage facilities. The segment benefits from strong investment in modern warehouses equipped with IoT monitoring systems. Government initiatives promoting food safety and reduced wastage further strengthen demand.

The pharmaceutical manufacturers & distributors segment is expected to have the highest CAGR during the forecast period

Over the forecast period, pharmaceutical manufacturers & distributors segment is predicted to witness the highest growth rate , reflecting strong demand for temperature-

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sensitive logistics. Vaccines, biologics, and specialty drugs require strict cold chain management to maintain efficacy. Rising global healthcare demand is accelerating investment in refrigerated transport and storage solutions. Pharmaceutical companies are partnering with logistics providers to strengthen cold chain networks. Regulatory frameworks mandating compliance with temperature standards further reinforce adoption. Advances in monitoring technologies such as real-time sensors enhance reliability and trust in pharmaceutical cold chains.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share by advanced infrastructure and strong demand for fresh produce. The United States and Canada benefit from widespread adoption of refrigerated warehouses and transport systems. Consumers in the region prioritize food safety and freshness, reinforcing demand for cold chain logistics. The presence of leading logistics providers and continuous innovation strengthens regional leadership. Government support for food safety standards further accelerates adoption. Growth in e-commerce grocery platforms adds momentum to cold chain expansion.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by rapid urbanization and rising food demand. Countries such as China, India, and Japan are witnessing strong investment in cold chain infrastructure. Expanding middle-class populations and growing packaged food consumption reinforce demand. Government initiatives promoting food safety and export competitiveness further accelerate adoption. Local logistics providers are increasingly deploying refrigerated trucks and warehouses to meet rising demand. E-commerce platforms are making fresh produce more accessible across diverse markets.

Key players in the market

Some of the key players in Cold Chain Logistics for Agri Produce Market include Americold Logistics, Lineage Logistics, United Parcel Service (UPS), Deutsche Post DHL Group, FedEx Corporation, Nippon Express Holdings, Kuehne + Nagel International AG, DB Schenker, Maersk Line, CMA CGM Group, Hapag-Lloyd AG, Snowman Logistics Ltd., Coldman Logistics Pvt. Ltd., Gati-KWE Ltd. and Blue Star Limited.

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Key Developments:

In June 2024, Lineage announced a significant expansion of its facility in McAllen, Texas, adding over 40,000 square feet of temperature-controlled space to enhance cross-border logistics for fresh produce from Mexico. This strategic investment, detailed in a June 11 press release, strengthens its position as a key gateway for perishables entering the U.S. market, improving supply chain efficiency for growers and retailers.

In March 2024, Americold announced a significant expansion of its facility in Waycross, Georgia, adding over 40,000 square feet of temperature-controlled space. This $50 million investment is specifically designed to enhance service for regional poultry and perishable food producers, strengthening its infrastructure in a key agricultural corridor to meet growing customer demand for sophisticated cold chain solutions.

Components Covered:

- Refrigerated Storage
- Refrigerated Transport
- Monitoring & Tracking Solutions
- Packaging Solutions
- Other Components

Temperature Ranges Covered:

- Chilled (0–5°C)
- Frozen (-18°C and below)
- Deep-Freeze (-40°C and below)
- Ambient Controlled (above 5°C with humidity control)

Mode of Transports Covered:

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Road Transport

Rail Transport

Air Cargo

Sea Transport

Storage Infrastructures Covered:

Cold Rooms

Refrigerated Warehouses

On-Farm Cold Storage

Other Storage Infrastructures

Technologies Covered:

IoT & Telematics

RFID & Barcode Systems

GPS & Real-Time Tracking

Solar-Powered Refrigeration

Other Technologies

End Users Covered:

Foodservice & Quick-Commerce Operators

Logistics Providers & Cold Chain 3PLs

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- Pharmaceutical Manufacturers & Distributors
- 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

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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 2024, 2025, 2026, 2028, and 2032
- 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

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- 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 Middle East & Africa Regions are also represented in the same manner as above.

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