

# **Cold Chain Logistics Market Forecasts to 2032 – Global Analysis By Type (Warehousing/Cold Storage, Value-Added Services and Transportation), Temperature Type (Temperature Type and Chilled), Application and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Cold Chain Logistics Market is accounted for \$384.11 billion in 2025 and is expected to reach \$985.01 billion by 2032 growing at a CAGR of 14.4% during the forecast period. Cold chain logistics involves the coordinated handling of products that require strict temperature control throughout the supply chain. It includes specialized equipment and processes for refrigerated storage, insulated packaging, and climate-controlled transportation to preserve product integrity from origin to delivery. This system is crucial for safeguarding the quality and compliance of perishable items like vaccines, fresh produce, and biochemicals. By reducing exposure to temperature fluctuations, it ensures safety standards are met and minimizes the risk of spoilage or degradation.

According to a University of Michigan study, fully refrigerated food supply chains could prevent nearly half of the estimated 1.3 billion tons of yearly global food waste and cut associated food-waste greenhouse gas emissions by around 41%.

Market Dynamics:

Driver:

Growing client demand for faster and more accessible services

The increasing expectation for prompt and convenient delivery of perishable and

temperature-sensitive goods is reshaping the cold chain logistics landscape. Consumers and businesses alike are seeking faster turnaround times, whether for pharmaceutical products, fresh produce, or frozen items. This demand is pressing logistics providers to invest in high-performance refrigeration systems and automated inventory handling. Additionally, e-commerce expansion is fueling the need for responsive last-mile solutions in cold chain operations.

Restraint:

Resistance to change and lack of digital literacy

Many operators in traditional setups exhibit hesitation toward digitizing operations due to insufficient training and fear of disruptions. A significant portion of workforce lacks adequate digital literacy to navigate data-driven logistics platforms efficiently. Moreover, change management challenges within legacy networks can delay modernization efforts. This reluctance, combined with budget constraints in smaller enterprises, can stall the implementation of intelligent tracking and automation tools.

Opportunity:

Integration with cloud-based platforms and hybrid models

Integration with digital ecosystems enables real-time temperature monitoring, predictive maintenance, and agile route optimization. Hybrid models—combining centralized cold storage with distributed micro-fulfillment hubs—are enhancing responsiveness to consumer needs. Cloud solutions also allow seamless stakeholder collaboration, from suppliers to end-users. With the rise of SaaS-based logistics tools, companies can scale operations and reduce overhead while maintaining compliance with temperature regulation standards.

Threat:

AI 'hallucinations' and inaccuracy

AI-driven forecasting and automation occasionally suffer from “hallucinations,” leading to erroneous insights or misplaced recommendations. These inaccuracies may result in misrouted shipments, incorrect temperature adjustments, or delayed interventions in case of asset failure. Such lapses can compromise product quality and result in financial losses, especially for pharmaceuticals or delicate food items.

### Covid-19 Impact:

The pandemic had a mixed effect on the cold chain logistics sector, generating both supply-side pressure and demand-side acceleration. Lockdowns and international transport restrictions caused delays in shipments and created bottlenecks in warehousing capacity. However, the surge in vaccine distribution, increased reliance on home delivery services, and growth in online grocery shopping drove exceptional demand for robust cold chain systems.

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

The warehousing/cold storage segment is expected to account for the largest market share during the forecast period due to its essential role in preserving temperature-sensitive goods. Large-scale cold storage units offer centralized control, minimizing spoilage and ensuring product quality across distribution cycles. Advancements in insulation materials and automated climate regulation systems are enhancing operational efficiency, making this segment indispensable for pharmaceuticals, seafood, and dairy logistics.

The bakery & confectionery segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the bakery & confectionery segment is predicted to witness the highest growth rate fueled by rising demand for temperature-controlled transportation of delicate edible items. As artisanal baked goods and premium confectionery gain popularity across global markets, logistics providers are innovating packaging and delivery processes to maintain freshness. The expansion of bakery chains and niche dessert startups, particularly in urban areas, is accelerating specialized cold chain adoption for short-distance distribution.

### Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share driven by rapid industrialization and urbanization across major economies like China, India, and Southeast Asian nations. The proliferation of organized retail, expansion of foodservice chains, and increased pharmaceutical exports are fueling demand for scalable cold chain networks. Public-private partnerships and policy

initiatives promoting food safety and healthcare logistics are further reinforcing infrastructure development.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR attributed to rising investments in refrigerated transportation and smart warehouse technologies. Emerging startups and logistics providers are adopting digital cold chain models to meet soaring consumer expectations. Government-led programs for vaccine distribution and food waste reduction are accelerating innovation and adoption.

Key players in the market

Some of the key players in Cold Chain Logistics Market include Nichirei Corporation, Cold Box Express, Inc., Americold Logistics, LLC, Kloosterboer Inc, Preferred Freezer Services Inc., Conestoga Cold Storage Inc, Lineage Logistics Holding, LLC, Burriss Logistics, Snowman Logistics Ltd., Tippmann Group, Congebec Logistics Inc., VersaCold Logistics Services Inc, Fresh and Healthy Enterprises Ltd, M.J. Logistics Services Ltd and Gubba Cold Storages Ltd.

Key Developments:

In March 2025, Lineage Logistics Holding, LLC Opened Cold-Storage Expansion in Denmark (Aarhus) Doubling facility at Port of Aarhus, is adding 18,000 pallet spaces to support seafood and perishables logistics with enhanced energy efficiency. The expansion features advanced automation and ammonia refrigeration systems to cut energy consumption and carbon footprint.

In May 2025, Lineage acquired four U.S. cold storage warehouses (160,000 pallet positions) from Tyson Foods. Additionally, Lineage will build two next-gen automated warehouses anchored by Tyson and deploy ~\$1 billion in acquisitions and greenfield developments

Types Covered:

Warehousing/Cold Storage

Value-Added Services

Transportation

Temperature Types Covered:

Frozen

Chilled

Applications Covered:

Fruits & Vegetables

Fish, Meat, and Seafood

Dairy & Frozen Desserts

Bakery & confectionery

Processed Food

Pharmaceuticals

Other Applications

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 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
- 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 alliance

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