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Smart Warehousing for Perishables Market Forecasts to 2032 – Global Analysis By Component (Smart Storage Infrastructure, Automated Handling Systems, Monitoring & Tracking Solutions and Other Components), Temperature Range, Mode of Transport, Storage Infrastructure, Technology, End User and By Geography

https://marketpublishers.com/r/SF06E8BFADB2EN.html
Date: December 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: SF06E8BFADB2EN

Abstracts

According to Stratistics MRC, the Global Smart Warehousing for Perishables Market is accounted for $23.1 billion in 2025 and is expected to reach $45.01 billion by 2032 growing at a CAGR of 10% during the forecast period. Smart warehousing for perishables refers to technology-driven storage and handling systems designed to maintain the quality, safety, and shelf life of temperature-sensitive products such as fresh foods, pharmaceuticals, and biologics. It integrates IoT sensors, automation, AI-based forecasting, real-time temperature and humidity monitoring, RFID tracking, and robotics to optimize inventory, reduce spoilage, and ensure end-to-end cold-chain transparency. These warehouses use data analytics for demand prediction, energy-efficient refrigeration, and rapid order fulfillment, enabling consistent compliance with food and pharma safety standards. Overall, smart warehousing enhances operational efficiency, minimizes waste, and supports reliable delivery of perishable goods.

Market Dynamics:

Driver:

Rising demand for efficient cold storage

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Consumers and industries are increasingly prioritizing fresh produce, dairy, meat, and pharmaceuticals that require strict temperature control. Smart warehousing integrates IoT sensors, automation, and AI-driven monitoring to ensure optimal storage conditions. Efficiency gains reduce energy consumption, minimize spoilage, and improve inventory management. Retailers and exporters benefit from extended shelf life and compliance with food safety standards. Governments and private players are investing in modern cold storage facilities to strengthen food security and healthcare logistics. As a result, demand for efficient cold storage is emerging as a primary driver of market growth.

Restraint:

Complex integration with existing legacy systems

Many warehouses operate on outdated infrastructure that is not easily compatible with smart technologies. Retrofitting facilities requires significant investment in hardware, software, and training. Integration challenges also disrupt operations during transition phases, discouraging adoption. Smaller logistics providers struggle with the technical expertise needed to manage advanced systems. These complexities slow penetration in cost-sensitive and fragmented markets. Consequently, integration with legacy systems remains a significant restraint to widespread adoption of smart warehousing solutions.

Opportunity:

Automation reducing spoilage and labor costs

Smart warehousing solutions employ robotics, automated conveyors, and AI-driven monitoring to streamline operations. Automation ensures consistent temperature control, reducing losses from human error and inefficiency. Labor costs are minimized as automated systems handle repetitive tasks such as sorting and stacking. Real-time analytics improve decision-making, further enhancing productivity. Retailers and pharmaceutical firms benefit from reduced operational expenses and improved reliability. As a result, automation-driven efficiency is expected to unlock substantial growth opportunities for the market.

Threat:

Limited skilled workforce for tech operations

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Advanced systems require trained personnel to manage IoT devices, robotics, and AI-driven platforms. Many regions lack sufficient technical expertise, slowing adoption of smart technologies. Training programs are limited, and knowledge transfer is slow, particularly in developing economies. Without skilled operators, warehouses risk underutilizing installed systems, reducing efficiency gains. This skills gap discourages investment in advanced infrastructure. Consequently, workforce limitations remain a critical threat to market credibility and growth.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the Smart Warehousing for Perishables market. Supply chain disruptions and mobility restrictions slowed deployment of smart infrastructure in several regions. Economic uncertainty reduced investment in premium warehousing solutions during the crisis. However, the pandemic highlighted the importance of resilient logistics and food security, driving renewed interest in smart warehousing. Online grocery and pharmaceutical demand accelerated adoption of automated cold storage systems. Remote monitoring and digital platforms gained traction as physical access was restricted.

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

The smart storage infrastructure segment is expected to account for the largest market share during the forecast period, driven by its critical role in ensuring efficiency and reliability. IoT-enabled sensors, automated cooling systems, and AI-driven monitoring enhance storage conditions for perishables. Farmers, retailers, and pharmaceutical firms rely on smart infrastructure to maintain quality across supply chains. Rising demand for efficient cold storage aligns directly with the benefits of smart infrastructure. The segment benefits from strong investment in modern warehouses equipped with automation and analytics. Government initiatives promoting food safety and healthcare logistics further strengthen demand.

The pharmaceutical companies segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the pharmaceutical companies segment is predicted to witness the highest growth rate owing to strong demand for temperature-sensitive logistics. Vaccines, biologics, and specialty drugs require strict cold chain management to maintain efficacy. Rising global healthcare demand is accelerating investment in

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smart warehousing solutions. Pharmaceutical firms 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 warehousing.

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 efficient cold storage. The United States and Canada benefit from widespread adoption of smart warehouses equipped with IoT and automation. Consumers in the region prioritize food safety and pharmaceutical reliability, reinforcing demand for smart warehousing. The presence of leading logistics providers and continuous innovation strengthens regional leadership. Government support for food safety and healthcare standards further accelerates adoption. Growth in e-commerce grocery and pharmaceutical platforms adds momentum to smart warehousing expansion.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR owing to the rapid urbanization and rising food and healthcare demand, the Asia Pacific region is anticipated to exhibit the highest CAGR over the forecast period. Countries such as China, India, and Japan are witnessing strong investment in smart warehousing infrastructure. Expanding middle-class populations and growing packaged food consumption reinforce demand. Government initiatives promoting food safety and pharmaceutical cold chains further accelerate adoption. Local logistics providers are increasingly deploying IoT-enabled warehouses to meet rising demand. E-commerce platforms are making perishable goods more accessible across diverse markets.

Key players in the market

Some of the key players in Smart Warehousing for Perishables 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 Logistics & Services, 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 March 2024, Lineage announced a multi-year strategic collaboration with Microsoft to accelerate its digital transformation. This partnership focuses on leveraging Microsoft’s Azure OpenAI Service and AI tools to further develop Lineage’s smart warehousing capabilities, including dynamic routing and predictive analytics, to optimize energy consumption and enhance the quality and longevity of stored perishable products.

In February 2024, UPS announced a strategic partnership with autonomous vehicle company Waymo. This collaboration will initially deploy Waymo's Class 8 trucks on the UPS routes between Dallas and Phoenix. The initiative aims to enhance the efficiency and reliability of middle-mile freight transport, a crucial leg for perishable goods where consistent, temperature-monitored transit is vital for maintaining product integrity.

Components Covered:

- Smart Storage Infrastructure
- Automated Handling Systems
- Monitoring & Tracking Solutions
- Warehouse Management Software
- Packaging & Insulation Materials
- Other Components

Temperature Ranges Covered:

- Chilled (0–5°C)
- Frozen (–18°C and below)
- Controlled Atmosphere Warehousing
- Ambient Controlled (humidity-controlled >5°C)

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Mode of Transports Covered:

- Road Transport
- Air Cargo
- Sea Freight
- Multimodal Cold Chain Transport

Storage Infrastructures Covered:

- Cold Rooms
- Refrigerated Warehouses
- Blast Freezers
- Cold Display Cabinets
- Other Storage Infrastructures

Technologies Covered:

- IoT & Telematics
- RFID & Barcode Systems
- AI/ML-Based Predictive Monitoring
- Automation & Robotics
- Other Technologies

End Users Covered:

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- Pharmaceutical Companies
- Logistics Providers & Cold Chain 3PLs
- Hospitals & Healthcare Facilities
- Government & NGOs
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan

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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

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

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