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Refrigerated Transport Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Mode (Road (Refrigerated LCV, Refrigerated MHCV and Refrigerated HCV), Sea, Rail and Air), By Product Type (Chilled and Frozen), By Technology (Vapor Compression Systems and Cryogenic Systems), By Temperature (Single Temperature and Multi Temperature), By Region & Competition, 2021-2031F

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Abstracts

The Global Refrigerated Transport Market is projected to expand from USD 122.13 Billion in 2025 to USD 199.36 Billion by 2031, achieving a CAGR of 8.51%. This sector covers the strategic logistics and movement of temperature-sensitive goods, such as perishable foods, medical supplies, and chemicals, using climate-controlled assets like reefer trucks, vessels, and air cargo units. Growth is primarily driven by the globalization of food supply chains, which requires the long-haul transport of fresh produce, and the pharmaceutical industry's need to transport biologics and vaccines. These fundamental drivers ensure a steady demand for reliable temperature assurance, independent of temporary technological trends in logistics.

However, the industry encounters significant hurdles due to the high capital and operational costs involved in maintaining energy-intensive refrigeration systems and ensuring regulatory compliance. These financial burdens, exacerbated by volatile fuel prices, can slow the fleet modernization necessary to handle increasing volumes. Despite these challenges, infrastructure investment continues; the Global Cold Chain Alliance reported that in 2025, the total temperature-controlled capacity of its global members reached 8.16 billion cubic feet, marking an increase of over 10 percent from

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the previous year.

Market Driver

The Global Refrigerated Transport Market is largely propelled by the rising global demand for frozen and perishable foods, influenced by shifting consumer lifestyles and the need for year-round availability of seasonal produce. This trend compels logistics providers to increase their capacity for temperature-sensitive cargo to maintain product integrity across complex international supply chains. According to Hapag-Lloyd's preliminary figures released in January 2025, the company saw a transport volume increase of approximately 5 percent to 12.5 million TEU in 2024, supported by its extensive fleet of modern reefer containers, highlighting the vital role of maritime infrastructure in meeting global consumption needs.

A second major driver is the rapid growth of pharmaceutical and healthcare cold chain logistics, which requires advanced temperature control for biologics, vaccines, and personalized medicines. This sector demands precise, compliant, and traceable transport solutions to prevent the spoilage of high-value life sciences products. United Cargo reported in January 2025 that it transported nearly 1.3 billion pounds of cargo in 2024, including about 43 million pounds of medical shipments. Furthermore, the International Air Transport Association noted in January 2025 that global air cargo demand for the full year 2024 rose by 11.3 percent compared to the previous year, surpassing the record volumes of 2021.

Market Challenge

High capital and operational expenditures represent a major bottleneck for the Global Refrigerated Transport Market. The substantial investment needed to purchase specialized climate-controlled vehicles and maintain energy-heavy refrigeration units creates high barriers to entry. These costs are further aggravated by strict regulatory compliance requirements and fluctuating fuel prices, which compress profit margins and deter new market participants. Faced with such financial pressures, carriers often delay fleet modernization or expansion, which limits the capacity available to support growing global food and pharmaceutical supply chains.

This financial strain is highlighted by recent industry data regarding rising fleet expenses. The American Transportation Research Institute reported that in 2025, non-fuel marginal costs for motor carriers hit a record high of $1.779 per mile, largely due to an 8.3 percent increase in truck and trailer lease or purchase payments compared to

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the prior year. This escalation in equipment and operating costs directly hinders the ability of logistics providers to scale their operations effectively, thereby stalling the market's overall ability to efficiently meet increasing demand volumes.

Market Trends

The electrification of refrigerated transport fleets is becoming a key strategy to decarbonize logistics and adhere to strict emission regulations. Companies are increasingly adopting electric transport refrigeration units (eTRUs) and axle-based energy recovery systems to remove dependence on diesel-powered auxiliary engines, a transition supported by battery advancements that enable autonomous temperature control. In September 2024, Thermo King reported that its AxlePower energy recovery system could reduce carbon emissions by up to 12 tonnes annually for distribution trailers, illustrating the substantial environmental benefits of these technologies.

Simultaneously, the development of smart containers with active temperature management is revolutionizing global cold chain efficiency by combining real-time monitoring with autonomous climate control. These advanced units use algorithms to adjust compressor speeds and energy use based on external conditions, significantly reducing operational costs and extending shelf life during transit. Carrier Transicold announced in November 2024 that its new OptimaLINE container refrigeration unit lowers annual energy costs by up to 15 percent compared to competitor units, underscoring the financial advantages of intelligent cold chain solutions.

Key Market Players

- Carrier Transicold
- Ingersoll Rand PLC
- China International Marine Containers
- Lamberet SAS
- Schmitz Cargobull AG
- Wabash National Corporation
- Hyundai Motor Company

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Utility Trailer Manufacturing Company

Daikin Industries Ltd

Singamas Container Holdings Ltd

Report Scope

In this report, the Global Refrigerated Transport Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- Refrigerated Transport Market, By Mode
  - Road (Refrigerated LCV, Refrigerated MHCV and Refrigerated HCV)
  - Sea
  - Rail and Air
- Refrigerated Transport Market, By Product Type
  - Chilled and Frozen
- Refrigerated Transport Market, By Technology
  - Vapor Compression Systems and Cryogenic Systems
- Refrigerated Transport Market, By Temperature
  - Single Temperature and Multi Temperature
- Refrigerated Transport Market, By Region
  - North America
    - United States

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- Canada
- Mexico

Europe

- France
- United Kingdom
- Italy
- Germany
- Spain

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea

South America

- Brazil
- Argentina
- Colombia

Middle East & Africa

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South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Refrigerated Transport Market.

Available Customizations:

Global Refrigerated Transport Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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