

Cold Chain Logistics Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Service Type (Refrigerated Warehouse, Refrigerated Transportation), By Application (Seafood, Meat, Fruit & Vegetable, Dairy Products, Alternative Protein, Others), By Temperature Type (Frozen, Chilled), By Technology (Dry Ice, Gel Packs, Eutectic Plates, Liquid Nitrogen, Quilts), By Region, Competition, 2018-2028

<https://marketpublishers.com/r/C682B17CDA03EN.html>

Date: November 2023

Pages: 182

Price: US\$ 4,900.00 (Single User License)

ID: C682B17CDA03EN

Abstracts

The Global Cold Chain Logistics Market, valued at USD 214.9 Billion in 2022, is poised for substantial growth in the forecast period, with a projected CAGR of 15.7% through 2028.

Key Market Drivers

1. Escalating Demand for Perishable Goods Driving Cold Chain Logistics Market Growth:

The significant driver fueling the expansion of the global cold chain logistics market is the increasing demand for perishable goods. This trend mirrors shifting consumer preferences and lifestyle changes that prioritize fresh, high-quality, and perishable products. With consumers seeking out fresh produce, dairy, meat, seafood, and pharmaceuticals in greater numbers, the need for a robust and efficient cold chain logistics system has become paramount.

Several factors contribute to this heightened demand. Firstly, the global population is on the rise, with more people residing in urban areas and leading increasingly hectic lives. Consequently, there is a growing expectation for convenient access to ready-to-consume perishable goods year-round, delivered in optimal condition right to their doorsteps. Cold chain logistics serves as the linchpin of this convenience-driven supply chain.

Furthermore, the expansion of e-commerce, accelerated by the COVID-19 pandemic, has boosted the demand for cold chain logistics. Online grocery shopping and meal kit delivery services require efficient cold storage and transportation to ensure that perishable items arrive fresh and safe. This trend is likely to continue as more consumers opt for the convenience of online shopping. To meet these escalating demands, the cold chain logistics industry has undergone significant technological advancements. IoT sensors, RFID tracking, and real-time temperature monitoring systems have become standard tools to maintain product integrity. These technologies provide end-to-end visibility into the supply chain, enabling better control and rapid response to any temperature deviations. In conclusion, the growing demand for perishable goods, driven by population growth, changing consumer preferences, and the expansion of e-commerce, is a powerful driver fueling the global cold chain logistics market. As long as consumers continue to prioritize fresh and temperature-sensitive products, the importance of an efficient and reliable cold chain logistics system will remain indispensable to the modern supply chain.

Globalization of the Food Supply Chain Have Played a Crucial Role in The Growth of The Cold Chain Logistics Market

The globalization of the food supply chain is poised to be a major driving force behind the growth of the global cold chain logistics market. This phenomenon reflects a fundamental shift in how food is sourced, processed, and distributed on a global scale. As consumers' tastes become more diverse and demanding, and as emerging markets open up to a wider array of food products, the need for efficient and reliable cold chain logistics has never been more critical. One of the primary drivers of this trend is the consumer's increasing appetite for fresh and perishable goods year-round, regardless of season or geographic location. Tropical fruits, seafood, dairy products, and exotic vegetables are just a few examples of products that have become staples in households worldwide. To meet this demand, the food industry has become a global enterprise, with products moving across continents and oceans. As a result, the cold chain logistics market is experiencing unprecedented growth. Cold chain logistics encompass the storage, transportation, and distribution of temperature-sensitive products, ensuring that

they maintain their quality, safety, and nutritional value throughout their journey from producer to consumer.

The globalization of the food supply chain brings with it several key challenges that only cold chain logistics can address effectively. These challenges include maintaining precise temperature control across long distances, compliance with varying international regulations, and the need for sophisticated tracking and monitoring systems to guarantee product integrity. Moreover, the COVID-19 pandemic has further underscored the importance of robust cold chain logistics, especially in the rapid distribution of vaccines and medical supplies worldwide. In response to these challenges, the cold chain logistics industry has seen significant technological advancements, including the use of IoT sensors, RFID tracking, and real-time temperature monitoring systems. These technologies enhance visibility, traceability, and efficiency within the supply chain, providing both businesses and consumers with greater confidence in the safety and quality of products. In conclusion, the globalization of the food supply chain is a powerful driver behind the growth of the global cold chain logistics market. As consumers continue to demand fresh and perishable products from around the world, the need for efficient, reliable, and technologically advanced cold chain logistics solutions will only intensify, making this sector a critical component of the modern global economy.

Key Market Challenges

Temperature Maintenance

The ability to maintain precise temperature control throughout the entire supply chain is a critical challenge that poses a significant threat to the global cold chain logistics market. Temperature maintenance is the linchpin of this industry, as it directly impacts the quality, safety, and shelf life of temperature-sensitive products, such as food, pharmaceuticals, and chemicals. One of the primary issues in temperature maintenance is the inherent difficulty in consistently and accurately controlling temperatures during transportation and storage. Variations in temperature, even within acceptable ranges, can lead to spoilage, bacterial growth, and product degradation. These temperature fluctuations are particularly concerning for perishable goods, vaccines, and medications, where efficacy and safety are paramount. Long-distance transportation, especially across international borders, presents additional challenges. Varying climates and weather conditions can lead to temperature deviations, which can be detrimental to the integrity of the products being transported. Additionally, the time-sensitive nature of some shipments, such as vaccines or fresh produce, means that any temperature

excursion can have severe consequences.

The cost of maintaining temperature-controlled environments is another significant challenge. Refrigeration, insulation, and climate control systems can be expensive to operate and maintain. Rising energy costs, coupled with environmental concerns, necessitate energy-efficient solutions without compromising temperature stability. Technological solutions like IoT sensors and real-time monitoring have helped address some of these challenges, providing better visibility and control over temperature-sensitive products in transit. However, ensuring the widespread adoption and integration of these technologies across the industry remains a complex task. In conclusion, the ability to maintain precise temperature control throughout the cold chain logistics process is vital for the industry's success. Failure to address this challenge can result in product losses, compliance issues, and customer dissatisfaction, ultimately hampering the growth and efficiency of the global cold chain logistics market.

Infrastructure Gaps

Infrastructure gaps are a significant impediment to the growth and efficiency of the global cold chain logistics market. These gaps encompass deficiencies in both physical and technological infrastructure, which are essential for the smooth and reliable transportation and storage of temperature-sensitive products. Insufficient temperature-controlled storage facilities, such as warehouses and distribution centers, can limit the capacity and coverage of cold chain logistics operations. Outdated or inadequate refrigerated transportation systems, including trucks, containers, and vessels, can result in delays and compromised product quality. Unreliable energy supplies can disrupt temperature control, posing a risk to the integrity of goods. In regions with infrastructure gaps, the adoption of advanced technologies like IoT sensors and real-time monitoring systems is often limited, reducing supply chain visibility and control. Insufficient road, rail, and port infrastructure can lead to transportation inefficiencies and increased costs.

Moreover, regulatory compliance is often compromised in areas with infrastructure gaps, as specialized facilities and equipment may be lacking, making it difficult to meet stringent standards. The shortage of skilled workers due to limited training and educational programs further exacerbates these challenges. These infrastructure gaps not only hinder the expansion of the cold chain logistics market but also pose risks to the safety, quality, and timeliness of temperature-sensitive products. Bridging these gaps demands substantial investments from governments and private sector stakeholders, especially in regions where cold chain logistics are underdeveloped. Such efforts are crucial to ensure the competitiveness and sustainability of the cold chain

logistics industry in an increasingly globalized and demanding market.

Key Market Trends

Advanced Technology Adoption

Environmental

Government Initiatives

Government initiatives are poised to play a pivotal role in driving the growth and development of the global cold chain logistics market. These initiatives, often driven by a mix of economic, environmental, and public health concerns, are aimed at fostering a more efficient, resilient, and sustainable cold chain ecosystem. One of the primary areas where government initiatives are impactful is in agriculture. Many governments recognize the critical role that cold chain logistics plays in reducing food waste and improving food security. To this end, they are investing in infrastructure development, including cold storage facilities and refrigerated transportation networks. These investments not only benefit farmers by reducing post-harvest losses but also ensure a more stable food supply for consumers. Moreover, in the healthcare sector, governments have intensified their support for cold chain logistics, especially in vaccine distribution. The COVID-19 pandemic brought this to the forefront, with governments worldwide investing in temperature-controlled storage and transportation systems to ensure rapid vaccine deployment.

Additionally, governments are often involved in shaping regulatory frameworks and quality standards for cold chain logistics, ensuring that products meet safety and quality requirements. Such regulations encourage the adoption of advanced cold chain technologies and best practices. Furthermore, environmental concerns have led some governments to incentivize the adoption of eco-friendly and energy-efficient refrigeration technologies and transportation methods, promoting sustainability within the cold chain industry. In conclusion, government initiatives are instrumental in shaping the future of the global cold chain logistics market. Their support not only accelerates market growth but also promotes efficient, sustainable, and resilient cold chain solutions, benefiting both businesses and consumers.

Segmental Insights

Application Insights

The fruits & Vegetables and dairy products Expected to Witness Significant Growth in the Market, these goods need a certain temperature for storage and transit because the majority of them are perishable and temperature sensitive. As a result, it is anticipated that the cold chain logistics industry is expected to grow in the upcoming years.

Temperature Type Insights

By temperature type, Frozen sector is expected to dominate the Cold Chain Logistics market.

Regional Insights

The Asia Pacific to Dominate has established itself as the leader in the Global Cold Chain Logistics Market with a significant revenue share in 2022. Asia Pacific is estimated to be the fastest-growing regional market from 2020 to 2028. This is due to increasing government investments for cold chain logistics infrastructure development. Countries such as South Korea, China, Japan, and India have a strong demand for meat, dairy, and processed food products, which in turn is anticipated to drive the market for the cold chain in the region. Moreover, factors like increased foreign direct investments in the healthcare sector, and the promotion of pharmaceutical industries are boosting the market growth for the pharmaceuticals sector in the Asia Pacific region.

Key Market Players

Americold Logistics, LLC

Burriss Logistics

Cold Box

Conestoga Cold Storage

Congebec

Lineage Logistics Holding, LLC

Nichirei Corporation

Tippmann Group

United States Cold Storage

VersaCold Logistics Services

Report Scope:

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

Cold Chain Logistics Market, By Service Type:

Refrigerated Warehouse

Refrigerated Transportation

Cold Chain Logistics Market, By Application:

Seafood

Meat

Fruit & Vegetable

Dairy Products

Alternative Protein

Others

Cold Chain Logistics Market, By Temperature Type:

Frozen

Chilled

Cold Chain Logistics Market, By Technology:

Dry Ice

Gel Packs

Eutectic Plates

Liquid Nitrogen

Quilts

Cold Chain Logistics Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Cold Chain Logistics Market.

Available Customizations:

Global Cold Chain Logistics Market report with the given market data, Tech Sci 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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