

# **Middle East & Africa Refrigeration Monitoring Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Offering (Hardware, Software, and Service), Hardware (Sensors, IoT Devices, Networking Devices, Monitoring Meter, Display, Thermistors, and Other Hardware), Industry (Food and Beverages, Healthcare, Chemicals, and Other Industries), Application (Storage, Transportation, Inventory Protection, and Other Applications), and Monitoring Types (Real-Time Temperature Tracking, Data Logging and Analysis, Energy Management, Product Freshness Monitoring, and Other Monitoring Types)**

<https://marketpublishers.com/r/ME65B60245D1EN.html>

Date: November 2025

Pages: 204

Price: US\$ 3,450.00 (Single User License)

ID: ME65B60245D1EN

## **Abstracts**

The Middle East & Africa refrigeration monitoring market is poised for substantial growth, with projections indicating a rise from US\$ 496.1 million in 2024 to US\$ 766.8 million by 2031, reflecting a compound annual growth rate (CAGR) of 6.8% from 2025 to 2031. This growth is primarily fueled by advancements in technology, stringent regulatory requirements, an increase in cold storage facilities, and specific demands from various sectors.

Currently, South Africa leads the continent in cold storage capacity, catering to both positive (fresh fruits and vegetables) and negative (fish and meat) storage needs. A notable development is the establishment of a 25,500-square-meter cold storage

warehouse by a logistics and supply management company, which cost approximately US\$ 10 million. This facility, one of the largest in Africa, can hold 37,000 pallets and includes versatile chambers for chilled, frozen, and super-frozen products. Similar initiatives are underway in regions like KwaZulu Natal and the Western Cape, indicating a trend towards enhanced cold storage solutions.

The refrigeration monitoring market in the Middle East and Africa is expanding rapidly, driven by the need for efficient temperature management and compliance with safety regulations across industries such as food and beverages, healthcare, and logistics. For instance, in November 2023, the ARCH Cold Chain Solutions Fund inaugurated its flagship cold storage facility in Nairobi, Kenya, located within the Tatu City Special Economic Zone. This state-of-the-art facility is the first of its kind in Africa, designed to provide temperature-controlled storage and distribution for perishable food items and pharmaceuticals, aiming to reduce food waste and enhance food safety in East Africa. Similarly, Cold Solutions announced a US\$ 70 million investment in advanced temperature-controlled cold storage facilities in Kenya, with major developments planned in Nairobi and Mombasa.

The market segmentation of the Middle East & Africa refrigeration monitoring market reveals several key areas of focus. By offering, the market is divided into hardware, software, and services, with hardware holding the largest market share in 2024. Within the hardware segment, sensors, IoT devices, networking devices, monitoring meters, and thermistors are included, with sensors being the most significant contributor. The industry segmentation highlights food and beverages as the leading sector, followed by healthcare and chemicals. In terms of application, storage is the dominant category, while real-time temperature tracking is the most prevalent monitoring type.

A notable trend in the refrigeration monitoring market is the integration of blockchain technology with cloud platforms. This combination allows for secure and scalable data storage and sharing, enabling stakeholders to access and share critical data in real-time from any location. Blockchain enhances traceability by providing all supply chain participants with access to a product's temperature history and route, thereby increasing confidence and compliance. This results in a comprehensive and immutable record of the product's journey, allowing manufacturers, shippers, and retailers to verify the product's condition at each stage, ensuring complete traceability.

The decentralized nature of blockchain technology facilitates real-time monitoring of temperature and environmental factors through IoT sensors. These sensors log data onto a blockchain ledger, ensuring that any temperature fluctuations are permanently

recorded. This capability allows for immediate responses to any issues that may arise, thus preserving product quality. Furthermore, the immutable record maintained by blockchain simplifies regulatory compliance, as auditors can easily access and verify records, reducing the time and costs associated with compliance checks.

Geographically, the market is segmented into the United Arab Emirates, Saudi Arabia, South Africa, and the rest of the Middle East and Africa, with the UAE holding the largest market share in 2024. The UAE's food and beverage industry is highly regulated, necessitating strict food safety certifications. Effective refrigeration monitoring systems are essential for compliance, helping businesses manage hygiene and safety standards. The Federal Authority for Food Safety (FAFS) oversees food safety practices in the UAE, working with health officials to implement comprehensive food safety procedures. The stringent regulations in the UAE drive the demand for advanced refrigeration monitoring solutions.

Key players in the refrigeration monitoring market include ORBCOMM Inc, TE Connectivity Ltd, Danfoss AS, Vaisala Oyj, Monnit Corporation, Samsara Inc, and others. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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