

Cold Chain Market Size, Share, and Outlook, 2025 Report- By Type (Refrigerated Storage, Refrigerated Trucks, Refrigerated Railway Wagons, Refrigerated Cargo Containers), Temperature (Chilled, Frozen), Commodity (Horticulture, Floriculture, Dairy Products, Meat, Fish, and Poultry, Processed Food Products, Pharmaceuticals, Chemicals, Others), and Companies, 2021-2032

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Abstracts

Cold Chain Market Outlook

The global Cold Chain market is expected to register a growth rate of 10.1% during the forecast period from \$285.1 Billion in 2024 to \$615.6 Billion in 2032. The Cold Chain market is a thriving business that is poised to keep growing and presents potential growth opportunities for companies across the industry value chain.

The comprehensive market research report presents 12-year historic and forecast data on Cold Chain segments across 22 countries from 2021 to 2032. Key segments in the report include By Type (Refrigerated Storage, Refrigerated Trucks, Refrigerated Railway Wagons, Refrigerated Cargo Containers), Temperature (Chilled, Frozen), Commodity (Horticulture, Floriculture, Dairy Products, Meat, Fish, and Poultry, Processed Food Products, Pharmaceuticals, Chemicals, Others). Over 70 tables and charts showcase findings from our latest survey report on Cold Chain markets.

Cold Chain Market Insights, 2025

The cold chain market in 2025 is undergoing rapid modernization to meet the rising demand for perishable foods, pharmaceuticals, and biologics. Advanced refrigeration technologies, IoT sensors, and blockchain-enabled traceability systems are reducing spoilage and enhancing compliance with stringent food safety and pharmaceutical standards. The COVID-19 vaccine distribution experience has accelerated investments in cold chain infrastructure worldwide, particularly in emerging economies. E-commerce growth and rising consumer expectations for fresh produce and frozen foods further drive expansion. Sustainability initiatives focus on reducing energy consumption and adopting eco-friendly refrigerants. Asia-Pacific and North America lead in technology adoption, while Africa and Latin America are expanding infrastructure rapidly.

Five Trends that will define global Cold Chain market in 2025 and Beyond

A closer look at the multi-million global market for Cold Chain identifies rapidly shifting consumer preferences across categories. By focusing on growth and resilience, leading Cold Chain companies are prioritizing their investments across categories, markets, and geographies. The report analyses the most important market trends shaping the new landscape to support better decisions for the long and short-term future.

What are the biggest opportunities for growth in the Cold Chain industry?

The Cold Chain sector demonstrated remarkable resilience over the past year across developed and developing economies. Further, the market presents significant opportunities to leverage the existing momentum towards actions by 2030. On the other hand, recent macroeconomic developments including rising inflation and supply chain disruptions are putting pressure on companies. The chapter assists users to identify growth avenues and address business challenges to make informed commercial decisions with unique insights, data forecasts, and in-depth market analyses.

Cold Chain Market Segment Insights

The Cold Chain industry presents strong offers across categories. The analytical report offers forecasts of Cold Chain industry performance across segments and countries. Key segments in the industry include By Type (Refrigerated Storage, Refrigerated Trucks, Refrigerated Railway Wagons, Refrigerated Cargo Containers), Temperature (Chilled, Frozen), Commodity (Horticulture, Floriculture, Dairy Products, Meat, Fish, and Poultry, Processed Food Products, Pharmaceuticals, Chemicals, Others). The largest types, applications, and sales channels, fastest growing segments, and the key factors

driving each of the categories are included in the report.

Forecasts of each segment across five regions are provided from 2021 through 2032 for Asia Pacific, North America, Europe, South America, Middle East, and African regions. In addition, Cold Chain market size outlook is provided for 22 countries across these regions.

Market Value Chain

The chapter identifies potential companies and their operations across the global Cold Chain industry ecosystem. It assists decision-makers in evaluating global Cold Chain market fundamentals, market dynamics, and disruptive trends across the value chain segments.

Scenario Analysis and Forecasts

Strategic decision-making in the Cold Chain industry is multi-faceted with the increased need for planning across scenarios. The report provides forecasts across three case scenarios: low growth, reference case, and high growth cases.

Asia Pacific Cold Chain Market Analysis: A Promising Growth Arena for Business Expansion

As companies increasingly expand across promising Asia Pacific markets with a combined population of over 4.5 billion, the medium-to-long-term future remains robust. The presence of the fastest-growing economies such as China, India, Thailand, Indonesia, and Vietnam coupled with strengthening middle-class populations and rising disposable incomes drive the market. In particular, China and India are witnessing rapid shifts in consumer purchasing behavior. China is recovering steadily with optimistic forecasts for 2025. Further, Japanese and South Korean markets remain stable with most companies focusing on new product launches and diversification of sales channels.

The State of Europe Cold Chain Industry 2025: Focus on Accelerating Competitiveness

As companies opt for an integrated agenda for competitiveness, the year 2025 presents optimistic scenarios for companies across the ecosystem. With signs of economic recovery across markets, companies are increasing their investments. Europe is one of the largest markets for Cold Chain with demand from both Western Europe and Eastern

European regions increasing over the medium to long-term future. Increasing omnichannel shopping amidst robust consumer demand for value purchases shapes the market outlook. The report analyses the key Cold Chain market drivers and opportunities across Germany, France, the United Kingdom, Spain, Italy, Russia, and other Europe.

The US Cold Chain market Insights Executives are most excited about opportunities for the US Cold Chain industry.

Easing inflation coupled with strengthening consumer sentiment is encouraging aggressive actions from the US Cold Chain companies. Market players consistently focusing on innovation and pursuing new ways to create value are set to excel in 2025. In addition, the Canadian and Mexican markets offer lucrative growth pockets for manufacturers and vendors. Focus on private-brand offerings and promotions, diversified sales channels, expansion into niche segments, adoption of advanced technologies, and sustainability are widely observed across the North American Cold Chain market.

Latin American Cold Chain market outlook rebounds in line with economic growth.

Underlying demand remains higher among urban consumers with an optimistic economic outlook across Brazil, Argentina, Chile, and other South and Central American countries. Increased consumer spending has been reported since H2-2024 and the prospects remain strong for 2025. Aggressive ecosystem moves to create new sources of income are widely observed across markets in the region. Marketing activities focused on customer insights, operations, and support functions are quickly gaining business growth in the region.

**Middle East and Africa Cold Chain Markets New Opportunities for Companies
Harnessing Diversity**

Rapid growth in burgeoning urban locations coupled with a young and fast-growing population base is attracting new investments in the Middle East and African Cold Chain markets. Designing expansion and marketing strategies to cater to the local consumer base supports the market prospects. In addition to Nigeria, Algeria, South Africa, and other markets, steady growth markets in Ethiopia, Rwanda, Ghana, Tanzania, the Democratic Republic of Congo, and others present significant prospects for companies. On the other hand, Middle Eastern Cold Chain markets including the UAE, Saudi Arabia, Qatar, and Oman continue to offer lucrative pockets of growth.

Competitive Landscape How Cold Chain companies outcompete in 2025?

The ability to respond quickly to evolving consumer preferences and adapt businesses to niche consumer segments remains a key growth factor. The report identifies the leading companies in the industry and provides their revenue for 2024. The market shares of each company are also included in the report. Further, business profiles, SWOT analysis, and financial analysis of each company are provided in detail. Key companies analyzed in the report include Americold Realty Trust, Lineage Logistics Holdings, LLC, AGRO Merchants Group, LLC, Nichirei Corporation, Kloosterboer Group B.V., NewCold Coöperatief U.A., VersaCold Logistics Services Inc., Interstate Warehousing, Inc., Frialsa Logistica S.A. de C.V., Cloverleaf Cold Storage Co., Emergent Cold Storage LLC, Henningsen Cold Storage Co., Burris Logistics, Gruppo Marconi Logistica Integrata S.r.l., Congebec Logistics Inc., Hanson Logistics, LLC, Conestoga Cold Storage, Oxford Cold Storage Ltd., Zero Mountain, Inc., Agri Norcold A/S, Montague Cold Storage Pty Ltd., Bring Frigo AS, Confederation Freezers LP, Friozem Armazens Frigorificos Ltda.

Cold Chain Market Scope

Leading Segments

By Type

Refrigerated Storage

Refrigerated Trucks

Refrigerated Railway Wagons

Refrigerated Cargo Containers

By Temperature

Chilled

Frozen

By Commodity

Horticulture

Floriculture

Dairy Products

Meat, Fish, and Poultry

Processed Food Products

Pharmaceuticals

Chemicals

Others

Leading Companies

Americold Realty Trust

Lineage Logistics Holdings, LLC

AGRO Merchants Group, LLC

Nichirei Corporation

Kloosterboer Group B.V.

NewCold Coöperatief U.A.

VersaCold Logistics Services Inc.

Interstate Warehousing, Inc.

Frialsa Logistica S.A. de C.V.

Cloverleaf Cold Storage Co.

Emergent Cold Storage LLC

Henningsen Cold Storage Co.

Burriss Logistics

Gruppo Marconi Logistica Integrata S.r.l.

Congebec Logistics Inc.

Hanson Logistics, LLC

Conestoga Cold Storage

Oxford Cold Storage Ltd.

Zero Mountain, Inc.

Agri Norcold A/S

Montague Cold Storage Pty Ltd.

Bring Frigo AS

Confederation Freezers LP

Friozem Armazens Frigorificos Ltda.

Geographies

North AmericaUS, Canada, Mexico

EuropeGermany, France, UK, Spain, Italy, Nordics, BeNeLux, Others

Asia PacificChina, India, Japan, South Korea, Australia, South East Asia, Others

Latin AmericaBrazil, Argentina, Others

Middle East and AfricaSaudi Arabia, UAE, Other Middle East, South Africa, Other Africa

Reasons to Buy the report

Make informed decisions through long and short-term forecasts across 22 countries and segments.

Evaluate market fundamentals, dynamics, and disrupting trends set to shape 2025 and beyond.

Gain a clear understanding of the competitive landscape, with product portfolio and growth strategies.

Get an integrated understanding of the entire market ecosystem and companies.

Stay ahead of the competition through plans for growth in a changing environment for your geographic expansion.

Assess the impact of advanced technologies and identify growth opportunities based on actionable data and insights.

Get free Excel spreadsheet and PPT versions along with the report PDF.

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By Type

- Refrigerated Storage
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- Refrigerated Railway Wagons
- Refrigerated Cargo Containers

By Temperature

- Chilled
- Frozen

By Commodity

- Horticulture
- Floriculture
- Dairy Products
- Meat, Fish, and Poultry
- Processed Food Products
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- Others

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Lineage Logistics Holdings, LLC

AGRO Merchants Group, LLC

Nichirei Corporation

Kloosterboer Group B.V.

NewCold Co?peratief U.A.

VersaCold Logistics Services Inc.

Interstate Warehousing, Inc.

Frialsa Logistica S.A. de C.V.
Cloverleaf Cold Storage Co.
Emergent Cold Storage LLC
Henningsen Cold Storage Co.
Burriss Logistics
Gruppo Marconi Logistica Integrata S.r.l.
Congebec Logistics Inc.
Hanson Logistics, LLC
Conestoga Cold Storage
Oxford Cold Storage Ltd.
Zero Mountain, Inc.
Agri Norcold A/S
Montague Cold Storage Pty Ltd.
Bring Frigo AS
Confederation Freezers LP
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