

Precision Medicine Supply Chain Logistics Market Size, Share and Growth Outlook 2026: By Type (Clinical, Commercial), By Service, By Product, By Storage Condition, By Application, Companies to 2034.

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Abstracts

The global Precision Medicine Supply Chain Logistics Market size is forecast to increase from \$8.8 Billion in 2026 to \$20.78 Billion in 2034 at a CAGR of 11.34% between 2026 and 2034.

The Precision Medicine Supply Chain Logistics market report provides detailed analysis and outlook of Precision Medicine Supply Chain Logistics segments including By Type (Clinical, Commercial), By Service (Transportation, Warehousing, Sourcing and Procurement, Others), By Product (Cell and Gene Therapies (CGT), Monoclonal Antibodies, Nucleic Acid Therapies, Vaccines), By Storage Condition (Ambient Storage, Refrigerated Storage, Ultra-Low Temperature Storage, Cryogenic Storage), By Application (Oncology, Cardiology, Neurology, Infectious Diseases, Rare Diseases) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Precision Medicine Supply Chain Logistics Industry Overview

Advanced Therapies Are Transforming the Requirements of Pharmaceutical Supply Chains

The precision medicine supply chain logistics industry is undergoing a major transformation as cell therapies, gene therapies, and personalized medicines create

unprecedented requirements for temperature-controlled distribution and chain-of-custody management. Unlike conventional pharmaceuticals, advanced therapies often involve highly individualized products with limited stability windows and stringent handling requirements, necessitating specialized logistics infrastructure capable of preserving product integrity from manufacturing through clinical administration. The industry is increasingly investing in cryogenic transportation, real-time monitoring technologies, and Good Distribution Practice-compliant networks to support the growing commercialization of autologous and allogeneic therapies. As precision medicines move into broader clinical use, logistics providers are becoming critical strategic partners within the advanced therapy ecosystem.

Cryogenic Monitoring and Digital Visibility Are Strengthening Supply Chain Reliability

The increasing value and complexity of precision medicine products are driving demand for technologies that provide continuous visibility into transportation conditions and product integrity. Logistics providers and therapy developers are implementing advanced monitoring systems capable of tracking temperature stability, environmental conditions, and shipment performance in real time. Reflecting this trend, MVE Biological Solutions, a subsidiary of Cryoport, introduced Integrated Condition Monitoring Systems embedded directly within cryogenic dewars. The technology enables advanced therapy logistics teams to monitor thermal integrity boundaries and temperature performance continuously during international transport of highly perishable therapeutic products. Such innovations are becoming essential as manufacturers seek to reduce product loss risks and improve confidence in global distribution networks supporting cell and gene therapies.

Global Infrastructure Expansion Is Building the Foundation for Precision Medicine Commercialization

The commercialization of advanced therapies is also accelerating investments in specialized logistics infrastructure and regional distribution capabilities. Pharmaceutical manufacturers increasingly require integrated third-party logistics providers capable of managing complex, temperature-sensitive therapies across multiple geographies. Supporting this trend, Cencora entered into a direct partnership with Kite to manage the United States distribution network and temperature-controlled logistics infrastructure for autologous CAR T-cell therapies. The company further expanded its precision medicine capabilities through the integration of NextPharma Logistics, establishing Good Distribution Practice-compliant deep-frozen and refrigerated distribution operations across Germany, Austria, and Switzerland. Additional investments, including a

dedicated precision medicine facility in Italy and a cryogenic specialty facility in the Netherlands, demonstrate the industry's broader movement toward building globally connected infrastructure capable of supporting the large-scale commercialization of personalized and advanced therapeutic products.

Precision Medicine Supply Chain Logistics Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Precision Medicine Supply Chain Logistics market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Kuehne + Nagel, FedEx Corporation, Marken Logistics, UPS (United Parcel Service), DB Schenker, CEVA Logistics, DSV, C.H. Robinson, Jaydeep Logistics, Safexpress. The Precision Medicine Supply Chain Logistics market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Precision Medicine Supply Chain Logistics industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Precision Medicine Supply Chain Logistics Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Precision Medicine Supply Chain Logistics companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Precision Medicine Supply Chain Logistics markets

- Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Precision Medicine Supply Chain Logistics Market Competitive Benchmarking and Company Analysis

Leading companies in Precision Medicine Supply Chain Logistics industry include- Kuehne + Nagel, FedEx Corporation, Marken Logistics, UPS (United Parcel Service), DB Schenker, CEVA Logistics, DSV, C.H. Robinson, Jaydeep Logistics, Safexpress. The Precision Medicine Supply Chain Logistics market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Precision Medicine Supply Chain Logistics Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Precision Medicine Supply Chain Logistics market remains one of the strongest-performing segments in the country.

The US Precision Medicine Supply Chain Logistics Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Precision Medicine Supply Chain Logistics market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026.

Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Precision Medicine Supply Chain Logistics industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Precision Medicine Supply Chain Logistics markets

Canada's strong Precision Medicine Supply Chain Logistics sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Precision Medicine Supply Chain Logistics market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Precision Medicine Supply Chain Logistics Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Precision Medicine Supply Chain Logistics market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Precision Medicine Supply Chain Logistics population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Precision Medicine Supply Chain Logistics industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Precision Medicine Supply Chain Logistics market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Precision Medicine Supply Chain Logistics sales through 2034

France Precision Medicine Supply Chain Logistics companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Precision Medicine Supply Chain Logistics Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Precision Medicine Supply Chain Logistics distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Precision Medicine Supply Chain Logistics Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Precision Medicine Supply Chain Logistics market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Precision Medicine Supply Chain Logistics industry, offering opportunities for

both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Precision Medicine Supply Chain Logistics industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Precision Medicine Supply Chain Logistics Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Precision Medicine Supply Chain Logistics market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Precision Medicine Supply Chain Logistics market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Precision Medicine Supply Chain Logistics Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Precision Medicine Supply Chain Logistics Market Segmentation

By Type

Clinical

Commercial

By Service

Transportation

Warehousing

Sourcing and Procurement

Others

By Product

Cell and Gene Therapies (CGT)

Monoclonal Antibodies

Nucleic Acid Therapies

Vaccines

By Storage Condition

Ambient Storage

Refrigerated Storage

Ultra-Low Temperature Storage

Cryogenic Storage

By Application

Oncology

Cardiology

Neurology

Infectious Diseases

Rare Diseases

Leading Companies in Precision Medicine Supply Chain Logistics Industry (2026)

Kuehne + Nagel

FedEx Corporation

Marken Logistics

UPS (United Parcel Service)

DB Schenker

CEVA Logistics

DSV

C.H. Robinson

Jaydeep Logistics

Safexpress

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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FedEx Corporation

Marken Logistics

UPS (United Parcel Service)

DB Schenker

CEVA Logistics

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