

# Pharmaceutical Refrigerated Warehousing Market Set to Double by 2034, Driven by Biologics and Vaccine Demand

*Global market to grow from USD 1.5 billion in 2024 to USD 3.5 billion by 2034 at a CAGR of 8.7%*

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/EINPresswire.com/ -- The global

[pharmaceutical refrigerated](#)

[warehousing market](#) is on track for

strong growth, projected to rise from

USD 1.5 billion in 2024 to USD 3.5 billion by 2034. This reflects a healthy compound annual growth rate (CAGR) of 8.7%, fueled by the rising demand for biologics, vaccines, and other temperature-sensitive medicines.



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Biologics storage is set to remain the largest segment of the market, supported by the increasing need for strict temperature control in vaccines and biologic drugs. Meanwhile, logistics and distribution services for temperature-sensitive pharmaceuticals are expected to record the fastest growth, as global vaccine distribution and personalized medicine continue to expand.

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Key uses of refrigerated warehousing include the safe storage and transport of vaccines, biologics, and specialty medicines, with growing attention to protecting cold chain integrity throughout the supply process. North America is expected to maintain market leadership due to its advanced healthcare infrastructure and strict regulatory standards, while the Asia-Pacific region is forecasted to experience the fastest growth as healthcare investments and infrastructure rapidly expand.

Top 10 Companies

Americold Logistics

Lineage Logistics

United States Cold Storage

Kuehne + Nagel

DHL Supply Chain

DB Schenker

Nippon Express

Yamato Logistics

SF Express

Agility Logistics

Technology is also reshaping the market. IoT-enabled monitoring systems and sustainable refrigeration solutions are increasingly being adopted to boost efficiency, cut costs, and lower carbon emissions. Industry leaders such as Americold Logistics, Lineage Logistics, and United States Cold Storage are focusing on expanding their cold chain networks and integrating smart technologies to meet rising demand.

#### Key Market Drivers

The growth of pharmaceutical refrigerated warehousing is being propelled by the expansion of cold chain logistics and rapid adoption of advanced technologies. According to the International Air Transport Association (IATA), global demand for cold chain logistics is expected to grow by 15% annually, largely due to increasing distribution of temperature-sensitive medicines.

Emerging economies are playing a key role, with governments investing heavily in healthcare infrastructure and cold chain systems to improve access to vital medicines. Technology adoption is also accelerating: the use of IoT-based temperature monitoring systems has grown 25% year-on-year, helping companies track and manage warehouse conditions in real time. This has not only boosted efficiency but also reduced risks of temperature-related spoilage and improved compliance with regulatory standards.

Regulations are further shaping the market. For example, the U.S. FDA's Drug Supply Chain Security Act requires stronger tracking and tracing of medicines, encouraging pharmaceutical companies to enhance cold chain capabilities. In response, Americold Logistics recently launched an IoT-enabled monitoring system that improved operational efficiency by 20% and reduced temperature excursions by 15%.

## Key Market Challenges

Despite strong growth, the market faces hurdles, particularly around regulatory compliance and infrastructure gaps. Compliance with strict storage and distribution standards, such as those outlined in the U.S. DSCSA and the EU's Good Distribution Practice guidelines, can be costly and complex. Industry reports suggest compliance costs for pharmaceutical companies have risen by 20% annually, placing financial strain on operations.

Infrastructure limitations remain a critical issue, especially in low-income countries where only 30% of healthcare facilities have reliable cold chain systems, compared to 80% in high-income nations. This disparity limits global access to vaccines and biologics. Operational challenges also weigh heavily on the industry, as refrigeration systems account for around 60% of total warehouse operating costs, according to the International Institute of Refrigeration.

Temperature excursions during transport remain a widespread problem, with 40% of pharmaceutical companies reporting issues that have led to product recalls and financial losses. Addressing these challenges will require further investments in infrastructure, adoption of energy-efficient technologies, and regulatory alignment across regions.

## Looking Ahead

The outlook for pharmaceutical refrigerated warehousing is positive. With vaccine demand expected to grow by 40% globally over the next decade, according to the World Health Organization, the need for reliable cold storage and distribution solutions will only intensify. Coupled with advances in IoT and sustainable refrigeration, the market is poised to deliver greater efficiency, compliance, and reach.

## Pharmaceutical Refrigerated Warehousing Market Segmentation

### By Product Type

Refrigerated Warehouses

Refrigerated Transportation

Temperature Monitoring Systems

### By Application

Vaccine Storage

Biologics Storage

Pharmaceutical Distribution

By End User

Pharmaceutical Companies

Biotech Companies

Healthcare Providers

By Technology

IoT-Enabled Monitoring

Automated Storage and Retrieval Systems

Energy-Efficient Refrigeration

By Distribution Channel

Direct Distribution

Third-Party Logistics (3PL)

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As healthcare continues to evolve worldwide, refrigerated warehousing will remain a vital part of the global supply chain, ensuring that life-saving medicines and vaccines are delivered safely and effectively to patients everywhere.

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