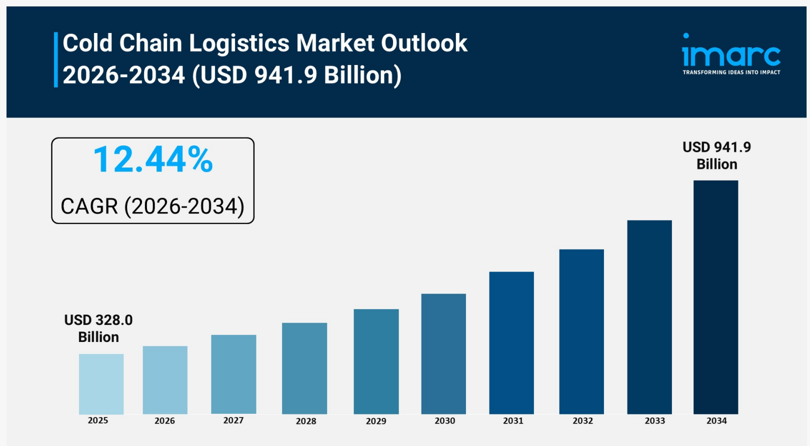
Cold Chain Logistics Market to Reach USD 941.9 Billion by 2034, Growing at 12.44% CAGR | IMARC Group



Cold Chain Logistics Market

IMARC Group estimates the market to reach USD 941.9 Billion by 2034, exhibiting a CAGR of 12.44% from 2026-2034.

SHERIDAN, WY, UNITED STATES, May 11, 2026 /EINPresswire.com/ -- The global cold chain logistics market size was valued at USD 328.0 Billion in 2025 and is projected to reach USD 941.9 Billion by 2034, expanding at a CAGR of 12.44% during 2026–2034, according to the latest market research report by IMARC Group. Growth is powered by rising demand for perishable foods, accelerating pharmaceutical cold-chain requirements, robust e-commerce last-mile delivery expansion, and technological advancements in real-time temperature monitoring, automation, and energy-efficient refrigeration systems.

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Cold chain logistics encompasses the end-to-end network of temperature-controlled storage and transportation solutions that preserve product integrity from origin to consumer. Refrigerated warehouses, reefer trucks, temperature-monitored rail freight, and air cargo cold suites collectively form this critical infrastructure layer serving food, pharmaceutical, chemical, and biotechnology industries worldwide.

The market was valued at USD 328.0 Billion in 2025 and is set to reach USD 941.9 Billion by 2034, expanding at a CAGR of 12.44% during 2026–2034. Refrigerated warehouses command a 65.0% type share, while dairy and frozen desserts lead applications at 33.2%. North America anchors regional dominance with a 38.6% market share, driven by advanced cold-chain infrastructure and rigorous regulatory compliance standards. Accelerating adoption of IoT-enabled monitoring, AI-driven route optimization, and sustainable refrigeration systems is reshaping operational benchmarks across the sector.

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The primary force driving cold chain logistics market growth is the escalating consumer appetite for fresh fruits, vegetables, dairy products, seafood, and frozen meals. Shifting dietary preferences toward organic, minimally processed, and convenience foods demand uninterrupted cold chain connectivity from farm to fork. The global dairy market reached USD 991.5 Billion in 2024 and is projected to exceed USD 1,505.8 Billion by 2033, directly amplifying demand for refrigerated storage and transportation at every distribution tier. Urban population growth and expanding modern retail formats are further intensifying this consumption-driven pressure on cold chain networks.

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The pharmaceutical sector’s dependence on validated, temperature-controlled logistics is intensifying as biologics, vaccines, hormone therapies, and precision medicine products multiply. Global pharmaceutical product markets surpassed USD 1 trillion, underscoring the enormous commercial stakes tied to cold chain integrity. Regulatory frameworks FDA Good Distribution Practice, EU GDP, and equivalent national standards compel manufacturers and logistics providers to invest in certified cold chain systems, specialist packaging, and real-time monitoring. US pharmaceutical production is anticipated to grow by 2.9% in 2024 and 2.5% in 2025, sustaining demand for high-quality cold chain services. Germany’s pharmaceutical sector recorded a 5.7% sales increase in a recent year, further reinforcing European cold chain investment momentum.

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Online grocery and pharmaceutical delivery platforms are fundamentally restructuring cold chain logistics requirements. Consumer expectations for same-day delivery of chilled and frozen goods are compelling operators to deploy dense micro-fulfilment centres, urban cold stores, and agile refrigerated last-mile fleets. Celcius Logistics backed by USD 4.8 Million from IvyCap Ventures exemplifies the startup wave engineering hyperlocal cold chain connectivity between shippers and transporters. The growing online grocery and pharmaceutical delivery trend is driving demand for localized, technology-enabled cold chain solutions globally.

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IoT-enabled monitoring systems are delivering real-time temperature anomaly alerts, minimizing spoilage risk and ensuring product quality compliance across the supply chain. Artificial intelligence and machine learning are being deployed to optimize delivery routes, predict equipment maintenance needs, and improve warehouse slotting efficiency. Automation through robotic handling systems accelerates inventory throughput while eliminating human error. In 2024, SSI Schaefer and Noatum Logistics Middle East partnered to design the largest mobile racking system for deep-freeze storage in the UAE at KEZAD, boosting storage capacity by over 90% and improving cooling efficiency for healthcare and FMCG sectors.

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Capital investment in purpose-built cold storage is accelerating globally. CJ Logistics America’s 291,000-square-foot cold storage facility in New Century, Kansas linked to an adjacent plant-based food manufacturer via a conveyor bridge illustrates the strategic integration of manufacturing and logistics under a shared temperature-controlled roof. A second 270,000-square-foot facility in Gainesville, Georgia, equipped with Alta EXPERT Refrigeration and QFM blast freezing, reinforces the trend of regionally distributed, high-capacity cold hubs. CN and Congebec’s partnership to build a cold storage facility at CN’s Calgary Logistics Park further signals North American infrastructure momentum.

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Environmental accountability is reshaping cold chain investment strategies. Celcius Logistics’ □100 crore deployment of 350 refrigerated electric trucks branded as the ‘Celcius Green’ zero-emission cold logistics network marks a decisive shift toward EV-powered last-mile cold transport in Indian cities. Maersk’s Cape Town cold storage facility aligns with its net-zero emissions target by 2040, while the Olmos, Peru hub adds advanced sorting and refrigerated storage for fruit exports. Blockchain technology is increasingly adopted for traceability, enhancing transparency and safety across food and pharmaceutical cold chains.

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Rail is emerging as a competitive, lower-emission alternative to road for pharmaceutical and agricultural cold chains. ONE and DP World’s dedicated reefer rail freight service connecting Hyderabad to Nhava Sheva Port transporting up to 43 refrigerated containers per trip with real-time temperature monitoring demonstrates how intermodal connectivity can improve schedule reliability while reducing carbon emissions for exporters. This initiative represents India’s first dedicated pharmaceutical reefer rail service, establishing a model for intermodal cold chain integration across Asia Pacific.

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- Refrigerated Warehouses
- Refrigerated Transportation
- Railways
- Airways
- Roadways
- Waterways

□□□□□□□□ □□□□□□□: Refrigerated warehouses dominate the market by providing stable, temperature-regulated environments essential for extending the shelf life of food, pharmaceutical, and chemical products. Advancements in automated storage and retrieval systems, real-time monitoring, and energy-efficient refrigeration are reinforcing their dominance. E-commerce grocery fulfilment, regulatory compliance mandates, and the need for localized urban cold storage are sustaining substantial capital investment. Regulatory requirements for validated temperature controls in pharmaceutical distribution are particularly driving warehouse infrastructure upgrades.

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- Fruits and Vegetables
- Bakery and Confectionary
- Dairy and Frozen Desserts
- Meat, Fish, and Sea Food
- Drugs and Pharmaceuticals
- Others

□□□□□□□□ □□□□□□□: Dairy and frozen desserts command the largest application share due to their acute temperature sensitivity and zero-tolerance threshold for supply chain breaches. Rising urban incomes, growing preference for premium dairy and frozen treat categories, and expanding modern retail formats are sustaining this segment's supremacy. Advanced storage and transport technologies combined with real-time monitoring systems ensure product safety and quality from production through final retail display.

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North America leads the global cold chain logistics market, driven by sophisticated refrigerated infrastructure, strict food safety and pharmaceutical regulations, and advanced supply chain management capabilities. The United States accounts for 87.30% of the regional market, supported by surging pharmaceutical and biotech production growth, rising consumer preference for fresh and frozen foods, and widespread IoT and blockchain adoption for traceability. Government infrastructure programmes and private-sector investments in green refrigeration and automated cold storage are sustaining the region's leadership position. E-commerce grocery and pharmaceutical delivery continue to drive demand for localized, technology-enabled cold chain solutions.

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Europe's cold chain market is shaped by some of the world's most stringent food safety and pharmaceutical distribution standards. Germany leads pharmaceutical cold chains, leveraging a robust healthcare ecosystem. The UK and France serve as critical hubs for frozen food and ready-to-eat logistics. Growing exports of perishable goods, rising online grocery demand, and biopharmaceutical sector expansion are sustaining market growth. Blockchain-enabled traceability and eco-friendly refrigeration investments are increasingly defining competitive differentiation across the region.

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Asia Pacific is among the fastest-growing regions in global cold chain logistics, driven by rapid urbanization India's urban population projected to exceed 40% by 2030 rising middle-class food preferences, and pharmaceutical sector expansion. China's National Cold Chain Logistics Development Plan and India's Pradhan Mantri Kisan Sampada Yojana are channelling public investment into refrigerated storage and transport infrastructure. India's first dedicated reefer rail freight service connecting Hyderabad to Nhava Sheva Port is a landmark milestone in Asia Pacific's intermodal cold chain evolution. Growing e-commerce and rising agricultural and seafood exports further underpin regional growth.

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Latin America's cold chain market is expanding on the strength of agricultural export leadership and pharmaceutical industry growth. Brazil's agribusiness exports reached a record USD 166.55

billion in 2023, illustrating the scale of cold chain requirements for meat, tropical fruits, and other perishables. Mexico's pharmaceutical and biotechnology sectors are driving demand for advanced temperature-controlled logistics. Maersk's new integrated packing and cold storage hub in Olmos, Peru, exemplifies the high-value infrastructure investment targeting the region's growing agro-export sector.

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The Middle East and Africa cold chain market is advancing through urbanization, dietary modernization, healthcare investment, and the rapid growth of digital commerce. Saudi Arabia's e-commerce sector generating USD 10 Billion in revenue, UAE's food security ambitions, and South Africa's logistics network upgrades are collectively strengthening cold chain capabilities. Ethiopia's government-backed push to improve cold chain infrastructure for horticulture, dairy, and pharmaceuticals, supported by a public-private partnership platform, signals growing institutional commitment to cold chain development across the continent. IoT-enabled monitoring and renewable energy integration are increasingly standard across leading regional operators.

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Major players profiled in the IMARC Group report include:

- Americold Realty Trust Inc.
- Burris Logistics Co.
- Cold Box Express Inc.
- Conestoga Cold Storage
- Congebec Inc.
- Lineage Logistics Holdings LLC (Bay Grove Capital Group LLC)
- Nichirei Logistics Group Inc. (Nichirei Corporation)
- Snowman Logistics Ltd.
- Tippmann Group
- United States Cold Storage Inc. (John Swire & Sons Ltd.)
- VersaCold Logistics Services

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Food Logistics Market Research Report

Logistics Market Research Report

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□ Market valued at USD 328.0 Billion in 2025, projected to reach USD 941.9 Billion by 2034 at a CAGR of 12.44%.

□ Refrigerated warehouses lead by type with a commanding 65.0% market share.

□ Dairy and frozen desserts hold the largest application share at 33.2%.

□ Drugs and pharmaceuticals is among the fastest-growing application segments.

□ North America dominates regionally with a 38.6% share; the United States accounts for 87.30% of the regional market.

□ AI, IoT, blockchain, and robotics are defining the next generation of cold chain operations.

□ Sustainability and zero-emission cold logistics initiatives are rising strategic priorities across all geographies.

□ Intermodal rail cold chain solutions are gaining traction as a lower-emission, high-reliability alternative to road transport.

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IMARC Group is a leading market research company that offers management strategy and market research worldwide. The company partners with clients across all sectors and regions to identify their highest-value opportunities, address their most critical challenges, and transform their businesses. IMARC's information products cover major market, scientific, economic, and technological developments for business leaders in pharmaceutical, industrial, and high-technology organizations.

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