

Africa Cold Chain Logistics Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** Cold Chain & Healthcare Logistics (Logistics & Supply Chain)
> ****Source:**** https://www.mordorintelligence.com/industry-reports/africa-cold-chain-logistics-market (https://www.mordorintelligence.com/industry-reports/africa-cold-chain-logistics-market)
> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 15.03 billion
Projected Forecast (2031)	USD 15.03 billion
Growth Rate (CAGR)	4.02 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Africa Cold Chain Logistics industry] (images/chart_2.png)

! [Africa Cold Chain Logistics Market (2025 - 2030)] (images/chart_3.png)

! [Africa Cold Chain Logistics Market: Market Share by Service Type, 2025] (images/chart_4.png)

! [Africa Cold Chain Logistics Market: Market Share by Temperature Type, 2025] (images/chart_5.png)

! [Africa Cold Chain Logistics Market Concentration] (images/chart_6.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 14.45 Billion |
Market Size (2026) | USD 15.03 Billion |
Market Size (2031) | USD 18.29 Billion |
Growth Rate (2026 - 2031) | 4.02 % |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

Market Overview

Africa Cold Chain Logistics Market Analysis by Mordor Intelligence Africa Cold Chain Logistics Market size in 2026 is estimated at USD 15.03 billion, growing from 2025 value of USD 14.45 billion with 2031 projections showing USD 18.29 billion, growing at 4.02% CAGR over 2026-2031.

Rising urbanization, local vaccine manufacturing targets, and the African Continental Free Trade Area (AfCFTA) are amplifying demand for temperature-controlled infrastructure across food and pharma supply chains. Cross-border trade corridors now carry more high-value perishables, while solar-powered micro cold rooms and IoT-enabled monitoring are cutting spoilage, especially in underserved rural zones. Consolidation among global and regional logistics providers is creating end-to-end service offerings, yet high energy tariffs and grid instability continue to push operators toward renewable power and natural refrigerants. Competitive differentiation now hinges on data-driven capacity planning, compliance with GDP standards, and the ability to navigate diverse regulatory frameworks across 54 countries.

Key Report Takeaways* By service type, refrigerated storage led with 50.42% of the Africa cold chain logistics market share in 2025; value-added services are projected to expand at a 4.12% CAGR to 2031.

* By temperature type, chilled storage accounted for 36.72% of the Africa cold chain logistics market size in 2025, while frozen storage is tracking the fastest 4.62% CAGR through 2031.

* By application, fruits & vegetables retained a 27.45% share of the Africa cold chain logistics market size in 2025 and is advancing at a 3.95% CAGR through 2031.

* By geography, South Africa held a 30.55% share of the Africa cold chain logistics market in 2025; Nigeria records the highest 4.32% CAGR through 2031.

Key Market Trends

Market Trends and Insights Drivers Impact Analysis of Africa Cold Chain Logistics Market* Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Rising demand for perishable foods | +1.2% | Nigeria, Kenya, Ghana | Medium-term (2-4 years) |

Pharmaceutical cold-chain expansion | +0.8% | Egypt, Morocco, South Africa, Nigeria | Long-term (≥ 4 years) |

Modern retail & e-commerce growth | +0.7% | Urban centers continent-wide | Short-term (≤ 2 years) |

AfCFTA-driven intra-Africa trade | +0.6% | West and East Africa corridors | Long-term (≥ 4 years) |

Solar-powered micro cold rooms uptake | +0.5% | Rural Nigeria, Kenya, Ghana | Medium-term (2-4 years) |

AI/ML capacity-planning adoption | +0.3% | South Africa, Egypt, Morocco, Kenya | Short-term (≤ 2 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The Africa cold chain logistics market is fragmented, with global integrators, regional champions, and impact-driven startups co-existing. DP World's acquisition of Imperial Logistics unlocks seamless door-to-door flows from berth to inland depot, strengthening vertical integration across African trade arteries[4] Seatrade Maritime, "DP World Acquisition of Imperial Logistics," seatrade-maritime.co

m. DHL earmarks EUR 2 billion (USD 2.08 billion) for its Health Logistics division, including GDP-compliant sites in Egypt, Kenya, and South Africa. Kuehne+Nagel's purchase of Morgan Cargo enhances perishables expertise, bridging farm-gates with EU retail distribution.

Solar-first disruptors such as ColdHubs and Africa GreenTec capitalize on decentralized energy to serve rural areas neglected by grid-reliant operators. Cross-border mergers accelerate as South African 3PLs seek scale in West Africa, with transaction rationales anchored in market access and portfolio diversification. Technology stacks combining AI capacity forecasts, IoT temperature loggers, and blockchain traceability become baseline client requirements, raising entry barriers for smaller incumbents.

Investors target facilities capable of switching from high-GWP refrigerants to natural alternatives with minimal downtime, viewing compliance readiness as a proxy for asset longevity. Competitive advantage now hinges on turnkey services covering import documentation, multi-temperature transport, and last-mile distribution tailored to e-commerce growth. Joint ventures with local SME truckers enable multinationals to navigate cabotage rules while expanding geographic reach.

Africa Cold Chain Logistics Industry Leaders* Imperial Logistics (Subsidiary of DP World)

* Kuehne + Nagel

* DHL Group

* Trans-Nationwide Express (TRANEX)

* Kennie-O Cold Chain Logistics

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Africa Cold Chain Logistics Market Report ScopeThe process of transporting, holding, and managing temperature-sensitive products in a controlled environment is referred to as cold chain logistics. For industries dealing with products that are sensitive to temperature variations, including both positive and negative temperature ranges, this is essential.

A complete background analysis of the African cold chain logistics market, including the assessment of the economy and contribution of sectors in the economy, market overview, market size estimation for key segments, and emerging trends in the market segments, market dynamics, and geographical trends, and COVID-19 impact, is covered in the report.

Africa's cold chain logistics market is segmented by service (storage, transportation, and value-added services (blast freezing, labeling, inventory management, etc.)), temperature (ambient, chilled, and frozen), application (horticulture (fresh fruits and vegetables), dairy products (milk, ice-cream, butter, etc.), meats and fish, processed food products, pharma, life sciences, and chemicals, and other applications), and country (Egypt, Morocco, Nigeria, South Africa, and Rest of Africa). The report offers market size and forecasts for the above-mentioned segments in value (USD).

By Service TypeRefrigerated Storage | Public Warehousing |
| Private Warehousing |
Refrigerated Transportation | Road |
| Rail |
| Sea |

| Air |
Value-Added Services |

Segmentation Accordion Item

By CountryEgypt |
Morocco |
Nigeria |
South Africa |
Rest of Africa |

Frequently Asked Questions

What is the current value of the Africa cold chain logistics market?

The market stands at USD 15.03 billion in 2026, with a forecast to reach USD 18.29 billion by 2031.

How fast is demand for frozen storage growing?

Frozen storage capacity is expanding at a 4.62% CAGR through 2031, the fastest among temperature segments.

Which country leads the continent in cold chain capacity?

South Africa holds the largest share at 30.55% because of its mature retail and export networks.

Why are solar-powered micro cold rooms important?

They provide off-grid, pay-as-you-store solutions that cut spoilage in rural areas lacking reliable electricity.

How is AfCFTA influencing refrigerated logistics?

Tariff removal and digital trade facilitation have raised intra-African perishables trade by 7.2%, boosting cross-border cold chain demand.

What technologies are logistics firms adopting for compliance?

Operators are integrating IoT temperature sensors, AI capacity-planning tools, and GDP-certified processes to meet food and pharma regulations.