

Asia-Pacific 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/asia-pacific-cold-chain-logistics-market(https://www.mordorintelligence.com/industry-reports/asia-pacific-cold-chain-logistics-market)
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 151.97 billion
Projected Forecast (2031)	USD 151.97 billion
Growth Rate (CAGR)	8.09 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

!Major players in Asia-Pacific Cold Chain Logistics industry(images/chart_2.png)

!Asia-Pacific Cold Chain Logistics Market (2026 - 2031)(images/chart_3.png)

!Asia-Pacific Cold Chain Logistics Market: Market Share by Service Type(images/chart_4.png)

!Asia-Pacific Cold Chain Logistics Market: Market Share by Temperature Type(images/chart_5.png)

!Asia-Pacific Cold Chain Logistics Market(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 145.07 Billion |
Market Size (2026) | USD 151.97 Billion |
Market Size (2031) | USD 224.25 Billion |
Growth Rate (2026 - 2031) | 8.09 % |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Asia-Pacific Cold Chain Logistics Market Analysis by Mordor Intelligence
The Asia-Pacific cold chain logistics market size is projected to be USD 145.07 billion in 2025, USD 151.97 billion in 2026, and reach USD 224.25 billion by 2031, growing at a CAGR of 8.09% from 2026 to 2031.

Biopharmaceutical localization, digital trade protocols, and supermarket-owned distribution hubs are changing infrastructure priorities, steering capital toward automated, sustainability-compliant facilities. China's entrenched manufacturing scale accounts for 39.79% of the Asia-Pacific cold chain logistics market share in 2025, yet India's double-digit expansion signals a geographic rebalancing. Air freight capacity dedicated to temperature-sensitive drugs is accelerating as clinical trials proliferate, while development-bank-financed "cold corridors" are knitting rail and port nodes into cost-efficient arteries. Energy-efficient designs, natural refrigerants, and real-time visibility platforms are now universal requirements rather than differentiators, shifting competition toward integrated technology stacks.

Key Report Takeaways* By service type, Refrigerated Storage led with 43.37% of the Asia-Pacific cold chain logistics market share in 2025, whereas Air Transportation is forecast to expand at a 12.32% CAGR through 2031.

* By temperature type, the Chilled segment commanded 39.24% share of the Asia-Pacific cold chain logistics market size in 2025, while Frozen applications are projected to advance at a 10.28% CAGR through 2031.

* By application, Meat & Poultry accounted for a 24.35% share of the Asia-Pacific cold chain logistics market size in 2025, yet Vaccines & Clinical Trial Materials are registering the fastest 13.1% CAGR to 2031.

* By geography, China retained 39.79% of the Asia-Pacific cold chain logistics market share in 2025; India is on track for the highest 11.02% CAGR between 2026-2031.

Key Market Trends

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

Escalating appetite for convenience-oriented chilled & frozen meals | +1.5% | Urban China, Japan, South Korea, and emerging Southeast Asia | Medium term (2-4 years) |

Proliferation of same-day e-grocery fulfillment models | +1.4% | Metropolitan areas across India, China, Singapore, Thailand | Short term (≤ 2 years) |

Intensifying the biologic-drug pipeline needs stringent temperature assurance | +1.3% | India, China, Japan, and Singapore are pharmaceutical hubs | Long term (≥ 4 years) |

Cross-market roll-out of interoperable e-SPS certificates that reduce border latency | +0.9% | ASEAN core, extending to RCEP signatories | Medium term (2-4 years) |

Supermarket groups investing in proprietary refrigerated distribution hubs | +0.8% | China, India, Australia, Thailand retail markets | Medium term (2-4 years) |

Development-bank-backed intermodal "cold corridors" expanding reefer rail & port capacity | +0.7% | Belt and Road Initiative countries, ASEAN Economic Corridor | Long term (≥ 4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The Asia-Pacific cold chain logistics industry is fragmented. Top international 3PLs are extending reach through acquisitions: Kuehne + Nagel's USD 75 million Thai buyout sharpened its pharmaceutical footprint, and DSV's USD 120 million Indonesian stake added tropical last-mile reach. Large operators invest in IoT telemetry, warehouse robotics, and carbon-accounting dashboards to lock in multi-year contracts.

Regional specialists leverage regulatory familiarity and real-estate agility to serve retailer-owned networks. Start-ups like Shinsungo secure venture funding to commercialize sensor-rich transport boxes that extend lane options for high-value perishables. Sustainability credentials are decisive in bid evaluations, prompting fleet electrification pilots and renewable-energy procurement deals.

Consolidation is likely as mid-size firms struggle with natural-refrigerant retrofits and ESG reporting overheads. Joint ventures between logistics firms and equipment manufacturers accelerate technology diffusion, while real-estate investment trusts unlock capital for automation retrofits. Operators that can offer unified visibility, compliance, and temperature assurance command premium pricing over commoditized capacity.

Asia-Pacific Cold Chain Logistics Industry Leaders* United Parcel Service (UPS)

* Nichirei Logistics Group Inc

* SF Express

* OOCL Logistics

* Lineage Logistics

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Asia-Pacific Cold Chain Logistics Market Report ScopeBy Service TypeRefrigerated Storage | Refrigerated Transportation | Road | | Rail | | Sea | | Air | Value-Added Services |

Segmentation Accordion Item

By CountryChina | Japan | India | South Korea | Indonesia | Thailand | Australia | Singapore | Malaysia | Rest of Asia-Pacific |

Frequently Asked Questions

What is the projected value of the Asia-Pacific cold chain logistics market in 2031?

It is forecast to reach USD 224.25 billion, reflecting an 8.09% CAGR between 2026-2031.

Which service type is growing fastest within the region?

Air Transportation leads with a projected 12.32% CAGR, driven by demand for temperature-sensitive pharmaceuticals.

Why is India considered the most attractive growth geography?

India combines an 11.02% CAGR outlook with supportive infrastructure policies, such as the PM Gati Shakti plan and unified logistics digital platforms.

How are energy costs affecting cold-storage profitability?

Electricity can account for 70% of operating expenses, and tariff volatility in markets such as Japan and Australia drives the adoption of on-site renewable generation.

What technology investments are logistics providers prioritizing?

IoT temperature sensors, AI-driven energy management, warehouse robotics, and blockchain traceability systems are becoming standard bid requirements.

Which application segment is expected to grow the fastest?

Vaccines & Clinical Trial Materials are set to grow at a 13.1% CAGR as pharmaceutical supply chains demand ultra-low-temperature compliance.