Central And Eastern Europe 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/central-and-eastern-europe-cold-chain-logistics-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 23.92 billion
Projected Forecast (2031)	USD 23.92 billion
Growth Rate (CAGR)	4.92 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Central And Eastern Europe Cold Chain Logistics industry](images/chart_2.png)

![Central And Eastern Europe Cold Chain Logistics Market (2026 - 2031)](images/chart_3.png)

![Central And Eastern Europe Cold Chain Logistics Market: Market Share by Service Type](images/chart_4.png)

![Central And Eastern Europe Cold Chain Logistics Market: Market Share by Temperature Type](images/chart_5.png)

![Central And Eastern Europe Cold Chain Logistics Market](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

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![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.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 22.74 Billion |
Market Size (2026) | USD 23.92 Billion |
Market Size (2031) | USD 30.41 Billion |
Growth Rate (2026 - 2031) | 4.92 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Central And Eastern Europe Cold Chain Logistics Market Analysis by Mordor IntelligenceThe Central and Eastern Europe Cold Chain Logistics Market size is projected to grow from USD 22.74 billion in 2025 to USD 23.92 billion in 2026, and to reach USD 30.41 billion by 2031, growing at a 4.92% CAGR from 2026 to 2031.

Expansion is underpinned by the region’s role as a low-cost protein processing hub exporting to Western Europe and a proving ground for decarbonized refrigerated transport designed to meet EU Carbon Border Adjustment Mechanism (CBAM) requirements. Rising ESG-linked capital inflows are funding automated freezers even as grid constraints delay commissioning, while 5G-enabled IoT telemetry lowers spoilage and insurance costs for pharmaceutical cargo. Hydrogen and battery-electric reefer pilots along TEN-T rail corridors improve intermodal efficiency, and quick-commerce platforms in tier-2 cities are reshaping last-mile refrigerated delivery economics. Collectively, these forces reinforce the competitiveness of the Central and Eastern Europe cold chain logistics market in global protein and biologics supply networks.

Key Report Takeaways* By service type, refrigerated transportation led with 61.37% of the Central and Eastern Europe cold chain logistics market share in 2025, while value-added services are forecast to expand at a 5.58% CAGR to 2031.
* By temperature type, the chilled segment captured 45.10% share of the Central and Eastern Europe cold chain logistics market size in 2025, whereas the frozen segment is projected to record a 6.11% CAGR through 2031.
* By application, meat and poultry held 20.68% of the Central and Eastern Europe cold chain logistics market share in 2025, while pharmaceuticals and biologics are advancing at a 6.73% CAGR during 2026-2031.
* By geography, Romania accounted for 33.72% of the Central and Eastern Europe cold chain logistics market size in 2025, while Poland is on track for a 5.43% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Central And Eastern Europe Cold Chain Logistics Market*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
CBAM-driven shift to low-carbon cold logistics solutions	+0.9%	EU-wide, CEE export corridors	Medium term (2-4 years)
Export boom of CEE animal protein demanding ultra-low temp capacity	+1.1%	Romania, Poland, Hungary	Short term (≤ 2 years)
Hydrogen and battery-electric reefer corridors backed by EU subsidies	+0.8%	Poland, Czech Republic, Slovakia	Long term (≥ 4 years)
5G and IoT telemetry lowering spoilage and insurance premiums	+0.7%	Regional urban centers	Medium term (2-4 years)
Tier-2 city dark-store quick-commerce fueling micro-fulfillment demand	+0.6%	Poland, Czech Republic, Romania	Short term (≤ 2 years)
ESG capital inflow for speculative high-bay freezer developments	+0.8%	Poland, Czech Republic	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The Central and Eastern Europe cold chain logistics market shows moderate concentration as scale and technology requirements spur consolidation. Global integrat ors such as DHL and UPS bought CRYOPDP, Frigo-Trans, and BPL to secure biologics lanes with premium yields. Regional champions Raben Group and Dachser SE differentiate through sustainability, rolling out electric semi-trailers and rooftop solar arrays that cut Scope 1 emissions and meet retailer carbon scorecards. Asset-heavy developers Lineage and NewCold bet on automated high-bay freezers financed by ESG investors eager for energy-efficiency stories; their facilities reach up to 40 m height, packing four times the pallet density of conventional warehouses.

Digital capability is the emerging battleground. Lineage's partnership with Cognizant embeds Agentic AI chatbots that answer customer queries and orchestrate inventory moves in real time. Rohlik Group spun off Veloq to commercialize AI fulfillment tech, promising 60-minute grocery deliveries in Prague, Budapest, and Vienna. Start-ups leverage 5G IoT sensors to offer usage-based insurance, undercutting traditional premiums by 20-25% for operators with proven telemetry data. Hydrogen reefer pilots attract consortiums that blend OEMs, fuel suppliers, and logistics firms in subsidy-backed demonstrations along Polish and Czech routes.

Competitive pressure also comes from real-estate developers such as Prologis and P3 that integrate cold boxes within broader logistics parks, bundling long-term leases with renewable energy add-ons. Quick-commerce entrants create demand fragmentation that incumbents counter with co-packing, kitting, and blockchain provenance to lock in customers for longer contract terms. As capex intensifies and compliance costs rise, small operators below 10,000 pallets risk marginalization, accelerating a consolidation wave that is likely to lift the combined top-five share toward 70% by 2031.

Central And Eastern Europe Cold Chain Logistics Industry Leaders* Raben Group

* DHL Group

* DSV A/S

* DACHSER

* Kuehne+Nagel

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Central And Eastern Europe Cold Chain Logistics Market Report ScopeBy Service TypeRefrigerated Storage | Public Warehousing |
 | Private Warehousing |
Refrigerated Transportation | Road |
 | Rail |
 | Sea |
 | Air |
Value-Added Services |

Segmentation Accordion Item

By CountryPoland |
Slovakia |
Czech Republic |
Hungary |
Romania |
Rest of CEE |

Frequently Asked Questions

How large will Central and Eastern Europe’s cold chain logistics sector be by 2031?

The Central and Eastern Europe cold chain logistics market size is forecast to reach USD 30.41 billion by 2031.

Which temperature segment is growing the fastest in the region?

The Frozen segment is projected to advance at a 6.11% CAGR between 2026-2031 thanks to vaccine and frozen protein exports.

Why is Romania so dominant in CEE refrigerated logistics?

Romania holds one-third of regional value because its meat-processing clusters and Black Sea port access anchor high-volume protein exports.

How is EU policy shaping investment in refrigerated transport?

CBAM and Alternative Fuels rules drive subsidies toward battery-electric and hydrogen reefers, accelerating zero-emission fleet roll-outs.

What strategies help logistics firms manage energy-cost inflation?

Operators deploy automated high-bay freezers, on-site renewable power, and IoT analytics to cut electricity use and avoid peak tariffs.