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/cold-chain-logistics-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 383.46 billion
Projected Forecast (2031)	USD 383.46 billion
Growth Rate (CAGR)	6.12 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

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

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

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

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

![Cold Chain Logistics Market Concentration](images/chart_7.png)

![footer background image](images/chart_10.png)

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![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 383.46 Billion |
Market Size (2031) | USD 515.79 Billion |
Growth Rate (2026 - 2031) | 6.12 % |
Fastest Growing Market | North America |
Largest Market | Asia Pacific |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Cold Chain Logistics Market Analysis by Mordor IntelligenceThe Cold Chain Logistics market size is expected to grow from USD 361.37 billion in 2025 to USD 383.46 billion in 2026 and is forecast to reach USD 515.79 billion by 2031 at 6.12% CAGR over 2026-2031.

Robust growth is anchored in the expanding global vaccine pipeline, the surge of quick-commerce grocery platforms, and sustained demand for premium frozen foods. Deep-frozen and ultra-low temperature services are growing faster than conventional frozen storage owing to the distribution requirements of mRNA vaccines and advanced biologics. Asia-Pacific is the fastest-growing region, yet North America retains the largest regional share through continued investment in automation and IoT-enabled monitoring. Regulatory mandates such as the United States Food Safety Modernization Act (FSMA) 204 rule are turning real-time temperature tracing into a competitive differentiator rather than a mere compliance box.

Key Report Takeaways* By service type, refrigerated transportation expanded at a 6.88% CAGR through 2031, overtaking refrigerated storage, which held a 52.37% cold chain logistics market share in 2025.
* By temperature range, the deep-frozen/ultra-low segment grew at an 8.22% CAGR, and the Frozen segment accounted for 61.35% of the cold chain logistics market size in 2025.
* By application, pharmaceuticals and biologics advanced at a 7.56% CAGR, while food and beverages maintained a 74.25% share of the cold chain logistics market size in 2025.
* By geography, Asia-Pacific led growth at an 8.05% CAGR, whereas North America contributed 33.62% of global revenue in 2025.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Cold Chain Logistics Market

*Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Ultra-low temperature demand for mRNA vaccines	+1.2%	North America & Europe	Medium term (2-4 years)
Quick-commerce grocery growth	+0.9%	Asia-Pacific & North America	Short term (≤ 2 years)
Pharmaceutical outsourcing to GDP-compliant 3PLs	+1.0%	Europe & global pharma hubs	Medium term (2-4 years)
IoT telematics adoption under FSMA 204	+1.1%	North America, expanding to Europe & Asia-Pacific	Short term (≤ 2 years)
Government Incentives for Solar-Powered Cold Warehouses in Middle East & Africa to Curb Post-Harvest Food Losses	+0.7	Middle East & Africa, with expansion to South Asia	Long term (≥ 5 yrs)
China's "Ready-to-Cook" Meal Boom Propelling Cold Storage Leasing in Tier-2 Cities	+0.8	China, with similar trends emerging in Southeast Asia	Medium term (~ 3-4 yrs)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The cold chain logistics market shows moderate consolidation. The top five operators command roughly 25% of global cubic-foot capacity, leaving room for regional specialists. Lineage Logistics tops the ranking with 2.98 billion ft^3 across more than 480 warehouses after its 2024 IPO raised USD 4.4 billion. Americold follows with 1.45 billion ft^3 and 234 sites, focusing on retrofitting facilities wi th shuttle-based automation and low-GWP refrigerants.

M&A continues at pace. Lineage acquired MTC Logistics in April 2025, adding port-centric capacity along the East and Gulf Coasts. DHL is allocating USD 2 billion to expand healthcare-compliant warehouses and validated transport assets. Vertical Cold Storage vaulted from fifteenth to sixth place by buying smaller operators and launching greenfield sites that rely on fully automated high-bay designs.

Technology is the chief battleground. Providers deploy AI route-planning tools, robotic case picking, and fully electric trailer units from OEMs such as Mitsubishi Heavy Industries. Autonomous driving pilots by Hirschbach Motor Lines and Kodiak Robotics test hands-free reefer lanes between distribution centres. Early movers expect labour savings and safety gains that could offset the driver shortage. Sustainability differentiators—such as solar rooftops, renewable diesel, and trans-critical CO_2 systems—also shape bidding contests for global contracts in the cold chain logistics market.

Cold Chain Logistics Industry Leaders* Lineage Logistics

* Americold Logistics

* NewCold Advanced Cold Logistics

* Nichirei Logistics Group Inc.

* Constellation Cold Logistics

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

Our study defines the cold chain logistics market as the end-to-end revenue generated from temperature-controlled storage, transportation, and value-added handling of perishable food, biopharmaceutical, and specialty chemical cargo that must remain within chilled, frozen, or ultra-low ranges from origin through final delivery. According to Mordor Intelligence, this includes public and private refrigerated warehouses, dedicated reefer fleets across road, rail, sea, and air, plus ancillary services such as blast-freezing and GDP compliance audits.

Scope exclusion: we exclude domestic ice-cream street vending, HVAC equipment sales, and one-time dry-ice packaging rentals.

Segmentation Container

* By Service Type* Refrigerated Storage* Public Warehousing
* Private Warehousing

* Refrigerated Transportation* Road
* Rail
* Sea
* Air

* Value-Added Services

* By Temperature Type* Chilled (0–5 °C)
* Frozen (-18–0 °C)
* Ambient
* Deep-Frozen / Ultra-Low (more than -20 °C)

* By Application* Fruits & Vegetables

* Meat & Poultry
* Fish & Seafood
* Dairy & Frozen Desserts
* Bakery & Confectionery
* Ready-to-Eat Meals
* Pharmaceuticals & Biologics
* Vaccines & Clinical Trial Materials
* Chemicals & Specialty Materials
* Other Applications

* By Geography* North America* United States
* Canada
* Mexico

* South America* Brazil
* Peru
* Chile
* Argentina
* Rest of South America

* Asia Pacific* India
* China
* Japan
* Australia
* South Korea
* South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines)
* Rest of Asia-Pacific

* Europe* United Kingdom
* Germany
* France
* Spain
* Italy
* BENELUX (Belgium, Netherlands, and Luxembourg)
* NORDICS (Denmark, Finland, Iceland, Norway, and Sweden)
* Rest of Europe

* Middle East And Africa* United Arab of Emirates
* Saudi Arabia
* South Africa
* Nigeria
* Rest of Middle East And Africa

Frequently Asked Questions

What is the current size of the cold chain logistics market?

The cold chain logistics market stands at USD 383.46 billion in 2026 and is projected to reach USD 515.79 billion by 2031 at a 6.12% CAGR.

Which service type is growing fastest within the cold chain logistics market?

Refrigerated transportation leads growth with an 6.88% CAGR as e-commerce and quick-commerce accelerate demand for time-critical deliveries.

Why is ultra-low temperature capacity expanding so rapidly?

Distribution of mRNA vaccines, cell therapies, and other biologics that require storage below -70 °C is driving a 8.22% CAGR in the deep-frozen segment.

Which region offers the strongest growth outlook?

Asia-Pacific shows the highest 8.05% CAGR due to rising disposable incomes, rapid urbanisation, and government incentives to reduce post-harvest losses.

How are regulations influencing technology investment?

Rules such as the United States FSMA 204 mandate real-time traceability, prompting widespread deployment of IoT sensors and telematics that improve compliance and operational efficiency.

Who are the leading players in the cold chain logistics market?

Lineage Logistics and Americold head the field, jointly controlling about 4.4 billion ft^3 of temperature-controlled space and focusing on automation, sustainability, and strategic acquisitions.