

Europe Pharmaceutical 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/europe-pharmaceutical-cold-chain-logistics-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 22.58 billion
Projected Forecast (2031)	USD 22.58 billion
Growth Rate (CAGR)	4.59 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

! [Europe Pharmaceutical Cold Chain Logistics Market Size] (images/chart_3.png)

! [Europe Pharmaceutical Cold Chain Logistics Market Share by Services, 2025] (images/chart_4.png)

! [Europe Pharmaceutical Cold Chain Logistics Market Share by Product, 2025] (images/chart_5.png)

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

! [Icon] (images/chart_7.png)

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

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

! [Mordor Intelligence on Pinterest] (images/chart_13.svg)

! [Mordor Intelligence on Instagram] (images/chart_14.svg)

! [ESOMAR] (images/chart_16.png)

! [GPTW] (images/chart_18.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2020 - 2031
Forecast Data Period	2026 - 2031
Base Year Market Size (2025)	USD 21.5 Billion
Market Size (2026)	USD 22.58 Billion
Market Size (2031)	USD 28.26 Billion
Growth Rate (2026 - 2031)	4.59 %

Market Concentration | Medium |

Major Players*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

|

Market Overview

Europe Pharmaceutical Cold Chain Logistics Market Analysis by Mordor Intelligence
The Europe pharmaceutical cold chain logistics market size is projected to expand from USD 21.50 billion in 2025 and USD 22.58 billion in 2026 to USD 28.26 billion by 2031, registering a CAGR of 4.59% between 2026 and 2031.

Demand grows as maternal immunization and respiratory syncytial virus vaccine roll-outs transform year-round distribution patterns, while cell and gene therapy approvals push requirements for ultra-low temperature handling. Serialization mandates under EU legislation elevate the need for value-added tracking and relabelling, and the EU Corporate Sustainability Reporting Directive spurs a shift toward reusable passive packaging that rewards providers with capital for green investments. At the same time, the F-gas phase-down obliges operators to phase out hydrofluorocarbon systems, tilting competitive advantage to firms able to finance natural-refrigerant retrofits. Automation, robotics, and IoT visibility tools drive productivity gains, but growing cyber-risks demand hardened digital infrastructure across the entire Europe pharmaceutical cold chain logistics market.

Key Report Takeaways

- * By services, transportation services held 61.76% of the Europe pharmaceutical cold chain logistics market share in 2025, while value-added services are forecast to expand at a 5.27% CAGR through 2031.
- * By temperature type, chilled products commanded 40.88% of the Europe pharmaceutical cold chain logistics market size in 2025, yet deep-frozen and ultra-low services are projected to advance at a 5.61% CAGR between 2026 and 2031.
- * By product, branded drugs led with a 56.34% market share in 2025, whereas specialty and orphan drugs are set to post the fastest growth at a 5.91% CAGR to 2031.
- * By end user, pharmaceutical manufacturers accounted for 40.69% of the Europe pharmaceutical cold chain logistics market size in 2025, but biotech and biosimilar manufacturers are expected to register a 6.27% CAGR over 2026-2031.
- * By geography, Germany held 21.05% of the market share in 2025, whereas the Netherlands is poised to grow at a 5.70% CAGR through 2031.

Key Market Trends

Europe Pharmaceutical Cold Chain Logistics Market Trends and Insights
Drivers Impact Analysis*

Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline

|

- Surge in RSV and maternal vaccine launches | +0.9% | EU-wide, led by Germany, France, United Kingdom, Spain | Medium term (2-4 years) |
- Expansion of specialty pharmacy and home infusion networks | +0.7% | Nordic countries, Netherlands, Germany, United Kingdom | Medium term (2-4 years) |
- Investment boom in automated cold warehouses and robotics | +0.8% | Germany, Netherlands, Belgium, France | Long term (≥ 4 years) |
- Cross-border Brexit corridor relabelling hubs | +0.5% | Netherlands, Belgium, Ireland, France | Short term (≤ 2 years) |
- EU-CSRD push toward reusable passive packaging | +0.4% | EU-wide, led by Germany, Netherlands, Nordic countries | Long term (≥ 4 years) |
- Near-shoring of API and fill-finish to Central-Eastern Europe | +0.6% | Poland, Czech Republic, Hungary, Romania | Long term (≥ 4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

DHL Supply Chain, Kuehne + Nagel, and UPS head the field with continent-wide GDP networks and capital to automate warehouses. DHL's EUR 2 billion (USD 2.35 billion) program adds Pharma Hubs equipped for multi-temperature docking and AI route optimization. UPS strengthened European reach via the CAD 2.2 billion (USD 1.6 billion) acquisition of Andlauer Healthcare in 2025.

Regional specialists like Movianto and Trans-o-flex capture therapeutic niches, leveraging bespoke packaging and last-mile fleets to differentiate. Cold Chain Technologies' energy-positive shipper plant in Breda aligns with EU-CSR goals, appealing to sustainability-focused tenders. F-gas compliance accelerates consolidation, as retrofits exceed EUR 5 million (USD 5.88 million) for mid-sized depots, unaffordable for some independents.

Technological rivalry intensifies around IoT telemetry, blockchain traceability, and warehouse robotics. Cyber-risk resilience becomes a selling point after the 2024 ransomware incident that froze customer portals. Providers offering end-to-end dashboards and 24/7 security operations command premium pricing, reinforcing a moderate-to-high concentration structure for the Europe pharmaceutical cold chain logistics market.

Europe Pharmaceutical Cold Chain Logistics Industry Leaders* DHL Group

* Kuehne+Nagel

* United Parcel Service of America, Inc. (UPS)

* DSV A/S

* CMA CGM Group (including CEVA Logistics)

* *Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Component Component 3 Scope Of The Report Bottom

Europe Pharmaceutical Cold Chain Logistics Market Report ScopeBy ServicesTransportation | Road |
| Air |
| Sea |
| Rail |
Warehousing and Distribution |
Value-added Services and Others |

Segmentation Accordion Item

By CountryGermany |
United Kingdom |
France |
Italy |
Spain |
Netherlands |
Belgium |
Poland |
Sweden |
Rest of Europe |

Frequently Asked Questions

What growth rate is forecast for the Europe pharmaceutical cold chain logistics market between 2026 and 2031?

The market is projected to expand at a 4.59% CAGR over 2026-2031.

Which service category is expected to grow fastest?

Value-added services, covering serialization and real-time monitoring, are forecast to register a 5.27% CAGR.

Why is the Netherlands the fastest-growing country market?

Post-Brexit relabelling demand and new A+++ cold-chain campuses are driving a 5.70% CAGR outlook for the Netherlands.

How will EU F-gas rules affect logistics providers?

Operators must replace HFC systems with natural refrigerants, lifting capital expenditure and favoring well-capitalized firms.

Which temperature band is expanding quickest?

Deep-frozen and ultra-low logistics for cell and gene therapies are set to rise at a 5.61% CAGR.

Which end-user group will contribute most to incremental demand?

Biotech and biosimilar manufacturers, growing at a 6.27% CAGR, will drive new contract wins for specialized providers.