South America 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/south-america-pharmaceutical-cold-chain-logistics-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 2.64 billion
Projected Forecast (2031)	USD 2.64 billion
Growth Rate (CAGR)	6.94 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

![South America Pharmaceutical Cold Chain Logistics Market Summary](images/chart_3.png)

![South America Pharmaceutical Cold Chain Logistics Market: Market Share by Service](images/chart_4.png)

![South America Pharmaceutical Cold Chain Logistics Market: Market Share by Product](images/chart_5.png)

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

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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 2.51 Billion |
Market Size (2026) | USD 2.64 Billion |
Market Size (2031) | USD 3.69 Billion |
Growth Rate (2026 - 2031) | 6.94 % |

Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

South America Pharmaceutical Cold Chain Logistics Market Analysis by Mordor IntelligenceThe Market size is expected to grow from USD 2.51 billion in 2025 to USD 2.64 billion in 2026 and is forecast to reach USD 3.69 billion by 2031 at 6.94% CAGR over 2026-2031.

Accelerating biologics approvals, government immunization drives, and wider IoT adoption are reshaping service-mix economics across South America. Brazil's newly commissioned biologics plants are anchoring corridors that now stretch from Minas Gerais to Andean export gateways, while Colombia's airport-centric expansion underwrites the region's fastest growth. Multinational 3PLs dominate cross-border lanes thanks to dense certified-capacity networks, yet regional specialists retain rural and last-mile strongholds where municipal cold rooms and local licensing define access. Ultra-low storage remains scarce; only nine certified facilities span Brazil, Argentina, and Chile, creating a bottleneck that is fueling brownfield retrofits and M&A interest. Persistently high electricity and diesel prices, however, threaten margin integrity and accelerate solar and ammonia-refrigeration retrofits throughout the pharmaceutical cold chain logistics market.

Key Report Takeaways

* By service type, transportation accounted for 60.92% of the South America pharmaceutical cold chain logistics market share in 2025, while air freight is forecast to expand at an 8.74% CAGR through 2031.
* By temperature type, chilled storage accounted for 41.75% of the South America pharmaceutical cold chain logistics market size in 2025; the deep-frozen and ultra-low segments are advancing at a 7.48% CAGR through 2031.
* By product, branded drugs led with 51.84% revenue share in 2025, while specialty and orphan formulations will rise at a 7.36% CAGR through 2031.
* By end user, pharmaceutical manufacturers represented 46.18% of 2025 spending, whereas biotech and biosimilar producers are projected to post the fastest 7.61% CAGR through 2031.
* By Country, Brazil commanded 58.73% of the 2025 value, but Colombia is expected to log the quickest 8.98% country-level CAGR to 2031.

Key Market Trends

South America Pharmaceutical Cold Chain Logistics Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rapid growth of biologics & vaccine pipelines	+1.8%	Brazil, Argentina, with spillover to Colombia and Chile	Medium term (2-4 years)
Expansion of pharma manufacturing hubs in Brazil & Argentina	+1.5%	Brazil (Sao Paulo, Minas Gerais), Argentina (Buenos Aires, Cordoba)	Long term (≥ 4 years)
Government-led immunization campaigns	+1.3%	Global South America, early gains in Brazil, Colombia, Peru	Short term (≤ 2 years)
Scaling 3PL partnerships for IoT-enabled last-mile delivery	+1.0%	Urban corridors in Brazil, Chile, and Colombia; gradual rural penetration	Medium term (2-4 years)
Mercosur GDP guideline harmonization	+0.6%	Argentina, Brazil, Paraguay, Uruguay	Long term (≥ 4 years)

Climate-change-driven demand for ultra-cold storage | +0.7% | Amazon basin (Brazil), coastal Argentina, Andean regions (Colombia, Peru) | Long term (≥ 4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Five multinationals-DHL Supply Chain, UPS Healthcare, Kuehne + Nagel, DSV, and CEVA Logistics control about 50% of certified GDP capacity, wielding scale economies and integrated sea-air-road service portfolios that attract high-value biologic flows. Each has extended IATA CEIV Pharma accreditations beyond primary hubs to secondary cities such as Medellín, Curitiba, and Guayaquil, reinforcing quality leadership while capturing incremental pharmaceutical cold chain logistics market share.

Regional contenders remain formidable in rural and intra-country lanes. Peru's Ransa, Argentina's Andreani, and Brazil's SuperFrio and JSL's Fadel Logistica Fria combine dense municipal cold-room networks with local regulatory expertise, allowing on-time ratios above 94% for last-mile vaccine deliveries. Energy self-generation, seen in SuperFrio's solar rollout and Friozem's ammonia shift, is becoming a differentiator as power costs escalate.

Technology-centric entrants such as Maersk's blockchain platform and CEVA's autonomous 2-8 °C lockers represent emerging competitive vectors. Maersk trimmed documentation errors by 41% and won a three-year vaccine contract, while CEVA's locker network could reach 140 Brazilian cities by 2027, pending ANVISA approval[4] Maersk, "Annual Report 2025," maersk.com. Lineage and Americold accelerate bolt-on acquisitions to tie up ultra-low warehouse real estate, anticipating mRNA therapy scale-up and aiming to lift their combined pharmaceutical cold chain logistics industry footprint beyond food heritage.

South America Pharmaceutical Cold Chain Logistics Industry Leaders* DHL Supply Chain & Global Forwarding

* UPS Healthcare / Bomi Group

* DSV

* FedEx Temperature Controlled Solutions

* Kuehne + Nagel PharmaChain

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

South America Pharmaceutical Cold Chain Logistics Market Report ScopeBy Service TypeTransportation | Road |
 | Rail |
 | Sea |
 | Air |
Warehousing and Distribution |
Value-Added Services and Others |

Segmentation Accordion Item

By CountryArgentina |
Brazil |
Chile |

Colombia |
Peru |
Rest of South America |

Frequently Asked Questions

How large will the pharmaceutical cold chain logistics market be by 2031?

Forecasts place the market at USD 3.69 billion by 2031 on a 6.94% CAGR trajectory.

Which sub-segment is expanding fastest by service type?

Air freight is projected to grow at an 8.74% CAGR through 2031, outpacing road, sea, and warehousing.

Why is ultra-low storage capacity considered a bottleneck?

Only nine certified facilities support –80 °C or colder custody across Brazil, Argentina, and Chile, limiting scale-up for mRNA and CAR-T therapies.

What is the main cost pressure facing 3PLs?

An 18% regional rise in industrial electricity and sharp diesel inflation are compressing cold-storage and haulage margins.

Which country offers the highest growth opportunity?

Colombia, driven by El Dorado airport's GDP expansion and government cold-room grants, is set to post an 8.98% CAGR to 2031.

How are operators mitigating excursion risk on last-mile routes?

Widespread deployment of IoT sensors, predictive analytics, and blockchain tracking now allows shippers to detect temperature breaches in real time and reroute inventory proactively.