United States Healthcare 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/united-states-healthcare-cold-chain-logistics-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 48.49 billion
Projected Forecast (2031)	USD 48.49 billion
Growth Rate (CAGR)	7.63 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

![United States Healthcare Cold Chain Logistics Market (2026 - 2031)](images/chart_3.png)

![United States Healthcare Cold Chain Logistics Market: Market Share by Logistics Function](images/chart_4.png)

![United States Healthcare Cold Chain Logistics Market: Market Share by Product Type](images/chart_5.png)

![United States Healthcare Cold Chain Logistics Market: Market Share by Destination](images/chart_6.png)

![United States Healthcare Cold Chain Logistics Market](images/chart_7.png)

![Icon](images/chart_8.png)

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![Mordor Intelligence on Facebook](images/chart_12.svg)

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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 Overview

Study Period
|

2020 - 2031
|

Forecast Data Period
|

2026 - 2031
|

Base Year Market Size (2025)
|

USD 44.90 Billion
|

Market Size (2026)
|

USD 48.49 Billion
|

Market Size (2031)
|

USD 70.03 Billion
|

Growth Rate (2026 - 2031)
|

7.63 %
|

Market Concentration
|

Low
|

Major Players

*Disclaimer: Major Players sorted in no particular order

|

Market Overview

United States Healthcare Cold Chain Logistics Market Analysis by Mordor Intelligence

The United States healthcare cold chain logistics market size was valued at USD 44.9 billion in 2025 and is estimated to grow from USD 48.49 billion in 2026 to reach USD 70.03 billion by 2031, at a CAGR of 7.63% during the forecast period (2026-2031).

The United States healthcare cold chain logistics market is supported by a broader biologics launch base, faster commercialization of cell and gene therapies, and a replenishment cycle for GLP-1 injectables that has increased the frequency of chilled deliveries across pharmacy and specialty networks. Demand is being shaped by structural changes rather than short-term swings, because domestic biologics manufacturing is expanding under supply resilience priorities, and newer therapies continue to favor temperature-sensitive large molecules over older small-molecule generics. Updated compliance expectations are also making cold-chain infrastructure harder to treat as an optional cost line, especially as route qualification, excursion review, and electronic traceability move deeper into daily operations across the distribution chain. The United States healthcare cold chain logistics market is also seeing a closer link between domestic production growth and route validation needs, which is lifting demand for monitoring platforms, specialist 3PL networks, and audit-ready data systems at the same time. Competition is separating into 2 layers, with UPS Healthcare, FedEx, and DHL adding scale through acquisitions and network investment, while specialist operators such as Cryoport Systems and Marken retain advantages in ultra-specialized lanes that broad generalists still struggle to serve efficiently.

Key Report Takeaways

* By logistics function, transportation led with 46.25% share of the United States healthcare cold chain logistics market size 2025, while value-added services are projected to expand at an 8.38% CAGR through 2031.

* By temperature type, ambient handling accounted for 46.62% of the United States healthcare cold chain logistics market share in 2025, while deep-frozen and ultra-low temperature bands are forecast to grow at an 11.55% CAGR through 2031.

* By product type, biopharmaceuticals held 44.2% of the United States healthcare cold chain logistics market share in 2025, while cell and gene therapies are projected to record the fastest CAGR at 13.69% through 2031.

* By destination, domestic flows represented 84.84% of the United States healthcare cold chain logistics market size in 2025, while international lanes are forecast to advance at an 8.69% CAGR through 2031.

* By end user, pharmaceutical manufacturers held 56.2% of the United States healthcare cold chain logistics market share in 2025, while biopharmaceutical manufacturers are forecast to grow at an 8.27% CAGR through 2031.

* By geography, the Northeast captured 26.84% of the United States healthcare cold chain logistics market size in 2025, while the Southwest is projected to expand at an 8.93% CAGR through 2031.

Key Market Trends

United States Healthcare Cold Chain Logistics Market Trends and Insights

Drivers Impact Analysis*

Driver |

(~) % Impact on CAGR Forecast |

Geographic Relevance |

Impact Timeline |

Rising Biologics and Specialty-Pharma Cold-Chain Demand

|

+1.8%
|

National, concentrated in Northeast and Midwest pharma corridors
|

Long term (≥ 4 years)
|

Cell and Gene Therapy Commercialization

|

+1.5%
|

National, with early concentration in Boston-Philadelphia biotech corridors
|

Long term (≥ 4 years)
|

Outsourcing to Specialist 3PLs and Digital Visibility Stacks

|

+1.0%
|

National
|

Medium term (2-4 years)
|

Vaccine, Plasma, and Other High-Integrity Temperature-Sensitive Flows

|

+0.7%
|

National, high intensity in Southeast and Midwest distribution hubs
|

Medium term (2-4 years)
|

Home Infusion and Specialty-Pharmacy Direct-To-Patient Fulfillment

|

+0.8%
|

National, highest density in suburban Northeast and Southeast
|

Medium term (2-4 years)
|

GLP-1 Injectable Replenishment Intensity and Tighter Cold-Chain Turns

|

+1.2%
|

National, highest velocity in Southwest and West Coast pharmacy networks
|

Short term (≤ 2 years)
|

Source: Mordor Intelligence
|

Competitive Landscape

Competitive Landscape

The United States healthcare cold chain logistics market is moderately concentrated at the top, but it remains fragmented across mid-market and specialty niches where more than 20 identified operators still compete. UPS Healthcare, FedEx, and DHL continue to hold the strongest positions in large-scale air freight and national ground coverage because they can fund networks that smaller rivals cannot match. UPS strengthened that scale model in 2025 through its USD 1.6 billion acquisition of Andlauer Healthcare Group, which added specialized cold-chain transportation and 3PL capabilities across North America. DHL used a similar expansion path by acquiring CryoPDP and SDS Rx in 2025, adding specialist cell and gene therapy capabilities and a final-mile healthcare footprint with more than 200 United States locations. FedEx took a different route, reporting USD 400 million in new annualized healthcare logistics revenue in 2025 and securing IATA CEIV Pharma corporate certification across its global hubs and ramps.

Integrated distributors such as Cencora, McKesson, and Cardinal Health occupy another important tier in the United States healthcare cold chain logistics market because they sit close to originating shippers and embedded wholesale contracts. That position gives them strong end-user access, but pure-play specialists still pressure them in complex biologics and advanced-therapy lanes where visibility and excursion performance matter more than scale alone. Cryoport Systems and Marken remain relevant examples of this specialist edge because ultra-specialized transport and clinical logistics are difficult for broad generalists to standardize at the same service level. The next white space appears to sit where cryogenic site support meets data services, because no single operator clearly dominat es cryogenic installation, site readiness assessment, staff training, and real-time cell and gene therapy chain-of-custody on one managed platform. Providers that can combine those pieces may gain an outsized position as treatment centers expand beyond a few leading biotech hubs.

Technology-led visibility specialists are also shaping competition by pairing physical logistics with IoT monitoring, predictive exception management, and blockchain-style chain-of-custody tools. These tools are especially relevant for mid-sized operators that cannot fund a fully proprietary digital stack but still need audit-grade performance. Certification has become another practical filter in air freight access, because IATA’s CEIV Pharma framework is now held by UPS Healthcare, FedEx, and Kuehne+Nagel at a scale that matters for major pharmaceutical tenders. Smaller providers without that compliance credential are more likely to be left out of regulated tenders even when they can compete on lane price. This keeps the United States healthcare cold chain logistics market open to specialists, but it also raises the entry bar for anyone trying to move from niche coverage into national regulated scale.

United States Healthcare Cold Chain Logistics Industry Leaders

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

* FedEx

*

DHL Group

*

Cencora

*

McKesson

*

*Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

United States Healthcare Cold Chain Logistics Market Report Scope

By Logistics Function

Transportation
|

Road
|

|

Air
|

|

Sea and Inland Waterways
|

|

Rail
|

Warehousing and Distribution
|

Value-added Services and Others
|

Segmentation Accordion Item

By Region

Northeast
|

Southeast
|

Midwest
|

Southwest
|

West
|

Frequently Asked Questions

What is driving growth in the United States healthcare cold chain logistics through 2031?

Growth is being supported by biologics expansion, cell and gene therapy commercialization, GLP-1 injectable replenishment, domestic manufacturing re-onshoring, and tighter compliance requirements. The sector is projected to rise from USD 48.49 billion in 2026 to USD 70.03 billion by 2031 at a 7.63% CAGR.

Which logistics function is the largest today?

Transportation is the largest function, holding 46.25% of total revenue in 2025. Its lead is supported by daily road-based replenishment and premium air freight for time-sensitive biologics and advanced therapies.

Which temperature band is growing the fastest in the United States healthcare cold chain logistics space?

Deep-frozen and ultra-low segments below -20 °C are expected to post the fastest growth, with an 11.55% CAGR through 2031. That pace is closely tied to the commercial scaling of cell and gene therapies.

Why are domestic flows still much larger than international lanes?

Domestic flows held 84.84% of total activity in 2025 because the United States is both a large pharmaceutical producer and the largest end market. International corridors are still growing faster at 8.69% CAGR, led by export growth and cross-border trade with Mexico.

Which end users matter most for service providers?

Pharmaceutical manufacturers remained the largest end-user group with 56.20% share in 2025, while biopharmaceutical manufacturers are the fastest-growing cohort at an 8.27% CAGR. This mix reflects the increasing weight of specialty and large-molecule therapies in distribution demand.

What is the biggest operational challenge for advanced therapy logistics providers?

The key challenge is not only transport capacity, but also site-of-care readiness. Many hospitals outside major biotech clusters still need cryogenic equipment, trained staff, and formal receiving protocols before they can handle advanced therapies at scale.