

Asia-Pacific Healthcare Cold Chain Logistics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Asia-Pacific Healthcare Cold Chain Logistics Market is expected to witness a CAGR of over 10% during the forecast period.

Healthcare cold chain logistics firms, which are involved in the storage, movement, and flow of goods, have been directly influenced by the COVID-19 pandemic. The COVID-19 pandemic impacted the supply chain of the healthcare cold chain industry due to restricted trade during the pandemic, resulting in cold chain manufacturers emphasizing their storage to increase their shelf-life, which is likely to propel the growth of the market for cold chain. With rising disposable incomes and an aging population, the healthcare expenditure in the region is exhibiting strong growth rates and remains integral to the growth prospects of multinational pharmaceutical and biotechnology companies.

A number of Asia-Pacific destinations, such as India, China, Singapore, South Korea, etc., are also emerging as major destinations for outsourcing clinical trials, drug manufacturing, and pathology testing. This has resulted in a rising demand for temperature-sensitive healthcare products such as vaccines, biopharmaceuticals, clinical trial materials, etc. These trends have driven the demand for cold storage facilities in the Asia-Pacific region and bolstered further investments in ongoing infrastructure improvements. Governments in some Asian countries are taking corrective measures to improve healthcare cold chain logistics services.

The growth of the healthcare cold chain logistics market is attributed to the increasing demand for biopharmaceuticals and vaccines that require cold chains and stricter government regulations for the efficient handling of temperature-sensitive pharma products. The flourishing pharmaceutical sector to serve the healthcare needs of the growing population is fueling the demand for healthcare cold chain logistics. Factors such as lack of standardization pertaining to operating procedures, security, temperature, pest control, and high operational cost restrain the market growth.

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APAC Healthcare Cold Chain Logistics Market Trends

Growth in the Pharmaceutical Sector Driving the Market

Pharmaceutical manufacturers in the Asia-Pacific region are increasingly focusing on product quality and sensitivity. Factors such as the development of complex biological-based medicines and shipment of hormone treatments, vaccines, and complex proteins that require cold chain refinements result in the need for temperature-controlled transportation and warehousing.

Temperature-controlled logistics of pharmaceutical products and medical devices is a significantly growing part of the healthcare logistics industry. During the COVID-19 crisis, cold chain logistics is playing a vital role for the pharmaceutical sector, while increasing concern toward health is expected to support the growth of the Asia-Pacific healthcare cold chain logistics market.

During the first quarter of 2021, China led the top 50 Asia-Pacific (APAC) pharmaceutical firms in terms of market capitalization. At the end of Q1 2021, the aggregate market capitalization of the 50 APAC firms was up by 3.8% when compared to Q4 2020, with 28 Chinese companies accounting for 60% of the total market cap.

The Japanese pharmaceutical market is expanding to become the world's second-largest. Foreign direct investments (FDI) have steadily increased in the Japanese pharmaceutical sector over the years, assisting the country in establishing a global presence. Japan is home to four of the world's top 25 pharmaceutical companies.

An increase in the need for effective cold chain logistics services to maintain the quality of goods fueling the growth of the market. In addition, the entire cold chain and logistics for the pharmaceutical industry are becoming more strategic and reliable. High-value pharmaceutical products are mostly shipped via cold chain solutions across the entire distribution network, thereby driving the growth of the market in Asia-Pacific.

Increase in Number of Refrigerated Warehouses

The COVID-19 pandemic has resulted in a significant change in the supply chain outlook, enabling the growing usage of high-end digital technologies to attain operational efficiency along with health concerns. The changing logistics industry outlook, requirement for substantial cost optimization, and optimum inventory management are anticipated to support the growth of the Asia-Pacific healthcare cold chain logistics market.

Japanese logistics companies are putting their vast experience to work in Southeast Asia, building modern warehouses with features like temperature controls to meet the evolving requirements of local consumers. As people's incomes improve in Asia, they expect faster delivery of online shopping orders, necessitating automated warehouse handling to save time and rigorous temperature controls to keep goods fresh.

Thailand is the Asian country with the most advanced warehouses. Indonesia, with a population of over 270 million people, has enormous potential but has fallen behind in logistics development, owing in part to the transportation constraints posed by the country's numerous islands. However, demand from domestic-market-focused enterprises is growing,

Businesses are investing millions of dollars in their cold chain operations to create effective, efficient, and reliable processes as end-to-end cold chain security is the weak link in the system. Moreover, the number of refrigerated warehouses is increasing, owing to a surge in demand for food and pharmaceutical products in the Asia-Pacific region. Therefore, an increase in refrigerated warehouses is anticipated to boost the growth of the Asia-Pacific Healthcare Cold Chain Logistics Market.

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The Asia-Pacific healthcare cold chain logistics market is fragmented with rising competition, product launches, collaborative partnerships, and other strategic decisions that are undertaken to achieve operational efficiency. Some of the major players include DHL, CEVA Logistics, and Cardinal Health. The key players have adopted the strategy of signing contracts and agreements for expanded regional reach and optimized operational costs. The market is highly competitive, with players competing and partnering to gain a substantial market share.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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