

Europe Pharmaceutical Cold Chain Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Pharmaceutical Cold Chain Logistics Market size is estimated at USD 19.59 billion in 2024, and is expected to reach USD 31.32 billion by 2029, growing at a CAGR of 10% during the forecast period (2024-2029).

Europe is home to some of the largest pharmaceutical and life sciences companies, including Roche Holding (Switzerland), Sanofi (France), GlaxoSmithKline (United Kingdom), AstraZeneca (United Kingdom), Novo Nordisk (Denmark), Merck Group (Germany), Allergan (Ireland), UCB (Belgium), Ipsen (France), and Lundbeck (Denmark), among others. Several pharmaceutical and life sciences companies are investing in Europe owing to the potential and opportunities it provides. Companies have been getting into M&As, opening manufacturing plants, investing in warehouses, technology advancements, etc., to expand their product offerings and improve their market share.

Owing to the large pharmaceutical market, Europe is one of the largest importers and exporters of pharmaceuticals. The United States and Switzerland were the EU's main trading partners for medicinal products in 2020. Among the EU member states, Germany was the largest exporter (EUR 49 billion) of medicinal products in 2020. The European Federation of Pharmaceutical Industries and Associations (EFPIA) represents around 1,900 pharmaceutical companies operating in Europe.

National pharmaceutical industry associations in the following 33 European countries are members of EFPIA: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, the Netherlands, Norway, Poland, Portugal, Romania, the Russian Federation, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, and the United Kingdom. In addition, 40 leading pharmaceutical companies are EFPIA members. COVID-19 further accelerated the demand for drugs and vaccines across Europe, which, in turn, drove the growth of the pharmaceutical logistics market in Europe.

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Europe Pharmaceutical Cold Chain Logistics Market Trends

Growing European Pharmaceutical Industry

- Europe is the second-largest biopharmaceuticals market in the world. The increasing population and chronic diseases are propelling the growth of the market studied. The adoption and accessibility, availability of biopharmaceuticals for the treatment and diagnosis of diseases, and awareness related to medicine raised the European market. Western Europe contains more than 33% of manufacturing facilities worldwide. Biopharma products have higher efficiency with safety than other products.
- In the European Union, about 80% of pharma products now require temperature-controlled transportation. For years, pharmaceutical mandates in most countries required products to be maintained within manufacturer-established guidelines only in storage. However, the European Union issued guidelines on Good Distribution Practices for medicinal products for human use, extending temperature requirements to transportation and expanding coverage to include over-the-counter drugs.
- To fulfill such needs, several warehouses comprising cold chain systems are designed to ensure the ideal storage and transportation conditions for temperature-sensitive products. Moreover, businesses invest 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.
- In addition, temperature-controlled logistics of pharmaceutical products and medical devices is a significantly growing part of the healthcare logistics industry. Further, 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. In addition, an increase in the need for effective cold chain logistics services to maintain the quality of goods fuels the growth of the market studied.

Increased Demand for Cold Chain Logistics Market

- As more and more people move to cities, there is a growing demand for fresh and prepared foods, which need to be transported and stored in a refrigerated environment; the e-commerce sales of food and beverages are growing rapidly in Europe, and this is driving demand for cold chain logistics to deliver these products to consumers doorsteps.
- In addition to these factors, the COVID-19 pandemic also highlighted the importance of cold chain logistics for the safe and efficient distribution of essential goods, such as food and medicine.
- Investors are building new cold storage facilities in strategic locations across Europe to meet the demand for temperature-controlled storage capacity. For example, in March 2023, Lineage Logistics announced the acquisition of a new facility in Belgium to expand its presence in the European market. Investors are also investing in transportation infrastructure to improve the efficiency and reliability of cold-chain transportation. For instance, in 2022, Maersk announced the launch of a new reefer container service that provides end-to-end visibility and control for the transportation of temperature-sensitive goods.

Europe Pharmaceutical Cold Chain Logistics Industry Overview

The European pharmaceutical logistics market is relatively fragmented, with prominent regional, global, and small- and medium-sized local players. The market is dominated by a few international players, such as DHL, FedEx, Kuehne + Nagel International AG, United Parcel Service, and CH Robinson. Some of the major domestic players include Eurotranspharma, Centre Specialites Pharmaceutiques, PostNL Pharma & Care, and Trans-o-Flex Schnell-Lieferdienst GmbH. The growing demand for temperature-controlled products and refrigerated packaging solutions to maintain the quality of pharma products has enabled the logistics players to diversify their service portfolio and gain more profit.

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Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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