

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

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Germany Cold Chain Logistics Market size is estimated at USD 16.92 billion in 2024, and is expected to reach USD 25.44 billion by 2029, growing at a CAGR of 8.5% during the forecast period (2024-2029).

Key Highlights

- The COVID-19 pandemic had a positive impact on the German cold-chain logistics market. According to the Federal Association of E-Commerce and Mail Order Business, online demand for medicines increased by 88 percent during the pandemic, as did food orders (by 55 percent or more) and drugstore goods (by nearly 30 percent). However, for the cold chain logistics market in Germany, the year 2020 witnessed a decline in terms of revenue and growth, owing to the negative demand and supply outlook due to COVID-19 restrictions for end users, including manufacturers and suppliers of food and beverages, health and nutrition products, bakery products, flower-related products, and many others.
- The demand for cold chains is due to the growth of the organized food retail industry, the demand for processed food, and increased health expenditures. The German cold chain logistics market is driven by factors, such as the growing penetration of e-commerce in the logistics industry, the growing penetration of e-commerce in the logistics industry, the rising number of refrigerated warehouses, and the growing pharmaceutical sector.
- Moreover, poor infrastructure, lack of standardization, higher logistics costs, and a lack of control by manufacturers and retailers over logistics services hamper the growth of the German cold chain logistics market. However, the surge in the use of IT solutions and automated software for cold chain logistics, cost cutting, and lead time reduction due to the adoption of the multi-modal system and RFID technologies for cold chain applications are expected to offer lucrative opportunities for the growth of the German cold chain logistics market.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Rising Number of Refrigerated Warehouses and Growing Pharmaceutical Industry

Germany is one of the most important biotech locations worldwide. The turnover of dedicated biotechnology companies reached more than 4.5 billion euros (USD 4.8 billion) during the COVID-19 pandemic, the highest figure since 2005. Among the EU Member States, Germany was the largest exporter (USD 60 billion) of medicinal and pharmaceutical products in 2021. The production value of pharmaceuticals in Germany has gradually increased within the provided period to over 36 billion euros (USD 39 billion) in 2018, the highest value so far. In 2021, pharmaceutical production in Germany was valued at 34.6 billion euros (USD 37 billion).

In the European Union, about 80% of pharmaceutical 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 EU has 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. For instance, in November 2022, Frigo-Trans (a German pharmaceutical logistics provider) will build the first cryopreservation warehouse at the Mutterstadt site in Germany. This warehouse offers 24 low-temperature storage tanks operated with liquid nitrogen from the market-leading manufacturer and supplier Cryotherm GmbH & Co. KG in the qualified storage area, which are suitable for storing sensitive biological and medical products such as vaccines or biological samples.

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 the shipment of hormone treatments, vaccines, and complex proteins that require cold chain refinements result in the need for temperature-controlled transportation and warehousing. The market is also growing because there is a growing need for good cold-chain logistics services to keep the quality of goods.

Increase in Demand for Frozen Foods

Germany holds the largest share of the frozen food market in Europe, as Germans prefer high-flavor, high-quality, and distinctive foods while avoiding excessive calorie intake. The consumer economy of Germany is booming, and the country has abundant natural resources; this has created huge opportunities in the cold chain logistics market. Increasing demand for perishable food, meat, seafood, and pharmaceutical products has resulted in the growth of the market for cold chain logistics in Germany. Moreover, consumers are shifting from consumption of animal-source foods to vegetable alternatives, driving growth in the frozen vegetable market. There is an awareness that frozen vegetables are healthier (in terms of vitamins and nutrients) than vegetables bought fresh and then refrigerated. This fact is now being talked about more in public, which is making younger people want to buy more frozen vegetables.

The demand for chilled and frozen foods is increasing as a solution for modern-age families, such as independent elderly citizens, an increase in dual-income households and single people, the danger of food loss, and increasing overall labor shortages in the food and beverage industry. According to the German Frozen Food Institute, the consumption of frozen foods amounted to 46.1 kilograms per capita in the year 2021. In 2021, 55.4 percent of frozen foods were sold by food retailers, the rest in away-from-home markets with large-scale consumers. Frozen foods in Germany generated revenues of roughly 15.92 billion euros (USD 17 billion) in 2021. Moreover, in the same year, over 879.1 thousand tons of frozen baked goods were sold in Germany. So, the market for cold chain logistics in Germany is expected to be driven by the rising demand for frozen food over the next few years.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The German cold chain logistics market is fragmented and consists of a large number of local players to cater to the growing demand. The market sees increasingly fierce competition in the field of e-commerce logistics. It is expected that the growth in exports of agricultural products in the international and domestic markets will also attract many international players in the warehousing and storage fields. Some of the major players in the market include Bitzer Kuhlmaschinenbau GmbH, CDS Hackner GmbH, Wagner Group GmbH, Pfenning Logistics, and Rite-Hite GmbH.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

- 2.1 Research Framework
- 2.2 Secondary Research
- 2.3 Primary Research
- 2.4 Data Triangulation and Insight Generation
- 2.5 Project Process And Structure
- 2.6 Engagement Frameworks

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Current Market Scenario
- 4.2 Technological Trends
- 4.3 Government Regulations and Initiatives
- 4.4 Spotlight on Ambient/Temperature-controlled Storage
- 4.5 Industry Value Chain/Supply Chain Analysis
- 4.6 Impact of Emission Standards and Regulations on Cold Chain Industry
- 4.7 Impact of COVID-19 on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints/Challenges
- 5.3 Market Opportunities
- 5.4 Industry Attractiveness - Porter's Five Forces Analysis
 - 5.4.1 Threat of New Entrants
 - 5.4.2 Bargaining Power of Buyers/Consumers
 - 5.4.3 Bargaining Power of Suppliers
 - 5.4.4 Threat of Substitute Products
 - 5.4.5 Intensity of Competitive Rivalry

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6 MARKET SEGMENTATION

6.1 By Services

6.1.1 Storage

6.1.2 Transportation

6.1.3 Value-added Services (Blast Freezing, Labeling, Inventory Management, etc.)

6.2 By Temperature Type

6.2.1 Chilled

6.2.2 Frozen

6.3 By Application

6.3.1 Horticulture (Fresh Fruits & Vegetables)

6.3.2 Dairy Products (Milk, Ice-cream, Butter, etc.)

6.3.3 Meat and Sea Food

6.3.4 Processed Food Products

6.3.5 Pharmaceuticals, Life Sciences, and Chemicals

6.3.6 Other Applications

7 COMPETITIVE LANDSCAPE

7.1 Market Concentration Overview

7.2 Company Profiles

7.2.1 BITZER Kuhlmaschinenbau GmbH

7.2.2 CDS Hackner GmbH.

7.2.3 Wagner Group GmbH

7.2.4 Pfenning Logistics

7.2.5 Rite-Hite GmbH

7.2.6 Eurofresh Logistics GmbH.

7.2.7 Heuer Logistics GmbH & Co. KG

7.2.8 KLM Kuhl- und Lagerhaus Munsterland GmbH

7.2.9 Kloosterboer BLG Coldstore GmbH

7.2.10 Frigolanda Cold Logistics

7.2.11 GEA Group Aktiengesellschaft

7.2.12 Fortdress International KG

7.2.13 NewCold Advanced Logistics*

8 MARKET OPPORTUNITIES AND FUTURE TRENDS

9 APPENDIX

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-04
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com