

## **Japan Cold Chain Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 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 Japan Cold Chain Logistics Market size is estimated at USD 20.52 billion in 2024, and is expected to reach USD 26.79 billion by 2029, growing at a CAGR of 5% during the forecast period (2024-2029).

With COVID-19 in effect, the Japanese Trade Ministry reported a 7.5% Y-o-Y increase in the sale of drugstores in March 2020. Along with this, the Japan Supermarkets Association, in response to the self-imposed quarantines and the need to cook at home, reflected a 7.4% Y-o-Y increase in the demand and sales of groceries at the supermarkets in March 2020. All these factors led to a negative impact on the cold chain logistics market in Japan. COVID-19 impacted Japan's cold chain operations, including increased food safety concerns.

Japan is regarded as a mature market for cold chain logistics and is dominated by several players. Rapid advancements in biopharmaceuticals and regenerative medicine recently increased the demand for the cold pharmaceutical chain in Japan. This trend is expected to continue with the COVID-19 vaccines introduction and other treatments. Cold chain logistics in Japan was initially established for the fresh, refrigerated, and frozen food industries. Cold chain logistics focuses on the timely distribution of products within a constantly controlled temperature and humidity environment.

Most cold storage facilities in Japan are owned and operated by major cold chain corporations, with only a small number available for lease. Advances in using e-commerce to sell frozen and chilled goods will accelerate cold storage development in areas with latent needs.

Factors such as an increase in the number of refrigerated warehouses and growth in the pharmaceutical sector are expected to drive the growth of Japan's cold chain logistics market. Some of the challenges in the market are the irregular distribution of cold

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

storage capacity, lack of proper logistical connectivity support, and the need for high capital investment.

## Japan Cold Chain Logistics Market Trends

### Modern Households Leading to Demand for Frozen Foods

The demand for chilled/frozen foods is increasing as a solution for modern-age families, such as independent elderly citizens, increase in dual-income households and single people, along with the danger of food loss and increasing overall labor shortages in the food and beverage industry.

In 2021, the consumption volume of frozen food in Japan amounted to about 2.9 million tons (USD 0.020 million tons). Popular frozen food products manufactured in Japan include dumplings (gyoza), croquettes, and wheat-flour noodles (udon). In recent years, Japanese food also exploded worldwide, especially agricultural products.

As the Japanese population ages, the shift to healthy life expectancy is a common desire of the people aiding the sale of frozen products. It also significantly increased in supermarkets, hypermarkets, and drugstores. Frozen food items in Japan became more diverse due to advances in refrigeration technology and growing demand for eat-at-home products amid the COVID-19 pandemic.

High-priced delicacies from well-known restaurants and authentic reproductions of food from abroad grew across the market, prompting department stores and supermarkets to speed up efforts to expand sales spaces.

### Growth of Pharmaceutical Sector in Japan

Japan is one of the largest pharmaceutical markets in the world, primarily due to its aging population. It is also among the major producers and importers of advanced medical facilities backed by active government initiatives to promote generic drugs.

The country's native biologics sector is second after the USA. Coupled with the government's focus on supporting lower-cost copycat products, this entails a massive opportunity for bio-similars. While innovative drugmakers long benefited from generous exclusivity periods in Japan, the country is catching up with other mature markets regarding generics penetration.

The confidence in the system is reflected by the fact that domestic drugmakers are increasingly going global with their products. With the share of top Japanese companies' overseas sales rising steadily, the demand for cold chain storage and transportation facilities is also increasing. Another critical factor for increased interest in Japan's pharmaceuticals sector is the need to enhance Japan's drug discovery ecosystem.

The increased COVID-19 infection cases in the country increased the demand for prescription drugs and vaccines. It impacted the pharmaceutical product demand. The increasing import of COVID-19 vaccines increased the pharmaceutical product demand. For instance, in May 2021, the Japanese government signed a contract with Pfizer-BioNTech to import 194 million (USD 1.33 million)vaccine doses by the end of 2021. In 2021, the Japanese prescription drug market was valued at approximately JPY 10.6 trillion (USD 0.080 Trillion), up from about JPY 10.4 trillion (USD 0.079 Trillion) in 2020, according to IQVIA.

### Japan Cold Chain Logistics Industry Overview

The market is relatively fragmented, with many local and international players, including Nippon Express, Yamato, Sagawa Express Co., Ltd, Itochu Logistics Corp., and Kintetsu World Express. The competition in the market pertains to costs, storage fees, and space, along with the rising prices of packing and packaging materials. The service providers are still working on developing the ability to provide standardization in the processes. Lack of standardization related to storage temperature and operating

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

procedures are a few more significant challenges the industry faces. The quality and flexibility of available cold warehousing space are a considerable concern.

Additional Benefits:

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

## **Table of Contents:**

### 1 INTRODUCTION

- 1.1 Study Deliverables
- 1.2 Study Assumptions
- 1.3 Scope of the Study

### 2 RESEARCH METHODOLOGY

### 3 EXECUTIVE SUMMARY

### 4 MARKET DYNAMICS AND INSIGHTS

- 4.1 Current Market Scenario
- 4.2 Market Dynamics
  - 4.2.1 Drivers
    - 4.2.1.1 Criticality of the healthcare sector
    - 4.2.1.2 Increased consumer demand for fresh foods
  - 4.2.2 Restraints
    - 4.2.2.1 Inadequate packaging or damaged products
    - 4.2.2.2 Disrupted temperature control
  - 4.2.3 Opportunities
    - 4.2.3.1 Technological Innovations
- 4.3 Technological Trends and Automation
- 4.4 Government Regulations and Initiatives
- 4.5 Industry Value Chain/Supply Chain Analysis
- 4.6 Spotlight on Ambient/Temperature-controlled Storage
- 4.7 Industry Attractiveness - Porter's Five Forces Analysis
  - 4.7.1 Threat of New Entrants
  - 4.7.2 Bargaining Power of Buyers/Consumers
  - 4.7.3 Bargaining Power of Suppliers
  - 4.7.4 Threat of Substitute Products
  - 4.7.5 Intensity of Competitive Rivalry
- 4.8 Impact of Emission Standards and Regulations on Cold Chain Industry
- 4.9 Impact of COVID - 19 on the Market

### 5 MARKET SEGMENTATION

- 5.1 By Services
  - 5.1.1 Storage
  - 5.1.2 Transportation
  - 5.1.3 Value-added Services (Blast Freezing, Labeling, Inventory Management, etc.)

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 5.2 By Temperature Type

### 5.2.1 Chilled

### 5.2.2 Frozen

## 5.3 By Application

### 5.3.1 Horticulture (Fresh Fruits & Vegetables)

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

### 5.3.3 Meats, Fish, Poultry

### 5.3.4 Processed Food Products

### 5.3.5 Pharma, Life Sciences, and Chemicals

### 5.3.6 Other Applications

## 6 COMPETITIVE LANDSCAPE

### 6.1 Market Concentration Overview

### 6.2 Company Profiles

#### 6.2.1 Nippon Express

#### 6.2.2 Yamato Holdings

#### 6.2.3 Sagawa

#### 6.2.4 Kintetsu World Express

#### 6.2.5 Itochu Logistics Corp.

#### 6.2.6 DHL

#### 6.2.7 Kuehne Nagel

#### 6.2.8 K line Logistics

#### 6.2.9 Nichirei Logistics Group, Inc.

#### 6.2.10 Sojitz Corporation

#### 6.2.11 CEVA Logistics

#### 6.2.12 Kokubu Goup

#### 6.2.13 Agility

#### 6.2.14 SF Express\*

## 7 FUTURE OF JAPAN COLD CHAIN LOGISTICS MARKET

## 8 APPENDIX

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Japan Cold Chain Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-05
		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](mailto:support@scotts-international.com)  
[www.scotts-international.com](http://www.scotts-international.com)