

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

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

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### **Report description:**

The Mexico Cold Chain Logistics Market size is estimated at USD 3.63 billion in 2024, and is expected to reach USD 6.18 billion by 2029, growing at a CAGR of 9.38% during the forecast period (2024-2029).

#### Key Highlights

- A number of factors have contributed to temperature-controlled logistics services being a significant growing sector in Mexico. One of them is that the global demand for and international trade in a broad range of temperature-controlled goods has increased as more nations make the shift to largely middle-class consumption patterns.
- In 2022, Mexico's cold chain sector witnessed significant investments. For instance, in September 2022, Emergent Cold Latin America (Emergent Cold LatAm), the fastest-growing refrigerated storage and logistics service provider, acquired Bajo Cero Frigorificos, an important cold storage company in Mexico. With this acquisition, Emergent Cold LatAm entered into Mexico's cold chain market and made notable investments in the sector.
- Moreover, most logistics players are attracted to invest in Mexico because of its geographic advantages. The country has the second largest and most populous economy in Latin America, with connectivity to the Atlantic and Pacific Oceans via important port locations. Furthermore, Mexico is an important partner to the United States due to its geographic location, free trade agreements, and central role in the global food trade.
- Moreover, Mexico is a central part of Latin America, and due to its size, scale, and attractive export and food consumption trends, the country is gaining significant traction among foreign countries. Furthermore, Emergent Cold Latin America, a major cold chain logistics company, expanded its presence across Mexico by acquiring Qualianz, a premier storage and logistics platform with operations in Mexico City, Mexico State, Monterrey, Queretaro, and Tijuana.
- Through this acquisition, the company emerged as one of Latin America's most dynamic temperature-controlled logistics partners. Furthermore, in 2022, Artico Cold Management, a Chicago-based startup, planned to construct a new facility in Las

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Cruces' industrial park. In addition, the company planned to erect approximately a 120,000-square-foot cold storage warehouse in the Las Cruces Innovation and Industrial Park from Interstate 10 just south of the city airport. Thus, the growing cold chain facilities across the region further drive the overall market.

## Mexico Cold Chain Logistics Market Trends

### Growing Agriculture product exports

- In 2023, the food and agricultural supply chains in Mexico and the United States became increasingly integrated, efficient, and interdependent in both directions. In addition, the United States and Mexico border is one of the busiest in the world in terms of commerce, with thousands of cargo trucks crossing daily and multiple freight rail crossings.
- Moreover, Southbound trade relies heavily on cross-border rail traffic and ocean freight through the Gulf of Mexico, particularly grain and oilseeds shipments. Furthermore, from January to October 2022, more than 75% of the volume and 86% of the value of total US agricultural and related product exports to Mexico were shipped overland via the US-Mexico border.
- During this period, bulk shipments of grains and oilseeds were primarily shipped via ocean freight through the Gulf of Mexico. On the other hand, regarding northbound trade, Mexico's exports to the United States are more heavily oriented toward overland shipments, given the country's higher proportion of fresh and consumer-oriented goods transported by truck.
- In addition, along the border between the United States and Mexico, the Laredo district handles most agricultural trade in both directions. Established industry supply chains drive the increasing trade activities, more commercial crossings with infrastructure to handle food and agricultural products, and the district's proximity to the largest population centers and key markets. Meanwhile, the current bilateral trade environment is characterized by increasing integration and efficiency, and challenges and disruptions are still a reality. The volume and value of bilateral agricultural trade reached record levels in recent years.
- Furthermore, in February 2023, as per the US Census Bureau published data, the two-way agricultural trade between Mexico and the United States totaled more than USD 70 billion in 2022, up by more than 13% compared to the previous year. In addition, the value of Mexico's agricultural exports to the United States increased 14% last year to a record high of more than USD 44 billion. The agriculture imports from the United States were USD 28 billion.
- Moreover, in 2022, Mexico recorded an agricultural trade surplus of more than USD 15 billion, up by more than 18% compared to the previous year. Mexico's Ministry of Agriculture and Rural Development (SADER) stated that the trade balance result was better than in the past five years. Thus, the growing agricultural trade activities in the country further require a huge network of cold chain logistics to prevent food spoilage. Hence, the increasing agricultural trade activities are anticipated to bolster the country's demand for cold chain logistics.

## INCREASING MEAT CONSUMPTION DRIVES THE MARKET

- In 2023, as per the US Department of Agriculture (USDA) Global Agricultural Information Network (GAIN) study, Mexico's chicken meat consumption is witnessing strong growth.
- In addition, Mexico is the fifth largest chicken meat consumer globally, and demand for chicken meat continues to rise. Chicken meat is Mexico's most consumed animal protein, and in 2024, consumption is forecast to be 3% higher than in 2023 at 4.9 million MT.
- Moreover, the demand is driven by increased demand for processed chicken meat such as cold cuts and frozen breaded chicken meat.
- Furthermore, when the price gap between chicken and pork narrowed in May 2023, consumers continued to purchase chicken meat at relatively higher levels than pork.

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- Meanwhile, in 2023, the logistics company Brado, a subsidiary of Rumo, saw a 16% increase in the transport of frozen meat by rail, reaching a historic mark of 8,346 containers in Q1 2023. thus, the rising meat consumption drives the country's unprecedented demand for cold chain networks.

## Mexico Cold Chain Logistics Industry Overview

Major foreign companies are present in this area of Mexico's extremely fragmented logistics market. Some startups offer cold chain storage options in addition to them. Frialsa and Qualianz are two significant participants in the cold chain logistics industry in Mexico. With a warehouse that is around 2.6 million cubic meters in size, Frialsa is a dominant participant in the cold storage industry. In addition to these two businesses, there are others in this industry, mostly from the USA.

### Additional Benefits:

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

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