

## **Spain Cold Chain Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029**

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### **Report description:**

The Spain Cold Chain Logistics Market size is estimated at USD 5.68 billion in 2024, and is expected to reach USD 9.33 billion by 2029, growing at a CAGR of 10.47% during the forecast period (2024-2029).

The main growth drivers of the market are the growth of warehousing facilities across the country, the growth of B2C e-commerce, and the increase in investment by public and private enterprises in infrastructure development. With the significant transformation in the frozen food industry, cold chain logistics has become more important due to increased investment by large enterprises in the industry. The Spanish cold chain logistics market is mainly driven by increased government investment, changes in customer preferences, and the growth of the country's pharmaceutical industry. To accelerate the improvement of logistics and transportation, the Spanish government has carried out structural reforms to promote trade and foreign investment in the country.

COVID-19 had a positive impact on the Spanish cold chain logistics market. During the lockdown, high demand for frozen food and pharmaceutical products helped in the growth of the cold chain logistics market. Because of the rapid growth of the e-commerce sector and the increasing expectations of customers for same-day delivery and same-hour delivery, Spain's demand for logistics space may continue to grow in the next few years. The increase in market penetration, the increase in security and privacy of online shopping, the shortening of delivery time, and the decrease in logistics costs in the next few years may further promote the development of the logistics industry in Spain. Large service providers are expected to adopt warehouse management systems, big data analysis, and transportation management systems to maintain market competitiveness. Companies are likely to further invest in technologies, such as artificial intelligence, RFID, GPS tracking, and automation, which will contribute to the overall development of the Spanish cold chain logistics industry.

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The growth of Spanish goods imports and exports, the growth of air cargo, the increase in the number of companies in the transportation industry, and the transportation and infrastructure expenditures of container ports are some of the other key factors that may have a positive impact on the Spanish cold chain market.

## Spain Cold Chain Logistics Market Trends

### Increase in cold warehouse demand driving the market

- A few years ago, it was widely reported that the self-storage market was thriving. It is currently trending at 4-5% year on year across Europe. Of course, this varies from one country to the next. However, there is a high demand for self-storage trends in Spain.
- In one such case, as quoted by the organization, facilities at uStore-it are frequently booked. As a result, many customers rent online by pre-booking their units rather than waiting until the last minute. Surprisingly, despite market growth, Spain ranks fourth in Europe in terms of the number of units and storage companies. However, when it comes to the Costa del Sol, the needs frequently outnumber the availability. As a result, our Manilva facility, for example, has recently expanded, and a new Palmones facility has successfully launched during the last 12 months.
- According to an industry association, with around 6.8 million square meters of logistics space taken up in the third quarter, the European logistics real estate market is returning to pre-pandemic levels of demand. Close to 22.9 million sqm were taken up during Q1-Q3 2022, matching the record level set in 2022. Despite the economic headwinds, however, the supply-demand imbalance persists. Investors, on the other hand, are treading carefully as pricing uncertainty slows transaction activity. The primary factor driving market growth is the increasing demand for refrigerated storage due to customer adaptation to perishable food.
- Moreover, as technology improves, there will be more automation in the refrigerated warehouse. There will also be more hypermarkets and supermarkets in developing countries, which will drive the market during the forecast period. Furthermore, the increasing need for food safety and taste consistency, as well as the rising amount of agricultural and chemical products, are anticipated to boost market growth.

### E-commerce growth driving the market

- With over 26 million e-commerce customers, Spain is the EU's fourth-largest e-commerce market, trailing only Germany, France, and Italy. Spain has the highest percentage of online purchases from non-EU countries of these four countries. In light of this, we will discuss Spain's potential in cross-border e-commerce, with a focus on trade with China, in this article. According to the International Postal Corporation, China and the United Kingdom have long been the two leading countries in terms of cross-border e-commerce sales in Spain. Chinese cross-border e-commerce vendors have gained ground in the last five years, while UK vendors have seen market share erode.
- Spain is more than just a promising import market. According to the Chinese Ministry of Commerce, the country is also one of the top ten exporters to China in terms of cross-border e-commerce. Food and cosmetics are two of the fastest-growing industries. China is currently pursuing a proactive policy of developing cross-border e-commerce through the implementation of facilitation measures. It recently expanded the List of Imported Retail Goods for Cross-Border E-Commerce (Positive List) and is establishing a growing number of pilot zones for cross-border e-commerce. This strategy should benefit Chinese demand for Spanish goods.
- The localization strategy goes beyond simply locating fulfillment centers closer to end-users. It is also about improving the overall experience of urban logistics. For example, in October 2021, AliExpress and Cainiao Network, Alibaba Group's logistics arm, collaborated with GLS Spain to provide a door-to-door order pickup and delivery solution for AliExpress sellers in mainland Spain. AliExpress was also anticipated to significantly expand its automated locker network in France and Spain, with a target of 2,000

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units and an increase in the number of cities covered by 2022. By 2021, the company planned to have 170 lockers in Spain (Madrid and Barcelona) and 80 lockers in France. The localization effort can also be seen in Alibaba's increased recruitment in Europe, which includes personnel to develop end-to-end logistics solutions for cross-border e-retailers in the Spanish market.

## Spain Cold Chain Logistics Industry Overview

The cold chain logistics market in Spain is fragmented, with both domestic and international players present. Major players are Frigoríficos Gelada SL, Interlogística Del Frio SA, Ferro-Montajes Albacete SCL De Balazote, Eurocruz, and Frillemena SA. The cold chain service providers are still working on developing the ability to provide standardization in the processes. The competition in the market pertains to costs, storage fees, and space, along with the rising prices of packing and packaging materials.

### Additional Benefits:

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

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