

Cold Storage Market - Global Outlook & Forecast 2024-2029

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Report description:

The global cold storage market size by revenue is expected to grow at a CAGR of 7.70% from 2023 to 2029.

MARKET TRENDS & OPPORTUNITIES

Expansion of Cold Chain Networks

The cold chain is vital to the global supply chain, confirming the safe and efficient transportation and storage of temperature-sensitive products. The expansion in demand for perishable food items, international trade because of trade liberalization, and the increasing organized food retail industry are some factors driving the cold chain networks. For instance, in 2023, Americold Logistics announced the opening of its office expansion in Santa Perpetua, Barcelona, Spain. The expansion added 11 storage locations and 12,000 packing slots, increasing the capacity of temperature-controlled products and services for regional customers. Hence, such factors support the growth of the cold storage market as cold storage is a static part of a cold chain, which can help preserve perishable commodities.

Growing Technological Advancements

Innovations in refrigerated warehouses and the cold storage market are crucial in supply chains prioritizing temperature control. Further, using cutting-edge technologies such as automation is one of the main trends influencing the cold chain logistics sector. It includes robotic arms and conveyors to store and retrieve pallets of goods within refrigerated environments efficiently. For instance, Lineage's new, fully automated warehouse expansion in Peterborough added an extra 45,000 pallet positions and increased the total capacity to nearly 71,000 pallets.

SEGMENTATION INSIGHTS

INSIGHTS BY WAREHOUSE TYPE

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The global cold storage market by warehouse type is segmented into private and public. The private segment holds the most significant segmental market share in 2023. The private segment dominates the global market as these facilities are committed to meeting an organization's or company's specific needs; this allows for tailor-made storage solutions in preferred sizes designed to meet unique customer needs. Private cold storage warehouses offer greater scalability and expansion opportunities for growing businesses. However, the public sector is growing at a high rate of CAGR due to the growth of e-commerce, and online commerce has increased the demand for cold storage facilities to support the storage and distribution of perishable goods.

Segmentation by Warehouse Type

- ☐ Private

- ☐ Public

INSIGHTS BY FACILITY TYPE

The global cold storage market by facility type is segmented into refrigerated warehouses, cold rooms, refrigerated containers, blast freezers & chillers, and other facilities. The refrigerated warehouse segment dominated the global cold storage market share in 2023 as it is versatile and can store a wide range of perishable products, including fruits, vegetables, dairy, meat, marine food, pharmaceuticals, and others. Further, it maintains environments to effectively inhibit the growth of microorganisms and enzymes responsible for spoilage, ensuring that products remain in optimal condition for extended periods. Furthermore, cold rooms are growing at a high CAGR owing to the rising expansion of supermarkets, convenience stores, and online grocery platforms. Additionally, advances in insulation materials and energy-efficient cooling systems have made cold rooms more cost-effective and sustainable.

Segmentation by Facility Type

- ☐ Refrigerated Warehouse

- ☐ Cold Rooms

- ☐ Refrigerated Containers

- ☐ Blast Freezers & Chillers

- ☐ Other Facilities

INSIGHTS BY TEMPERATURE

The chilled storage segment, which typically refers to storage at 0C and 5C, held the largest share of the global cold storage market in 2023. Chilled storage is specifically designed to preserve perishable goods such as fruits, vegetables, dairy products, meat, and seafood. Chilled storage facilities are in high demand due to the increasing need for temperature-controlled storage solutions. These facilities help maintain the freshness, quality, and safety of perishable items throughout the supply chain, from production to distribution.

Segmentation by Temperature Type

- ☐ Chilled

- ☐ Frozen

- ☐ Deep Frozen

INSIGHTS BY STRUCTURE TYPE

The global cold storage market by structure type is segmented into civil, steel, and hybrid structures. In 2023, the civil structure

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dominated the industry share as this type of cold storage warehousing provides effective insulation, essential for maintaining the desired temperature levels within the cold storage facility. They also utilize insulation materials and construction techniques that minimize heat transfer and prevent temperature fluctuations. Further, the hybrid structure is growing at a high CAGR rate, driven by the versatility of systems assembled around a mobile hybrid cold storage unit. This setup effectively fulfills the cooling requirements for preserving and distributing perishable foods like fish, meat, vegetables, and beverages.

Segmentation by Structure Type

- Civil Structure
- Steel Structure
- Hybrid Structure

INSIGHTS BY APPLICATION

The global cold storage market by application is segmented into dairy products, fish, meat & seafood, fruits & vegetables, bakery & confectionery, pharmaceuticals, and others. The dairy products segment holds the most substantial global market share in 2023. Cold storage, such as cold rooms, refrigerated warehouses, and others, are used for dairy products depending on various factors such as the volume of products, storage requirements, transportation needs, and facility infrastructure for maintaining low temperatures to prevent spoilage and maintain product quality. The surge in demand for dairy products is influenced by several factors, including the expanding global population, escalating personal disposable income among consumers, heightened health consciousness, augmented milk production in emerging economies, and amplified consumption of protein-enriched foods.

Segmentation by Application

- Dairy Products
- Fish, Meat & Seafoods
- Fruits & Vegetables
- Bakery & Confectionery
- Pharmaceuticals
- Others

GEOGRAPHICAL ANALYSIS

The APAC region led the global cold storage market share, accounting for a revenue share of over 37% in 2023. The presence of huge cold chain networks drives the growth. For instance, according to GCCA (Global Cold Chain Alliance), the region represents more than 300 cold chain suppliers and logistics providers in more than 15 countries, significantly supporting the market. Moreover, China holds the largest regional market share. India is the fastest-growing market in the region as the government is implementing various cold chain schemes for setting up cold storage for perishable goods and horticultural & non-horticultural products.

North America is also a well-developed and mature market with two major U.S. and Canada contributors to this region's cold storage industry growth. Factors such as the expanding demand for frozen food products, the growth of e-commerce, and the need for effective supply chain management have driven market expansion. Moreover, Europe has a significant presence in the global cold storage market, with countries like Germany, France, and the U.K. boasting well-developed infrastructure for cold storage facilities. The market extension in this region is propelled by numerous factors, including increasing demand for convenience foods, the expansion of organized retail, and strict regulations concerning food safety and quality.

Segmentation by Geography

- APAC

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- o China
- o India
- o Japan
- o South Korea
- o Australia
- o Indonesia
- North America
- o The U.S.
- o Canada
- Europe
- o The U.K.
- o Spain
- o Germany
- o France
- o Italy
- o Poland
- Latin America
- o Brazil
- o Mexico
- o Argentina
- o Chile
- Middle East & Africa
- o South Africa
- o Saudi Arabia
- o UAE
- o Turkey

COMPETITIVE LANDSCAPE

The global cold storage market is a highly competitive industry crucial in storing and preserving perishable goods, such as food and pharmaceuticals, at low temperatures. The industry is dominated by several major players who have established a strong presence globally. Companies such as Americold Logistics, Lineage Logistics, and Preferred Freezer Services are among the leading players in the industry. Further, the global cold storage market could be more cohesive with several local companies present. These market players strive to gain a higher market share by adopting investments, partnerships, acquisitions, and mergers. Companies are also spending on the development of improved products and focusing on maintaining competitive pricing. For instance, in February 2023, Lineage Logistics started its 'Lineage Fresh' service in Europe, providing a storage solution for major producers, grocers, and fresh fruit importers at the Fruit Logistica trade show in Berlin. With Lineage's cold storage technology and strong logistics network, the service launched in the U.S. in November 2022 will allow products with a short shelf life to face fewer obstacles and less risk and damage.

Key Company Profiles

- Lineage Logistics Holding, LLC
- Americold Logistics
- United States Cold Storage, Inc
- NewCold
- Nichirei Corporation

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Other Prominent Vendors

- [] Emergent Cold LatAM
- [] The Tippmann Group
- [] Constellation Cold Logistics
- [] Superfrio Logistica Frigorificada
- [] FreezPak Logistics
- [] Conestoga Cold Storage
- [] Congebec Logistics, Inc.
- [] Metcold Holdings Limited
- [] RLS Logistics
- [] Friozem Armazens Frigorificos
- [] Magnavale Ltd
- [] Trenton Cold Storage
- [] Nor-Am Cold Storage
- [] Burris Logistics
- [] Arihant Cold Storage
- [] ColdStar Solutions Pvt Ltd
- [] ColdStar Logistics
- [] Coldman Logistics Pvt Ltd
- [] Coldrush Logistics
- [] Indicold Private Limited
- [] Frialisa
- [] Confederation Freezers (Premium Brands Holdings)
- [] Vertical Cold Storage

KEY QUESTIONS ANSWERED:

- 1.[] How big is the cold storage market?
- 2.[] What are the significant trends in the cold storage industry?
- 3.[] Which region dominates the global cold storage market share?
- 4.[] What is the growth rate of the global cold storage market?
- 5.[] Who are the key players in the global cold storage market?

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