

Japan Cold Chain Logistics Market Assessment, By Type [Refrigerated Warehouses, Refrigerated Transportation], By Temperature [Frozen, Chilled], By Reefer [Reefer Vans, Reefer Trucks, Others], By Application [Dairy and Frozen Desserts, Meat, Seafood, Fruits and Vegetables, Pharmaceuticals, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan cold chain logistics market is projected to witness a CAGR of 12.35% during the forecast period FY2024-2032, growing from USD 16.65 billion in FY2024 to USD 42.27 billion in FY2032.

Growth in the market in Japan for cold chain logistics is immense as changing lifestyle and increasing health awareness promote fresh and frozen foods amongst consumers. Hence, companies in food, pharmaceutical and e-commerce industries increasingly adopt temperature-controlled solutions due to which advanced cold chain systems gain importance to preserve the product quality that relies more and more on these. The pharmaceutical industry is especially the development and distribution of temperature sensitive vaccines and biological products which is fueling this demand. The demand for refrigerated and frozen medical supplies is on the rise with Japan's aging population, which is putting more pressure on the cold chain logistics providers to expand and innovate. Regulatory changes, such as increased food safety standards and labor reforms impacting transportation, are also accelerating investments in automation and technology to guarantee operational efficiencies. The emergence of online grocery and meal kit delivery services requires dependable last-mile cold chain solutions. The current collaboration between powerful infrastructure, advanced technology, and logistics suppliers is an important facilitator for this growth. Companies are striving to meet the needs of these market developments while achieving the target of labor shortage and sustainability, but the cold chain logistics market has developed regularly and efficiently rotten products nationwide. It is necessary to ensure reliable distribution.

In April 2023, GLP Japan is constructing two new cold storage facilities, GLP Kobe Sumiyoshihama, and GLP Rokko V, to meet the

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growing demand for temperature-controlled logistics solutions with a combined area of 55,000 SQM. These purpose-built facilities will enhance the capacity and efficiency of the cold chain industry in Japan supporting the storage and distribution of perishable goods. By implementing advanced technologies and sustainable practices, GLP aims to provide high-quality, versatile cold storage solutions that cater to the expanding needs of food manufacturers, wholesalers, and third-party logistics providers, ultimately boosting the growth of Japan's cold chain logistics market.

Perishable Goods Drive Market Growth

The growth of perishable products in Japan, including fresh seafood, dairy products, fruits, and vegetables, is the biggest driver of the cold chain logistics market, and growing demand from consumers for fresh and quality food increases the need for efficient temperature-controlled storage and transportation systems. Japan's food industry relies highly on cold chain solutions to keep products fresh and avoid spoiling them while they are in distribution. The increasing demand for internet-based grocery shopping and the growth of food exportation have further boosted the acceptance of advanced cold chain logistics. Cold chain systems ensure the safe and timely delivery of perishable items to meet increasing demand while maintaining high-quality standards. This makes the cold chain sector indispensable in Japan's food supply chain, driving consistent market growth.

In June 2024, Fosun Hive Capital Management and Idera Capital Management launched a joint venture to develop a modern, energy-efficient cold storage logistics facility in Greater Osaka, Japan. This project, part of a more extensive pipeline of cold chain assets, aims to address the urgent need for updated facilities and promote sustainability with features like natural CO2 refrigerants. This initiative will enhance Japan's cold chain logistics market by providing advanced infrastructure, reducing carbon emissions, and supporting the growing demand for efficient and eco-friendly logistics solutions.

Technology Advancements Fueling the Cold Chain Logistics Market Growth

Technological advancements are playing a key role in the growth of Japan's cold chain logistics market. Innovations in refrigeration systems such as energy efficient cooling technologies and advanced insulation have improved the reliability and durability of cold storage facilities. Integrating IoT enabled tracking devices and temperature monitoring systems ensures real time visibility and precise control of perishable goods during transport. These technologies help prevent spoilage, reduce operational losses, and maintain compliance with strict safety and quality standards. Warehouse automation, including robotic material handling and intelligent inventory management, has increased efficiency and reduced labor costs, while advances in electric vehicles and eco-friendly refrigerated vehicles support Japan's goal of reducing its carbon footprint. At the same time, these innovations are more effective, reliable, and adapted to market requirements, as they strengthen the cold circuit's infrastructure.

In November 2023, Bushu Pharma opened the Soka Packaging Center, its 5th base in Japan, inside Prologis Park Soka. This state-of-the-art facility, featuring advanced ecological and safety technologies, offers extensive storage and packaging services for biological and regenerative medical products. The center's capabilities include storing 1,671 pallets at 2°C and providing easy access to refrigerated storage from truck berths. This expansion helps Bushu Pharma meet the growing demand for pharmaceutical medicines by ensuring optimal cold storage supply chain operations, contributing to Japan's cold chain logistics market's growth through enhanced efficiency, technology adoption, and ecological sustainability.

Pharmaceutical Segment Dominate Cold Chain Logistics Market

Pharmaceutical segments dominate the Japanese cold chain logistics market because demand for medical products sensitive to temperatures, such as vaccines, biology, and special drugs, is increasing. A medical solution that requires a robust cold chain system to maintain the effectiveness and safety of advanced products due to the aging of Japan and the increase in chronic illness. Strict regulatory requirements for pharmaceutical storage and transport provide high criteria for cold circuit infrastructure. Innovation in cold chain technology, such as IoT monitoring and green solutions, further improves efficiency and reliability, which is an important factor in Japan's market growth of cold chain logistics.

In June 2024, CONCOR and ITE Japan teamed up to introduce ice battery technology in containers for temperature-sensitive cargo, eliminating the need for diesel generators and maintaining freshness for up to 72 hours. This environmentally friendly solution reduces CO2 emissions by 70-80% and enhances the efficiency of cold chain logistics. By fostering innovation in sustainable logistics and utilizing ITE's advanced technology, this collaboration boosts Japan's cold chain logistics market, promoting eco-friendly practices and efficient transport of temperature-sensitive products.

Eastern Japan Dominates Cold Chain Logistics Market Share

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Eastern Japan dominates the Japanese cold chain logistics market due to its strategic location, developed infrastructure, and strong industrial presence. The region is home to key ports, including the Port of Tokyo and the Port of Yokohama, which facilitate international trade and distribution. East Japan also boasts a high concentration of food processing and manufacturing industries, driving demand for efficient cold chain systems to preserve perishable goods. The region's investment in modern cold storage facilities, temperature-controlled transportation, and innovative logistics technologies further strengthens its market leadership with a well-developed supply chain network and an increasing accent on sustainability, Eastern Japan continues to exceed other regions to meet the growing demand for high-quality and sensitive time.

In June 2023, Made4net partnered with Naoyoshi Co., Ltd. to expand its presence in Japan by offering deals, consulting, perpetration, training, and support services for its force chain prosecution results. Naoyoshi, with expansive experience in cold chain, food distribution, and dry storehouse sectors, will help Made4net enhance its footmark and invention in the region. This collaboration will support Japan's cold chain logistics request growth by furnishing advanced, configurable, and scalable software results that ameliorate force chain effectiveness and client success in temperature-sensitive sectors.

Future Market Scenario (FY2025 ? FY2032F)

- ?□Increased adoption of IoT, AI, and blockchain technologies for real-time tracking, temperature monitoring, and enhanced transparency.
 - ?□Growing focus on eco-friendly practices, including the use of renewable energy sources and sustainable packaging materials.
 - ?□Rising demand for cold chain solutions driven by the growth of online grocery shopping and direct-to-consumer delivery services.
 - ?□Stricter food safety and pharmaceutical regulations will necessitate advanced cold chain infrastructure and compliance measures.
- Key Players Landscape and Outlook

Companies focus on innovation, efficiency, and sustainability. Many invest a large amount of money in modern cold storage facilities and transport systems with temperature control, ensuring safe and efficient processing of rotten products. These logistics providers are also using technologies such as IoT sensors to monitor and track temperatures in real time minimizing the risk of spoilage and ensuring compliance with strict food safety standards. Japanese cold chain companies are adopting automation and AI solutions to streamline operations, reduce costs and improve delivery times with the growing demand for e-commerce and home delivery services, many logistics companies are expanding their services to meet direct consumer needs, such as last-mile delivery with optimized refrigerated vehicles. Another key strategy is to reduce carbon emissions and increase sustainability through energy-efficient methods, such as using environmentally friendly refrigerants and introducing electric vehicles for transportation. In addition, these companies promote solid partnerships with food producers, retailers and global supply chain partners to ensure transparent coordination and meet the growing consumer expectations for fresh and safe products. As competition intensifies, Japanese cold chain logistics companies are continuously adapting to technological progress and changing market trends to maintain their position in the market.

In January 2024, Fujitsu and YE Digital partnered to provide distribution center services that address labor shortages and enhance supply chain sustainability in Japan. By integrating Fujitsu's Warehouse Management System and YE Digital's Warehouse Execution System MMLogiStation, they aim to automate operations, improve efficiency, and reduce waiting times for transportation vehicles. This collaboration supports the growth of Japan's cold chain logistics market by ensuring timely, temperature-controlled deliveries, which is crucial for perishable goods and pharmaceuticals.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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