

Asia-Pacific Cold Chain Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia-Pacific Cold Chain Logistics Market size is estimated at USD 168.24 billion in 2025, and is expected to reach USD 253.92 billion by 2030, at a CAGR of 8.58% during the forecast period (2025-2030).

Factors such as the increasing number of refrigerated warehouses and the development of the pharmaceutical sector are expected to drive the growth of the Asia-Pacific cold chain logistics market.

Key Highlights

- Cold chain logistics are popular in the Asia Pacific. The region has a large consumer base, accounting for roughly 60% of the global population. Demand for premium products is increasing, driven by rising disposable incomes and a shift in dietary habits. Transportation for these products is also important. Of course, COVID-19 has had an impact on Asian cold chain operations, including increased concerns about food safety. This is already changing consumer habits, with more people buying fresh and frozen food from organized retail channels like supermarkets rather than traditional wet markets. The rise of e-commerce and online food retailing has also fueled demand for frozen foods. These trends have increased the demand for cold storage facilities in the region and bolstered further investments in infrastructure and transportation improvements.
- Japan is regarded as a mature market for cold chain logistics, with several players dominating. Nichirei Logistics Group Inc., based in Tokyo, was founded in 1945 as Nippon Reizo Inc. Today, the company provides warehousing, cold storage, and transportation services in Japan and around the world. Customers in a variety of industries use its low-temperature logistics services, including restaurants, retail stores, food manufacturers, trading companies, and wholesalers. The 'upper limit on overtime hours in automobile driving operations' will be implemented in Japan in 2024, raising concerns about the impact on the transportation and logistics industries. Technological innovation is also expected to improve work efficiency, reduce workplace errors, and prevent accidents.

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- The availability of Radio-frequency identification (RFID) technologies for cold chain applications and the adoption of automated software for cold chain logistics is projected to offer lucrative growth opportunities for the market players. Recent years have seen robust demand for high-quality industrial and logistics assets in Asia-Pacific due to strong domestic consumption, the e-commerce industry's expansion, and the development of modern logistics facilities. Due to the rising disposable income and ageing population, Asia-Pacific has a vast consumer base for healthcare supplies. There are increasing concerns over food safety and a continuous shift in consumer habits to buy fresh and frozen food products from organized retail channels, such as supermarkets, compared to traditional wet markets.
- The shift in dietary patterns is increasing the demand for premium products, including meat, dairy, and seafood, which are temperature-sensitive and need to be stored and transported at controlled temperatures. Despite robust leasing demand for cold storage facilities in Asia-Pacific, cold storage capacity in the region is limited compared to that in developed western markets. Cold storage facilities command higher rental premiums than dry warehouses. However, factors such as lack of standardization about operating procedures, security, temperature, pest control, and increased operational costs restrain the market's growth.

Asia Pacific Cold Chain Logistics Market Trends

Decreasing Volume of Domestic Water Freight Transport in Japan

- Japan handles more than 4.7 billion tons of domestic freight every year. Every mode of transport, including water, rail, air, and road, fulfills a crucial role in the economy. While cargo transport relies primarily on demand created by manufacturing industries and consumption, transportation creates demand for trucks and vehicles of any kind, including drones.
- Rapid developments in automation are taking place in Japan. The Japanese logistics industry suffers labor shortages, and the existing drivers are rapidly aging, thereby threatening to increase the fraction of transport costs in the sale of goods.
- Trucking and coastal shipping are the Japanese logistics industry's dominant modes of transport in terms of yearly payload distance. Railway and air transport are also used for transporting goods. However, despite the railway network being highly efficient for the transport of people, most logistics facilities, warehouses, and factories are better connected to roads.

Increased Number of Refrigerated Warehouses

- The COVID-19 pandemic has resulted in a significant change in the supply chain outlook, enabling the growing usage of digital high-end technologies to attain operational efficiency along with health concerns. The changing logistics industry outlook, requirement for substantial cost optimization, and optimum inventory management are anticipated to support the growth of the Asia-Pacific cold chain logistics market.
- Several warehouses comprising cold chain systems are designed to ensure the ideal storage and transportation conditions for temperature-sensitive products. Multiple export industries are now dependent on the vital links provided by cold chain solutions.
- Businesses are investing millions of dollars in their cold chain operations to create effective, efficient, and reliable processes, as end-to-end cold chain security is the weak link in the system. Moreover, the number of refrigerated warehouses is increasing due to a surge in demand for food and pharmaceutical products in the Asia-Pacific region. Therefore, an increase in refrigerated warehouses is anticipated to boost the growth of the Asia-Pacific cold chain logistics market.

Asia Pacific Cold Chain Logistics Industry Overview

The Asia-Pacific cold chain market is highly fragmented, with many global and local players catering to the growing demand. UPS,

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OOCL Logistics, and JWD are some of the major players in the market. Critical challenges faced by the cold chain industry are enormous energy and space consumption and huge setup and modification costs. Lack of standardization related to storage temperature and operating 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

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