

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

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

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Report description:

The Brazil Cold Chain Logistics Market size is estimated at USD 2.94 billion in 2025, and is expected to reach USD 4.74 billion by 2030, at a CAGR of 10.02% during the forecast period (2025-2030).

Key Highlights

- The COVID-19 pandemic significantly boosted the domestic e-retailing sector and the consumption of processed foods and beverages, pushing the demand for refrigerated storage spaces and logistics.
- Brazil is one of the world's fastest-growing economies and among the top 20 markets in the world for the cold storage industry. The country has a storage capacity of about 6 million cu. m, as per the Global Cold Chain Alliance (GCCA). Brazil is a major exporter of fruits, meat, sugar, and soya beans. It is developing its cold chain logistics and storage facilities to support the expected growth in the sectors.
- The Brazilian government allocated a budget of USD 10 billion to improve the country's infrastructure, aiding the efficiency of the logistics supply chain. The growth of the transport infrastructure and connectivity is expected to drive the growth of the market during the forecast period. With the increasing per capita income of the country, people are gradually improving their standards of living and updating their food habits with a shift to packaged, refrigerated, and readymade food items. The increasing per capita income is also fueling the overall retail grocery spending in the country. All these factors have led to an increase in the consumption of refrigerated and processed foods, which is expected to drive the cold chain logistics market over the forecast period.

Brazil Cold Chain Logistics Market Trends

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Increasing Meat Exports to Drive the Market

In 2021, the Brazilian meat sector faced serial difficulties. However, 2022 was more promising. The resumption of beef imports by China, beef and pork imports by Russia, and the continued high demand for these commodities globally encouraged the leading players in the sector. In November 2021, Russia announced zero import tariffs on beef and pork and import quotas for several countries, including Brazil. The expectation was that, in Q1 2022, the Russian government would carry out inspections to qualify new Brazilian plants for export.

In December 2021, China lifted the embargo on Brazilian beef. The restrictions began after cases of mad cow disease occurred in the states of Minas Gerais and Mato Grosso in September 2021. Brazilian beef exports registered consecutive drops in the following months since its largest buyer decided to suspend shipments. Following these lows, the meat sector has recovered and improved. This improvement is expected to continue, driving the Brazilian cold chain logistics market during the forecast period.

However, in Q2 2022, Brazil slaughtered a total of 6.96 million head of cattle, which was up by 6% (+362,000 head) compared to 2021. The Y-o-Y growth in slaughter has increased beef production by 6% (+105,000 ton) to 1.84 million ton. However, Brazil is the world's largest beef exporter, and the country exported more than 469,000 ton of fresh and frozen beef in Q1 2022, up by 37% (+126,000 ton) from Q1 2021. In 2022, according to the survey conducted by Banco do Nordeste, beef production in Brazil amounted to more than 9.9 billion kg, up by 4% compared to the previous year. Thus, the growing beef exports may drive the country's cold chain market.

Brazil's Interest in Healthier Frozen Foods Driving the Market

Brazilian consumers have shown increasing interest in frozen food over the past years, and demand for healthier options also witnessed significant growth in the country. In addition, the frozen food manufacturing industry witnessed lucrative growth during the pandemic, and the consumption of healthier frozen foods increased. However, frozen food sales were majorly driven by consumers' behavior of seeking convenient products, helping them reduce store visits.

Brazil's frozen-food market comprises some of the country's major players in packaged food, including BRF and JBS. However, the sector is also being served by up-and-coming businesses. In addition, major companies in Sao Paulo, such as Liv Up, Beleaf, and Free Soul Food, directly sell frozen food to consumers through their online channels. Most of their product costs range between USD 1 and USD 5, which attracts customers.

Brazil exports its food and meat products to more than 22 countries. In Q1 2022, the food exports from Brazil to Arab Nations witnessed significant growth, as the total exports reached more than USD 3.8 billion, up by nearly 34% compared to the same period in 2021. Thus, the increasing exports and imports of frozen foods are expected to drive the cold chain market in the country. However, e-commerce sales of food and beverages are a major supporting factor for cold chain logistics. In 2022, food and beverages e-commerce sales reached more than USD 5 billion, at a growth rate of 8% compared to the previous year.

Brazil Cold Chain Logistics Industry Overview

The Brazilian cold chain logistics market is highly fragmented, with the presence of both international and local players. The local players have smaller fleets. The market is dominated by Localfrio, Brado Logistica, and Comfrio.

Additional Benefits:

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

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