

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

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Report description:

The Cold Chain Packaging Market size is estimated at USD 32.29 billion in 2025, and is expected to reach USD 48.93 billion by 2030, at a CAGR of 8.67% during the forecast period (2025-2030).

The Food and Agriculture Organization estimates that 1.3 billion metric tonnes of food are wasted worldwide each year, accounting for contributions from every country, every societal group, and every step in the supply chain. The instability in the food system brought on by the COVID-19 epidemic made an already terrible loss even more painful.

Key Highlights

- The adoption of cold chain packaging by various governments not only demonstrates the importance of the packaging but also aids in market expansion. For instance, in June 2022, the "Scheme of Cold Chain, Value Addition and Preservation Infrastructure" plan, which is largely funded by the Indian government, reported that the government provides funding for investments in the cold chain, including processing.
- The Scheme of Cold Chain, Value Addition, and Preservation Infrastructure aims to provide seamless, integrated cold chain and preservation infrastructure facilities from the farm gate to the consumer. With a focus on developing farm-level cold chain infrastructure, the strategy offers project planning flexibility. Additionally, an interested investor may receive a grant or subsidy of 35% to 50% of the project cost based on previously established cost parameters by the government under the scheme for integrated cold chain and value addition infrastructure released by the Government of India.
- Further, considering the spike in e-commerce, insulated packaging is expected to see strong sales with smaller e-commerce and food delivery formats across meal kits and other perishable food and beverage items. As multiple packages containing fresh and frozen items require good insulation, the pandemic-led behavioral change has led to packages being left outdoors for some time. Hence, the pandemic is further expected to witness a significant increase in the demand for cold chain packaging solutions.

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- Cold chain packaging solutions are essential to the growth of the global trade in perishable products and the worldwide availability of food and health supplies. The rise in consumer demand for perishable food items, growth of international trade due to trade liberalization, and expansion of the organized food retail industry are some of the factors driving the growth of the market.
- Increasing stringent regulations, such as the effective implementation of the Food Safety Modernization Act (cold storage warehouse requirement to preserve food), drive the market's growth. Additionally, the rising demand from various industrial applications, such as the medical devices and pharmaceutical industries, are significant contributors to the global cold chain packaging market.
- However, in recent times, instability in polystyrene prices, due to the increased gap between demand and supply, has led to a price surge, which is likely to continue during the forecast period. Moreover, the escalated cost of raw materials is boosting the overall cost of the final product.
- Efficiency in using cold chain solutions was never a top priority before COVID-19. While during the pandemic, one of the most difficult challenges facing the globe was to produce enough vaccines to immunize every citizen, which was a huge undertaking to ensure that vaccines were distributed to citizens without spoiling them. Due to lockdowns and other limitations brought on by the outbreak, some businesses were forced to alter their business plans and implement home delivery options. Additionally, this called for efficient cold chain logistics solutions. Demand increased even more due to growing consumer awareness and the necessity of upholding essential quality standards.

Cold Chain Packaging Market Trends

Growth in Pharmaceutical Sector to Augment the Cold Chain Packaging Market

- According to Almac Pharma Services, the pipeline of biological drugs in development is becoming more temperature-sensitive, resulting in an increase in the storage of bulk drug substances at frozen temperatures (-40 to -70 C). The company adds that labeling, packing, and distributing cell and gene therapy products often requires products to be stored and processed at ultra-low temperatures (-20 to -80 C), with the products only being defrosted immediately before use.
- The high-value pharmaceutical products are mostly shipped via the cold chain across the entire distribution network worldwide. Thus, pharmaceutical growth is anticipated to propel the cold chain packaging market. According to International Trade Center, the value of exports of pharmaceutical products from the United Kingdom to the European Union show that in that year, Belgium was the EU member with the largest export value of such British goods, amounting to almost 2.43 billion British pounds. The significant export value represents that the packaging conditions may choose cold chain packaging to adapt to dynamic conditions such as temperature, mode of transportation, etc.
- Moreover, the cold chain packaging market is directly influenced by the continuous growth in demand for cold storage medicinal products used in the healthcare industry. Regionally, the cold chain packaging market is dominated by Europe and North America region. This is due to the high number of biopharmaceuticals imports & exports in the countries in Europe and North America. These regions are also the innovators for the improvement in shipping and warehousing of pharmaceutical products.
- Further, the market is witnessing an effect due to government regulations regarding the use of materials in cold chain packaging. There is also a strong demand for more sustainable designs, including re-use programs, to reduce the carbon footprint. The interest in temperature-controlled packaging is also impacted by changing regulations and standards. For instance, ISTA's (International Safe Transit Association) temperature profiles were altered within the past five years. Such changes are anticipated to affect the market.

Europe to Hold the Largest Market Share

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- Europe occupies the major share in the cold chain packaging market. The market is expected to grow significantly in the forecast period owing to continuous growth in demand for cold storage medicinal products used in the healthcare industry.
- Many companies have focused on investments and research and development activities on creating innovative cold chain packaging technologies to stay ahead of the competition. For instance, in May 2022, Essentra Packaging collaborated with AMD to create a new generation of Time Temperature Indicators (TTIs), a smart packaging technology for the pharmaceutical industry. The collaboration by the United Kingdom-based companies aims to provide future packaging solutions that are relevant and improve patient safety by combining the strengths of AMD and Essentra Packaging.
- Additionally, European businesses are creating advancements in enhancing pharmaceutical packaging and storage by implementing cold chain solutions. For instance, in July 2022, the Netherlands' Sharp plant in Heerenveen increased the range of healthcare service offerings. Sharp is a prominent player in contract packaging and clinical supply services. Labeling and secondary packaging services have been added to the site to accommodate open and randomized clinical trials, enhancing the clinical storage and distribution capabilities already there. Already finished are the initial packaging and labeling procedures. Sharp can now provide a full range of clinical services out of the facility, including secondary packaging between temperatures of -80C and -80C, storage between 2 and 8C, and on dry ice as QP release for clinical trial materials. The website's customers can get help with regulatory issues to release and distribute items in Europe.
- Furthermore, many European-based businesses are engaged in corporate growth to broaden their reach internationally due to the growing number of pharmaceutical and life sciences enterprises across the continent. For instance, in February 2022, the life sciences and healthcare (LSHC) sector of the Deutsche Post DHL Group's logistics company, DHL Supply Chain, announced that it would invest more than USD 400 million this year to expand its pharmaceutical and medical device distribution network footprint by 27 percent or nearly 3 million additional square feet. The new buildings will have complete licensing, temperature-controlled space that satisfies pharmaceutical storage needs, and integrated solutions that can handle the packing and managed transportation.

Cold Chain Packaging Industry Overview

The cold chain packaging market is moderately fragmented due to a few players having a significant share in the market. Some of the major players are Cold chain Technologies, Sonoco Thermosafe, Sofrigrum, Softbox Systems, Cryopak, Sealed Air Corporation, DGP Intelsius LLC., Amcor Plc, among others.

- March 2022 - The acquisition of Packaging Technology Group, LLC, a prominent supplier of environmentally friendly, curbside-recyclable thermal packaging solutions for the life sciences sector, was announced by Cold Chain Technologies, LLC. Through this agreement, the Packaging Technology Group Company will be able to make more investments in vital sustainable technologies and provide its customers worldwide with a wider range of innovative solutions.
- December 2021 - Recycold Cool Solutions BV, a producer of eco-friendly cool packs, has been acquired by Ranpak Holdings Corp. Recycold Cool Packs, which are constructed from a drain-safe, plant-based gel, unlike conventional cool packs, have been added to increase the variety of Ranpak's Cold Chain packaging solutions.

Additional Benefits:

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

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