

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

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### **Report description:**

The Colombia Cold Chain Logistics Market size is estimated at USD 2.32 billion in 2025, and is expected to reach USD 3.86 billion by 2030, at a CAGR of 10.7% during the forecast period (2025-2030).

#### Key Highlights

- Colombia witnessed trade growth in perishable products and favorable government support for developing cold chain infrastructure. In recent years, Colombia's logistics sector improved and is now 5th in Latin America and the Caribbean. The government is doing everything possible to improve the decentralized logistical infrastructure. The development of Columbia's challenging logistics market is expected to be driven by growth in the processed food sector, an increase in cold storage, and the pharmaceutical industry.
- Infrastructure development, such as investments in storage facilities, refrigerated transport, and technology integration, is taking place in Colombia's cold chain logistics market. Efforts are being made to improve the overall infrastructure to enhance the reliability of the cold chain.
- In February 2024, Emergent Cold Latin America declared that it would rapidly expand the facilities of Colombian company Red Polar, which is based in Bogota. Emergent Cold will have a state-of-the-art facility in the short term, with a positioning capacity of 25,000 pallets. It will strengthen its presence in Colombia's capital and benefit both businesses' customers depending on their supply chain's objectives.
- With the massive demand for the cold chain market, the pharmaceutical industry has accepted the potential advantages of using cryogenic storage facilities to store vaccines, blood samples, and other cell tests. In addition, there has been an increase in the need for frozen storage at online grocery stores. Demand for cold storage space in the next five years is projected to increase due to the growth in online grocery sales.

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## Colombia Cold Chain Logistics Market Trends

### Colombia's Cold Chain: A Key Player in the Transportation Sector

Colombia's cold chain logistics market is witnessing robust growth, fueled by a surge in demand for perishable goods and advancements in its infrastructure.

While Colombia boasts ample arable land dedicated to fruit cultivation, its cold storage infrastructure, especially in rural production areas, lags. Although the flower export industry has spurred some progress in cold chain logistics, other agricultural products still grapple with insufficient cold storage solutions.

Refrigerated warehouses play a pivotal role in upholding the stringent controls of Colombia's cold chain industry. The country is increasingly adopting temperature-controlled storage, driven by a rising food demand from its expanding population. Moreover, Colombia stands out as a key exporter of perishables, processed foods, and fresh produce, including vegetables and flowers, in South America. For Instance, In June 2024, In a move that underlines its commitment to Colombia, A.P. Moller-Maersk (Maersk) unveiled a 44,000 m2 container logistics center in Tocancipa. This initiative is part of Maersk's broader strategy to enhance its logistics offerings in Colombia. The center, situated in the Tocancipa industrial zone, is designed to cater to customers' growing demands for agile and flexible supply chain solutions. Strategically positioned 47 kilometers north of Bogota, the center's location is pivotal.

Boasting a 3,378 m2 depot, a 23,000 m2 container storage area, and a 651 m2 refrigerated container storage section with connectivity for 50 containers, the logistics center is well-equipped. With a handling capacity of up to 1,600 containers, it features a sophisticated depot management system. Services range from container loading and unloading to cargo handling at the on-site depot. Additionally, the center offers storage for full containers and will have reach stackers readily available.

### Colombia Emerges as Top Destination for US Agricultural Exports in South America

According to the US Department of Commerce, as of November 2023, Colombia has become the largest destination for US agricultural exports in South America. Colombia continues to import a wide range of farm products. The country may rely on something other than its domestic sources of raw materials or ingredients to meet the growing demand for processed foods and beverages.

Traditional retail outlets are Colombia's most common form of shopping, even though formal retailers account for 60% of food distribution. Responding to consumer trends has benefited hard discounters offering good quality products at reasonable prices. Thanks to Colombians' rapid adoption of digital technologies, e-commerce is also a significant activity in this area.

The Colombian food and beverage industry denotes 28% of the country's total manufacturing production by value. In addition, many food ingredients are imported into Colombia by the net. Demand for higher quality and healthier confectionery products is growing in the country. These factors create the need for cold chain storage and logistics.

### Colombia Cold Chain Logistics Industry Overview

Given the presence of local and international players, the Colombian cold chain logistics market is fragmented. In e-commerce logistics, competition in the market is becoming increasingly intense. Many foreign players in the warehousing and storage field are expected to benefit from a growing export of farm products worldwide and at home. The major players in the market include Frigometro, Megafin Logistica Para Alimentos, Apex Logistica Especializada SAS, and Transportes Iceberg De Colombia.

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

**Table of Contents:**

1 INTRODUCTION

- 1.1 Study Deliverables
- 1.2 Study Assumptions
- 1.3 Scope of the Study

2 RESEARCH METHODOLOGY

- 2.1 Analysis Methodology
- 2.2 Research Phases

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS AND INSIGHTS

- 4.1 Current Market Scenario
- 4.2 Market Dynamics
  - 4.2.1 Market Drivers
    - 4.2.1.1 Export of Fresh Produce
    - 4.2.1.2 Pharmaceutical Industry Growth
  - 4.2.2 Market Restraints
    - 4.2.2.1 Infrastructure Challenges
    - 4.2.2.2 Costs and Investment
  - 4.2.3 Market Opportunities
    - 4.2.3.1 Collaboration and Partnerships
- 4.3 Technological Trends and Automation
- 4.4 Government Regulations and Initiatives
- 4.5 Industry Value Chain/Supply Chain Analysis
- 4.6 Spotlight on Ambient/Temperature-controlled Storage
- 4.7 Industry Attractiveness - Porter's Five Forces Analysis
- 4.8 Impact of Emission Standards and Regulations on Cold Chain Industry
- 4.9 Impact of COVID-19 on the Market

5 MARKET SEGMENTATION

- 5.1 By Services
  - 5.1.1 Storage
  - 5.1.2 Transportation
  - 5.1.3 Value-added Services (Blast Freezing, Labeling, Inventory Management, etc.)
- 5.2 By Temperature Type
  - 5.2.1 Ambient
  - 5.2.2 Chilled
  - 5.2.3 Frozen
- 5.3 By Application

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- 5.3.1 Horticulture (Fresh Fruits and Vegetables)
- 5.3.2 Dairy Products (Milk, Ice-cream, Butter, etc.)
- 5.3.3 Meats and Fish
- 5.3.4 Processed Food Products
- 5.3.5 Pharma, Life Sciences, and Chemicals
- 5.3.6 Others

## 6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration Overview
- 6.2 Company Profiles
  - 6.2.1 Megafin Logistica Para Alimentos
  - 6.2.2 Frigometro
  - 6.2.3 Apex Logistica Especializada SAS
  - 6.2.4 Transportes Iceberg De Colombia
  - 6.2.5 Sefarcol SA
  - 6.2.6 Rentafrio
  - 6.2.7 Ransa Colombia Colfrigos
  - 6.2.8 Frimac
  - 6.2.9 Sabanagro Ltda
  - 6.2.10 Transportes Camfri SA\*
- 6.3 Other Companies

## 7 FUTURE OF COLD CHAIN LOGISTICS MARKET

## 8 APPENDIX

- 8.1 Macroeconomic Indicators (GDP Distribution, by Activity, Contribution of the Transport and Storage Sector to Economy)
- 8.2 External Trade Statistics - Exports and Imports, by Product

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