

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

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Europe Healthcare Cold Chain Logistics Market size is estimated at USD 11.41 billion in 2025, and is expected to reach USD 18.11 billion by 2030, at a CAGR of 9.69% during the forecast period (2025-2030).

A surge in the development and production of biopharmaceutical vaccines and advanced therapies, technological advancement, and the region's interest in R&D have contributed significantly to the market's growth.

During the COVID-19 pandemic, the pharmaceutical industry was one of the most affected sectors, witnessing increased production and supply of vaccines and antidotes worldwide. The United States Department of Transport selected 41 projects to receive around USD 653 million in grants under the Port Infrastructure Development Programme for infrastructure spending for ports and waterways in 2021. Improved temperature-controlled storage facilities at ports for pharmaceutical and other medical products, which require special temperature conditions throughout their journey, were crucial.

The European Medical Agency approves an average of 38 drugs annually, depicting an increase in the development of biopharmaceuticals. The growth in the biopharmaceuticals sector demands advanced requirements for the storage and supply of the products, as regulatory compliance and patient safety are manufacturers' primary concerns.

In 2023, Germany spent USD 8,011 per capita on health, approximately 12.7% of GDP. It is also one of the largest producers and exporters of healthcare products.

Europe Healthcare Cold Chain Logistics Market Trends

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

The OTC Pharmaceuticals Consumption is Projected to Grow Significantly

A notable increase in health awareness among consumers in Europe has been noticed during the pandemic. By empowering people and making better ways of accessing healthcare, self-care has the potential to meet these challenges. The growth of European healthcare cold chain logistics is a result of these reasons.

People are looking proactively for ways to manage their health, which has led to a growth in the demand for self-care and OTC pharmaceuticals. Consequently, OTC pharmaceutical consumption in Europe has become more accessible to consumers as a result of the development of e-commerce platforms. The growth of this segment can be attributed to the convenience of individuals buying healthcare products through electronic platforms. As per industry experts, in 2023, OTC pharmaceuticals consumption increased from USD 50.46 billion in 2022 to USD 52.72 billion in 2023 and is projected to reach USD 54.79 billion in 2024.

Governments across the region are also supporting market players. For instance, in November 2023, the Swedish Government expanded the use of naloxone spray that reverses opioid overdose. To offer a wider range of medicines for common illnesses such as pain relief, cough and cold, allergies, digestive disorders, and more, pharmaceutical companies in Europe are expanding their OTC product portfolio. As a result, stringent and efficient cold chain logistics systems are increasingly in demand.

Germany is Set to Lead Pharmaceuticals Production

In 2022, pharmaceutical production in Germany was valued at its highest at EUR 37.4 billion (USD 40.31 billion). According to Strategy 4.0, published in November 2023, the German Government is also discussing a new Pharma Strategy with a number of reforms to improve the conditions for the pharmaceutical industry in Germany.

The increase in pharmaceutical production is due to the growing instances of chronic diseases and increased emphasis on prevention and self-medication for disease. In addition, the country's growth has been driven by an increase in the use of OTC medicines.

In addition, government support for research and development helps speed up the development of medicines. In 2022, according to a 2023 article published by Eurostat, across the EU, the total government budget allocations for R&D (GBARD) stood at EUR 117.37 billion (USD 126.52 billion), equivalent to 0.74% of GDP. An increase of 5.4% compared with 2021.

Europe Healthcare Cold Chain Logistics Industry Overview

The market for healthcare cold chain logistics in Europe is competitive, owing to the presence of various companies. The healthcare cold chain logistics industry in Europe may have high barriers to entry due to the need for specialized infrastructure, temperature-controlled storage facilities, and compliance with stringent regulatory requirements. To be competitive efficiently, newcomers would need to invest significantly in technology, expertise, and facilities. New entrants face the challenge of stringent regulations and compliance standards, including guidelines on Good Distribution Practice (GDP) guidelines. The primary growth tactics used by businesses to maintain their competitiveness are the integration of technologies, worldwide network expansion, and modernization of cold storage centers. Several European healthcare cold chain logistics market players are headquartered in Germany, such as DB Schenker and Rhenus Logistics. DHL International GmbH and Kuehne + Nagel are among the most important players in this sector.

Additional Benefits:

- The market estimate (ME) sheet in Excel format

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 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

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

4.1 Current Market Scenario

4.2 Technological Trends

4.3 Industry Value Chain Analysis

4.4 Government Regulations and Initiatives

4.5 Spotlight on Ambient/Temperature-controlled Storage

4.6 Insights into Refrigerants and Packaging Materials Used in Refrigerated Warehouses

4.7 Impact of COVID-19 on the Market

5 MARKET DYNAMICS

5.1 Drivers

5.1.1 Increasing Focus on Vaccine Distribution

5.1.2 Growing Pharmaceutical and Biotechnology Industries

5.2 Restraints

5.2.1 High Initial Capital Investment

5.2.2 Risk of Temperature Excursions

5.3 Opportunities

5.3.1 E-commerce Growth in Healthcare

5.4 Industry Attractiveness - Porter's Five Forces Analysis

5.4.1 Bargaining Power of Suppliers

5.4.2 Bargaining Power of Consumers / Buyers

5.4.3 Threat of New Entrants

5.4.4 Threat of Substitute Products

5.4.5 Intensity of Competitive Rivalry

6 MARKET SEGMENTATION

6.1 By Product

6.1.1 Biopharmaceuticals

6.1.2 Vaccines

6.1.3 Clinical Trial Materials

6.2 By Services

6.2.1 Transportation

6.2.2 Storage

6.2.3 Value Added Services (Packaging and Labeling)

6.3 By End User

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.3.1 Hospitals, Clinics and Pharmaceuticals

6.3.2 Biopharmaceutical

6.3.3 Biotechnology

6.4 By Country

6.4.1 Germany

6.4.2 France

6.4.3 Spain

6.4.4 Rest of Europe

7 COMPETITIVE LANDSCAPE

7.1 Overview (Market Concentration and Major Players)

7.2 Company Profiles

7.2.1 Carrier Transicold

7.2.2 Primafrío

7.2.3 Alloga

7.2.4 Kuehne + Nagel

7.2.5 Cavalier Logistics

7.2.6 Marken Ltd

7.2.7 Biocair

7.2.8 DB Schenker

7.2.9 DHL

7.2.10 Envirotainer*

7.3 Other Companies

8 MARKET OPPORTUNITIES AND FUTURE TRENDS

9 APPENDIX

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

