

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

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Report description:

The Germany Pharmaceutical Cold Chain Logistics Market size is estimated at USD 0.94 billion in 2025, and is expected to reach USD 1.26 billion by 2030, at a CAGR of 5.98% during the forecast period (2025-2030).

Key Highlights

- In Germany, the market is being propelled by a rising demand for temperature-sensitive pharmaceuticals, a swift growth in the e-commerce sector, and a heightened consumer preference for fresh and perishable foods. Furthermore, technological advancements are playing a pivotal role in this surge. Innovations like IoT (Internet of Things) devices, sophisticated temperature monitoring systems, and automated cold storage facilities are bolstering the efficiency and reliability of cold chain logistics.
- Approximately 80% of pharmaceutical items in the European Union currently need to be transported under temperature control. Pharmaceutical laws in the majority of nations for years merely required that products be stored according to the manufacturer's specifications.
- However, the EU has published guidelines on safe distribution procedures for pharmaceuticals intended for human use, extending the need for transportation-related temperature control and broadening coverage to embrace over-the-counter medications. In order to meet these demands, a number of warehouses with cold chain systems are created to guarantee the best conditions for the storage and transportation of temperature-sensitive goods.
- Germany's chemicals sector, the nation's third-largest industry and a major employer of around half a million workers, faces ongoing challenges. Customers, wary of the prolonged economic uncertainty, are hesitating to place new orders. This caution comes as high prices for raw materials and energy persist.
- As reported by industry experts, in July 2024, industry lobby VCI reported that Germany's chemical industry achieved sales of EUR 112 billion (USD 121 billion) in the first half of 2024. This marked a 1% decline from last year's 114 billion EUR, reflecting a cautious sentiment prevailing in the industry.

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Germany Pharmaceutical Cold Chain Logistics Market Trends

Surge in Demand for Temperature-Controlled Solutions

Efficient and reliable logistics solutions for temperature-sensitive pharmaceutical products are increasingly in demand, underscoring the importance of proper storage and transportation in this sector. For example, the Budapest Branch, recently certified for Good Distribution Practice (GDP), is strategically located next to Liszt Ferenc International Airport. This prime location enhances its capability to manage air freight transport. The branch features a state-of-the-art temperature-controlled facility, offering dual storage zones: one set between 2C to 8C (refrigerated) and another maintaining a constant temperature of 15C to 25C. By merging NX Group's international temperature-controlled transport services with its storage solutions, the Group, as highlighted by Nippon Express Holdings in August 2024, has established a robust and premium platform for pharmaceutical logistics.

To cater to the pharmaceutical sector's transportation needs, there's a growing requirement for expanded capacities in refrigerated fleets. For instance, Petit Forestier, a cooling solutions provider, has introduced over 100 additional rental refrigerated vehicles in the 7.2, 12, and 18-ton classes, specifically targeting the German market.

Moreover, in August 2024, Parcel and Postal Technology International reported that Trans-o-flex and PostNL Pharma & Care Benelux have collaborated to integrate each other's temperature-controlled logistics solutions for the pharmaceutical industry, aiming to broaden their geographical presence. In conclusion, the pharmaceutical logistics sector is evolving rapidly, driven by the need for advanced temperature-controlled solutions. Strategic collaborations and expansions in refrigerated fleet capacities are essential to meet the growing demands and ensure the safe and efficient transport of pharmaceutical products.

Biopharmaceuticals to Contribute in Market Expansion

Biological medicines have significantly reshaped the landscape of the pharmaceutical industry. Germany, particularly its southern region, produces over half of the EU-approved active biopharmaceutical ingredients, solidifying its position as the leading producer in the European pharmaceutical market. For instance, Frigo-Trans, a German logistics provider, has unveiled its plans to build a cryopreservation warehouse at its Mutterstadt site.

Lake Constance and Ulm serve as the primary hubs for this activity. This small region is home to over 100 companies spanning biotech, pharmaceuticals, and medical technology, alongside various research organizations. While Germany has consistently held a prominent position within Europe, global rankings place it fifth in manufacturing capacity. This lag is largely attributed to other nations, bolstered by competitive tax structures, outpacing Germany in biopharmaceutical production investments. Nevertheless, biologics, given their remarkable therapeutic potential, have significantly expanded their foothold in Germany's pharmaceutical landscape.

Germany fosters a dynamic environment not just for general drug production but also for biopharmaceutical enterprises. Companies such as Vetter, Teva, Biberach Site, and Boehringer Ingelheim are at the forefront, introducing innovations that bolster the nation's pharmaceutical ambitions. Navigating these intricate markets, EuroDev has been a steadfast ally for North American producers, offering insights on market entry into Germany's pharmaceutical realm. Their expertise encompasses real-time guidance on prevailing regulations, market trends, competitive landscape, and potential challenges in the German pharmaceutical arena.

Germany Pharmaceutical Cold Chain Logistics Industry Overview

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The German pharmaceutical Cold Chain Logistics Market is highly fragmented, with a mix of global and regional players dominating the industry. Some of the key players in the market are Trans-o-flex (ThermoMed), DHL, Biotech and Pharma Logistics, GDP Network Solutions GmbH, Transmed Transport GmbH etc,. As pharmaceutical logistics requires a high level of specialization, government approvals, cutting-edge technology, a wider network coverage, and a lot of know-how, given the delicacy of the goods transported, the market has a comparatively moderate number of players.

For instance, in March 2024, trans-o-flex, a prominent player headquartered in Weinheim, Germany, announced that its subsidiary, trans-o-flex ThermoMed Austria (TMA), has inaugurated a new logistics center in Lebring, Styria. TMA specializes in temperature-controlled transport services tailored for the pharmaceutical and healthcare sectors. This strategic expansion underscores trans-o-flex's commitment to enhancing its service capabilities and operational efficiency.

Additional Benefits:

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

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