

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

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Report description:

The Mexico Cold Chain Logistics Market size is estimated at USD 4.56 billion in 2025, and is expected to reach USD 8.17 billion by 2030, at a CAGR of 12.36% during the forecast period (2025-2030).

With a population of nearly 130 million, a rich cultural history, and abundant natural resources, Mexico is among the 15 largest economies in the world and the second-largest economy in Latin America. The country has solid macroeconomic institutions, and it is open to trade. Moreover, in October 2023, Mexico's GDP grew over 3.2% compared to 2022.

In 2023, the Mexican cold chain sector witnessed significant investments. In December 2023, Emergent Cold LatAm raised USD 500 million to invest in refrigerated logistics in Latin America. The refrigerated food storage and transportation solutions provider in Latin America raised USD 500 million to boost its expansion and consolidation plan in the region. Emergent Cold LatAm raised twice the capital initially planned for this third investment round.

In November 2023, warehousing giant Lineage Logistics announced plans to build a massive cold storage facility in Laredo, with a capital investment of around USD 79 million due to the growing demand for avocados fueling the growth of cold storage.

Mexico Cold Chain Logistics Market Trends

Growing Agriculture Product Exports

- In February 2024, the value of agri-food exports, a category that includes big-earning beverages such as beer and tequila, hit a

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record high of USD 51.87 billion in 2023, a 3.9% increase compared to 2022. Thus, the Mexican agri-food industry recorded export growth for the 14th consecutive year, even as drought afflicted a large portion of the national territory. Agri-food exports accounted for 8.7% of Mexico's total exports in 2023, which exceeded USD 593 billion.

- Meanwhile, agri-food imports declined ever so slightly (0.07%) to USD 44.29 billion, leaving Mexico with an agri-food trade surplus of just under USD 7.58 billion in 2023, a 35.3% increase compared to the 2022 surplus. It was the ninth consecutive year that Mexico had an agri-food trade surplus.
- According to the sources, the agri-food trade surplus was clear from the agri-food export data, which generated revenue of USD 6.16 billion in 2023, more than any other product in the category. The value of beer exports rose by 2.2% compared to 2022. The next biggest earner was tequila/mezcal, with the two agave spirits lumped together in the Bank of Mexico data, bringing in just under USD 4.3 billion in export revenue, an increase of 1.6% compared to the previous year.
- The Ministry of Agriculture and Rural Development noted that the value of live beef cattle exports rose by 63.1% in 2023, the highest percentage terms increase of any agri-food product. The total value of such exports was USD 1.11 billion. The biggest market for Mexican agri-food exports is the United States, but Mexico sends its products worldwide.

Increasing Meat Consumption Drives the Market

- In 2023, as per the US Department of Agriculture (USDA) Global Agricultural Information Network (GAIN) study, Mexico's chicken meat consumption is witnessing strong growth.
- Mexico is the world's 5th largest consumer of chicken meat, and demand remains high. Mexico's most significant animal protein consumption is chicken meat, with an expected increase of 3% to 4.9 million tonnes in 2024 from the previous year. Moreover, the demand is driven by increased demand for processed chicken meat, such as cold cuts and frozen breaded chicken meat. Furthermore, consumers continued to buy chicken meat at a relatively higher level than pork when the price gap between chickens and pigs closed in May 2023.
- Meanwhile, in 2023, the logistics company Brado, a subsidiary of Rumo, witnessed a 16% increase in the transport of frozen meat by rail, reaching a historic mark of 8,346 containers in Q1 2023. thus, the rising meat consumption drives the country's unprecedented demand for cold chain networks.

Mexico Cold Chain Logistics Industry Overview

Major foreign companies are present in this area of Mexico's highly fragmented logistics market. Some startups offer cold chain storage options in addition to them. Frialsa and Qualianz are significant participants in Mexico's cold chain logistics industry. With its warehouse of around 2.6 million cubic meters, Frialsa is a dominant participant in the cold storage industry. In addition to these two businesses, there are others in this industry, mainly from the United States.

Additional Benefits:

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

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