

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

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Report description:

The Netherlands Cold Chain Logistics Market size is estimated at USD 4.49 billion in 2025, and is expected to reach USD 7.31 billion by 2030, at a CAGR of 10.25% during the forecast period (2025-2030).

The Netherlands is strategically located in Europe, connecting to major European Union countries. Being a maritime country, there are big ports that contribute to the logistics sector of the country. In cold chain logistics, temperature-sensitive products are transported via refrigerated packaging solutions. As of January 2021, the Netherlands transportation and logistics industry saw year-on-year growth of 6% by the financial year-end. The warehousing and storage industry is projected to have a revenue of more than US 11 million dollars by 2024. The E-commerce industry has been driving the logistics sector in the Netherlands. The E-commerce industry operating in the cold storage segment includes buying online groceries and other frozen food like meat and beverages.

Because of the COVID-19 impact, an increase in online shopping in the essential segment, which constitutes frozen food and meat, was observed. Apart from e-commerce, pharmaceuticals is another sector where the country is witnessing demand for cold storage solutions. E-commerce is also driving the demand for a wide range of temperature-sensitive products, such as fresh produce, prepared foods, and pharmaceuticals. These products require specialized handling and transportation to ensure that they are kept at the correct temperature throughout the supply chain. For example, the demand for online grocery shopping has increased significantly in recent years. This has led to a growing demand for cold chain logistics services for the transportation and storage of temperature-sensitive food products.

For instance, in 2022, Albert Heijn, one of the largest retailers in the Netherlands, announced a partnership with HSF Logistics to provide cold chain logistics services for its online grocery business. The partnership will allow Albert Heijn to deliver

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temperature-sensitive food products to its customers throughout the Netherlands. As e-commerce continues to grow, the demand for cold-chain logistics services is expected to increase as well.

Netherlands Cold Chain Logistics Market Trends

Pharma industry is key growth driver in Netherlands cold chain logistics market

The pharmaceutical industry is a major driver of the cold chain logistics market in the Netherlands. This is due to the increasing demand for temperature-sensitive pharmaceutical products, such as vaccines, biologics, and cell and gene therapies. AstraZeneca has a major manufacturing facility in Leiden, the Netherlands, which produces a number of temperature-sensitive products, including the COVID-19 vaccine. The company relies on a network of cold chain logistics providers to transport its products around the world. GSK (GlaxoSmithKline plc) also has a large presence in the Netherlands, with a number of manufacturing and research facilities, and works with a number of cold chain logistics providers to ensure that its products are transported and stored at the correct temperature.

In October 2023, Geodis, a global logistics provider, opened a new temperature-controlled facility in Schiphol-Rijk, the Netherlands. The new facility has 5,500 square meters of temperature-controlled storage space, capable of storing products at temperatures ranging from 15-25 C and 2-8 C. The facility is located near Amsterdam Schiphol Airport, making it a convenient location for the import and export of temperature-sensitive goods.

In March 2023, Alloga, a provider of cold chain logistics services for the pharmaceutical and life sciences industries, announced the expansion of its cold storage capacity in the Netherlands. The expansion will add 10,000 pallet positions of temperature-controlled storage space at Alloga's facility in Amsterdam. The expansion is in response to the growing demand for cold chain logistics services in the Netherlands.

In addition to the above, the Netherlands is a well-established logistics hub with a strong infrastructure and a skilled workforce. Pharmaceutical companies are collaborating with cold chain logistics providers to develop innovative solutions for the transport and storage of products. This collaboration is helping to drive the development of new technologies and services that can meet the specific needs of the pharmaceutical industry. In 2022, AstraZeneca collaborated with Kuehne+Nagel to develop a new temperature-controlled packaging solution for the transport of its drugs.

Investments in Dutch warehousing industry driving the cold chain logistics industry

Investments in the warehousing industry are leading to the development of new temperature-controlled warehouses. This is increasing the availability of storage space for temperature-sensitive products, such as pharmaceuticals, food, and chemicals.

Investments are also leading to improvements in infrastructure and technology. This includes the installation of new temperature-controlled equipment, such as racking systems and climate control systems. In addition, warehousing companies are investing in new technologies, such as RFID and sensor-based monitoring systems, to improve the tracking and management of temperature-sensitive products.

In May 2023, Prologis announced plans to invest EUR 100 million in the development of a new temperature-controlled logistics facility in Venlo. The new facility will have 60,000 square meters of temperature-controlled storage space. In 2022, Goodman Group announced plans to invest USD 50 million in the development of a new temperature-controlled logistics facility in Amsterdam. The new facility will have 30,000 square meters of temperature-controlled storage space.

These investments are just a few examples of the growing interest in the cold chain logistics market in the Netherlands. As the

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demand for temperature-sensitive products continues to grow, investments in the warehousing industry are likely to continue to drive the growth of the cold chain logistics market.

Netherlands Cold Chain Logistics Industry Overview

The logistics sector in the Netherlands is fragmented and has the presence of domestic and international companies. The Netherlands has many domestic and international players that are working in the sector of refrigerated warehouses and cold storage transportation. The Netherlands Foreign Investment Agency has a list of more than 500 global firms considering investing in the Netherlands in cold storage warehousing - half of which are UK companies. The other half are from places such as the US and Asia, who want a foothold in the EU.

Additional Benefits:

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

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