

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

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Report description:

The Peru Cold Chain Logistics Market is expected to register a CAGR of 15.16% during the forecast period.

The Peruvian cold chain logistic market is in developing phase where the government is understanding the importance of cold chain supply and working on building more temperature controlled warehouses. Also, with low supermarket penetration in the country, there is a potential growth for the sector.

With outburst of Covid-19, people switch to online mode and thus an exponential growth is recorded for business switching to online mode. Fresh food demand during the lockdown kept the cold chain logistics in business while exports of fruits and vegetables, one of the most exported item in Peru, also returned to their usual export figures i.e pre-pandemic. Also, the vaccines against corona virus is required to be kept at low temperatures, thus driving the demand of cold chain logistics market in country.

The food service industry accounts for up to 18% of total foreign tourist revenue. Peru has around 20,000 hotels with about 500,000 bedrooms. High-end restaurants and hotels serve high-value consumer-oriented products from the United States (such as wines, cheese, beef, and pork), which necessitates the use of cold storage warehouse space.

The food processing industry in Peru is a thriving area of the country's economy. Peru's food business contributes for over 28% of the country's industrial GDP, with a gross value added of USD 9.4 billion in 2020.

Peru Cold Chain Logistics Market Trends

Pharmaceutical sector growth driving the market

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The Peruvian pharmaceutical industry market is extremely competitive, with annual sales exceeding USD 2.2 billion in 2020. The digital transformation is currently having a significant impact on the sector.

In Peru, factors driving the pharmaceutical industry include increased purchasing power, improved access to healthcare and government initiatives to stock up on generic medicines. Composed of a relatively small number of companies, the market is primarily dominated by Inkafarma, Quimica Suiza, and Boticas Arcangel, local players that have grown rapidly.

The country has over 200 national and transnational laboratories. In addition to laboratories, other important players in the industry include pharmaceutical distributors and pharmacy chains.

To safely distribute the vaccine to remotest corners of the country. Peru has signed an agreement for the air transport of the COVID-19 vaccine in specially equipped planes and containers. Through the United Nations Children's Fund (UNICEF), the Ministry of Health (Minsa) has purchased 10,339 units of refrigeration equipment to improve the cold chain system required to transport and store COVID-19 vaccines throughout Peru. The equipment, primarily electric and solar-powered refrigerators, will be used to preserve and transport vaccines across the country under proper cold-chain conditions, ensuring vaccine quality wherever they go.

Necessity for cold chain logistics by ever growing agricultural sector

Agriculture business contributes close to 7% to Peru's GDP while employing 27% of the total work force. In Peru, a high percentage of the world's fruits and vegetables are exported by farmers and food manufacturers who require a high degree of logistics and transportation support for their perishable products.

Peruvian fruit exports have increased rapidly over the last decade, rising from USD 540 million in 2010 to USD 3.8 billion in 2020, with Peru ranking among the top ten fruit exporting countries. Peru's grapes and blueberries are always in demand across the globe and thus makes the top two agricultural items in country's export list. US and Netherlands are top two destinations for exports of fresh fruits and vegetables from Peru followed by Spain and UK.

Peru is also a major supplier of crops such as asparagus, because of its unique climate. Peru has a window for asparagus exports between November and January, months in which almost no other country exports the product.

With the country's cold chain logistics market still developing, there is a lot of room for improvement through which food wastage could be reduced as Peru lost 33% of the food it produced due to lack/mismanagement of cold chain in 2018.

Peru Cold Chain Logistics Industry Overview

Peruvian Cold Chain Logistics Market is fairly consolidated with top 5 players taking up a market share of approximately 35%. Some of the key players in the market include Ransa (Depsa), Frialsa Frigorificos, Frio Aereo, and Critical Express Cargo amongst others. Technology integration is slowly but steadily increasing, and players that have invested in the technology are expected to have a competitive edge in the market.

Additional Benefits:

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

Table of Contents:

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1 INTRODUCTION

- 1.1 Study Assumptions
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

- 2.1 Analysis Methodology
- 2.2 Research Phases

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Current Market Scenario
- 4.2 Technological Trends
- 4.3 Government Regulations
- 4.4 Value Chain / Supply Chain Analysis
- 4.5 Insights on Refrigerants and Packaging Materials
- 4.6 Brief on Freight Rates
- 4.7 Impact of COVID-19 on Peru's cold chain logistics market

5 MARKET DYNAMICS

- 5.1 Drivers
- 5.2 Restraints
- 5.3 Opportunities
- 5.4 Industry Attractiveness - Porter's Five Forces Analysis
 - 5.4.1 Bargaining Power of Suppliers
 - 5.4.2 Bargaining Power of Consumers
 - 5.4.3 Threat of New Entrants
 - 5.4.4 Threat of Substitutes
 - 5.4.5 Intensity of Competitive Rivalry

6 MARKET SEGMENTATION

- 6.1 By Service
 - 6.1.1 Cold Storage/Refrigerated Warehousing
 - 6.1.2 Refrigerated Transportation
 - 6.1.3 Value-added Services (Order Management, Blast Freezing, Labeling, Inventory Management, etc.)
- 6.2 By Temperature Type
 - 6.2.1 Chilled
 - 6.2.2 Frozen
- 6.3 By End User
 - 6.3.1 Fruits and Vegetables
 - 6.3.2 Dairy Products (Milk, Butter, Cheese, Ice Cream, etc.)
 - 6.3.3 Fish, Meat, and Seafood
 - 6.3.4 Processed Food
 - 6.3.5 Pharmaceutical (Includes Biopharma)
 - 6.3.6 Bakery and Confectionery
 - 6.3.7 Other End Users (Chemicals, etc.)

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7 COMPETITIVE LANDSCAPE

7.1 Market Concentration Overview

7.2 Company Profiles

7.2.1 Frialsa Frigorificos Del Peru

7.2.2 Depsa

7.2.3 Lineage Logistics

7.2.4 South Pacific Logistics

7.2.5 G&R Frigotrans

7.2.6 San Louis J&C

7.2.7 Absolute Zero

7.2.8 TIMCO SAC

7.2.9 Transporte Campos

7.2.10 Husky SAC*

7.3 Other Companies (Key Information/Overview)

7.4 Key Vendors and Suppliers (Cold Storage Equipment Manufacturers, Carrier Manufacturers, Technology Providers for the Cold Chain Industry)

8 FUTURE OF THE MARKET

9 APPENDIX

9.1 Macroeconomic Indicators (GDP Distribution by Activity, Contribution of Transport Sector to economy)

9.2 Detailed Imports and Exports Statistics of Frozen Food Products

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Growth Forecasts (2025 - 2030)**

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