

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

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

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### **Report description:**

The UAE Cold Chain Logistics Market size is estimated at USD 0.71 billion in 2025, and is expected to reach USD 1.15 billion by 2030, at a CAGR of 10.29% during the forecast period (2025-2030).

#### **Key Highlights**

- The latest economic insight report for the Middle East revealed that economic growth in the United Arab Emirates is expected to remain robust in 2024 despite slowing down in 2022-2023. The slowdown in growth will be largely driven by the OPEC+ policy, which may reverse some of the past year's increase in oil production.
- The market for cold chains in the United Arab Emirates is anticipated to grow strongly in the coming years due to the rise in food consumption, the expanding tourist industry, and the growing demand for frozen and ready-to-eat food. A few key growth causes include the development of cold storage for retail distribution, the building of new warehouses, the government's creation of significant food and pharmaceutical reserves, and the rise in end consumers.
- The pharmaceutical industry's increased production activity, infrastructure expenditures, the dairy industry's expansion, and rising import and export volumes are all credited with the market's growth.
- Under the country's economic diversification plans like UAE Vision 2021, Abu Dhabi Vision 2030, and Dubai's Industrial Strategy 2030, aimed at reducing the economy's dependence on Hydrocarbon exports, the development of the logistics sector is held as an important strategic goal for sustained long term growth of the economy as UAE becomes a crucial trans-shipment hub for Europe-Asia-Africa trade. There is a boom in the construction of refrigerated facilities in the United Arab Emirates.
- In July 2023, A.P. Moller - Maersk (Maersk) inaugurated its first cold store in the United Arab Emirates. Spanning an area of 13,000 square meters, the new facility marks Maersk's third warehousing and distribution center in Dubai. Moreover, the new cold store facility is strategically positioned within Dubai Industrial City, offering enhanced connectivity to major transportation and logistics hubs, including Jebel Ali Port, Al Maktoum International Airport, and an Etihad Rail freight terminal. In addition, it offers

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direct road access for swift distribution across the United Arab Emirates.

## UAE Cold Chain Logistics Market Trends

### The Pharma and Life Sciences Segment Occupies the Largest Market Share in the UAE Cold Chain Logistics Market

- The pharma and life sciences segment in the United Arab Emirates has skyrocketed in sales in the past few years. As most items in this segment are temperature-sensitive, the cold chain market has also seen a steep rise in sales in the region. In November 2022, Etihad Cargo, the cargo and logistics arm of Etihad Aviation Group, in partnership with Etihad Airport Services and Abu Dhabi Airports, prepared to launch a new state-of-the-art pharmaceutical cool chain facility.
- Due to an upcoming operation, the facility will significantly expand the pharmaceutical handling and storage at Abu Dhabi International Airport (AUH). Etihad Cargo's customers will benefit from the carrier's expanded International Air Transport Association (IATA) Center of Excellence for Independent Validators (CEIV) Pharma certification for pharmaceutical and life science logistics and provision of world-class, end-to-end temperature-controlled solutions for the transportation of pharmaceuticals across the carrier's global network.
- Before the opening of the new pharmaceutical facility at the carrier's Abu Dhabi hub, Etihad Cargo transported over 50,000 tons of cool chain products, including pharmaceutical and healthcare products via its PharmaLife product and fresh produce via its IATA CEIV Fresh-certified FreshForward product, in the past twelve months. The strong collaboration between Etihad Cargo, Etihad Airport Services, and Abu Dhabi Airports will continue to increase pharmaceutical cargo volumes and further position Abu Dhabi as a major solutions provider in the logistics supply chain.
- Aligned with Abu Dhabi's Economic Vision 2030, a state-of-the-art Hayat Biotech Life Sciences Park is set up in Abu Dhabi's KEZAD. This innovative and integrated hub is dedicated to R&D in life sciences, biotechnology, and vaccine production. The park's design fosters an ecosystem of collaboration and knowledge exchange.
- In April 2023, Saudia Cargo added Tower Cold Chain to its approved roster of temperature-controlled containers for shipping pharmaceutical, biotech, and life science products in a new global rental agreement. The deal reinforces Saudia Cargo's commitment to having the broadest possible selection of cold chain products (both in terms of cargo size and temperature requirements).
- A key benefit of Tower Cold Chain's technology is its reliability in maintaining product integrity without electricity, even in extreme heat, meaning that a robust solution is required to prevent temperature excursions. Tower's passive solutions are proven to maintain temperatures for up to 120 hours without intervention or external power.

### The Chilled Segment is Expected to Gain Traction in the Coming Years

- Pharmaceuticals and medical products often require strict temperature control to ensure their efficacy and safety. Chilled transportation plays a crucial role in maintaining the integrity of these products during transit. In July 2023, AD Ports Logistics (ADPL), a subsidiary of AD Ports Group, and Acino, a Swiss pharmaceutical company that develops and manufactures well-proven and innovative medicines, signed an agreement for ADPL to provide Acino with global freight forwarding services in the Middle East and North Africa (MENA) region.
- ADPL will use its fully integrated and GDP-certified end-to-end pharma cold chain capabilities to carry important drugs from Acino's worldwide sites of origin to markets in the MENA area under the terms of the deal. ADPL's Healthcare and Lifesciences division will be required to provide specific transport and handling skills for pharmaceutical items.
- The scope of the goods forwarding services will comprise first-mile transport, ports and airport loading, customs clearing, and final-mile logistics, according to the conditions of the agreement. Since its inception in 2020, ADPL has collaborated with global

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logistics companies to create one of the world's most integrated pharmaceutical supply chains capable of carrying medicines at storage temperatures ranging from -80C to +25C.

- In November 2022, Invictus Investment announced a capital investment of AED 2.8 million (USD 760,000) to acquire a fleet of more than eight refrigerated trucks to facilitate the transit of perishable commodities between Sudan, the United Arab Emirates, and Saudi Arabia.
- The specially designed vehicles will deliver vital products such as cold lamb, beef, goat meat, and fruits. This is the first important purchase to help Invictus Investment extend its product and services in climate-controlled transport and storage facilities, prioritizing asset allocation.

## UAE Cold Chain Logistics Industry Overview

Large enterprises claim a sizable portion of the highly fragmented UAE cold chain market. The market mostly centers on areas like Dubai and Abu Dhabi's ports and free zones. These areas have seen a growth in cold chain businesses due to their closeness to the sea and airports, rising metropolitan populations, well-developed transportation infrastructure, and well-developed transit systems. Cold chain companies compete in the nation in terms of location, cost, temperature range, product range, warehouse infrastructure, and industry experience.

Additionally, international companies are investing in the market and buying regional companies to increase their presence there. Regional enterprises invest in similar cold chain infrastructure investments to compete with multinational corporations. Additionally, businesses are putting more money into logistics for fruits, vegetables, flowers, cosmetics, and consumer goods. They are also attempting to strengthen the cold chain.

Major players in the cold chain market are GAC Dubai, GSL Logistics, Mohebi Logistics, CEVA Logistics, and RHS Logistics.

### Additional Benefits:

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

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