

United States Refrigerated Trucking - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The United States Refrigerated Trucking Market is expected to register a CAGR of greater than 4% during the forecast period.

Key Highlights

- The COVID-19 crisis significantly impacted refrigerated truck transportation in the country due to lockdown restrictions, labor shortages, etc. As per the USDA's Economic Research Service (ERS), the combination of shutdowns and shifts in consumer demand has affected fresh produce markets. The increasing demand for fresh vegetables, fruits, and packaged foods surged due to panic-buying behaviors among consumers. The sector is recovering from the effects of the pandemic.
- Agriculture is one of the major end users of the refrigerated trucking industry in the United States. The growth in agriculture products and increasing trade have led to a growing dependence on the refrigerated trucking industry. The overall number of farms was over two million in 2021. Farms in the United States are typically 445 acres in size, with around 89 million acres of farmland. The total real estate value of farmed land in the United States was approximately USD 2.9 trillion.
- The refrigerated transport sector is reviving due to its importance in the food supply chain. However, the pharmaceutical transportation industry also registered huge demand for refrigerated trucking during the pandemic.

US Refrigerated Trucking Market Trends

Consumer Demand for Packaged Foods is Surging

Packaged foods consumption is witnessing significant growth in the country, and the rising per capita consumer spending on frozen food in the United States is fueling the demand for refrigerated vehicles. Packaged food goods, such as rice, pasta, noodles,

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snacks, and canned food, have a long shelf life, thus boosting their sales. Product innovation, the launch of new products from private label businesses, and a significant shift from generic to premium items such as gluten-free and organic alternatives are boosting the consumption of packaged food in the country. In addition, with the younger generation acquiring more purchasing power, the sales of organic products in the United States were estimated to increase by 5-10% in 2022. The price difference between non-organic and organic foods has also decreased due to the increased availability of organic food.

The COVID-19 pandemic caused dramatic transformations in the food-spending habits of Americans. Consumers generally increased their spending on food at grocery stores and other retail food venues while decreasing their spending on food away from home. With modest pantry loading, at-home consumption of packaged food such as snacks, dairy products, prepared meals, and bakery goods increased.

Sales of drinks through on-trade channels declined significantly in 2020, most likely due to revenue loss caused by the temporary closure of restaurants, pubs, and bars during the pandemic. Even though the profitability fluctuated, sales of preserved and packaged goods increased. Packaged food giants started promoting their product sales through their online channels. In 2021, the sales of online packaged food in the country witnessed a growth rate of 12% compared to the previous year.

Strong Demand from the Healthcare and Pharmaceutical Industries

A refrigerated or insulated truck is typically used to deliver pharmaceutical products or medications. The significant reforms in the healthcare sector have created a way for new medicines to enter the market. Many pharmaceuticals must be kept within a specific temperature range to maintain efficiency. The increased production of these temperature-sensitive pharmaceutical products creates opportunities for temperature-controlled transportation services.

The United States accounts for around 45% of the worldwide pharmaceutical market and 22% of the global output. US pharmaceutical output and sales were expected to increase in 2022 due to the ongoing global rollout of vaccines and pent-up demand for necessary and non-essential medical treatments. Pharmaceuticals are subject to federal laws and regulations concerning medicines' storage, transportation, and distribution. The Food and Drug Administration (FDA) sets these rules to meet the increasing safety standards.

However, most technology providers are innovating new systems for safely handling temperature-sensitive biological products. Many patents have been registered in the US patent and trademark office. Technological innovations in these fields have created more products that need temperature-controlled environments to maintain their effectiveness. In 2021, the US spending on new brand medicines reached more than USD 46.4 billion, up by more than 140% compared to the previous year.

US Refrigerated Trucking Industry Overview

The US refrigerated trucking market is highly fragmented, with many local players trying to acquire significant market share through mergers and acquisitions. The market is expected to move toward consolidation by the end of the forecast period. Some major players are C.R. England Inc., Prime Inc., KLLM Transport Services, Stevens Transport Inc., and Marten Transport Ltd.

Additional Benefits:

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

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