

US 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 US Cold Chain Logistics Market size is estimated at USD 83.02 billion in 2025, and is expected to reach USD 110.22 billion by 2030, at a CAGR of 5.83% during the forecast period (2025-2030).

Key Highlights

- The COVID-19 pandemic significantly boosted the domestic e-retailing sector and the consumption of processed foods and beverages, pushing the demand for refrigerated storage spaces and logistics. The rise of online groceries, with a significant share of orders for perishables and frozen foods, is also supporting the market demand. The market has also benefitted significantly from the stringent government regulation toward the production and supply of temperature-sensitive products.
- However, the labor shortages in the transportation and warehousing sector, high energy requirements, and the negative environmental impact of the cold chain logistics operations are some of the challenges that may limit the market growth. To tackle the challenges regarding the high energy requirements and negative environmental impact, some companies are introducing solutions that increase the energy required to run the cold chain infrastructure.
- Technologies like Artificial Intelligence (AI), Machine Learning, Internet of Things (IoT), Robotics, Ware, and distribution center automation are being incorporated by players to increase the efficiency of their operations, reduce operational costs, and provide better customer experience.
- More outsourcing is occurring throughout the broader industrial logistics market, with third-party logistics (3PL) providers accounting for 34% of total leasing activity in 2022 through May, up from 30% in the same period of 2021. This trend is particularly common in the cold storage industry due to costs and more complex technology systems.
- According to the US Department of Agriculture (USDA), 72% of the refrigerated storage capacity in the US is outsourced to public refrigerated warehouse (PRW) companies, down from 75% five years ago. The remaining 28% includes in-house cold chain operators, up from 25% five years ago.

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- The perishables imports, pharmaceutical industry growth, including the biologics sector, increasing consumption of frozen foods, pharmaceutical temperature monitoring regulations, etc., are the demand drivers for the cold chain logistics market in the United States.

US Cold Chain Logistics Market Trends

Rising fresh produce imports from Mexico

- The United States imports over USD 22 billion worth of fresh produce annually from all over the globe and receives fresh produce from over 125 countries. Thirty-two percent of the country's fresh vegetables and fifty-five percent of its fresh fruit are imported from other countries.
- Almost 70% of all goods shipped via air freight between Latin America and North America consist of perishable products. Seventy-seven percent of the fresh fruits and vegetables imported by the United S come from Mexico, with an additional 11% from Canada.
- Mexico is the largest agricultural trading partner for the United States, totaling USD 71.9 billion (imports plus exports) in 2022. US agricultural exports to Mexico totaled USD 28.5 billion, while imports from Mexico totaled USD 43.4 billion. The main agricultural products imported from Mexico are fruits and vegetables; in fact, 44% of the fruits and 48% of the vegetables imported by the US are from Mexico.
- In 2022, 83.6% of US agricultural imports from Mexico consisted of vegetables, fruit, beverages, or distilled spirits, according to the US Department of Agriculture (USDA).
- The United States imported USD 18.7 billion of produce from Mexico in 2022, including fresh, frozen, and processed fruits, vegetables, and nuts. Just over 98% of these imports entered the United States through land ports between Mexico and Texas, New Mexico, Arizona, and California. When considering only fresh fruits and vegetables, which constitute nearly 89% of the total produce, imports totaled USD 16.6 billion.
- These imports were shipped in 590,906 forty-thousand-pound truckloads. Approximately 55% of the US fresh fruit and vegetable imports from Mexico entered through Texas land ports, arriving in 325,467 truckloads worth USD 11.6 billion.

Increasing popularity of frozen foods

- The American Frozen Food Institute (AFFI) reported that frozen food sales increased 8.6% to USD 72.2 billion in 2022. Unit sales decreased during that time but remained 5% above pre-pandemic levels.
- Between 2018 and 2022, frozen food dollar sales increased a whopping USD 19.4 billion, underlining the impact of the pandemic on the category's growth. While frozen food dollar sales have consistently climbed since 2018, unit sales decreased in both 2021 and 2022 by 3.2% and 5.1%, respectively, highlighting the potential impact of inflation on frozen food costs.
- Despite the decreases, unit sales remain elevated compared to pre-pandemic levels, indicating continued demand for frozen foods. This is particularly true for frozen processed meat, frozen snacks, and seafood, which have seen double-digit increases in unit sales compared to pre-pandemic levels.
- A new survey from AFFI finds that more than a quarter of shoppers are buying more frozen fruits and vegetables than three years ago and identify many benefits with these foods. Frozen fruits and vegetables help make it easier for households and demographic groups to increase their produce consumption and reduce food waste. Overall, penetration in the United States is high, with 94% of American households buying frozen fruits and vegetables.
- The sales of frozen fruits and vegetables in the United States reached USD 7.1 billion over the 52 weeks ending June 26, 2022, and product volume were 271 million pounds above pre-pandemic levels at 3.9 billion pounds. The top products within the

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segment were plain vegetables, potatoes, onions, and fruit, with sales of USD 2.9 billion, USD 2.3 billion, and USD 1.5 billion, respectively.

US Cold Chain Logistics Industry Overview

The cold chain logistics market of the United States is highly fragmented, aiding the domestic as well as international transportation of temperature-sensitive goods. It is undergoing developments with the introduction of solar-powered refrigerated units, multi-temperature trucks, and freight optimization software. International and local players like FedEx, XPO Logistics, Total Quality Logistics, Americold Logistics and many such companies are operational in the market.

Additional Benefits:

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

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