

India Cold Chain Market Growth Analysis - Forecast Trends and Outlook (2025-2034)

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Report description:

The India cold chain market reached a value of nearly INR 1918.86 Billion in 2024 . The industry is further expected to grow at a CAGR of 12.70% over the forecast period of 2025-2034 to attain a value of INR 6342.82 Billion by 2034 .

India Cold Chain Market Growth

Cold chain logistics refers to a temperature-controlled supply chain, involving a series of refrigerated production, storage, and distribution activities. It also includes equipment that helps to maintain the desired temperature range, thus ensuring preservation and extension of the shelf life of various temperature-sensitive products.

The India cold chain market development is influenced by the growing demand for processed food products and the growth of the retail and e-commerce industry in the region. One of the biggest factors which will aid market growth over the forecast period is the growth of the organised food retail sector in the region.

Currently, the country is the largest producer of milk and the second-largest producer of fruits and vegetables. The region is also experiencing substantial production of marine, meat, and poultry products. As most of these products are perishable and temperature-sensitive, they require a specific temperature for storage and transportation. This is generating the demand for and leading to the establishment of large cold chain facilities in the region.

Key Trends and Developments

Rising demand for perishable goods, expansion of e-commerce sector, and advancements in refrigerating technologies are factors boosting the India cold chain market growth.

May 2024

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Superplum, an agritech startup, has secured USD 15 million to expand its premium fresh fruit business. The startup directly sources fruits from farms across India and sells them to customers. This funding will enable Superplum to further scale its operations and increase its market reach.

May 2024

DP World opens new warehouse in Goa, India for chemical and healthcare cargo storage, boosting trade opportunities. The facility features 3 docks, 2,620 pallet positions, and supports DP World's multi-modal supply chain network expansion in India and globally.

June 2021

Snowman, a major cold chain logistics player, is set to invest INR 425 crore over the next 3 years to expand its infrastructure, including increasing warehouse capacity to over 2 lakh pallets and adding 100 reefer trucks. This expansion aligns with the growing demand for cold chain logistics services.

Increasing demand for perishable goods

The demand for perishable goods such as fruits, vegetables, and dairy products is driving the growth of the India cold chain market. Companies like ColdEX Logistics and Snowman Logistics are focusing on providing end-to-end cold chain solutions for the transportation and storage of perishable goods.

Expansion of organised retail and e-commerce

Organised retail and e-commerce sectors in India are creating a significant demand for cold chain services as they require reliable transportation and storage solutions to maintain the quality and freshness of their products. Amazon and Flipkart are relying heavily on cold chain logistics providers to ensure timely and temperature-controlled delivery of perishable goods to their customers.

Government initiatives and regulations

The government has been actively promoting the growth of the cold chain market in India through initiatives such as the development of cold chain infrastructure and the implementation of regulations that ensure food safety and quality.

Advancements in refrigeration technologies

The development of new and more efficient refrigeration technologies is enabling cold chain logistics providers to offer better services to their customers. The use of dry ice and gel packs is becoming increasingly popular in the industry as it is a cost-effective way of maintaining the required temperatures during transportation.

India Cold Chain Market Trends

The growing demand for effective cold chain facilities from the health care sector to preserve heat sensitive products like vaccines, biopharmaceuticals, and clinical trial materials, among others, is also propelling the market growth. With the expected growth in India's pharmaceutical industry, the market is expected to witness a strong demand in the forecast period. Companies like Gati Kausar are focusing on providing integrated cold chain solutions that cater to the needs of the pharmaceutical industries.

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Government initiatives and regulations are also playing a crucial role in shaping the India cold chain market outlook. For example, regulations such as the Food Safety and Standards Act (FSSAI) and the Prevention of Food Adulteration (PFA) Act are ensuring that food products are stored and transported safely and hygienically, which is driving the demand for cold chain services.

India Cold Chain Industry Segmentation

The EMR's report titled "India Cold Chain Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Services

- Cold Chain Storage
- Cold Chain Transportation
- Others

Market Breakup by Temperature Type

- Chilled
- Frozen

Market Breakup by Application

- Fruits and Vegetables
- Meat, Fish, and Seafood Products
- Dairy Products
- Processed Food Products
- Healthcare Products
- Others

Market Breakup by Region

- North India
- East and Central India
- West India
- South India

India Cold Chain Market Share

Both cold chain storage and transportation facilities are crucial for efficient and safe delivery of perishable and time-sensitive goods

The cold chain storage segment plays a critical role in maintaining the quality and freshness of products across industries such as fruits & vegetables, bakery and confectionery, dairy & frozen desserts, drugs & pharmaceuticals, meat, fish & seafood. ColdEX Logistics offers comprehensive cold chain solutions for fruits and vegetables, ensuring their preservation and quality throughout the supply chain.

According to India cold chain market report, the cold chain transportation segment is vital for ensuring the seamless and

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temperature-controlled movement of perishable goods from manufacturers to storage facilities, distribution centers, retailers, and consumers. Kool-ex specialises in providing temperature-controlled logistics solutions for pharmaceutical products, ensuring their efficacy and safety during transportation. Snowman Logistics focuses on cold chain transportation services for dairy products, highlighting the significance of maintaining product freshness and quality throughout the delivery process.

Fruit and vegetables segment bolsters the market growth due to their perishable nature

In the India cold chain logistics market analysis, the fruits and vegetables segment see a high demand for efficient cold chain storage and transportation solutions due to India's significant production of perishable produce. The meat and fish segment showcases an increasing need for cold chain services to maintain the safety and quality of these perishable products. Dairy products represent another crucial segment in the market, requiring cold chain infrastructure to preserve the quality and freshness of dairy items such as milk, cheese, and ice cream. In the healthcare products segment, particularly pharmaceuticals and biopharmaceuticals, there is a rapidly growing demand for precise temperature control during storage and transportation to maintain product efficacy and safety.

Leading Companies in the India Cold Chain Market

Market players are focused on facility expansion, technology adoption, and serving agro-food and pharmaceuticals industries to expand their presence.

CEVA Logistics SA

CEVA Logistics SA was founded in 2007 as a joint venture between Thomas Nationwide Transport and Eagle Global Logistics. The company is headquartered in Marseille, France and provides freight management, contract logistics, and supply chain solutions in 170 countries worldwide.

Snowman Logistics Limited

Snowman Logistics Limited was established in 1993 and is based in Bangalore, India. The company specialises in temperature-controlled logistics services, including cold storage warehousing and distribution.

ColdEX Logistics Pvt. Ltd.

ColdEX Logistics Pvt. Ltd. was founded in 1997 and is headquartered in New Delhi, India. The company offers temperature-controlled logistics, cold chain solutions, warehousing, and distribution services.

TCIEXPRESS LIMITED

TCIEXPRESS LIMITED was founded in 1958 as Transport Corporation of India. The company is headquartered in Gurugram, India and provides express logistics services, including surface express, domestic and international air express.

Other key players in the India cold chain market include GK Cold Chain Solutions, Coldrush Logistics Pvt. Ltd., Gubba Cold Storage Pvt. Ltd., Future Enterprises Limited, Container Corporation of India Limited (Fresh and Healthy Enterprises Ltd.), and Coldman Logistics Pvt.Ltd., among others.

India Cold Chain Market Analysis by States

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North India has a prominent market due to the presence of various cold chain logistics facilities

In northern India, Uttar Pradesh dominates market share as it is one of the major states with a growing demand for processed food products and a thriving retail sector. Punjab can account for a larger India cold chain market share due to its emphasis on the production and consumption of perishable food products, which is driving the need for efficient cold chain infrastructure. Companies like Kool-ex have established a strong foothold in Punjab, providing temperature-controlled logistics solutions to support the state's thriving dairy and horticulture sectors.

West Bengal in east India is also contributing to the growth of the market with its focus on enhancing food processing and storage capabilities. The state's emphasis on improving its cold chain infrastructure has attracted investments from key players.

More Insights On:

North America Cold Chain Market United States Cold Chain Market China Cold Chain Market

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