

Cold Chain Monitoring Market by Sensors and Data Loggers, RFID Devices, Telematics & Telemetry Devices, Networking Devices, Logistics (Storage, Transportation), Application (Pharmaceuticals & Healthcare, Food & Beverages) - Global Forecast to 2030

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Report description:

The global cold chain monitoring market is expected to grow from USD 8.31 billion in 2025 to USD 15.04 billion by 2030, at a CAGR of 12.6%. The rapid growth of e-commerce and online grocery platforms, fueled by changing consumer preferences for convenience and fresh food delivery, is significantly driving the demand for advanced cold chain monitoring solutions. With the rise of quick-commerce models promising ultra-fast deliveries, maintaining temperature integrity across last-mile logistics has become critical to ensure food safety and quality. Retailers and logistics providers are increasingly investing in IoT-enabled sensors, real-time tracking, and predictive analytics to enhance visibility and control throughout the delivery cycle. This shift is positioning cold chain monitoring as a strategic enabler for building consumer trust, reducing spoilage, and ensuring regulatory compliance in the fast-evolving digital retail ecosystem.

<https://www.marketsandmarkets.com/Images/cold-chain-monitoring-market1.webp>

"Hardware segment accounted for largest market share in 2024"

The hardware segment accounted for the largest market share in 2024, reflecting the strong reliance on IoT-enabled sensors, RFID tags, GPS trackers, and data loggers that form the backbone of cold chain monitoring infrastructure. The growing demand for precise temperature and humidity tracking in food, pharmaceutical, and vaccine distribution has accelerated the adoption of large-scale hardware across warehouses, transport fleets, and retail networks. Investments in advanced sensor technologies and wireless connectivity solutions are further enhancing real-time visibility and reliability. Additionally, regulatory mandates for

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quality compliance continue to make hardware indispensable for ensuring integrity throughout the supply chain.

"Pharmaceuticals & healthcare application projected to register highest CAGR during forecast period"

The pharmaceuticals & healthcare segment is projected to register the highest CAGR during the forecast period. This is driven by the rising global demand for vaccines, biologics, and temperature-sensitive drugs that require strict storage and distribution conditions. The COVID-19 vaccine rollout underscored the crucial role of cold chain monitoring, prompting increased investments in advanced, IoT-enabled solutions and predictive analytics for pharmaceutical logistics. Increasing regulatory enforcement by agencies such as the FDA and EMA is further pushing the adoption of compliant monitoring systems to ensure product integrity and patient safety. Moreover, the growth of biopharmaceuticals and personalized medicines is creating sustained demand for highly reliable and transparent cold chain solutions.

"China to lead growth in Asia Pacific cold chain monitoring market during forecast period"

China is estimated to lead the Asia Pacific cold chain monitoring market during the forecast period, supported by its rapidly expanding pharmaceutical, biotechnology, and e-commerce sectors that demand advanced temperature-controlled logistics. The government's "Healthy China 2030" initiative and strict food safety regulations are accelerating investments in digital monitoring solutions to safeguard quality across food and healthcare supply chains. Major logistics players such as SF Express and JD Logistics are deploying IoT-based tracking and AI-driven cold chain platforms to enhance efficiency and compliance. Additionally, rising cross-border trade in fresh produce, seafood, and vaccines is reinforcing China's position as the region's growth engine for cold chain monitoring technologies.

Breakdown of Primaries

Various executives from key organizations operating in the cold chain monitoring market were interviewed in-depth, including CEOs, marketing directors, and innovation and technology directors.□

-□By Company Type: Tier 1-40%, Tier 2-30%, and Tier 3-30%

-□By Designation: C-level Executives-40%, Directors-40%, and Others-20%

-□By Region: North America-40%, Asia Pacific-30%, Europe-20%, and RoW-10%

The cold chain monitoring market is dominated by globally established players such as ORBCOMM (US), Carrier (US), Monnit Corporation (US), Controlant hf. (Iceland), ELPRO-BUCHS AG (Switzerland), Infratab, Inc. (US), Copeland LP (US), Tive, Inc. (US), Cryoport Inc. (US), Digi International Inc. (US), AgroFresh (Verigo) (US), Zebra Technologies Corp. (US), IOBOT TECHNOLOGIES INDIA PRIVATE LIMITED (India), Digital Matter (Australia), Smarter Technologies Group (UK), Ezurio (US), Dickson (US), Rotronic AG (Switzerland), Xylem (US), InsightGeeks Solutions Pvt. Ltd. (India), CapTemp (Portugal), SpotSee (US), Accent Advanced Systems, SLU. (Spain), Testo SE & Co. KGaA (Germany), and RFID4U (US). The study includes an in-depth competitive analysis of these key players in the cold chain monitoring market, with their company profiles, recent developments, and key market strategies.

Study Coverage

The report segments the cold chain monitoring market and forecasts its size by temperature type, offering, logistics, application, and region. The report also discusses the drivers, restraints, opportunities, and challenges pertaining to the market. It gives a detailed view of the market across four main regions-North America, Europe, Asia Pacific, and RoW. A value chain analysis has been included in the report, along with the key players and their competitive analysis of the cold chain monitoring ecosystem.

Key Benefits of Buying the Report

-□Analysis of key drivers (Rising demand for perishable food, pharmaceuticals, and biologics requiring temperature-controlled logistics), restraints (High implementation and maintenance costs of advanced cold chain monitoring systems), opportunities (Rapid growth of online grocery and food delivery fueling last-mile cold chain visibility solutions), and challenges (Limited skilled workforce to manage advanced cold chain monitoring technologies) influencing the growth of the cold chain monitoring market

-□Products/Solution/Service Development/Innovation: Detailed insights into upcoming technologies, research, and development activities in the cold chain monitoring market

-□Market Development: Comprehensive information about lucrative markets-the report analyses the cold chain monitoring market across varied regions.

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-□Market Diversification: Exhaustive information about new hardware/software, untapped geographies, recent developments, and investments in the cold chain monitoring market

-□Competitive Assessment: In-depth assessment of market shares and growth strategies and offerings of leading players, such as Carrier (US), Testo SE & Co. KGaA (Germany), Cryoport Inc. (US), ORBCOMM (US), and Controlant hf. (Iceland), among others

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