Mexico Cold Chain Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Mexico Cold Chain Logistics Market Analysis

The Mexico Cold Chain Logistics Market size in 2026 is estimated at USD 7.37 billion, growing from 2025 value of USD 7.04 billion with 2031 projections showing USD 9.27 billion, growing at 4.7% CAGR over 2026-2031.

Mexico's role as the largest trading partner of the United States, combined with 7.35 million cross-border truck moves in 2023, underpins the expanding demand for temperature-controlled services. Rising avocado output of 2.77 million t in 2024 and broader fresh-produce volumes amplify exports that require strict refrigeration. President Claudia Sheinbaum's MXN 157 billion (USD 7.6 billion) rail modernization plan and USD 1.6 billion port upgrades improve network efficiency, reducing dwell time in coastal and border corridors. The refrigerated storage segment leads service uptake with a 42% slice in 2024, while frozen-temperature logistics secure 27% of revenue, driven by a projected 4.1 million tons poultry output in 2025. Consolidation is accelerating as multinationals expand Latin capacity; DHL alone has earmarked half of its EUR 2 billion (USD 2.20 billion) healthcare budget for the Americas, fueling competitive scale.

Mexico Cold Chain Logistics Market Trends and Insights

Growing Agricultural-Produce Exports

Mexico's avocado sector now spans 8,400 certified hectares in Jalisco, adding 100,000 tons of U.S.-bound fruit that supplements

Michoacan's 2.77 million tonnes output. The Association of Avocado Producers and Export Packers of Mexico estimates 78,000 direct jobs and USD 7.5 billion in U.S. economic contributions, reinforcing premium refrigerated freight to satisfy USDA certification processes. Berry exports advanced as free-trade provisions fuel a projected 35% rise in fresh-produce shipments over five years, creating steady lane volumes for controlled-atmosphere containers. Long haul of 24 days from interior farms to North American grocery depots intensifies the need for high-reliability reefer fleets. Cold chain intermediaries differentiate through forced-air precooling and modified-atmosphere packaging that extend shelf life without chemical preservatives.

Rising Domestic Meat and Seafood Consumption

Higher minimum wages, remittance inflows, and social transfers lifted meat purchases by 4.5% in 2024 projects total animal protein use beyond 10.2 million t in 2025, translating into increased throughput at refrigerated DCs in metropolitan clusters. USDA forecasts per-capita poultry demand climbing from 38.3 kg in 2023 to 43.8 kg in 2033, while Mexico's poultry output targets 4.1 million tons in 2025. Import reliance on pork (52%) forces tight temperature control during trans-Pacific and cross-border legs. Biosecurity upgrades, including chilled hatchery corridors, strengthen supply continuity and require sophisticated HACCP-compliant warehousing.

High Fuel and Electricity Costs

Projected jumps of up to 40% in tortilla prices underscore broader energy cost headwinds, with CFE industrial tariffs diverging by grid zone. Refrigeration represents as much as 60% of a cold store's utility spend. Imported yellow corn drives 75% of poultry feed expenses, increasing upstream cost pass-through to logistics rates. Operators consider LNG-powered trucks and on-site PV plus battery systems for price stability, but capex remains high amid uncertain policy incentives.

Other drivers and restraints analyzed in the detailed report include:

E-commerce Grocery ExpansionFederal Logistics-Infrastructure SpendingQualified-Driver Shortage

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Refrigerated storage controlled 41.35% of the Mexico cold chain logistics market share in 2025, anchored by a national footprint exceeding 157 million ft□ from Emergent Cold Latin America facilities. Value-added services are projected to widen at a 4.78% CAGR through 2031, reflecting rising adoption of co-packing, labeling, and customs-bonded fulfilment. The Mexico cold chain logistics market size for value-added services is forecast to reach USD 1.48 billion by 2031, reflecting deep integration into shipper inventory systems. AI-enabled platforms from Blue Yonder expand predictive demand planning across Mexican retail and manufacturing clients, fortifying vendor-managed inventory models.

In transport, Canadian Pacific Kansas City allocates USD 240 million annually to enhance refrigerated rail sets that cut transit to Chicago by 36 h. Technology-savvy entrants such as UNK deploy IoT probes monitoring temperature, humidity, and vibration in real time, allowing carriers to guarantee food-safety compliance across long distances. As multichannel retailers transition to same-day grocery delivery, micro-fulfillment hubs and cross-docks will fuel further service diversification.

The Mexico Cold Chain Logistics Market Report is Segmented by Service Type (Refrigerated Storage, Refrigerated Transportation, Value-Added Services), Temperature Type (Chilled, Frozen, Ambient, Deep-Frozen/Ultra-Low), Application (Fruits & Vegetables, Meat & Poultry, Fish & Seafood, Dairy & Frozen Desserts, Bakery & Confectionery, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Frialsa Frigorificos AIT Worldwide Logistics Emergent Cold LatAm DHL Group UPS Supply Chain Solutions C.H. Robinson Worldwide Yusen Logistics (Part of NYK Line) Kuehne Nagel Penske Logistics DSV Fresco Traxion Friopuerto Crane Worldwide Logistics CEVA Logistics NCC Logistics Arc Global Logistics TIBA Group Noatum Logistics Werner Enterprises

Additional Benefits:

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

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