

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

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Report description:

Asia-Pacific Cold Chain Logistics Market Analysis

The Asia-Pacific Cold Chain Logistics Market is expected to grow from USD 145.07 billion in 2025 to USD 151.64 billion in 2026 and is forecast to reach USD 189.23 billion by 2031 at 4.53% CAGR over 2026-2031.

Rising disposable incomes, rapid e-grocery penetration, and pharmaceutical supply-chain upgrades keep demand on a steady upward course even as overall warehouse builds move from hyper-expansion to disciplined, technology-led optimization. China retains scale leadership, yet India's faster build-out of distributed depots signals a decisive pivot toward proximity-based networks designed for same-day fulfillment. Operators embed AI, robotics, and natural-refrigerant systems to compress energy intensity and labor exposure, turning operational excellence into the new growth lever for the Asia-Pacific cold chain logistics market. Competition remains moderately fragmented; global consolidators accelerate M&A to secure tech capabilities while regional specialists leverage hard-won local permits and first-mile know-how to guard niche positions.

Asia-Pacific Cold Chain Logistics Market Trends and Insights

Rising Consumption of Processed & Frozen Foods

Asia's middle-income households increasingly favor quick-prep meals, frozen seafood, and multi-day protein packs, creating a durable core of throughput for the Asia-Pacific cold chain logistics market. Supermarket chains respond by shifting stock-keeping

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units toward frozen entrees and par-baked dough that demand precise -18 C handling from plant to shelf. Facility owners retrofit high-bay zones with automatic shuttle systems to segregate chilled, frozen, and deep-frozen pallets, trimming travel time and energy loss. Smart labels record time-temperature curves, letting retailers cull at-risk lots before display, which reduces write-offs and tightens food-safety compliance. Urban family sizes continue to shrink, spurring purchases of portioned packs that cycle through storage networks faster, raising pallet-turn velocity and amplifying revenue per cubic meter.

Growth in E-Commerce Grocery Delivery

Instant delivery platforms pledge 15- to 30-minute drop-offs, propelling a new generation of micro-fulfillment "dark" stores furnished with modular coolers. Energy-saving variable-speed compressors paired with AI-driven HVAC trim power draw by 30% while preserving tight ± 0.5 C bands. Hybrid passive-active gel-pack boxes allow ice-cream to survive scooter rides across humid Bangkok afternoons, and IoT monitors feed data to consumer apps, turning temperature transparency into a trust signal. As grocery apps expand into Tier-2 cities, demand shifts from mega-warehouses on city fringes to spoke depots embedded in densely populated suburbs, broadening the Asia-Pacific cold chain logistics market footprint.

High Energy & Real-Estate Cost of Cold Facilities

Electricity often represents 70% of opex, and data-center demand crowds grids across Tokyo and Sydney, driving tariff spikes that erode warehouse margins. Solar-panel retrofits cut bills 25% but entail high capex and lengthy permitting, restricting adoption to larger rooftops or greenfield projects. In parallel, land prices within 10 km of CBDs climb steeply, forcing developers outward where cheaper plots lengthen final-mile legs and elevate fuel spend. Energy-efficient insulation panels and variable-capacity compressors partially offset power hikes, but payback stretches past five years, complicating ROI math for smaller operators.

Other drivers and restraints analyzed in the detailed report include:

Expansion of Pharmaceutical Cold Chain
Harmonised SPS e-Certification & Paperless Customs Integration
Rural First-Mile Infrastructure Gaps

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

Segment Analysis

Refrigerated storage contributed 40.55% to the Asia-Pacific cold chain logistics market in 2025. Modern high-bay freezers now rise 40 meters, using shuttle robots to pull pallets in under 60 seconds, halving manual labor and maintaining chamber integrity. Operators invest in predictive maintenance software that monitors compressor vibration and coolant pressure, cutting unplanned downtime by 15%.

Value-added services, though smaller, capture the strongest 4.71% CAGR as brand owners outsource repackaging, blast-freezing, and product conditioning to a single 3PL. Service bundling reduces handoffs, thereby minimizing temperature excursions and liability disputes. Public warehouses embrace flexible slot-pricing based on dwell time and temperature band, appealing to SME food exporters eyeing sporadic shipments. Conversely, private dedicated sites attract vaccine manufacturers that demand validated layouts and 24/7 audit access. The shift from siloed warehousing to turnkey solutions underscores how the Asia-Pacific cold chain logistics market pivots toward holistic supply-chain orchestration.

The Asia-Pacific Cold Chain Logistics Market Report is Segmented by Service Type (Refrigerated Storage, Refrigerated Transportation, and Value-Added Services), Temperature Type (Chilled, Frozen, Ambient, and Deep-Frozen/Ultra-Low), Application (Fruits & Vegetables, Meat & Poultry, Fish & Seafood, and More), Country (China, Japan, India, South Korea, Indonesia, and More).

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The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

United Parcel Service (UPS) JWD Group Nichirei Logistics Group Inc SF Express AIT Worldwide Logistics Inc CWT Pte Ltd Rokin Logistics Lineage Logistics Kerry Logistics Network Ltd Snowman Logistics Ltd ColdEX Logistics Pvt Ltd Linfox Pty Ltd Yusen Logistics Co Ltd (Part of NYK Line) Kuehne + Nagel DHL Group DSV Nippon Express Yamato Transport Co. Ltd CEVA Logistics Konoike Transport Co., Ltd

Additional Benefits:

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Rising consumption of processed & frozen foods
 - 4.2.2 Growth in e-commerce grocery delivery
 - 4.2.3 Expansion of pharmaceutical cold chain
 - 4.2.4 Harmonised SPS e-Certification & Paperless Customs Integration
 - 4.2.5 Retailer-led captive cold warehousing
 - 4.2.6 Multilateral Infrastructure Corridors Expanding Refrigerated Capacity
 - 4.3 Market Restraints
 - 4.3.1 High energy & real-estate cost of cold facilities
 - 4.3.2 Rural first-mile infrastructure gaps
 - 4.3.3 Shortage of low-GWP refrigerant engineers
 - 4.3.4 Divergent ESG disclosure burdens on emissions
 - 4.4 Value / Supply-Chain Analysis
 - 4.5 Regulatory Landscape
 - 4.6 Technological Outlook
 - 4.7 Porter's Five Forces
 - 4.7.1 Threat of New Entrants
 - 4.7.2 Bargaining Power of Buyers
 - 4.7.3 Bargaining Power of Suppliers
 - 4.7.4 Threat of Substitutes
 - 4.7.5 Competitive Rivalry
 - 4.8 Impact of Emission Standards on the Industry

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4.9 Impact of COVID-19 and Geo-Political Events on the Market

5 Market Size & Growth Forecasts (Value)

5.1 By Service Type

5.1.1 Refrigerated Storage

5.1.1.1 Public Warehousing

5.1.1.2 Private Warehousing

5.1.2 Refrigerated Transportation

5.1.2.1 Road

5.1.2.2 Rail

5.1.2.3 Sea

5.1.2.4 Air

5.1.3 Value-Added Services

5.2 By Temperature Type

5.2.1 Chilled (0-5 C)

5.2.2 Frozen (-18-0 C)

5.2.3 Ambient

5.2.4 Deep-Frozen / Ultra-Low (less than-20 C)

5.3 By Application

5.3.1 Fruits & Vegetables

5.3.2 Meat & Poultry

5.3.3 Fish & Seafood

5.3.4 Dairy & Frozen Desserts

5.3.5 Bakery & Confectionery

5.3.6 Ready-to-Eat Meals

5.3.7 Pharmaceuticals & Biologics

5.3.8 Vaccines & Clinical Trial Materials

5.3.9 Chemicals & Specialty Materials

5.3.10 Other Perishables

5.4 By Country

5.4.1 China

5.4.2 Japan

5.4.3 India

5.4.4 South Korea

5.4.5 Indonesia

5.4.6 Thailand

5.4.7 Australia

5.4.8 Singapore

5.4.9 Malaysia

5.4.10 Rest of Asia-Pacific

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials, Strategic Info, Market Rank/Share, Products & Services, Recent Developments)

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- 6.4.1 United Parcel Service (UPS)
- 6.4.2 JWD Group
- 6.4.3 Nichirei Logistics Group Inc
- 6.4.4 SF Express
- 6.4.5 AIT Worldwide Logistics Inc
- 6.4.6 CWT Pte Ltd
- 6.4.7 Rokin Logistics
- 6.4.8 Lineage Logistics
- 6.4.9 Kerry Logistics Network Ltd
- 6.4.10 Snowman Logistics Ltd
- 6.4.11 ColdEX Logistics Pvt Ltd
- 6.4.12 Linfox Pty Ltd
- 6.4.13 Yusen Logistics Co Ltd (Part of NYK Line)
- 6.4.14 Kuehne + Nagel
- 6.4.15 DHL Group
- 6.4.16 DSV
- 6.4.17 Nippon Express
- 6.4.18 Yamato Transport Co. Ltd
- 6.4.19 CEVA Logistics
- 6.4.20 Konoike Transport Co., Ltd

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-need Assessment

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