

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

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Australia Cold Chain Logistics Market Analysis

The Australia Cold Chain Logistics Market was valued at USD 4.62 billion in 2025 and estimated to grow from USD 4.79 billion in 2026 to reach USD 5.73 billion by 2031, at a CAGR of 3.66% during the forecast period (2026-2031).

Surging e-commerce grocery volumes, expanding pharmaceutical cold storage demand, and infrastructure upgrades driven by net-zero mandates are shaping short and long-term growth trajectories. Rising private-equity activity is unlocking build-to-suit capacity as industrial vacancy tightens below 1% in Sydney and Melbourne. High electricity prices, refrigerant phase-outs, and a scarcity of modern freezer space weigh on margins but simultaneously accelerate investment in renewable power and low-GWP systems. Federal export-hub grants are funneling capital toward regional storage nodes that support the nation's USD 4.8 billion sheep-meat export economy. Consolidation among warehouse operators and fleets is enabling nationwide temperature-controlled networks that meet increasingly stringent product-integrity requirements.

Australia Cold Chain Logistics Market Trends and Insights

E-commerce grocery boom accelerating last-mile refrigerated logistics

Growing online grocery penetration is re-drawing distribution footprints. Retailers such as Coles invested USD 1 billion in automated centers that process 4 million cartons weekly across multi-temperature zones, lowering manual handling and

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

shrinkage. Woolworths sources 96% of fresh produce domestically, intensifying demand for chilled facilities proximate to metropolitan customers. Voice-directed picking devices engineered for -30 C improve order accuracy and reduce turnover in harsh storage environments. Transport, Postal and Warehousing job postings surged 41% year-on-year in Sydney during 2024, reflecting last-mile fulfillment momentum. This activity underpins consistent throughput for road, rail, and air fleets within the Cold chain logistics Australia market.

Pharma & biologics pipeline expansion raising ultra-cold storage needs

DHL has earmarked EUR 2 billion (USD 2.20 billion) by 2030 for GDP-certified hubs and temperature-controlled vehicles, signalling sustained life-science demand. Baxter Healthcare's Western Sydney facility upgrade adds 20 million IV bags of annual capacity, requiring stringent 2 C to 8 C storage to protect product efficacy. Toll Group's 10,000 sqm healthcare warehouse in Tullamarine supports CSL Seqirus vaccine manufacturing with -20 C zones and dedicated quality labs. Rising biologics pipelines are boosting the Deep-Frozen/Ultra-Low sub-segment's 4.1% CAGR and reinforcing the Cold chain logistics Australia market as a strategic enabler for sovereign medicine supply. Integration of BICON with customs systems further reduces temperature-excursion risk by streamlining import clearance for sensitive therapies.

High electricity prices and carbon pricing inflating opex

Wholesale gas and power prices have tripled since 2022, imposing acute cost pressure on energy-intensive cold storage operations. Some plastics and fertilizer plants shuttered in 2024, underlining the threat to high-consumption sites. Operators retrofit LED lighting, high-speed doors, and thermal insulation but face capital constraints and protracted paybacks. CSIRO's GenCost report warns that integration costs for variable renewables further complicate energy planning. Solar-equipped roofs at Coles' new facilities illustrate a pathway to hedge tariff volatility. Despite mitigation, energy remains the largest controllable expense within the Cold chain logistics Australia market over the near term.

Other drivers and restraints analyzed in the detailed report include:

Federal export-hub grants for agri-food cold chain infrastructure
Real-estate REIT capital inflow amid less than 1% vacancy
unlocking build-to-suit capacity
Severe shortage of modern grade-A freezer space in tier-1 metros

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

Segment Analysis

Refrigerated Storage maintained 41.56% of Cold chain logistics Australia market share in 2025, underscoring its foundational role. Public warehousing models let smaller producers access certified temperature zones without heavy capital outlays. Private warehousing supports retailers requiring bespoke handling protocols, and Americold's USD 36 million Sydney build-out will add 2.8 million cu ft to meet anchor-tenant grocery demand. Value-Added Services such as kitting, labeling, and repacking command higher margins, and their 4.32% CAGR through 2031 indicates shippers' shift toward integrated solutions.

Refrigerated Transportation spans road, rail, sea, and air, with Toll Group's USD 67 million battery-electric fleet investment illustrating decarbonization intent. Cross-docking and synchronized inventory programs shorten dwell time, freeing capacity for high-velocity SKUs. Voice-directed workflow adoption exceeds global benchmarks, enhancing labor productivity and reducing errors in sub-zero environments. As service portfolios deepen, the Cold chain logistics Australia market increases its resilience and pricing power.

The Australia Cold Chain Logistics Market Report is Segmented by Service Type (Refrigerated Storage, Refrigerated

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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), and Geography (Australia). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Lineage Logistics NewCold Advanced Cold Logistics Karras Cold Logistics Toll Group Linfox AHG Refrigerated Logistics Primary Connect Victorian Refrigerated Transport & Storage (VRTS) CEVA Logistics Cold Chain Logistics Global Cold Chain Solutions (GCCS) Kerry Logistics Cannon Logistics Hawk Logistics Relicold Pty Ltd SLR Trans Berle Transport Blenners Transport Chillfreeze Logistics & Storage CTI Logistics Limited (CTI)

Additional Benefits:

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

Table of Contents:

1 Introduction

1.1 Study Assumptions and 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 E-commerce grocery boom accelerating last-mile refrigerated logistics

4.2.2 Pharma and biologics pipeline expansion raising ultra-cold storage needs

4.2.3 Federal export-hub grants for agri-food cold chain infrastructure

4.2.4 Real-estate REIT capital inflow amid <1 % vacancy unlocking build-to-suit capacity

4.2.5 Net-zero mandates spurring low-GWP refrigerant and solar-powered facilities

4.2.6 Private-equity roll-ups creating nationwide temperature-controlled networks

4.3 Market Restraints

4.3.1 High electricity prices and carbon-pricing inflating opex

4.3.2 Severe shortage of modern grade-A freezer space in Tier-1 metros

4.3.3 Costly refrigerant phase-outs (R-404A) and compliance retrofits

4.3.4 Chronic scarcity of certified refrigeration technicians

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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.7.5 Competitive Rivalry
- 4.8 Impact of Emission Standards and ESG Reporting on Cold Chain
- 4.9 Impact of COVID-19 and Geo-Political Events

5 Market Size & Growth Forecasts

- 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 (0-5C)
 - 5.2.2 Frozen (-18-0C)
 - 5.2.3 Ambient
 - 5.2.4 Deep-Frozen / Ultra-Low (less than-20C)
- 5.3 By Application
 - 5.3.1 Fruits and Vegetables
 - 5.3.2 Meat and Poultry
 - 5.3.3 Fish and Seafood
 - 5.3.4 Dairy and Frozen Desserts
 - 5.3.5 Bakery and Confectionery
 - 5.3.6 Ready-to-Eat Meals
 - 5.3.7 Pharmaceuticals and Biologics
 - 5.3.8 Vaccines and Clinical Trial Materials
 - 5.3.9 Chemicals and Specialty Materials
 - 5.3.10 Other Perishables

6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Strategic Moves (M&A, Greenfield, PE deals)
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
 - 6.4.1 Lineage Logistics
 - 6.4.2 NewCold Advanced Cold Logistics
 - 6.4.3 Karras Cold Logistics
 - 6.4.4 Toll Group
 - 6.4.5 Linfox
 - 6.4.6 AHG Refrigerated Logistics
 - 6.4.7 Primary Connect
 - 6.4.8 Victorian Refrigerated Transport & Storage (VRTS)
 - 6.4.9 CEVA Logistics

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.10 Cold Chain Logistics
- 6.4.11 Global Cold Chain Solutions (GCCS)
- 6.4.12 Kerry Logistics
- 6.4.13 Cannon Logistics
- 6.4.14 Hawk Logistics
- 6.4.15 Relicold Pty Ltd
- 6.4.16 SLR Trans
- 6.4.17 Berle Transport
- 6.4.18 Blenners Transport
- 6.4.19 Chillfreeze Logistics & Storage
- 6.4.20 CTI Logistics Limited (CTI)

7 Market Opportunities and Future Outlook

7.1 White-Space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-27"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

