

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

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Report description:

Colombia Cold Chain Logistics Market Analysis

Colombia Cold Chain Logistics market size in 2026 is estimated at USD 1.74 billion, growing from 2025 value of USD 1.67 billion with 2031 projections showing USD 2.16 billion, growing at 4.38% CAGR over 2026-2031.

Demand stems from the country's dominant flower export trade, a rapidly modernizing pharmaceutical sector, and rising e-grocery adoption that together keep utilization rates high despite infrastructure bottlenecks. Energy-efficient refrigeration retrofits, highway upgrades that shorten transit to Caribbean ports, and foreign direct investment from DHL and Emergent Cold LatAm collectively reinforce capacity while tempering cost pressures. At the same time, high electricity tariffs, fragmented trucking, and security-related insurance premiums continue to limit margin expansion and impose persistent operating risk. Competition pivots toward integrated, technology-enabled solutions as customers seek real-time traceability and compliance with strict WHO Good Distribution Practice standards.

Colombia Cold Chain Logistics Market Trends and Insights

Exports of High-Value Fresh Flowers to US?/?EU

Colombia shipped more than 65,000 tons of cut flowers for Valentine's Day 2025, a 13% increase versus 2024, with 80% of exports headed to the United States. Continuous 1-2 C handling from farm to El Dorado International Airport is mandatory, and

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vacuum-cooling lines installed in 2024 now lower core temperature within 30 minutes, reducing spoilage loss by double-digit percentages. Florverde-certified farms, which now represent more than half of export stems, drive demand for detailed traceability records that logistics providers supply through IoT loggers. Airfreight still moves 92% of flower tonnage, but diversification efforts toward the UAE and Switzerland push forward containerized ocean pilots that need longer-duration phase-change packaging. Collectively, these factors amplify capacity utilization for the Colombia cold chain logistics market during peak seasons and support year-round asset deployment.

Expansion of Pharma Cold Chain for Biologics

Legislation enacted in August 2024 strengthened Colombia's pharmaceutical regulatory framework and heightened GDP compliance expectations across the supply chain. The Ministry of Health has distributed 585 ice-lined refrigerators and 105 solar direct-drive freezers to more than 500 cities, extending ultra-low storage to previously underserved municipalities. Biologic imports and local fill-finish projects require stable 2°C to 8°C corridors, spurring logistics providers to certify facilities under WHO GDP. Panalpina Bogota and DSV led early adoption, but domestic 3PLs now pursue similar accreditation, enlarging service depth within the Colombia cold chain logistics market. Clinical research sponsors value the new capacity, which reduces trial delays linked to temperature excursions and regulatory clearance.

High Electricity Tariffs Raise Refrigeration OPEX

Industrial power prices account for 10%-20% of operating cost among cold chain warehouses, compressing margins. Operators retrofit natural-ammonia systems and inverter compressors, driving documented 12% savings at Ransa Colombia. Yet, capital intensity and permitting delay widespread adoption, especially among SMEs that comprise over half of the capacity in the Colombia cold chain logistics market. Distributed generation rules allow rooftop solar to net-meter surplus, but connection queues hamper onboarding, leaving electricity inflation as an ongoing drag.

Other drivers and restraints analyzed in the detailed report include:

Antioquia-Bolivar Highway Boosting Connectivity
Urban E-Grocery and Quick-Commerce Last-Mile Demand
Scarcity of GDP-Compliant Biologics Transport

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

Segment Analysis

Refrigerated storage captured 46.45% of the Colombia cold chain logistics market share in 2025, reflecting the historic reliance on large, pallet-dense warehouses near El Dorado Airport and Bogota's industrial belt. Growth remains steady as exporters secure redundancy against peak-season shocks. Value-added services, however, are forecast to rise at a 5.62% CAGR, outpacing the broader Colombia cold chain logistics market and signaling customer preference for bundling packaging, quality inspection, and export document preparation under one SLA. Operators such as Megafin Logistica embed voice-directed picking and temperature-zoned staging, shrinking dwell time and yielding throughput gains that resonate with tight Valentine's Day and Mother's Day shipping calendars.

Emergent Cold LatAm's acquisition of Red Polar inserted 25,000 pallet spots into an already tight Bogota grid, but its parallel expansion in Cali underlines a pivot toward multi-node national networks. As storage footprints widen, customers negotiate end-to-end tariffs rather than siloed rates. This shift grows recurring revenue streams and pushes the Colombia cold chain logistics market toward higher service intensity and data-driven workflows.

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The Colombia Cold Chain Logistics 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, Dairy & Frozen Desserts, Bakery & Confectionery, Pharmaceuticals & Biologics, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Megafin Logistica Para Alimentos Ransa Colombia (Colfrigos) Rentafrio Frimac Apix Logistica Especializada SAS Sefarcol SA Transportes Camfri SA DHL Group Emergent Cold Latam GEODIS Grupo Logistico TIBA DSV Crane Worldwide Logistics Traxion (including Solistica) ATN Logistics SAS Grupo Alcomex Airseatrans Noatum Logistics TIBA Group Grupo TCC

Additional Benefits:

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

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