

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

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Report description:

Europe Pharmaceutical Cold Chain Logistics Market Analysis

The Europe Pharmaceutical Cold Chain Logistics Market was valued at USD 21.5 billion in 2025 and estimated to grow from USD 22.51 billion in 2026 to reach USD 28.29 billion by 2031, at a CAGR of 4.67% during the forecast period (2026-2031).

Demand for ultra-low-temperature services-particularly below -120 C for cell and gene therapies-remains the single most influential driver of this expansion, pressing logistics firms to deploy cryogenic freezers, dry-shippers, and redundant power systems that go far beyond conventional 2-8 C solutions. The Europe pharmaceutical cold chain logistics market continues to benefit from sustained biologics uptake, stricter EU GDP and serialization mandates, and sizable pandemic-preparedness budgets under HERA that add long-term volume to national stockpiles. However, energy-price volatility, driver shortages, and GMP-skilled labor gaps have raised operating costs and accelerated automation investments across the Europe pharmaceutical cold chain logistics market. Competitive intensity has sharpened as global integrators such as UPS, DHL, and DSV spend aggressively on acquisitions and digital visibility tools that promise real-time, batch-level temperature assurance across borders.

Europe Pharmaceutical Cold Chain Logistics Market Trends and Insights

Rise in Biologics & Temperature-Sensitive Drugs Demand

A growing pipeline of monoclonal antibodies, mRNA vaccines, and autologous cell products has pushed half of all new European

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drug approvals into cold-chain categories, many of which require controlled environments at 0-5 C or down to -120 C to preserve potency. The Europe pharmaceutical cold chain logistics market, therefore, sees sustained capital inflows into GDP-certified warehouses fitted with continuous power backups, liquid nitrogen chambers, and IoT sensors. Real-time lane qualification and end-to-end audit trails are now baseline expectations for sponsors submitting to EMA quality-risk assessments. Logistics providers that previously specialized in 2-8 C vaccines now differentiate on their ability to host cryogenic fleets, digitally verify temperature excursions within ± 2 C, and generate 21 CFR Part 11-compliant data in seconds.

E-commerce & Direct-to-Patient Last-Mile Growth

Post-pandemic consumer behavior favors home delivery of prescription biologics, prompting pharmacies and tele-health platforms across the Nordics to integrate carrier-agnostic APIs that allocate shipments to couriers based on real-time temperature-validated capacity. This trend forces the Europe pharmaceutical cold chain logistics market to deploy smaller insulated parcel shippers with phase-change materials engineered for 24-hour autonomy while maintaining 2-8 C stability, replacing bulk pallet moves to hospital warehouses. Providers must also reconcile diverse national GDP licensing rules for patient-level distribution, bringing digital labeling, photo proof-of-delivery, and automated return logistics into a single compliant workflow.

High Energy Cost & Infrastructure Complexity

Electricity tariffs remain 30-60% higher than pre-2022 averages across key industrial clusters, raising refrigeration OPEX and elongating ROI on new GDP facilities. Simultaneously, EU Green Deal mandates require carbon-footprint reporting, pushing operators to upgrade insulation panels, switch to low-GWP refrigerants, and install rooftop solar arrays. These capital-intensive retrofits compress margins in the Europe pharmaceutical cold chain logistics market even as compliance standards climb.

Other drivers and restraints analyzed in the detailed report include:

Seasonal Variant-Adapted mRNA Booster Campaigns
HERA-Driven Pandemic Stockpile Purchases
GMP-Skilled Labor Shortages

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

Segment Analysis

Transportation accounted for 61.40% of Europe's pharmaceutical cold chain logistics market share in 2025, underpinned by the continent's dense road network linking more than 200 cross-border corridors under a harmonized but stringently policed GDP umbrella. Road freight dominates because it supports pallet-level tracking, validated reefer units, and direct store delivery models that remove airport hand-offs. Airfreight remains indispensable for high-value, ultra-low shipments, yet yield management drives selective use to premium therapies with rigid stability profiles. In parallel, rail operators test refrigerated wagons between Spain and Germany, signaling modal diversification aimed at carbon reduction.

Value-added services posted the fastest growth at 4.03% CAGR, reflecting mounting demand for serialization, GDP auditing, and lane-qualification consulting. Pharma shippers now seek one-stop partners able to integrate SOP design, temperature-map packaging, and real-time dashboarding-capabilities that elevate barriers to entry and generate fee-based revenue streams within the Europe pharmaceutical cold chain logistics market. The segment also benefits from regulatory clauses that hold logistics providers jointly liable for data integrity, incentivizing investment in blockchain-ready platforms that can prove chain-of-custody compliance in seconds.

Chilled cargo (0-5 C) represented 40.55% of the Europe pharmaceutical cold chain logistics market size in 2025, encompassing vaccines, insulins, and monoclonals whose volume streams stabilize warehouse utilization throughout the year. Operators adopt

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multi-chamber trucks capable of holding +15 C, 2-8 C, and -20 C zones to consolidate deliveries, sharpening drop density and decreasing cost per kilometer.

Deep-frozen/ultra-low segments record the highest CAGR at 4.48% through 2031. Cell therapy sponsors bypass dry ice pallets in favor of liquid nitrogen dry-shippers that maintain -150 C for 10 days without external power, enabling intercontinental autologous transfers. This niche compels logistics firms to invest in droplet-digital tracking that monitors internal pressure and tilt events, thereby enhancing risk mitigation across the Europe pharmaceutical cold chain logistics market.

The Europe Pharmaceutical Cold Chain Logistics Market Report is Segmented by Services (Transportation, Warehousing and Distribution, and More), Temperature Type (Chilled, Frozen, Ambient, and More), Product (Generic Drugs, Branded Drugs, and More), End User (Pharmaceutical Manufacturers, Biotech & Biosimilar Manufacturers, and More), Country (Germany, France, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

DHL Supply Chain Kuehne + Nagel International AG United Parcel Service DSV CEVA Logistics C.H. Robinson Worldwide Inc. EuroTrans Pharma Trans-o-flex GmbH PostNL Pharma & Care Astra Logistic Ltd. Yusen Logistics (Part of NYK Line) Hellmann Worldwide Logistics Geodis Movianto VTS Transport & Logistics Frigo-Trans Girtekagroup B+S logistics EPCourier GmbH Loxxess Pharma GmbH

Additional Benefits:

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

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