

UAE 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:

UAE Cold Chain Logistics Market Analysis

UAE Cold Chain Logistics Market size in 2026 is estimated at USD 1.72 billion, growing from 2025 value of USD 1.63 billion with 2031 projections showing USD 2.22 billion, growing at 5.31% CAGR over 2026-2031.

Growing demand for temperature-controlled flows of food, pharmaceuticals, and high-value perishables keeps utilization rates high across specialized storage and multimodal transport assets. Completion of the 900-kilometer Etihad Rail network in 2023, DP World's USD 2.5 billion logistics expansion that breaks ground in 2025, and government incentives under the National Food Security Strategy 2051 jointly anchor long-run capacity additions. Operators differentiate with AI-based fleet routing, IoT temperature telemetry, and blockchain traceability, while autonomous electric trucks deployed at Jebel Ali Port point to a future of low-carbon, highly automated corridors. Yet persistent skilled-reefer-driver shortages and power-intensive refrigeration plants expose margins to labor and energy inflation. Consolidation-highlighted by ADQ's 2025 majority stake in Aramex-signals a shift toward scale-driven efficiency as demand for value-added compliance and handling services outpaces basic transport.

UAE Cold Chain Logistics Market Trends and Insights

Booming hospitality-driven food import volumes

Post-pandemic tourism recovery spurs year-round demand for premium perishables. Jebel Ali's dedicated reefer berths handle

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

rigorously monitored containers, supporting Dubai's plan for the world's largest fresh-food hub. Vertical farms at Dubai Food Tech Valley add 3 million kg of annual output by 2025, and still rely on cold-chain links for inputs and last-mile distribution. Emirates SkyCargo lifts 900-1,000 tonnes of fresh produce daily, underscoring air-cargo dependence for high-value imports. Coupled with the D33 agenda to double foreign trade, hospitality keeps multi-temperature warehouses close to seaports and airports operating near capacity.

Pharmaceutical cold-chain compliance for biologics & vaccines

The 2025 pharmaceutical law and creation of the Emirates Drug Corporation centralize quality mandates, raising infrastructure specifications for biologics transit. CEIV-certified corridors at Dubai and Abu Dhabi airports underpin a 37% 2023 jump in PharmaLife volumes for Emirates SkyCargo. The Hope Consortium's 6 billion-dose capacity positions Abu Dhabi as a global vaccine gateway. End-to-end serialization and data-logging requirements encourage investments in IoT sensors, GDP-compliant warehouses, and validated packaging.

Chronic skilled-reefer-driver deficit

Research using fuzzy ISM identifies labor scarcity as a high-driving inhibitor in Gulf cold chains. Reinforced heavy-vehicle rules issued in January 2024 raised licensing thresholds, prolonging recruitment cycles. Competitors in Saudi Arabia and Qatar draw from the same talent pool, intensifying churn. Etihad Rail's rail-diploma program and OEM-funded simulators lift Emirati participation but remain insufficient relative to 5% annual fleet growth. Autonomous truck pilots at Jebel Ali offer longer-term relief, though regulatory harmonization delays nationwide deployment.

Other drivers and restraints analyzed in the detailed report include:

Acceleration of e-commerce grocery & q-commerce models
Government food-security free-zone incentives
High energy tariffs for Ammonia/CO₂ refrigeration plants

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

Segment Analysis

Refrigerated storage accounted for 50.62% of UAE cold chain logistics market share in 2025, underpinned by transshipment dwell times and consolidation needs at Jebel Ali. The UAE cold chain logistics market size for storage services is projected to expand at 4.14% CAGR as RSA Cold Chain's 40,000-pallet JAFZA facility and KEZAD's multi-chamber complexes come online. Multi-tenant public warehouses remain popular among FMCG importers seeking cost-effective pay-per-pallet models, while large retailers commission dedicated blocks for omnichannel fulfillment. Transportation sub-segments now ride Etihad Rail's long-haul network, integrating sea-rail-road routings that cut coast-to-hinterland lead-times by 25%.

Value-added services, although representing a smaller revenue base, top growth at 4.42% CAGR through 2031. Services span kitting, labeling, quarantine inspection, and customs documentation capabilities rewarded with double-digit margins. The 23,200 m² Dubai South-Expeditors facility exemplifies demand by bundling container freight station operations with e-commerce order preparation. Anticipated GDP compliance audits and halal certification checks further stimulate outsourcing to specialist providers.

The UAE 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, and Other Perishables), and Geography (Dubai, Abu Dhabi, Sharjah, Ajman & Others). The Market Forecasts are Provided in Terms of Value (USD).

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

List of Companies Covered in this Report:

Global Shipping & Logistics LLC Mohebi Logistics GAC Dubai RSA Logistics CEVA Logistics DSV Al-Futtaim Logistics Hellmann Worldwide Logistics Tameem Logistics Emirates SkyCargo GulfTainer Aramex Kuehne + Nagel Etihad Cargo NAQEL Express Total Freight International (TFI) Clarion Shipping BrightLink Shipping and Logistics Yusen Logistics (Part of NYK Line) Clymet Logistics LLC

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 Booming Hospitality-Driven Food Import Volumes
 - 4.2.2 Pharmaceutical Cold-Chain Compliance for Biologics & Vaccines
 - 4.2.3 Acceleration of E-commerce Grocery and Q-commerce Models
 - 4.2.4 Government Food-Security Free-Zone Incentives
 - 4.2.5 Rail-Enabled Inland Cold Hubs (Etihad Rail Freight Corridors)
 - 4.2.6 AI-Optimised Multi-Temperature Fleet Routing
 - 4.3 Market Restraints
 - 4.3.1 Chronic Skilled-Reefer-Driver Deficit
 - 4.3.2 High Energy Tariffs for Ammonia/CO2 Refrigeration Plants
 - 4.3.3 Inefficient Cross-Emirate Permit Harmonisation
 - 4.3.4 Insurance Premium Spikes for Temperature Excursions
 - 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 Insights into Refrigerants and Packaging Materials
 - 4.9 Multi-temperature Controlled Vehicles Analysis

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

4.10 Impact of COVID-19 and Geo-Political Events

5 Market Size and 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 (0-5C)

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 & Biologics

5.3.8 Vaccines and Clinical Trial Materials

5.3.9 Chemicals and Specialty Materials

5.3.10 Other Perishables

5.4 By Emirate

5.4.1 Dubai

5.4.2 Abu Dhabi

5.4.3 Sharjah

5.4.4 Ajman and Others

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 as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

6.4.1 Global Shipping & Logistics LLC

6.4.2 Mohebi Logistics

6.4.3 GAC Dubai

6.4.4 RSA Logistics

6.4.5 CEVA Logistics

6.4.6 DSV

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 6.4.7 Al-Futtaim Logistics
- 6.4.8 Hellmann Worldwide Logistics
- 6.4.9 Tameem Logistics
- 6.4.10 Emirates SkyCargo
- 6.4.11 Gulftainer
- 6.4.12 Aramex
- 6.4.13 Kuehne + Nagel
- 6.4.14 Etihad Cargo
- 6.4.15 NAQEL Express
- 6.4.16 Total Freight International (TFI)
- 6.4.17 Clarion Shipping
- 6.4.18 BrightLink Shipping and Logistics
- 6.4.19 Yusen Logistics (Part of NYK Line)
- 6.4.20 Clymet Logistics LLC

7 Market Opportunities and Future Outlook

8 Appendix

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

**UAE 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

