

**China Cold Chain Logistics Industry  
Report, 2019-2025**

**Aug. 2019**

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Cold chain logistics is developing apace in China as cold chain for food is increasingly needed due to the accelerating process of urbanization and the changes in residents' diet structure, whilst local Chinese governments are sparing no efforts in constructing cold chain infrastructure.

Chinese cold chain logistics market was worth RMB295.6 billion in 2018 with an upsurge of 18.8% from a year earlier, and it will keep expanding and soar to RMB522.5 billion in 2025 with an expected CAGR of 8.5% between 2018 and 2025 as the cold chain standards and policy grow clear, the fresh food e-commerce burgeons and financial innovations continue.

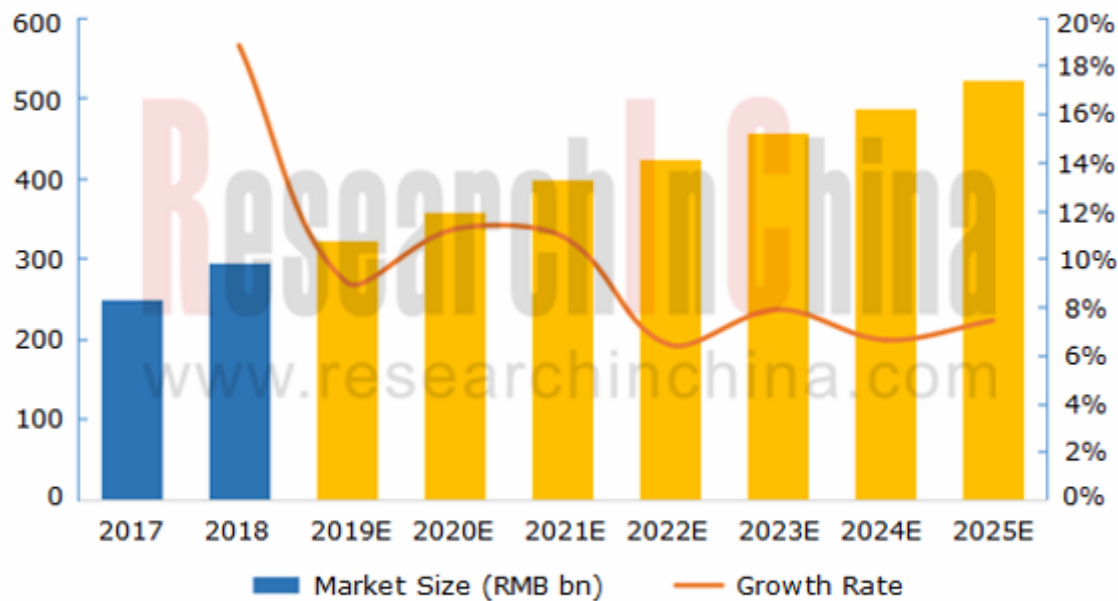
Robust demand for cold chain logistics comes largely from five agricultural products including meat, aquatic product, quick-frozen food, fruits & vegetables, and dairy products, among which cold chain for fruits and vegetables is the segment of the largest size; there is also a rapidly growing demand for cold chain for aquatic products. The two types of products will hold ever larger market shares with maturity of cold chain technologies. What's more, cold chain for medicine is gathering momentum, particularly for vaccines, blood products and diagnostic reagents.

### **Competition in cold chain logistics:**

**Logistics operation:** most players are engaged in both cold storage operation and cold chain transportation, like Xianyi Holding, Swire Cold Chain Logistics, and ZM Logistics. Not only have they huge cold storage capacity, but their transportation power is quite competitive.

**Cold storage operation:** Chinese cold storage market is scattered with a low concentration ratio and with strong regional attributes. In 2018, the top 10 cold storage operators had a total cold storage capacity of 30.89 million, commanding roughly 21.0% market shares, and the typical ones like Xianyi Supply Chain, Swire Cold Chain Logistics, and China Merchants Americold, all of which boast large cold storage network across China.

### China Cold Chain Market Size and Growth Rate, 2017-2025



Source: China Cold Chain Logistics Industry Report, 2019-2025 Aug.2019

China Cold Chain Logistics Industry Report, 2019-2025 highlights the following:

- Overview of cold chain logistics industry (definition, classification, composition structure, industrial chain, market features, business model, policies, etc.);
- Chinese cold chain logistics market (market size, market demand, competitive landscape, market structure, development prospects and development in key regions in the Yangtze River Delta, the Pearl River Delta and the Beijing-Tianjin-Hebei Region);
- Cold chain market segments including fruits & vegetables, meat, quick-frozen rice and flour products, aquatic products, dairy products, and medicine (market features, demand, etc.);
- Cold storage market (overview, overall capacity, regional analysis, competitive pattern and predictions);
- 22 Cold chain operators (profile, performance, revenue structure, cold chain business, development strategy, etc.)

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