



# China Cold Chain Logistics Industry Report, 2020-2026

Apr.2020

## 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

The Chinese residents see a change in food consumption and there is a growing market demand for cold chain of food alongside the accelerating urbanization in China. Chinese governments at all levels beef up investments in cold chain infrastructure, facilitating enlargement of cold chain logistics. In 2019, the Chinese cold chain logistics market was worth RMB276.37 billion, growing an annual compound rate of 10.5% between 2010 and 2019. As China's policy and standards for cold chain becomes clear, fresh food e-commerce springs up and financial innovations are further made, the cold chain logistics industry of China will take a great leap forward and will be sized by RMB512.25 billion in 2026, showing a CAGR of 9.4% from 2019 to 2026.

Chinese Market Size of Cold Chain Logistics and Growth Rate, 2016-2026E



Source: ResearchInChina

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Cold chain logistics is driven primarily by meat, aquatic products, quick-frozen food, fruits & vegetables, and dairy products, among which the fruit & vegetable cold chain is now the largest market segment in terms of cold chain circulation, and aquatic products have a fast-growing demand for cold chain. What's more, medicines, particularly vaccines, blood products and diagnostic reagents will be a key growth driver for cold chain logistics.

As concerns competition in cold chain logistics:

**Logistics operation:** the majority of cold chain logistics operators are engaged in both cold storage and cold chain transportation, such as Xianyi Holdings, Swire Cold Chain Logistics, and ZM Logistics that boast huge cold storage capacity and strong transportation capability domestically.

**Cold storage operation:** the Chinese cold storage market is scattered and characterized by low concentration and distinct regionality. The top ten cold storage operators had a total of cold warehousing capacity up to 25.15 million cubic meters in 2019, an about 17.3% share of the national total, and the typical companies are Xianyi Holdings, Swire Cold Chain Logistics, and China Merchants Americold, each of which enjoys a nationwide cold storage network.

China Cold Chain Industry Report, 2020-2026 highlights the following:

- ◆ Cold chain logistics (definition, classification, composition, industry chain, market features, business models, industrial policy, etc.);
- ◆ Chinese cold chain logistics market (market size, demand, competitive landscape, market structure, prospects as well as the development in key areas including Yangtze River Delta region, the Pearl River Delta region and the Beijing-Tianjin-Hebei region);
- ◆ Cold chain logistics market segments (fruits & vegetables, meat, quick-frozen food made of wheat flour and rice, aquatic products, dairy products);
- ◆ Cold storage market (overview, gross capacity, regional analysis, competitive pattern, forecasts);
- ◆ Refrigerated vehicle market (overview, overall scale, regional analysis, competitive pattern, forecasts);
- ◆ 22 cold chain operators (profile, performance, revenue structure, cold chain business, development strategy, etc.)

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