

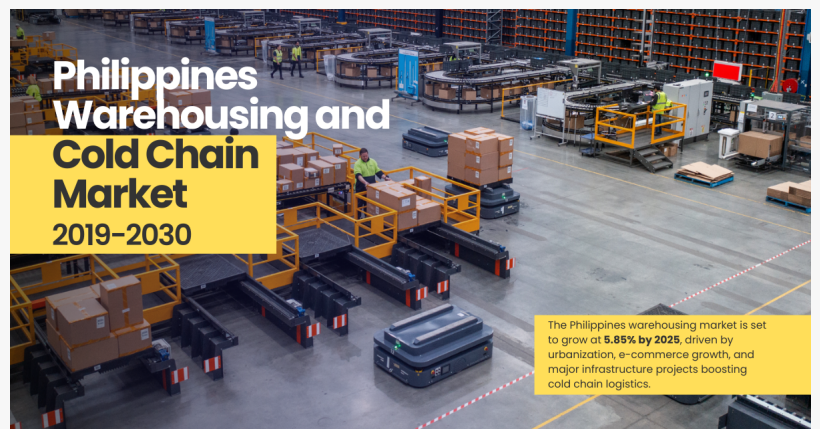
Philippines Warehousing Market Set to Grow at 5.85% by 2025 as Cold Chain Demand Surges Across E-Commerce, Pharma & F&B

Philippines warehousing and cold chain sectors grow rapidly, driven by e-commerce, pharma, F&B demand, infrastructure upgrades, and modern logistics solutions.

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The [Philippines warehousing market](#) is projected to witness steady growth, with an anticipated CAGR of 5.85% by the end of 2025. Supply remains

largely concentrated in strategic provinces including Rizal, Cavite, Laguna, Pampanga, Cebu, and Davao—forming the backbone of the nation's warehousing network.



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The Philippines' warehousing and cold chain market is rapidly expanding, driven by urbanization, technology, and strategic infrastructure projects enhancing supply chain resilience.”

Omkar Manjrekar

Advancements in Cold Chain Infrastructure -

The country is actively upgrading its cold chain infrastructure by adopting best practices from Japan, South Korea, Singapore, and Vietnam. These enhancements aim to improve energy efficiency, supply chain resilience, and food preservation. Rising demand from the pharmaceutical, food & beverage, and e-commerce sectors is driving investments in temperature-controlled logistics, smart storage, warehouse automation, and public-private partnerships, contributing to the evolution of a resilient and technology-driven cold storage market.

Rising Demand Fuels Growth of the Philippines Cold Chain and Warehousing Market -

Accelerated urbanization and population growth are fueling increased demand for perishable goods, prompting continuous investments in logistics infrastructure, warehousing, and last-mile delivery solutions. Technological advancements and modernization are crucial to improving supply chain efficiency.

The Philippines' cold chain market is projected to register double-digit growth by 2025, supported by growing foreign trade in meat and seafood, as well as rising domestic consumption. Increased demand for pharmaceutical and food cold storage underlines the need for robust and resilient infrastructure, especially in the face of livestock diseases and natural disasters.

With a 0.84% annual population growth rate and a predominantly young demographic, the demand for cold storage solutions is expected to remain strong, presenting long-term opportunities across the logistics and warehousing sector.

Infrastructure Advancements and Emerging Trends in the Warehousing Sector -

The Philippines is undergoing significant logistics infrastructure modernization and cold chain expansion. Warehouse supply continues to grow, with high occupancy reported in areas like Cebu, Laguna, Davao, and Cavite. The cold chain market is gaining momentum due to food security concerns and meat importation. Meanwhile, rising rental rates point to tightening supply and a shift toward modern, sustainable facilities.

Key Infrastructure Projects Supporting Market Growth -

- Port Cold Chain Network Project -

A PHP 30.80 billion pre-implementation initiative aimed at developing a nationwide cold chain logistics network across major Philippine ports. The project targets reducing agricultural spoilage and strengthening the country's cold chain infrastructure.

- Bataan–Cavite Interlink Bridge -

A USD 3.91 billion infrastructure project funded by the ADB, AIIB, and the Philippine government. Once completed, this bridge will be one of the world's longest marine bridges, significantly enhancing logistics connectivity and enabling long-term supply chain growth.

Notable Developments in the Warehousing and Cold Chain Market -

- Surging Warehouse Demand:

In 2024, total warehouse storage demand in the Philippines reached 1.37 million m²—doubling within a year. Key contributors to this growth include logistics, wholesale, retail, and



manufacturing sectors, reflecting the ongoing expansion of the warehousing industry.

- Shift Toward Grade A and B Facilities:

There is a noticeable shift toward modern warehouses equipped with loading bays, energy-efficient features, and smart logistics systems. Relocations from Grade C to upgraded facilities are increasingly common, particularly in Calabarzon, indicating a strong trend toward smart warehousing in the Philippines.

Noteworthy Industry Moves:

- DHL inaugurated a new warehouse in Santa Rosa, Laguna.
- The U.S. Navy is seeking to lease a 19,000–33,000 m² climate-controlled warehouse near Subic Bay or Clark by 2026. If implemented, this will be the largest U.S. prepositioning facility in the Philippines since 1992, boosting demand for high-grade industrial storage infrastructure.

Impact of E-Commerce on Warehousing and Cold Chain Logistics Demand -

Cold Chain Implications of E-Commerce Growth:

- Last-Mile Cold Delivery

The rise in online grocery shopping and meal delivery services is driving demand for refrigerated transport and localized micro-fulfillment centers. These services require robust cold chain support to maintain product integrity during delivery.

- Cold Storage Warehousing

Demand for biopharmaceuticals, vaccines, and fresh perishable goods is exceeding the current cold storage capacity, highlighting the need for continued investment and expansion in this sector.

- E-Commerce & Frozen Foods

E-commerce platforms increasingly offer perishable goods, especially frozen foods, leading to rising demand for automated cold storage, advanced refrigeration systems, and temperature-controlled packaging to ensure safety during storage and transport.

Growing Demand for Refrigerated Trucks in the Philippines and ASEAN -

Refrigerated trucks under 1.5 tons are in high demand across ASEAN, including the Philippines. These vehicles play a vital role in cold chain logistics for perishable items such as food and pharmaceuticals. The surge in e-commerce activity further intensifies the need for robust refrigerated transport infrastructure to support the expanding market.

Key Players and Products in the Philippines Cold Chain and Warehousing Market -

- Coolaire Consolidated Inc.

A leading manufacturer of refrigerated vans in the Philippines, known for its ISO 9001:2015-certified vehicles that uphold industry standards in the transport of perishables.

- Autokid Truck Solutions

A key supplier of surplus refrigerated trucks, predominantly from Isuzu Philippines, offering reliable transport options for cold chain logistics.

Comprehensive Overview of the Philippines Warehousing and Cold Chain Market
Makreo Research's report, "Philippines Warehousing and Cold Chain Market Size and Forecast (2019–2030)," delivers a deep-dive analysis into the country's logistics landscape, including service segmentation, regional performance, infrastructure developments, and demand patterns.

- Key Focus Areas:

Type of Services: Warehousing, Cold Chain

End-User Industries: Manufacturing, Agriculture, Pharmaceuticals, F&B, Retail & E-Commerce

Geographical Coverage: NCR, Mindanao, Visayas, Luzon

Demand & Supply Trends: Cold Storage, Cold Transport

- Competitive Assessment of the Market:

Market Share of Major Players

Comparative Analysis on Key Parameters

Mergers and Acquisitions

Funding Timeline

Company Profiles of Key Players

Prominent market participants profiled in the report include VVS Cold Storage, Yusen Logistics, 2GO Group, Logicore, FedEx Express Philippines, ORCA Cold Chain Solutions, and Glacier Megafridge.

This report equips stakeholders with actionable insights to identify growth opportunities, navigate infrastructure challenges, and make informed strategic decisions in the evolving warehousing and cold chain sector of the Philippines.

Related Reports:

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