

Cold Chain Monitoring Technology

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting cold chain monitoring technology: the sensors, loggers, real-time trackers, and software that protect temperature-sensitive goods, how the market and vendors stack up in 2026, what they cost, how to run the selection, and how to de-risk the rollout.

Prepared by **Supply Chain Research** · June 2026 · Vendor-neutral: we take no payment from the vendors covered.

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1. Executive summary

Cold chain monitoring technology keeps temperature-sensitive goods within their safe range from origin to destination, and proves it. It spans the sensors and data loggers that record temperature, the real-time trackers that report location and condition in transit, the software that visualizes the data and alerts on excursions, and the compliance reporting that satisfies regulators in pharma and food. This is the monitoring and device layer, distinct from the physical cold-chain logistics and warehousing market, which is vastly larger, and from refrigeration equipment. In 2026 the category is being reshaped by real-time, connected trackers displacing passive loggers, by AI applied to excursion prediction, and by the growth of pharma and biologics cold chains.

This guide is written for supply chain, quality, logistics, and IT leaders in pharma, food, and life sciences evaluating a cold-chain monitoring investment, and for the teams who must deploy the devices and act on the alerts. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best platform, because the right choice depends on whether you ship pharma or food, whether you need passive loggers or real-time trackers, your regulatory requirements, and your tolerance for device cost. The pages that follow define the category and size the market honestly, where the headline finding is a roughly fortyfold gap between definitions, profile the logger, tracker, packaging, and platform tiers, lay out an evaluation framework, and explain why spoilage avoidance, not the dashboard, drives the return.

~40x the gap between cold-chain monitoring technology and the broad cold-chain logistics market	No MQ there is no Gartner Magic Quadrant; analyst-quadrant coverage is thin or absent	\$35B estimated annual biopharma loss from temperature-controlled-logistics failures (IQVIA)
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What the evidence says

The definitional gap here is the widest in this series. Cold-chain monitoring technology is sized near \$8B to \$10B, while the broad cold-chain logistics market is around \$371B, roughly forty times larger, so be precise about which one a figure counts.

Analyst-quadrant coverage is thin or absent. There is no Gartner Magic Quadrant for cold-chain monitoring; the specialist analyst Berg Insight is the most credible source, so references and pilots matter more than in well-covered categories.

Spoilage is the business case. The industry loses an estimated \$35 billion a year in biopharma alone to temperature failures, and the World Health Organization estimates up to half of all vaccines are wasted, much of it from broken cold chains.

Real-time trackers are displacing passive loggers. The clearest shift is from passive, after-the-fact data loggers to real-time, connected trackers that report condition and location in transit and allow intervention before product is lost.

Hardware dominates, but software is the growth. Devices make up roughly four-fifths of monitoring spend today, while real-time platforms and analytics are the faster-growing, software-led part of the category.

2. What cold chain monitoring is

Cold chain monitoring technology records and reports the temperature, and increasingly the location and condition, of sensitive goods as they move and are stored, and provides the evidence that they stayed safe. The core capabilities are:

- **Temperature monitoring devices.** IoT sensors and data loggers that record temperature in shipments, storage, and transport, from single-use loggers to reusable devices.
- **Real-time trackers.** Connected devices that report temperature and location in transit over cellular or other networks, enabling intervention before product is lost.
- **Visibility and analytics.** Software that aggregates the data, visualizes conditions across the network, and analyzes trends and risk.
- **Excursion alerting.** Detecting when temperature moves outside the safe range and alerting the right people in time to act.
- **Compliance and reporting.** Producing the records that satisfy pharma and food regulation, including good distribution practice and food-safety rules.

Passive loggers versus real-time trackers

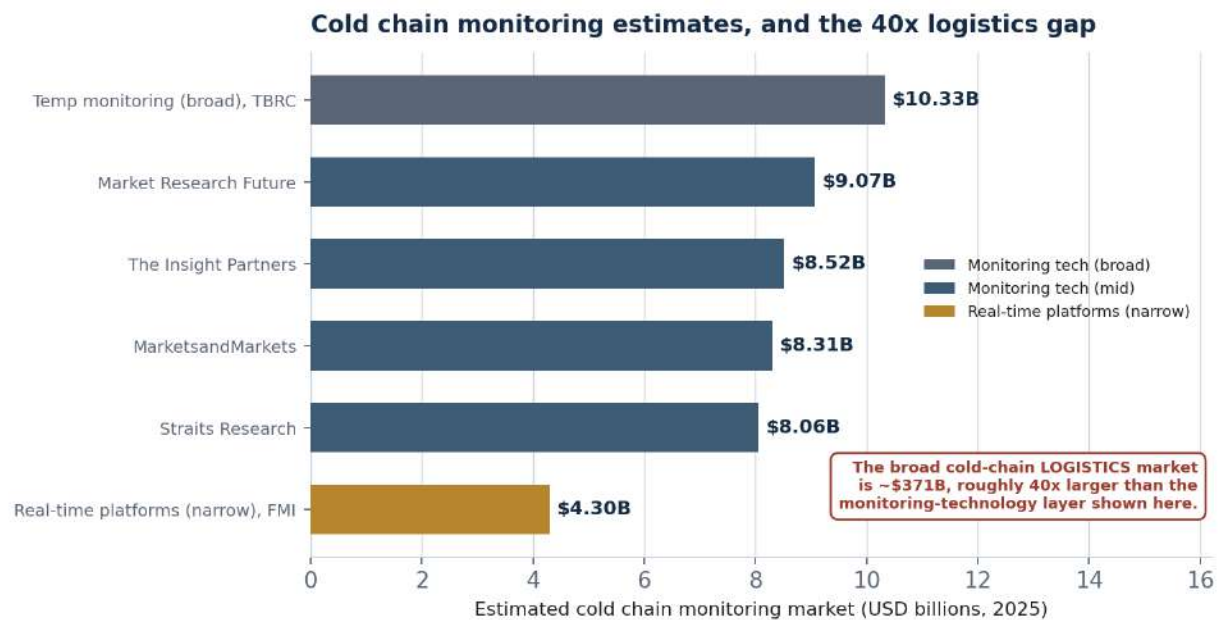
The most important distinction in the category is between passive data loggers and real-time trackers. A passive logger records temperature during a shipment and is read on arrival: it tells you whether the product stayed safe, but only after the fact, when it is too late to intervene. A real-time tracker reports temperature and location continuously in transit, so an excursion can be caught and addressed before the product is lost. Real-time trackers cost more per device and depend on connectivity, but they convert monitoring from a record-keeping exercise into a loss-prevention tool. The shift from loggers to trackers is the defining trend in the category, and it shapes both cost and value.

Approach	What it tells you	When you learn it
Passive data logger	Whether product stayed in range	On arrival
Real-time tracker	Condition and location in transit	Continuously
Visibility platform	Network-wide conditions and trends	Continuously
Protective packaging	Maintains temperature physically	Throughout

This guide covers the monitoring technology and software layer, which is distinct from physical cold-chain logistics and warehousing, the trucks, reefers, and cold stores, and from refrigeration equipment itself. It also sits alongside protective packaging and containers, which maintain temperature physically rather than measuring it, and which several monitoring vendors also offer.

3. The cold chain monitoring market in 2026

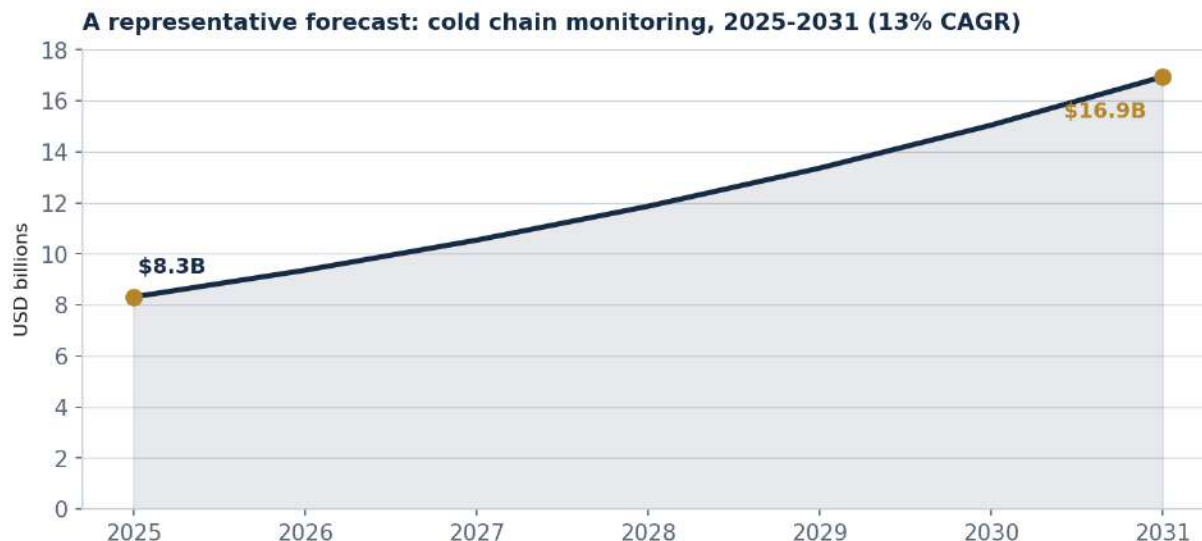
Cold chain has the widest definitional gap of any category in this series, and getting the scope right is essential. The monitoring-technology market is sized near \$8B to \$10B; the broad cold-chain logistics market is around \$371B, roughly forty times larger. They are entirely different things. Even within monitoring, estimates vary by definition. Treat the figures below as directional, and read them with that fortyfold gap in mind.



Source: Supply Chain Research analysis of published 2025 estimates. The broadest count temperature-monitoring widely; the narrowest count real-time software platforms.

Figure 1. Published 2025 monitoring-technology estimates. The broad cold-chain logistics market is around \$371B, roughly forty times larger and a separate category.

Source and definition	Size (2025)	Forecast	CAGR
The Business Research Co (temp)	\$10.33B	strong growth	17.5%
Market Research Future	\$9.07B	\$21.48B / 2035	9.01%
The Insight Partners	\$8.52B	\$15.42B / 2034	7.70%
MarketsandMarkets	\$8.31B	\$15.04B / 2030	12.6%
Straits Research	\$8.06B	\$26.45B / 2033	16.0%
Future Market Insights (real-time)	\$4.30B	\$14.8B / 2036	11.9%



Source: MarketsandMarkets, 2025 (mid-range). Pharma and real-time tracking grow faster; the broad temperature-monitoring figures cluster near \$8-10B in 2025.

Figure 2. A representative trajectory for cold chain monitoring at about 13 percent CAGR (MarketsandMarkets). Pharma and real-time tracking grow faster.

Why the estimates diverge

The spread has two layers. The headline gap is between monitoring technology and cold-chain logistics: the logistics and warehousing market, the physical movement and storage of cold goods, is around \$371B, while the monitoring technology that protects it is a small fraction of that. Conflating the two overstates the technology market by roughly fortyfold. Within monitoring, the broadest figures count temperature monitoring widely, while the narrowest count only real-time software platforms. Hardware makes up roughly 78 percent of monitoring spend, food and beverage is the largest application at around 77 percent, pharma and healthcare are the fastest-growing, and North America holds roughly a third of the market. For planning, the monitoring figures clustering near \$8B to \$10B in 2025 are the most consistent baseline for the technology layer.

Why spoilage drives the market

Demand is anchored in the cost of failure. The IQVIA Institute has estimated that the biopharma industry loses around \$35 billion a year to temperature-controlled-logistics failures, and the World Health Organization estimates that up to half of all vaccines are wasted globally each year, much of it from broken cold chains. Those losses, shown in Figure 3, are why pharma and food companies invest in monitoring: a single ruined shipment of biologics or vaccines can dwarf the cost of monitoring it. The growth of biologics, cell and gene therapies, and post-pandemic vaccine distribution has only raised the stakes.



Sources: World Health Organization (vaccine waste); IQVIA Institute for Human Data Science, 2019 Biopharma Cold Chain Logistics Survey (\$35B annual loss). Named third-party sources.

Figure 3. The cost of a broken cold chain (named third-party sources). Spoilage avoidance is the core return-on-investment case for monitoring.

4. The vendor landscape

The cold chain monitoring market spans device makers, real-time tracker startups, packaging specialists, and software platforms, and it is less mapped by analysts than any other category in this series. We group vendors into four tiers by what they do best, not by size. No vendor leads every tier, and the boundary between hardware and software is blurring as devices gain connectivity.

What the analysts say, and what they do not

This is the thinnest analyst coverage in the series. Buyers should not expect a quadrant to lean on. What exists:

- **No Gartner Magic Quadrant.** There is no Gartner Magic Quadrant for cold-chain monitoring, and dedicated analyst-quadrant coverage is thin or absent, in sharp contrast to mature categories like warehouse management.
- **Specialist IoT analysts cover the space.** The specialist analyst Berg Insight publishes the most credible vendor-deployment data, and market-research firms profile the leading device and tracker vendors, but none ranks them on a quadrant.
- **Thin coverage means references matter most.** With no analyst scoreboard, reference customers in your industry, pharma or food, and pilots on your own lanes carry more weight here than in any other category.

Cold chain monitoring landscape, 2026



There is no Gartner Magic Quadrant for cold chain monitoring; analyst-quadrant coverage is thin or absent, and Berg Insight is the key specialist source. SCR's directional interpretation, not analyst coordinates.

Figure 4. Supply Chain Research's directional map. There is no analyst Magic Quadrant for this category; these positions are our interpretation, not analyst coordinates.

IoT loggers and sensors

These vendors make the devices that record temperature. Sensitech, a Carrier company since 2006, is among the largest, runs the Lynx platform, and acquired the monitoring business of Berlinger, adding a pharma-focused service. ELPRO, DeltaTrak, Emerson and its Copeland cargo solutions, ORBCOMM, Monnit, Testo, and Dickson round out a broad field of logger and sensor makers. Strengths: proven devices, regulatory pedigree, and breadth. Limitations: many are rooted in passive logging, the after-the-fact model that real-time tracking is displacing.

Real-time trackers

These vendors lead the shift to connected, in-transit monitoring. Tive, based in Boston, raised a significant funding round, surpassed two million trackers shipped, and serves hundreds of customers. Roambee provides real-time shipment monitoring and acquired a pharma cold-chain specialist, SpotSee offers connected condition monitoring, and the broad visibility platforms add cold-chain telemetry. Strengths: real-time condition and location, and loss prevention rather than record-keeping. Limitations: higher device cost and dependence on connectivity.

Packaging and software platforms

Two further groups complete the picture. Pharma packaging and container specialists, SkyCell, va-Q-tec, Sonoco ThermoSafe, and Cryoport, maintain temperature physically for high-value pharma and biologics, a complement to monitoring rather than a substitute. And visibility and software platforms, Controlant, which scaled through pandemic vaccine distribution, Carrier Lynx, Emerson, and Zest Labs, provide the software layer that turns device data into alerts and analytics. Strengths: physical protection and software depth respectively. Limitations: packaging does not monitor, and platforms depend on the underlying devices.

Vendor summary

Vendor	Tier	Best fit	Notes
Sensitech (Carrier)	Loggers and sensors	Enterprise pharma and food	Carrier company; acquired Berlinger
ELPRO / DeltaTrak	Loggers and sensors	Established monitoring	Broad logger and sensor lines
Emerson / ORBCOMM	Loggers and sensors	Transport and cargo	Cargo and telematics monitoring
Tive	Real-time trackers	In-transit visibility	\$40M Series C; 2M+ trackers
Roambee / SpotSee	Real-time trackers	Connected monitoring	Roambee acquired a pharma specialist
Controlant	Software platform	Pharma visibility at scale	Scaled via vaccine distribution
Carrier Lynx / Zest Labs	Software platform	Visibility and analytics	Software layer over devices
SkyCell / Sonoco ThermoSafe	Packaging	High-value pharma containers	Physical protection, not monitoring

Positions and notes are Supply Chain Research's interpretation from public information and specialist sources such as Berg Insight, current to mid-2026. There is no analyst Magic Quadrant for this category. Ownership and scope change quickly; verify current details directly with each vendor.

5. How to evaluate a monitoring platform

The right solution depends first on whether you need passive loggers or real-time trackers, and then on accuracy, compliance, and the software that turns data into action. We use five dimensions.

The five evaluation dimensions

1. **Passive versus real-time.** Do you need after-the-fact records, where a passive logger suffices, or in-transit intervention, where a real-time tracker is required? This is the first and most consequential choice.
2. **Device accuracy and form factor.** How accurate and reliable are the sensors, and do the form factors, single-use or reusable, suit your shipments and price point?
3. **Compliance fit.** Does it meet your regulatory requirements, good distribution practice for pharma, food-safety rules, and electronic-records standards, with the validation and documentation those demand?
4. **Software and alerting.** How good is the visibility platform, how timely and actionable are the excursion alerts, and does the data integrate with your systems?
5. **Cost model and viability.** Assess the per-device economics, reusable versus single-use, against your volumes, and the vendor's stability in a fragmented, fast-moving market.

Making the decision

Match the approach to your goods and goals. Companies shipping high-value pharma and biologics, where a lost shipment is catastrophic and intervention matters, reward the real-time trackers and pharma platforms such as Tive, Roambee, and Controlant. Food and lower-value shipments may be served well by passive loggers from Sensitech, ELPRO, and DeltaTrak. Companies needing physical protection should weigh the packaging specialists alongside monitoring. Then pilot on your own lanes and shipments.

A selection process that works

6. Decide whether you need passive logging or real-time tracking, and define your goods and lanes.
7. Match that to a tier, and shortlist within it rather than across all four.
8. Pilot the devices on your own shipments, measuring accuracy, reliability, and alert timeliness.
9. Confirm compliance coverage and the validation and documentation your regulators require.
10. Model the per-device cost against your volumes, and check references in your industry.

6. Cost and pricing

Cold chain monitoring cost is driven by the devices and the model, single-use or reusable, plus the software subscription. The models you will encounter:

Pricing model	Typical basis	Notes
Per single-use logger	Per device, consumed	Low unit cost, recurring per shipment
Reusable device	Higher unit, reused	Lower per-trip cost if recovered
Real-time tracker	Device + connectivity	Higher cost, in-transit visibility
Software subscription	Platform fee	Visibility, alerting, analytics
Implementation	Project fee	Deployment, integration, validation

What drives the number

Device volume and the choice between single-use and reusable devices are the main cost drivers. Single-use loggers have a low unit cost but recur with every shipment; reusable devices and real-time trackers cost more up front but can be cheaper per trip if they are recovered and reused, and connectivity adds an ongoing cost for real-time tracking. The software subscription and, in regulated pharma, the validation and documentation effort complete the picture. The economics turn on volume and recovery rates, and a frequent mistake is choosing single-use loggers at scale when reusable devices would cost less per trip. Model the per-shipment cost against your volumes, not the device sticker price alone.

Pricing for enterprise and pharma deployments is often gated behind a sales process, so published figures should be treated as starting points. Build a pilot and a reference check into the buying process to validate both cost and the spoilage-reduction benefit the vendor projects.

7. Implementation: where programs succeed or fail

Cold chain monitoring programs fail in predictable ways, and almost none of the failure modes are about the dashboard. They are about devices, alerts, and acting on them. The recurring causes:

- **Device reliability and recovery.** Inaccurate or failed devices undermine trust, and reusable devices that are not recovered quietly inflate cost, both common and avoidable problems.
- **Alerts no one acts on.** An excursion alert is worthless if there is no process and no one positioned to intervene before the product is lost; the value is in the response.
- **Compliance validation underestimated.** In regulated pharma, the validation and documentation required for good distribution practice and electronic records is substantial and routinely underscoped.
- **Connectivity gaps.** Real-time tracking depends on network coverage; gaps on certain lanes can leave shipments unmonitored at exactly the wrong moment.

Devices accurate, reliable, and recovered devices are the precondition for value	Response an excursion alert only pays off if someone can act on it in time	Compliance validation and documentation must be resourced from the start
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Three principles that separate success from failure

Prove the devices on your lanes. Pilot for accuracy, reliability, connectivity, and recovery before scaling, because device performance sets the ceiling on the result.

Build the response, not just the alert. Decide in advance who acts on an excursion and how, because spoilage avoidance depends on intervention, not on the notification.

Resource compliance validation. Plan the good-distribution-practice and electronic-records validation as a real workstream, because it is substantial and routinely underestimated in pharma.

A phased rollout

Sequence the program to retire risk early. Begin with a pilot on representative lanes and goods, proving device accuracy, connectivity, alert timeliness, and recovery. Establish the response process and the compliance documentation, then scale to more lanes and shipments, carrying the lessons forward. Treating these as sequential stages, rather than a single switch, is what separates a smooth rollout from a stalled one.

8. Trends shaping 2026

Real-time trackers replacing passive loggers

The defining trend is the shift from passive, after-the-fact data loggers to real-time, connected trackers over cellular, Bluetooth, and emerging networks. Real-time visibility converts monitoring from record-keeping into loss prevention, allowing intervention before product is lost, and it is reshaping both the device market and buyer expectations.

AI for excursion prediction

AI and analytics are being applied to predict temperature excursions before they happen and to flag at-risk shipments, rather than only recording breaches after the fact. Predictive monitoring is an emerging differentiator for the software platforms.

Pharma, biologics, and advanced therapies

The growth of biologics and cell and gene therapies, which are extremely temperature-sensitive and extraordinarily valuable, is raising the stakes and the requirements for cold-chain monitoring. Pharma and healthcare are the fastest-growing segment, and advanced therapies are pulling the category toward ever tighter control.

Vaccine cold chain and sustainability

Post-pandemic vaccine distribution left a lasting investment in cold-chain monitoring, and sustainability is now a parallel driver, pushing reusable devices and packaging over single-use to cut waste. Several vendors run device-recovery and recycling programs as part of that shift.

Regulatory tightening and agentic AI

Regulation continues to tighten around good distribution practice, food safety, and electronic records, raising the bar for monitoring and documentation. And as across supply chain technology, agentic AI is beginning to appear, promising to investigate and act on excursions with less human effort, though it is early and demonstrated capability should be weighed over roadmap promises.

9. Segment-specific guidance

The right approach depends on what you ship and how valuable it is. The table summarizes where each segment usually starts; the prose adds the nuance.

Segment	What matters most	Where to start
High-value pharma / biologics	Real-time, compliance, packaging	Tive, Controlant, SkyCell
Vaccines and advanced therapy	Tight control and visibility	Controlant, Roambee, Cryoport
Food and beverage	Cost-effective monitoring	Sensitech, DeltaTrak, ELPRO
In-transit risk exposure	Real-time intervention	Tive, Roambee, SpotSee
Records-only requirement	Low-cost compliance logging	Passive loggers (Sensitech, ELPRO)

High-value pharma and biologics shippers need real-time tracking, compliance, and often packaging, the combined strength of the trackers, platforms, and container specialists. **Vaccine and advanced-therapy distributors** need the tightest control. **Food and beverage companies** reward cost-effective monitoring, often passive logging. **Shippers with in-transit risk exposure** need real-time intervention, and **those with a records-only requirement** can use low-cost passive loggers. The unifying rule is to match the approach to the value of the goods and whether you need to intervene in transit or only prove conditions after.

10. ROI and the business case

The business case for cold chain monitoring is unusually clear, because the cost of failure is so high. The levers are reduced spoilage and product loss, compliance, fewer excursions, and longer usable shelf life. The discipline is refusing to bank the vendor's headline figure before testing it against your own loss history.

Spoilage catching excursions in time prevents the loss of high-value product	Compliance monitoring records satisfy regulators and avoid rejected shipments	Shelf life clear condition history avoids discarding product that is still good
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Where the value comes from

Most of the return comes from spoilage avoidance, and the numbers are stark. With the biopharma industry losing an estimated \$35 billion a year to temperature failures and up to half of all vaccines wasted globally, a single prevented loss of high-value product can justify a monitoring program many times over, the case shown in Figure 3. Real-time monitoring adds value specifically by enabling intervention before product is lost, rather than documenting the loss after. Compliance avoids rejected or recalled shipments, and clear condition history prevents the common waste of discarding product whose transit history is unknown but which is in fact still good. These figures are drawn from named third-party sources, but the return depends on acting on alerts and on your own loss profile. Build the case on your historical spoilage and rejection rates, and use the industry figures only to frame the scale of the opportunity.

11. Frequently asked questions

What is cold chain monitoring technology?

The sensors, data loggers, real-time trackers, and software that record and report the temperature, and increasingly the location and condition, of sensitive goods in transit and storage, and produce the records that satisfy regulators. It is the monitoring layer, distinct from physical cold-chain logistics and refrigeration.

What is the difference between a passive logger and a real-time tracker?

A passive logger records temperature during a shipment and is read on arrival, telling you whether the product stayed safe only after the fact. A real-time tracker reports condition and location continuously in transit, so an excursion can be caught and addressed before product is lost. The shift from loggers to trackers is the category's defining trend.

Is there a Gartner Magic Quadrant for cold chain monitoring?

No. There is no Gartner Magic Quadrant, and dedicated analyst-quadrant coverage is thin or absent, the least-covered category in this series. The specialist analyst Berg Insight publishes the most credible vendor data, so references in your industry and pilots matter more than a ranking.

Who are the leading vendors?

It depends on the tier. Logger and sensor makers include Sensitech, ELPRO, and DeltaTrak; real-time trackers include Tive, Roambee, and SpotSee; software platforms include Controlant and Carrier Lynx; and pharma packaging and container specialists include SkyCell, Sonoco ThermoSafe, and Cryoport.

How big is the market?

The monitoring-technology market is sized near \$8B to \$10B in 2025, while the broad cold-chain logistics market is around \$371B, roughly forty times larger. They are different categories and should never be conflated. The monitoring figures clustering near \$8B to \$10B are the most consistent baseline for the technology layer.

Why is the market gap so large?

Because cold-chain logistics, the trucks, refrigerated containers, and cold stores that physically move and store goods, is a vast market, while the monitoring technology that protects it is a small fraction of that. Treating the two as one overstates the technology market roughly fortyfold, the widest definitional gap in this series.

What is the business case?

Spoilage avoidance, and it is compelling. The biopharma industry loses an estimated \$35 billion a year to temperature failures, and the World Health Organization estimates up to half of all vaccines are wasted, much of it from broken cold chains. Preventing a single high-value loss can justify a monitoring program many times over.

What does it cost?

Single-use loggers have a low unit cost but recur per shipment; reusable devices and real-time trackers cost more up front but can be cheaper per trip if recovered, with connectivity adding an ongoing cost for real-time tracking. The software subscription and, in pharma, compliance validation complete the cost. The economics turn on volume and recovery rates.

How is AI changing cold chain monitoring?

AI is being applied to predict temperature excursions before they happen and flag at-risk shipments, rather than only recording breaches after the fact. Agentic AI is beginning to appear, promising to investigate and act on excursions with less human effort, though it is early and demonstrated capability should be weighed over roadmap promises.

What is the most common reason these programs fail?

Device reliability and recovery problems, excursion alerts that no one acts on, underestimated compliance validation, and connectivity gaps. Almost none of the common failures are about the dashboard. Proving the devices on your lanes and building a response process are the most important steps.

12. Recommendations

A practical path for buyers, drawn from the analysis above:

- 11. Be precise about which market you are in.** Cold-chain monitoring technology is roughly fortyfold smaller than cold-chain logistics; size and scope the project against the monitoring layer, not the logistics market.
- 12. Decide passive versus real-time first.** Determine whether you need after-the-fact records or in-transit intervention, because that single choice shapes the devices, the cost, and the value.
- 13. Do not wait for an analyst quadrant.** With the thinnest analyst coverage in this series, rely on Berg Insight, references in your industry, and pilots on your own lanes rather than a ranking.
- 14. Prove the devices and build the response.** Pilot for accuracy, connectivity, and recovery, and define who acts on an excursion, because spoilage avoidance depends on intervention, not the alert.
- 15. Resource compliance validation.** In regulated pharma, plan the good-distribution-practice and electronic-records validation as a real workstream, because it is substantial and routinely underestimated.
- 16. Build the case on your own losses.** Model spoilage reduction against your historical loss and rejection rates, using the industry figures only to frame the scale of the opportunity.

13. Methodology and caveats

- This guide synthesizes public market-research estimates, specialist analyst data such as Berg Insight, vendor disclosures, and trade reporting, current to mid-2026. Supply Chain Research is independent and accepts no payment from the vendors covered.
- This category has the widest definitional gap in the series: cold-chain monitoring technology near \$8B to \$10B versus the broad cold-chain logistics market around \$371B, roughly fortyfold larger. We size the monitoring-technology layer and flag the gap throughout.
- There is no Gartner Magic Quadrant or Forrester Wave for cold-chain monitoring, the thinnest analyst coverage in this series. The landscape map in Figure 4 is our directional interpretation, informed by specialist sources, not analyst coordinates.
- The cost-of-failure figures in Figure 3 are from named third-party sources, the IQVIA Institute (\$35B annual biopharma loss, a 2019 figure) and the World Health Organization (up to 50 percent vaccine waste). Spoilage and ROI benefits depend on acting on alerts and on your own loss profile.
- Vendor ownership and scope change quickly, including Sensitech's position within Carrier and its acquisition of Berlinger, and ongoing tracker funding. Validate current details directly with vendors before any purchasing decision.

14. Sources

- [1] MarketsandMarkets (2025). [Cold Chain Monitoring Market](#). \$8.31B (2025), 12.6% CAGR, NA 32.9%.
- [2] Grand View Research (2025). [Cold Chain Monitoring Market](#).
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Additional figures drawn from: The Business Research Company, Straits Research, and ReAnIn (temperature-monitoring sizing); Berg Insight (specialist vendor-deployment data, the most credible source for this category); and vendor and trade reporting on Tive, Roambee, Controlant, and the Carrier acquisitions of Sensitech and Berlinger. The cost-of-failure figures are from the IQVIA Institute (2019) and the World Health Organization. Spoilage and ROI claims depend on your own loss profile, and there is no analyst Magic Quadrant for this category.

Supply Chain Research is an independent, vendor-neutral research platform for supply chain and IT leaders. We accept no payment from the vendors covered. Figures should be validated against your own requirements before any purchasing decision.