

THE TRANSPORT REFRIGERATION CENSUS 2026

The first of its kind national census of transport refrigeration operators aims to track progress and attitudes toward reducing emissions from UK temperature-controlled distribution. Aimed at operators of refrigerated vans, rigids and articulated vehicles it asks questions on current fleet makeup, tracks investment in low and zero emission technology and seeks views on how businesses feel government could best support quicker adoption.

By completing this anonymous survey, businesses will get special advanced access to the results and will be contributing to pioneering research which will empower the Cold Chain Federation to present compelling evidence to the Government on the cold chain's journey to decarbonisation and push for future strategies and policy that can support, rather than hinder, progress.

Section 1: About your organisation

What is the size of your organisation? Choose one:

- Small business (1-49 employees)
- Medium business (50-249 employees)
- Large business (250+ employees)

What type of refrigerated distribution does your company operate? Tick all that apply:

- Third Party Logistics
- Secondary retail distribution (Distribution to store)
- Food service
- Pharmaceutical/healthcare logistics
- Courier
- Direct to customer
- In house (e.g. between own manufacturing sites)
- Other (please specify):

What is the approximate split in temperature regime of your fleet as a percentage?

- Frozen:
- Chilled:

Do you operate multi-temperature vehicles? Eg. chilled and frozen compartments on the same vehicle

- Yes
- No

Section 2: About your refrigerated fleet

REFRIGERATED VANS

A small goods vehicle, usually less than 3.5t, with insulated, airtight compartments and an integrated transport refrigeration unit (TRU)

Do you operate refrigerated vans?

- Yes
- No

If yes:

What is the size of your refrigerated van fleet?

What proportion of your refrigerated van fleet is leased vs owned?

- Leased
- Owned

How many of your refrigerated vans are powered by the following fuel sources?

Diesel or petrol	Fully Electric	Hybrid (Diesel and electric)	HVO, or biofuels	LPG/CNG	Hydrogen	Other (please specify)

Have you taken any other specific actions to reduce the emissions from your van fleet? Tick all that apply

- Route optimisation
- Reduction in empty running
- Improved loading/unloading of cargo to minimise heat ingress to refrigerated compartments
 - Air/PVC curtains
 - Driver procedures for loading/unloading
- Active use of telematics data to improve performance and efficiency
- Other (please specify):

REFRIGERATED RIGID VEHICLES

A goods vehicle with a permanently attached, insulated box body equipped with a transport refrigeration unit (TRU)

Do you operate rigid refrigerated vehicles?

- Yes
- No

If yes:

What is the size of your rigid vehicle fleet?

What proportion of your refrigerated rigid vehicle fleet is leased vs owned?

- Leased:
- Owned:

What are the primary fuel sources for the rigid's traction engine?

	Diesel	Electric	Hybrid (Diesel and electric)	HVO, or biofuels	LPG/CNG	Hydrogen	Other (please specify)
Number of vehicles							

How is refrigeration powered on your rigid vehicles?

	Secondary diesel engine (TRU)	Secondary diesel TRU with option to power by take-off from the traction engine	Powered by direct drive from the traction engine (no secondary diesel TRU)	Battery Electric Refrigeration (independent of traction engine)	Secondary engine powered by HVO or biofuels	Other (please specify)
Number of TRUs						

Have you taken any other specific actions to reduce the emissions from your van fleet? Tick all that apply:

- Route optimisation
- Reduction in empty running
- Improved loading/unloading of cargo to minimise heat ingress to refrigerated compartments
 - Air/PVC curtains
 - Driver procedures for loading/unloading
- Active use of telematics data to improve performance and efficiency
- Other (please specify):

Do you plug your diesel refrigerated rigid vehicles into electric shore power when they are on stand at depot?

- Always
- Never

- Sometimes

ARTICULATED REFRIGERATED VEHICLES (HGV AND TRAILER)

A heavy goods vehicle (HGV) consisting of a powered tractor unit and a separate, detached refrigerated trailer

Do you operate articulated refrigerated vehicles? Yes/No

If yes:

What is the total fleet size of your HGV tractors?

How many refrigerated trailers do you currently operate?

What proportion of your HGV fleet is leased vs owned?

What proportion of your refrigerated trailer fleet is leased vs owned?

What are the primary fuel sources for your HGV tractors?

	Diesel	Electric	Hybrid (Diesel and electric)	HVO, or biofuels	LPG/CNG	Hydrogen	Other (please specify)
Number of vehicles							

How is refrigeration powered on your refrigerated trailers?

	Secondary diesel engine (TRU)	Secondary diesel TRU with option to power via take-off from the traction engine	Fully Battery Electric	Secondary engine powered by HVO or biofuels	Other (please specify)
Number of trailers					

Have you taken any other specific actions to reduce the emissions from your van fleet? Tick all that apply:

- ✓ Route optimisation
- ✓ Reduction in empty running
- ✓ Improved loading/unloading of cargo to minimise heat ingress to refrigerated compartments
 - Air/PVC curtains
 - Driver procedures for loading/unloading
- ✓ Active use of telematics data to improve performance and efficiency
- ✓ Other (please specify):

Do you plug your diesel trailers into electric shore power when they are on stand at depot?

- Always
- Never
- Sometimes

Section 3: Attitudes Toward Decarbonisation

What are your main motivations for considering lower or zero emission TRUs? Rank 1-5

1. Getting ahead of future regulation
2. Internal sustainability targets
3. Customer requirements
4. Cost savings
5. Corporate reputation

What are the biggest barriers to adopting low or zero emission refrigerated vehicles? Rank 1- 8

1. Upfront capital cost
2. Technological uncertainty
3. Grid connection constraints
4. Maintenance concerns (lack of network, or suitable engineers)
5. Lack of charging capacity across road & depot network
6. Uncertainty about depreciation and end of life resale
7. Payload reduction
8. Lack of clear regulatory direction

Section 4: Technology & Infrastructure

Do you agree with the following statement? 'Zero emission TRUs can meet future UK operational requirements for refrigerated distribution'?

- Yes
- No
- Partially
- Unsure

Have you applied for or received any UK government support for adopting low-emission vehicles or infrastructure?

- Yes (please specify)
- No
- Not aware of available schemes

To what extent do you think hydrogen will form part of the future fuel mix for refrigerated vehicles?

- Significantly, greater potential than electric
- Partially, alongside electric
- Not at all, electric will dominate
- Unsure

Section 5: Government Policy & Regulation

Do you agree with the following statement? **‘There is clear direction from the UK Government on how and when TRUs will transition to low or emission free sources’**

- Yes
- No
- Unsure

Is uncertainty over policy direction for zero emission vehicles influencing your decision to adopt lower emission technologies such as HVO and biofuels?

- Yes
- No
- Unsure

Do you expect regulation of diesel TRUs (for example bans to certain models or geographical restrictions in the usage of diesel TRUs) to tighten within the next 10 years?

- Yes
- No
- Unsure

Are you aware of the UK F-Gas Regulations which are reducing the availability of refrigerants used in TRUs?

- Yes
- No
- Unsure

What single government action would most accelerate your adoption of zero emission TRUs?

Section 6: Outlook for Decarbonisation

On the current trajectory, when do you expect your organisation will eliminate the usage of secondary diesel engines to power transport refrigeration units?

- Already achieved
- By 2030
- By 2035
- By 2040
- By 2045
- By 2050

- Not sure

Would you support a voluntary registration scheme to identify the number of TRUs in the UK and track progress to decarbonisation?

- Yes
- No
- Maybe

If you answered “**No**” or “**Maybe**”, what are the main reasons for your response? (Select all that apply)

- Administrative burden
- Risk of future regulation or enforcement
- Cost or resource implications
- Data privacy or confidentiality concerns
- Unclear benefits of registration
- Other (please specify)

Do you believe a TRU registration scheme would help government design more effective decarbonisation policy for refrigerated transport?

- Yes
- No
- Unsure

Section 7: Final comments

Are there any other comments you would like to add about the decarbonisation of refrigerated vehicles that have not been addressed in this census?