



Corey Rosenbusch

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Alliance*



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GCCA Energy Excellence and Benchmarking

Customer Research & European Benchmarking

Presented by



GLOBAL COLD CHAIN
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Smart & Final *Wegmans* **Kwik Trip** *Walgreens*



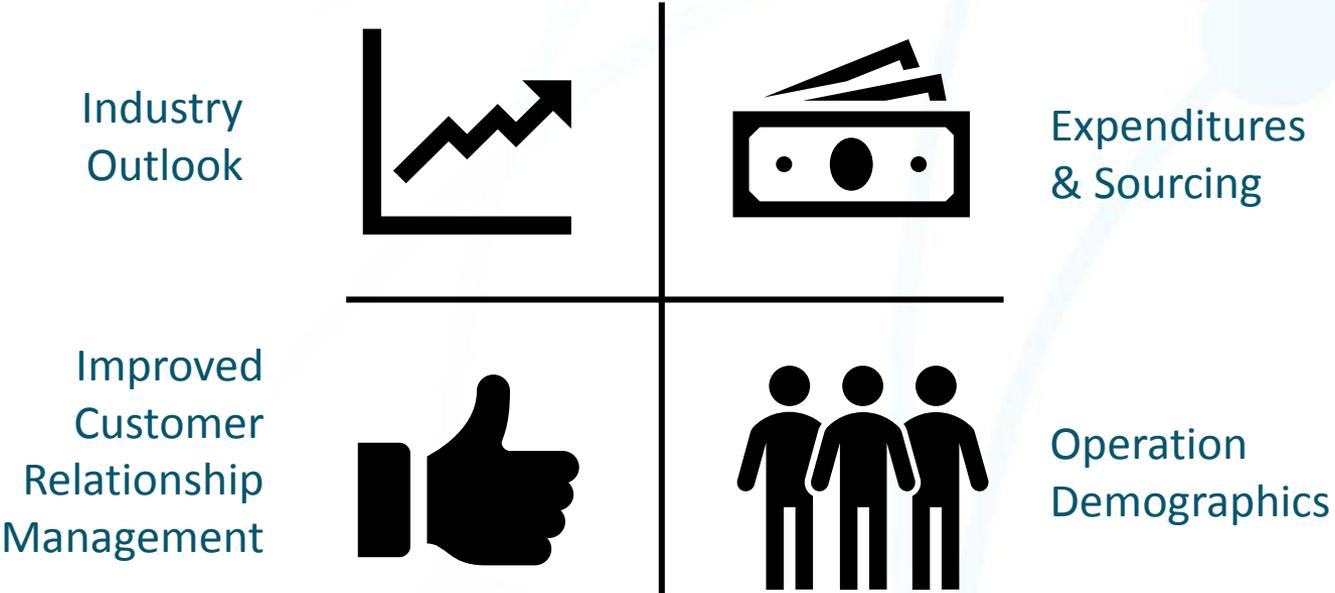
Smithfield



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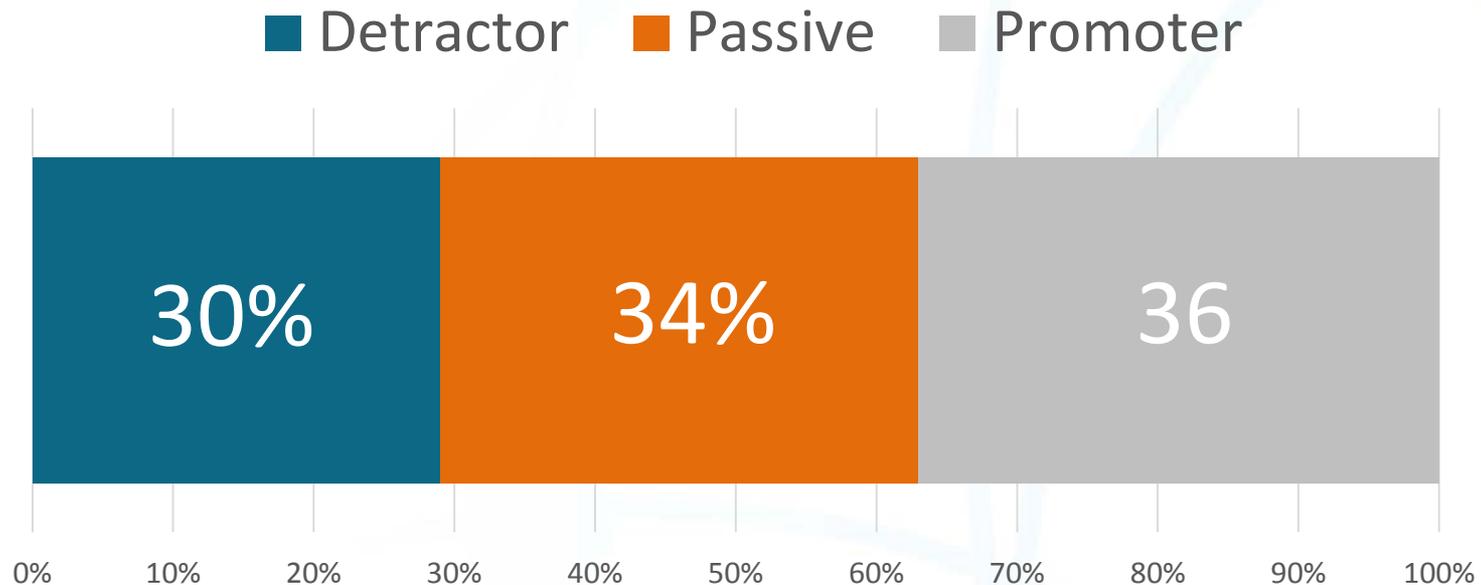


Customer Research Survey



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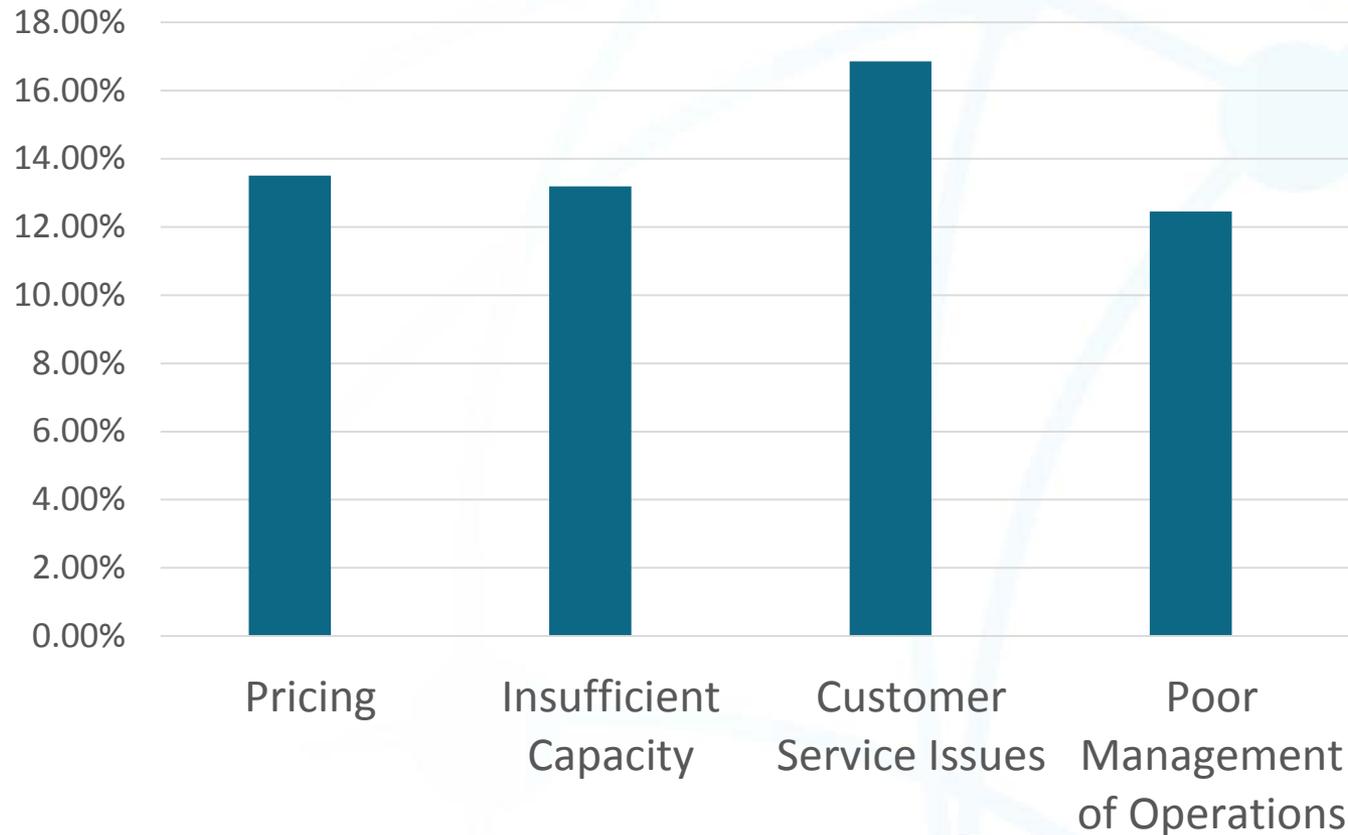
How likely are customers to promote the use of temperature-controlled 3PL services?



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Most common reasons for ceasing work with a 3PL



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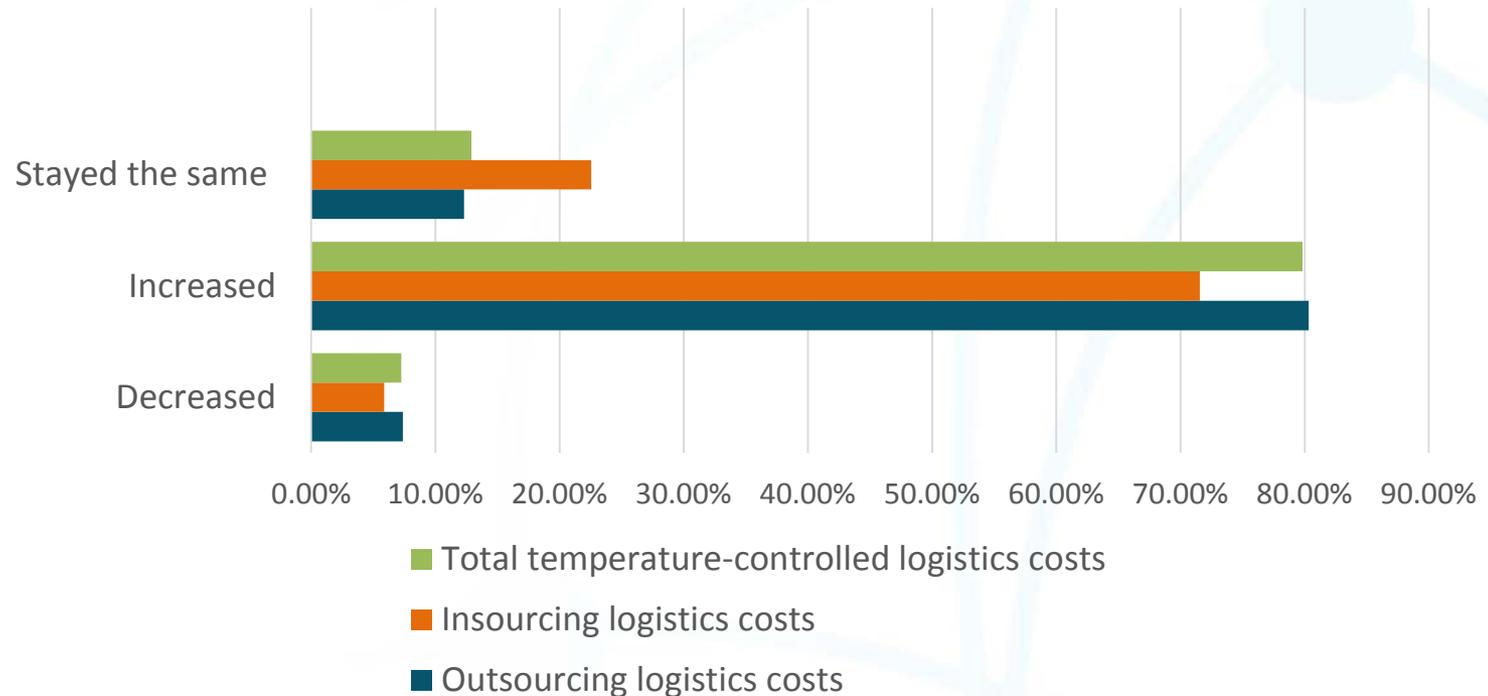
Business trends in the next 5 years



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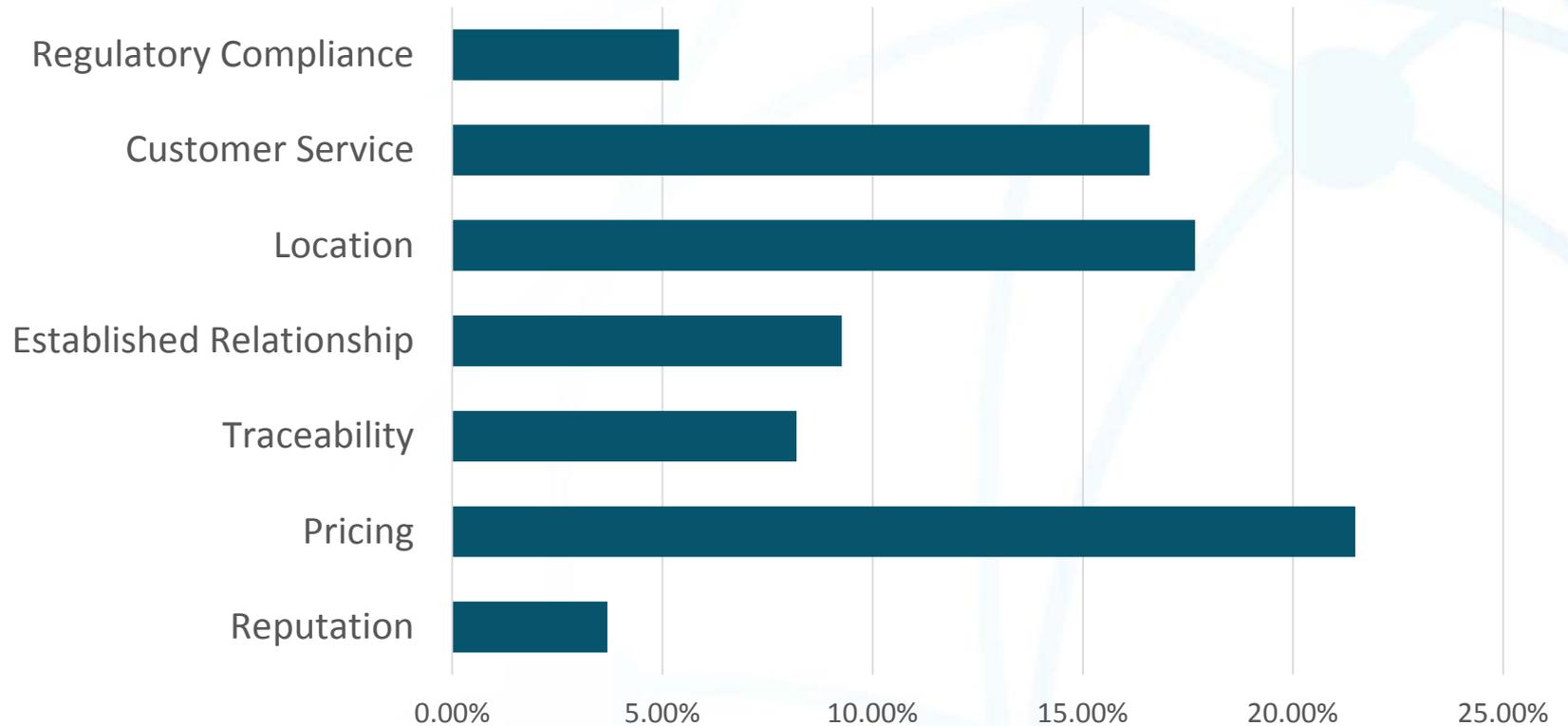


Temperature-controlled logistics costs in the last 24 months





Factors in selecting a 3PL partner



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European Productivity & Benchmarking Survey



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Participating Countries

Austria
Belgium
Denmark
France
Germany
Greece
Ireland

Lithuania
Netherlands
Poland
Portugal
Spain
United
Kingdom



13 countries
28 warehouses



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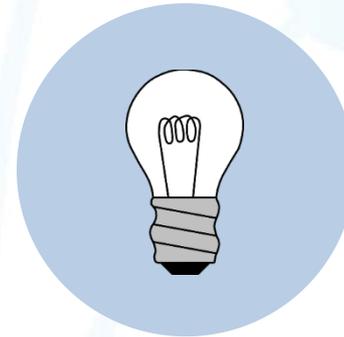
Areas of Focus



Financial



Labor



Energy



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Average Revenue Per Facility

€ 9,600,000



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North America vs. Europe

12.5 ----- *Average Inventory Turns per Year* ----- **10.5**

\$6,740,000 USD ----- *Average Revenue per Facility* ----- **9,660,000 Euros**

42 employees ----- *Number of Full Time Equivalentents per Warehouse* ----- **47 employees**

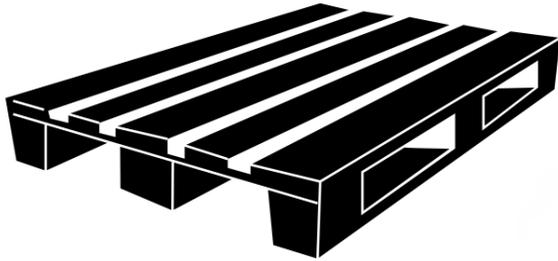
143,000 (median) ----- *Pallets Handled per Year per Warehouse* ----- **37,331 (average)**



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37,331

The average number of pallets handled per year



71%

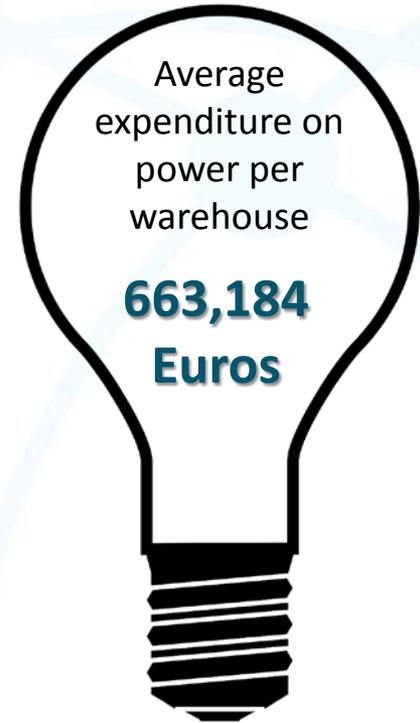
Average occupancy rate



10.5
inventory turns per year

Average expenditure on power per warehouse

663,184
Euros

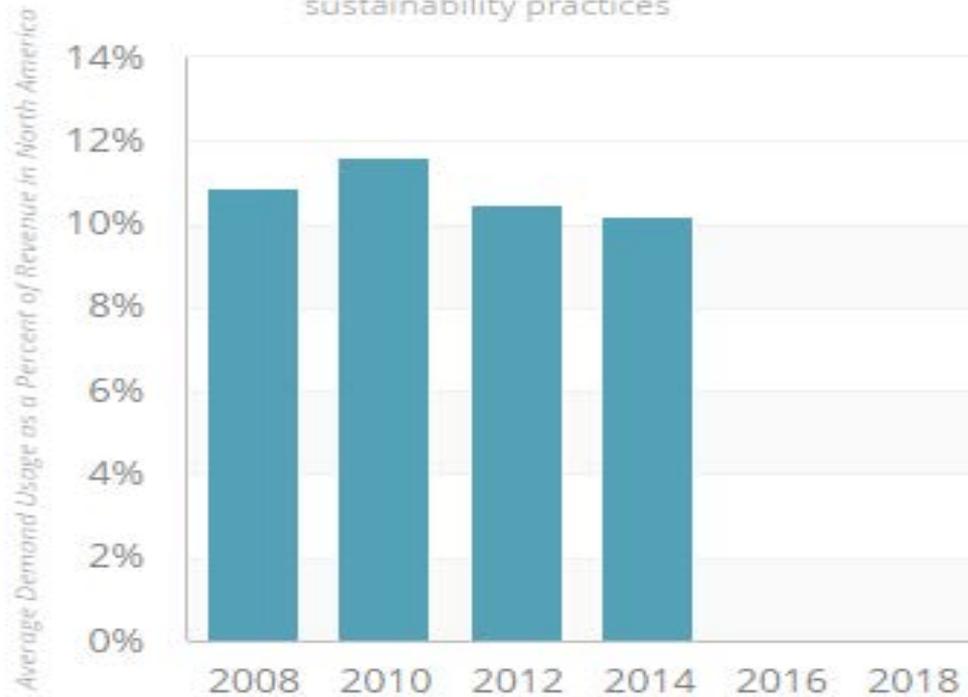


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Background

14. Demand/Usage

Reduce demand/usage by 10% through energy-efficient technology, energy management and sustainability practices



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| Category | Bronze <i>Demonstrates a baseline commitment from management and basic tracking</i> | Silver <i>Demonstrates behavior-based changes to regular operations and increased tracking</i> | Gold <i>Demonstrates organizational investment in energy excellence and real-time tracking</i> |
|-------------------|---|--|--|
| Commitment | Savings goal | Savings goal | Savings goal |
| | Written plan | Written plan | Written plan |
| | Energy champion | Energy champion | Energy champion |

| | | | |
|--------------------------------------|------------------------|------------------------------|-------------------------------------|
| Planning & Implementation | Self-assessment | Self-assessment | Self-assessment |
| | Energy Map | Energy Map | Energy Map |
| | Metrics | Metrics | Metrics |
| | - | Suggestion Program | Suggestion Program |
| | - | Energy Waste Walks | Active capital/investment portfolio |
| | - | Energy Team/Committee | Energy Team/Committee |
| | - | Training | Training |
| | - | Recognition Program | Recognition Program |
| | - | Incentive Program | Incentive Program |
| | - | - | Quarterly controls review |
| - | - | Persistence | |

| | | | |
|----------------------------------|--|---|-------------------------------|
| Measuring & Reporting | Manual, at least monthly measurements | Manual, at least weekly measurements | Real-Time measurements |
| | - | - | Audit/certification |
| | Reporting | Reporting | Reporting |
| | - | Weekly production data | Weekly production data |

More than 3 consecutive years of Gold Status will be recognized with Platinum status.

Energy Management Assessment Report

Prepared for

Example Customer Name

By: Mike Smith • For: Sam Walton • sam.walton@testco.com • Return Password: 9ffc7746
123 Test St, Portland, 97201 • 01/13/2015

EXECUTIVE SUMMARY

Thank you for recently partaking in the Northwest EMA (Energy Management Assessment) to identify your Energy savings opportunities. Your Northwest EMA report provides information and details on recommended energy strategies together with local programs and tips to help you improve energy management within your organization. We hope that your Northwest EMA report is valuable to your business and achieving long term energy savings.

Your energy consumption

Estimated annual electric consumption 1000000 kWh

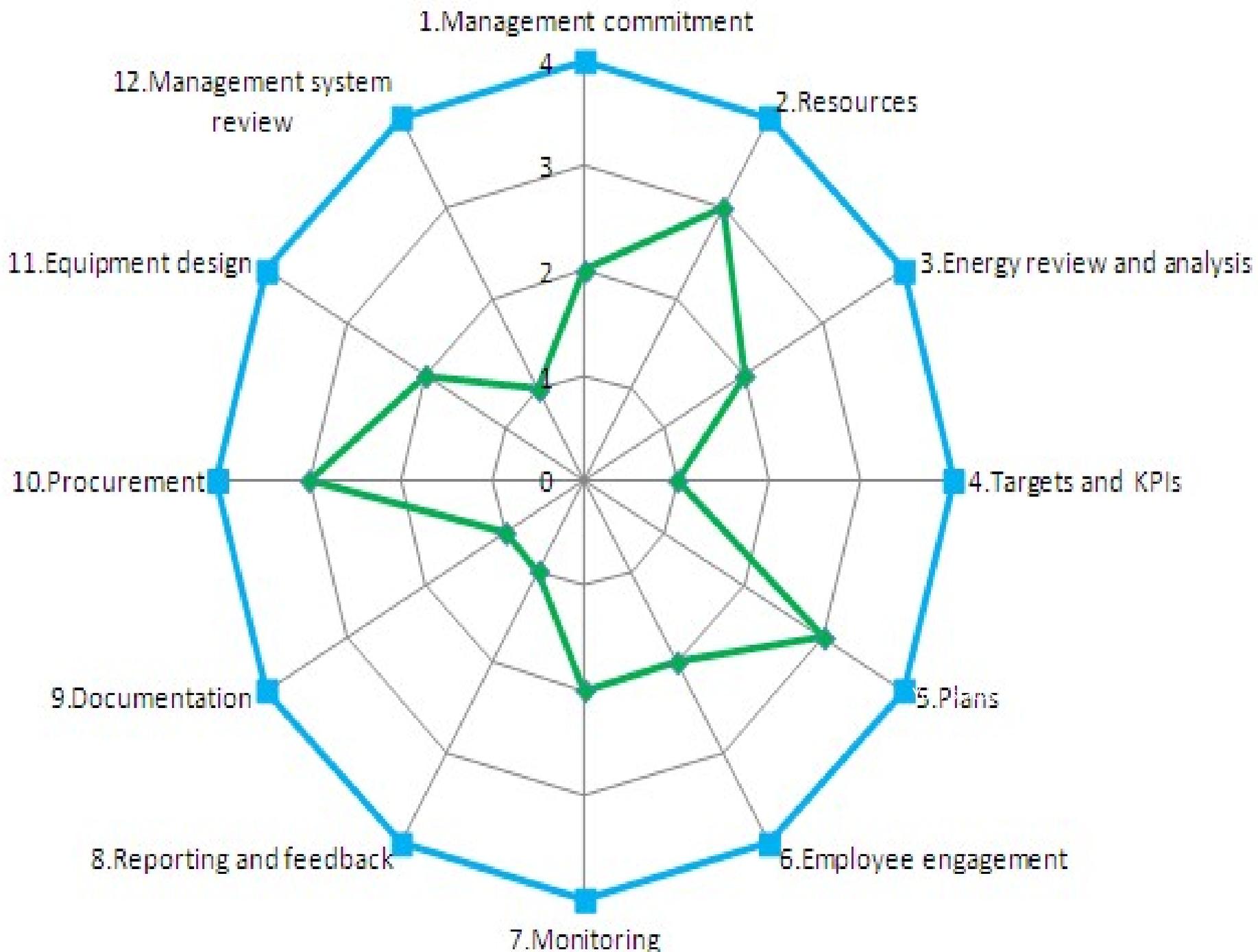
Estimated annual gas consumption 50000 mmBTU

How well are you managing energy?

Your overall score (towards Sustaining level) 52%



| # | Level | Description |
|---|--------------|---|
| 1 | Awareness | Awareness of how process/facility conditions affect energy intensity/spend |
| 2 | Projects | Have implemented energy efficiency projects |
| 3 | Programmatic | Identify and prioritize energy efficiency projects to maximize return on investment |
| 4 | Sustaining | Value of energy embedded in business decision making |



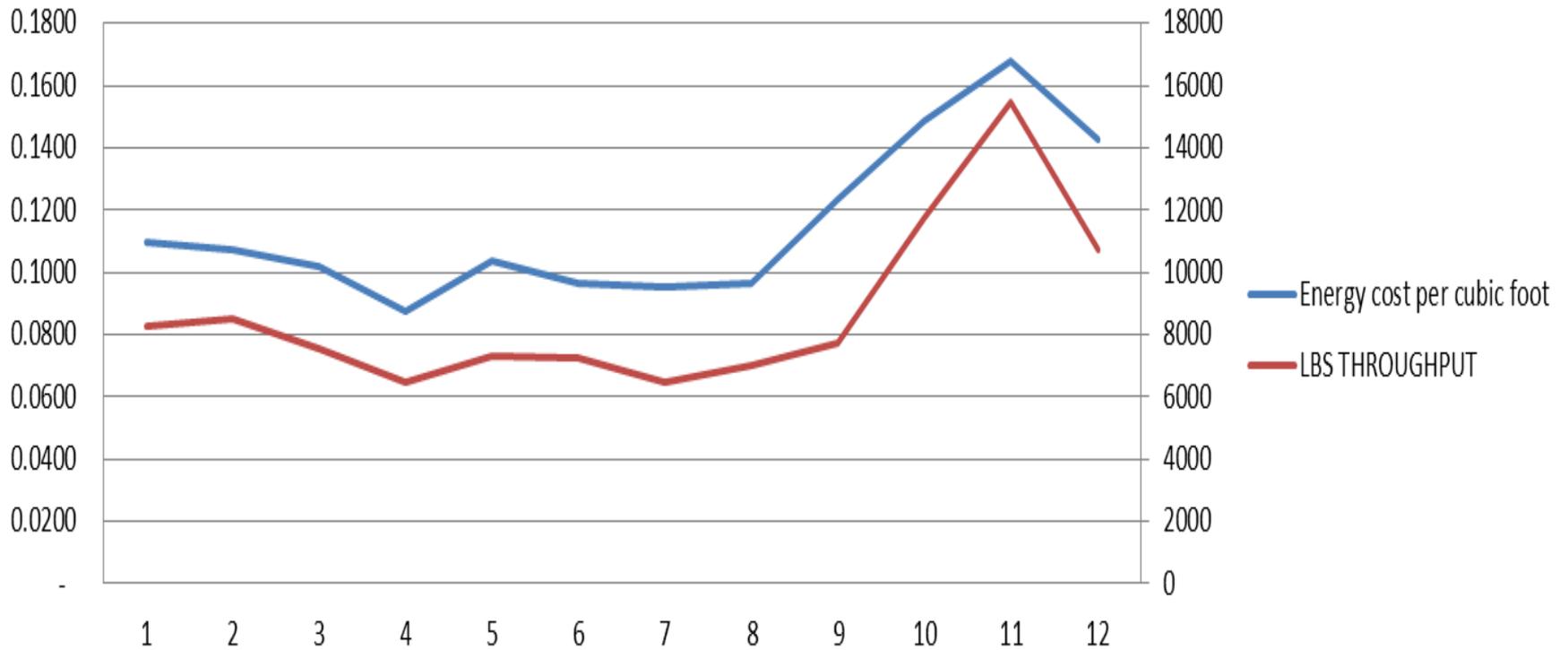
RECOMMENDATIONS FOR YOUR BUSINESS

The following recommendations are provided based on the results of your self-assessment. The recommendations are prioritized based on your responses provided in the self-assessment, your level of development in each of the 12 components and the assessment prioritization factors for each component.

| | | |
|--|--|-------------------------------------|
| <p>Resources (human and financial)</p> <p>Assign at least one staff member responsibility for energy performance within your organization, as part of their role.</p> <p>More info: http://energyimprovement.org/getstarted.php</p> | <p>By When</p>  Apr/30/2015 | <p>By Whom</p> <p>Jane Marsh</p> |
| <p>Energy review and analysis</p> <p>Conduct a review of your equipment and energy bills to identify savings opportunities (e.g. complete an energy audit of your facility/organization).</p> <p>More info: http://online-sem.com/resourcelibrary.php</p> | <p>By When</p>  May/22/2015 | <p>By Whom</p> <p>Karen Smiles</p> |
| <p>Monitoring and analysis</p> <p>Conduct regularly monitoring of energy consumption and costs at your facility level.</p> <p>More info: http://energyimprovement.org/getstarted.php</p> | <p>By When</p>  Jun/30/2015 | <p>By Whom</p> <p>Juan Gonzalez</p> |

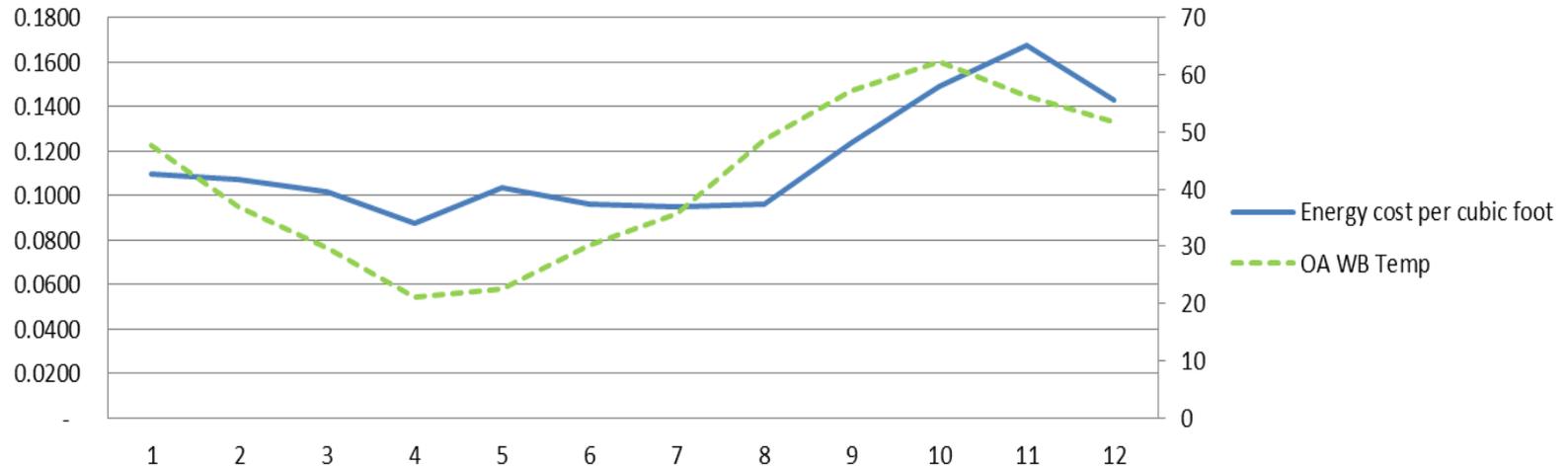
Correlations

ENERGY USE (compared to) PRODUCT THROUGHPUT (corr 0.92)

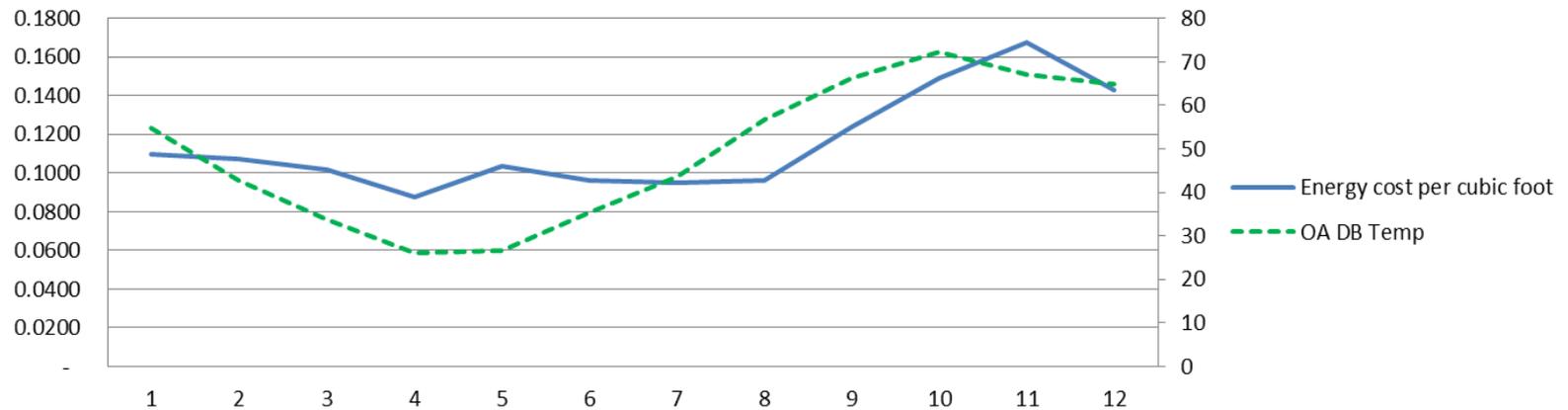


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ENERGY USE (compared to) OA WET BULB TEMP (corr 0.81)



ENERGY USE (compared to) OA DRY BULB TEMP (corr 0.84)



Comparative Analysis

| Overall Site Analysis | Site 1 | Site 2 | Site 3 | Site 4 | Site 5 | Site 6 |
|----------------------------|----------|----------|----------|----------|---------|----------|
| BTU/CF/YR | 7300 | 3909 | 3191 | 7119 | 3571 | 971 |
| BTU/CF/YR/10kLB | 30.71 | 22.74 | 11.02 | 33.62 | 9.36 | 5.90 |
| Energy \$ / Product Volume | \$ 17.05 | \$ 18.96 | \$ 10.56 | \$ 17.39 | \$ 8.90 | \$ 19.85 |
| THROUGHPUT / CF | 69 | 41 | 41 | 67 | 52 | 11 |
| Type of Lights | LED | MH | MH | HID | LED/T8 | LED |
| Type of Floor Heat | ELECTRIC | ELECTRIC | NONE | GLYCOL | GLYCOL | ELECTRIC |
| Blast Freezing | ✓ | | ✓ | ✓ | | |
| Frozen Storage | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Refrigerated Storage | | | | | | ✓ |
| Non-Conditioned Storage | | | | | | ✓ |



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Thank you!

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