



GLOBAL COLD CHAIN
ALLIANCE®

CONGRESO
LATINOAMERICANO
DE CADENA DE FRÍO®



• **17 Noviembre 2022**

GCCA, Presente y Futuro

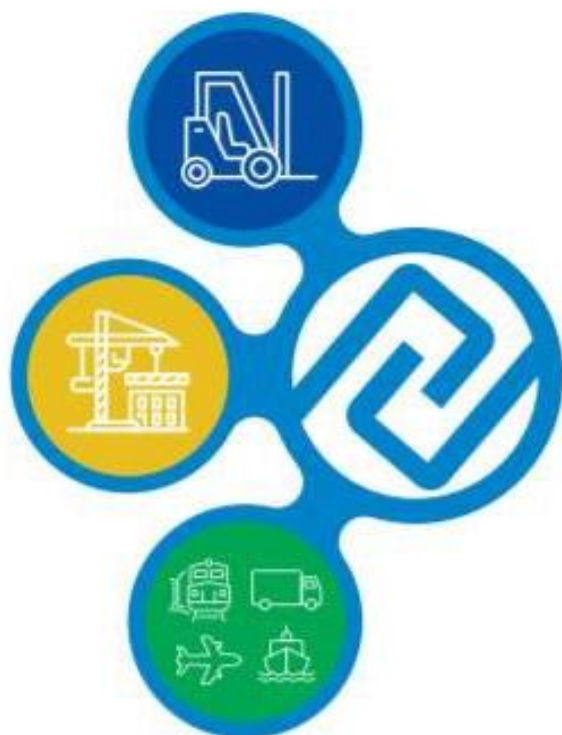
• Manuel Cabrera-Kabana

• Chairman, IARW

GCCA

Visión General

Una Voz Global



GLOBAL COLD CHAIN ALLIANCE®

Warehousing, Construction, and Transportation



GCCA, su Huella Mundial



1500+

MEMBER
COMPANIES
WORLDWIDE



92

COUNTRIES



49%+

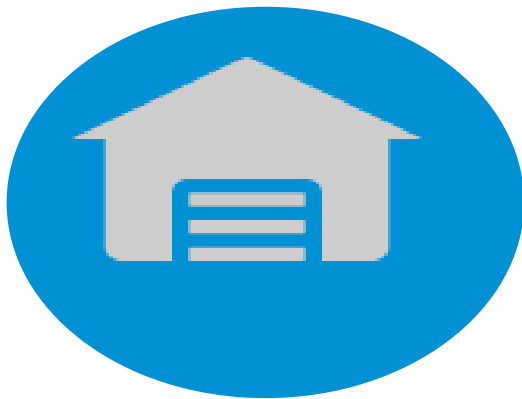
MEMBERS FROM
OUTSIDE NORTH
AMERICA

INTERNATIONAL OFFICES

AFRICA, BRAZIL, EUROPE, INDIA, AND LATIN AMERICA



Miembros en Latinoamérica habla Hispana



70 Bodegas



13 Países



6.490.000

A Nivel Industrial Mundial



719M*

TOTAL
CAPACITY OF
REFRIGERATED
WAREHOUSES

globally in 2020.

*in cubic meters



51

PARTICIPATING
COUNTRIES

TOP 3 COUNTRIES IN
TERM OF CAPACITY:

United States

India

China



16.7%

GREATER
CAPACITY

in 2020 versus
reported numbers
in 2018.





GCCA

Estrategia Mundial

y Principales

Prioridades

GCCA Prioridades Principales

Mejorar y continuar aumentando las oportunidades de abogacía y promoción del sector, a nivel mundial

Evaluar y presentar mayor información junto a ofrecer mayores oportunidades de capacitación

Implicación y desarrollo de proyectos internacionales

Repensar y revitalizar la estrategia de eventos globales de la GCCA



Colaboración Internacional



Mantener la Cadena de Frío Conectada



2023 Eventos Globales

MARCH

26TH GCCA EUROPEAN COLD CHAIN CONFERENCE & EXPO

20-22 MARCH 2023

Barcelona, Spain | InterContinental Barcelona

Here, delegates gain a better understanding of market trends, industry challenges, business solutions, and technological innovations. The conference also provides ample networking opportunities, enabling attendees to meet and connect with professionals from throughout Europe and around the world.

Audience: Executives and managers from temperature-controlled, third-party logistics companies.



MAY

WFLO INSTITUTE AUSTRALIA

TBD 2023

Melbourne, Australia

This event, designed for employees with clear management potential and executives new to the industry, features more than 40 classes in warehouse management and transportation management taught by leading experts in the industry.

Large Company Audience: Warehouse managers, operations managers, warehouse supervisors, shift leads, workers with high potential for management, customer service managers, business development managers, transportation managers, executives new to the industry.

Small to Medium Company Audience: Warehouse managers, operations managers, workers with high potential for management.



JUNE

GCCA COLD CHAIN POLICY FORUM

19-21 JUNE 2023

Washington, DC | The Watergate Hotel

The GCCA Global Policy Forum is the premier policy event for businesses engaged in temperature-controlled logistics. Featuring education sessions and keynote presentations focused on rules and regulations that impact the cold chain, the Global Policy Forum is a must attend policy event for multiple regions across the world.

Large Company Audience: Executives with compliance and regulatory responsibility, members of safety and government affairs committees.

Small to Medium Company Audience: Owners, CEOs, executives with compliance and regulatory responsibility, members of safety and government affairs committees.



GCCA BRAZILIAN COLD CHAIN CONGRESS

28 JUNE 2023

Sao Paulo, Brazil

This educational event focuses exclusively on the temperature-controlled logistics industry and features opportunities and solutions for business development.

Audience: High-level executives in temperature-controlled warehousing or logistics.



JULY

WFLO INSTITUTE LATIN AMERICA

17-19 JULY 2023

Mexico City, Mexico | Hilton Mexico City Reforma

This event, designed for employees with clear management potential and executives new to the industry, features extensive classes in warehouse management and transportation management taught by leading experts in the industry.

Large Company Audience: Warehouse managers, operations managers, warehouse supervisors, shift leads, workers with high potential for management, customer service managers, business development managers, transportation managers, executives new to the industry.

Small to Medium Company Audience: Warehouse managers, operations managers, workers with high potential for management.



AUGUST

GCCA SOUTH AFRICAN COLD CHAIN CONFERENCE

2-4 AUGUST 2023

Cape Town, South Africa

This event is South Africa's one and only venue bringing together cold store operators, controlled-environment builders, equipment suppliers and service providers to discuss opportunities and innovations of this essential sector. The conference provides leadership experience, knowledge, and exclusive networking with decision makers from across South Africa and beyond, in a relaxed yet professional atmosphere.

Audience: Executives and managers from temperature-controlled, third-party logistics companies.



SEPTEMBER

132ND GCCA CONVENTION

24-27 SEPTEMBER 2023

Scottsdale, AZ | The Westin Kierland Resort & Spa

This annual gathering features education, networking and business development opportunities for third-party logistics companies and warehouse operators.

Large Company Audience: Owners, CEOs, presidents, executive leadership teams.

Small to Medium Company Audience: Owners, presidents, senior executives.



OCTOBER

43RD CEBA CONFERENCE & EXPO

TBD NOVEMBER 2023

Location to Be Announced Soon

This annual meeting of CEBA members offers education, business development opportunities and networking for company executives managing the building of new cold storage facilities and cold storage builders.

Large Company Audience: Chief engineers, regional facility managers, regional facility maintenance leads, construction engineer managers.

Small to Medium Company Audience: Owners/CEOs who are building or expanding facilities, chief engineers.



GCCA LATIN AMERICAN COLD CHAIN CONGRESS

TBD NOVEMBER 2023

Mexico City, Mexico

This meeting enables GCCA members and leaders in the temperature controlled industry to interact, learn about industry trends and expand their knowledge. The Congress also serves as a discussion forum for issues of interest to multi-regional cold chain industry leaders.

Audience: Senior executives in temperature-controlled warehousing or logistics.



Estado de la Industria Frigorífica

Top 25 Empresas del Sector - 2020

<u>Company</u>	<u>Capacity (m³)</u>	<u>Company</u>	<u>Capacity (m³)</u>
1. Lineage Logistics	50,661,616	14. Conestoga Cold Storage	1,603,345
2. Americold Logistics	31,426,688	15. Constellation Cold Logistics	1,595,000
3. United States Cold Storage	10,590,159	16. Superfrio Armazéns Gerais	1,476,144
4. AGRO Merchants Group, LLC	6,865,163	17. Comfrio Soluções Logísticas	1,378,400
5. NewCold Cold Logistics	5,510,621	18. Hanson Logistics	1,240,803
6. Nichirei Logistics Group, Inc.	5,186,000	19. Magnavale Ltd.	1,159,510
7. Kloosterboer	4,847,354	20. Friozem Armazéns Frigoríficos	1,053,000
8. VersaCold Logistics Services	3,483,224	21. Holt Logistics Corp.	991,090
9. Interstate Warehousing, Inc.	3,277,261	22. Confederation Freezers	979,197
10. Frialsa Frigoríficos	2,894,758	23. Agri-Norcold A/S	978,751
11. VX Cold Chain Logistics	2,746,610	24. Trenton Cold Storage, Inc.	970,627
12. Burris Logistics	2,120,987	25. Bring Frigo	817,628
13. Congebec Logistics, Inc.	1,635,068		



Private Equity Investment



Top 25 Empresas del Sector - 2022

	<u>Company</u>	<u>Capacity (m3)</u>		<u>Company</u>	<u>Capacity (m3)</u>
1	Lineage Logistics	73,498,271	14	Burris Logistics	1,667,491
2	Americold Logistics	39,962,659	15	Friozem Armazens Frigorificos Ltd	1,060,000
3	United States Cold Storage, Inc.	11,987,220	16	Magnavale Ltd	1,034,800
4	NewCold Cooperatief U.A.	6,091,576	17	Confederation Freezers	976,780
5	Nichirei Logistics Group, Inc.	5,639,111	18	Trenton Cold Storage, Inc.	970,618
6	Interstate Warehousing, Inc.	3,277,230	19	Nor-Am Cold Storage	964,797
7	Frialsa Frigorificos S.A. De C.V.	3,075,558	20	Frigoscandia	817,616
8	VersaCold Logistics Services*	2,988,276	21	Agri-Norcold A/S	810,743
9	Constellation Cold Logistics	2,743,289	22	METCOLD Supply Network Mgmt	745,788
10	Superfrio Logistica Frigorificada	2,145,377	23	Quallanz	735,042
11	Conestoga Cold Storage	1,821,148	24	Snowman Logistics Ltd	715,794
12	Congebec Logistics, Inc.	1,723,542	25	WOW Logistics	662,798
13	RLS Logistics	1,671,488		*Acquirida por Lineage Logistics recientemente	



2020-22 % Incremento Capacidades

	<u>Company</u>	<u>2020 Capacity (m3)</u>	<u>2022 Capacity (m3)</u>	<u>Increase by %</u>
1	Constellation Cold Logistics	1,595,000	2,743,289	72%
2	Nor-Am Cold Storage	629,251	964,797	53%
3	Lineage Logistics	50,661,616	76,486,547	51%
4	Superfrio Logística Frigorificada	1,476,144	2,145,377	45%
5	Americold Logistics	31,426,688	39,962,659	27%
6	RLS Logistics	1,386,840	1,671,488	21%
7	Conestoga Cold Storage	1,603,345	1,821,148	14%
8	United States Cold Storage, Inc.	10,590,159	11,987,220	13%
9	NewCold Cooperatief U.A.	5,510,612	6,091,576	11%
10	Nichirei Logistics Group, Inc.	5,186,000	5,639,111	9%
11	Frialsa Frigoríficos S.A. De C.V.	2,894,758	3,075,558	6%
12	Congebec Logistics, Inc.	1,635,068	1,723,542	5%



The background of the image is a photograph of a warehouse interior, showing rows of tall metal shelving units. The entire image is covered with a semi-transparent blue overlay. The text is white and positioned on the left side of the image.

WFLO

World Food

Logistics

Organization

Desarrollo Internacional

A través del WFLO, los Socios de GCCA participan activamente en el desarrollo de la cadena de frío a nivel internacional

Eliminar el desperdicio de alimentos y las pérdidas poscosechas

- Estudios de factibilidad y desarrollo de infraestructura
- Entrenamiento técnico
- Evaluaciones e investigación
- Viajes y recorridos de estudio de instalaciones





INTERNATIONAL DEVELOPMENT PROJECTS



Inseguridad Alimentaria

El volumen total de alimentos perdidos o desperdiciados por año es aproximadamente suficiente para acabar con el hambre en el mundo unas cuatro veces más

Según la FAO, el PNUMA y Project Drawdown, la cantidad de alimentos desperdiciados o perdidos por año (a nivel mundial) es de 1300 millones de toneladas, lo que equivale a 2,6 billones de US dólares y representa entre el 8 y el 10 % de las emisiones de gases de efecto invernadero (GEI), (GHG, en inglés)

Es posible que alrededor de 660 millones de personas sigan padeciendo hambre en 2030, en parte debido a los efectos duraderos de la pandemia de COVID-19 en la seguridad alimentaria mundial



Postharvest Education

En conjunto con la Postharvest Education Foundation, desarrollar un programa de tres partes para economías en desarrollo y países emergentes

El programa se centrará en tres áreas de capacitación para reducir las pérdidas poscosecha:

- Manipulación de Producto
- Infraestructura
- Operaciones



Estemos Conectados



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