

## COLDFACTS JULY-AUGUST 2018

COVER STORY

### MEETING THE CHALLENGES OF GLOBAL AIR CARGO HANDLING

Pursuing best practices, setting standards, and creating opportunities.



**RMP** in the Spotlight

### 20

Planning for Food Safety in Design and Construction

## 24

GCCA Establishes Brazil Office

26 Food Max

31

Cold Chain Innovations

## 34

Cool People: Francois Dowling

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#### **DEPARTMENTS**

- 26 Food Max
- 28 Member News
- **30** Association News
- **31** Cold Chain Innovations
- 32 New Members
- 32 Industry Calendar

#### COLUMNS

- 06 Leadoff
- 34 Cool People





#### About the Cover

Cargo loading at Miami International Airport, the leading airport in the Americas for handling perishables. The article, "Meeting the Challenges of Global Air Cargo Handling," on page 12 of this issue of COLD FACTS explores how carriers are pursuing best practices, setting standards, and creating opportunities. (Photo courtesy of Miami-Dade Aviation.)





# CONTENTS

JULY-AUGUST 2018

### **FEATURES**



#### **RMP** in the Spotlight

EPA proposes rescinding Obama-era changes to Risk Management Program. *By Lowell Randel* 

## 12

### Meeting the Challenges of Global Air Cargo Handling

Pursuing best practices, setting standards, and creating opportunities. *By Karen E. Thuermer* 



## 20

## Planning for Food Safety in Design and Construction

Address challenges upfront by choosing right materials, systems, and processes. *By Sheryl S. Jackson* 

24

#### GCCA Establishes Brazil Office

Partnership with ABIAF to add value to Brazilian cold chain companies. *By Alexandra Walsh* 









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MESSAGES FROM GCCA LEADERS

## **IRTA-fication**

RECENT HEADLINE IN THE WALL STREET JOURNAL READ, "COLD SHIPPING IN HOT DEMAND AS THE WORLD CRAVES MORE FRESH FOOD." It documented the uptick in international refrigerated container shipments as South American fruits and vegetables, European pharmaceuticals, and other temperaturesensitive products are crisscrossing the globe in response to increased demand.

Was there ever a moment of greater opportunity for the cold chain, GCCA, and the International Refrigerated Transportation Association (IRTA) to chart new waters? I think not. Now is the time for cold chain shippers and transporters and third-party logistics providers to rise to the challenge of building this growing network to maximize efficiency, safety, quality, and on-time delivery.

Not so fast. As exists with any complex endeavor, external forces serve as the headwind and resist the positive direction for which we strive:

- Increased regulations from multiple government agencies (and countries) that sometimes conflict with each other;
- A continued lack of communication and coordination between shippers and receivers;
- A shrinking pool of qualified truck drivers; and
- Changing consumer habits. And those are but a few.

Yet each problem presents an opportunity for our industry to leverage the specialized skills and infrastructure we have spent decades developing. As a trade association, our greatest opportunity is to provide value to our members by guiding them past the headwinds and around the rocks and shoals. Last year IRTA brought you the Sanitary Transportation of Food (STF) Best Practices Guidebook to navigate the way around the pieces of FSMA regulation that could easily make a journey treacherous for the cold chain. Now I would like to introduce you to the next concept tool for avoiding trouble and building business relationships: IRTA-fication. The IRTA Board has taken a step in further leading the cold chain by exploring the development of a certification program based on the STF Guidebook, for carriers. Shippers will be able to use the certification to help identify carrier partners that demonstrate a commitment to food safety, quality, and efficiency.

So, join our quest for a better cold chain! Encourage all the carriers you work with to become an IRTA member. Tap into our vast knowledge and resources. Take advantage of our discounts for legal services with our outstanding transportation legal partner, Scopelitis. Attend IRTA education programs at GCCA annual events, such as the Global Cold Chain Expo in Chicago and the Assembly of Committees in Washington, D.C.

It won't be long before you see these IRTA benefits flowing to your bottom line. Find out how you can become IRTA-FIED at gcca.org/irta or speak to me or any other IRTA members or association staff at the next GCCA event. Avoid the headwinds. Sail around the rocks and shoals and get yourself IRTA-fied today. **@** 



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#### COLDFACTS

COLD FACTS magazine is published every other month by the **Global Cold Chain Alliance** (GCCA), an organization that unites partners to be innovative leaders in the temperature-controlled products industry. The GCCA Core Partners are:

The International Association of Refrigerated Warehouses (IARW), which promotes excellence in the global temperature-controlled warehouse and logistics industry.

#### The World Food Logistics Organization

(WFLO), which delivers education and research to the industry and empowers economic development by strengthening the global cold chain.

The International Refrigerated Transportation Association (IRTA), which cultivates, fosters and develops commercial and trade relations between all those engaged in the transportation and logistics of temperature-controlled commodities.

The International Association for Cold Storage Construction (IACSC), which provides a forum for innovative ideas, promotes standards of practice, and sponsors professional education programs for the cold storage construction industry.

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# RMP IN THE SPOTLIGHT

EPA proposes rescinding Obama-era changes to Risk Management Program.

#### By Lowell Randel

he Environmental Protection Agency (EPA) released a proposed rule on May 17, 2018, to reconsider amendments made to the Risk Management Program (RMP) at the end of the Obama Administration.

The RMP amendments came, in part, as a response to the explosion at a fertilizer plant in West, Texas. The changes to the RMP were finalized just before President Trump took office. The Trump Administration placed a hold on the regulation to enable a review, which led to a postponement of the effective date of the amendments until February 2019. This delay has given the new leadership at the EPA time to evaluate concerns raised about the RMP amendments and reconsider the policy direction for the program. The reconsideration rule is a part of broader regulatory reform efforts by the Trump Administration.

The RMP amendments addressed various aspects of risk management programs, including prevention programs at stationary sources, third-party audits, emergency response preparedness requirements, and information availability. GCCA actively participated in the rulemaking process from the beginning and led a coalition sharing concerns with both the substance of the RMP amendments and the process followed by the EPA. The GCCA communicated its concerns through public comments, coalition letters and oral testimony to the EPA. In addition, the EPA received multiple petitions arguing that the RMP amendments were problematic and the rulemaking process was flawed.

In the Proposed Rule to reconsider the amendments, the EPA highlighted the following concerns:

- Potential security risks associated with new information disclosure requirements introduced in the final rule.
- The government's finding that the explosion in West, Texas, was caused by a criminal act (arson) rather than being the result of an accident.
- Concerns with economic analysis submitted by the EPA.
- Concerns that the EPA did not coordinate its rulemaking with the Occupational Safety and Health Administration (OSHA).

With its May announcement, the EPA is proposing changes to the RMP Amendments to better address potential security risks and reasonable consideration of costs. The proposed changes are intended to promote better emergency planning and public information about accidents and maintain the trend of fewer significant accidents involving chemicals regulated under the RMP rule. According to the EPA, the Proposed Rule would:

• Maintain consistency of RMP accident prevention requirements with the OSHA Process Safety Management (PSM) standard.

- Address security concerns.
- Reduce unnecessary regulations and regulatory costs.
- Revise compliance dates to provide necessary time for program changes

The new Proposed Rule from the EPA addresses the same concerns expressed by the GCCA and its coalition partners during the original rulemaking process. Under the new rule, the EPA proposes to rescind almost all the requirements added to the accident prevention provisions program within RMP. Major proposed changes include:

- Rescinding all accident prevention program provisions of the RMP Amendments rule (i.e., third party audits, safer technology and alternatives analyses, incident investigation root cause analysis, and most other minor changes to the prevention program) so that the EPA can better coordinate revisions to the RMP rule with OSHA and its PSM standard and reduce regulatory costs.
- Rescinding most of the public information availability provisions of the RMP Amendments rule that would have provided redundant, less secure means of access to information that is available through better controlled means, while retaining the provision requiring a public meeting after an accident but with minor language modifications.
- Modifying the emergency coordination and exercise provisions of the Amendments rule to address security concerns raised by petitioners and give more flexibility to regulated facilities in complying with these provisions.

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## SEPA United States Environmental Protection Agency

These proposed changes correct the problems that the GCCA identified and communicated to the EPA throughout the RMP Amendments rulemaking process. Of particular interest is the rescission of the third-party audit provision. This was a major concern expressed by GCCA and its coalition partners. If the RMP Amendments were to go into effect, the independent third-party audit requirements would place a significant challenge on the industry. By automatically disqualifying companies that have provided services other than just auditing within a two-year period, the availability of qualified auditors with experience in ammonia refrigeration would be constrained. The rescission of the third-party audit provision, along with the root cause analysis, information sharing, and inherently safer technology requirements would represent significant improvements to the RMP Amendments and remove unnecessary and costly burdens for regulated facilities.

The Proposed Rule also includes new compliance dates. Facilities would need to comply with the revised provisions by the following dates:

- one year after the effective date of a final rule for the emergency coordination provisions,
- two years after the effective date for the public meeting provision,

- four years after the effective date for the emergency exercise provisions, and
- five years after the effective date for incorporating new data elements into a facility's risk management plan.

The EPA scheduled a public hearing on June 14, 2018, to provide interested stakeholders an opportunity to express their views on the Proposed Rule. The GCCA planned to provide oral testimony at the public meeting in support of the proposed changes to the RMP Amendments. The GCCA will also provide written comments in support of the Proposed Rule and continue to actively engage with the EPA on RMP program policy, as well as with other agencies, to advance regulatory reforms to benefit the industry. **@** 

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#### By Karen E. Thuermer

### **COVER STORY**



## MEETING THE CHALLENGES OF GLOBAL AIR CARGO HANDLING

Pursuing best practices, setting standards, and creating opportunities.

erishable goods such as fruits, flowers, and vegetables were among the first commodities carried by air. At the time, there was little attention given to handling practices or quality control while in transit despite the fact such goods deteriorate over time and under extreme temperatures and humidity.

While times have changed and best practices are continually being introduced, handling issues remain.

For example, consider the journey of a case of cherries heading to China last year from Sea-Tac (Seattle-Tacoma) International Airport in Seattle, Washington. Staci Tucker, General Manager of Western Distribution Services, explains, "We were asked to cross-dock cherries from eastern Washington to Sea-Tac Airport. Our new warehouse is set up with excellent cold chain integrity, but unfortunately not all handling agents loading the cargo planes have sufficient chilled space for everything being loaded. Since cherry season is mid-summer, they had a chance to sit in an unrefrigerated area for a time before actually being loaded."

It's obvious that shipment practices in the cold chain are inconsistent across the globe, with the airport equation being no different. Those employed by, or working on behalf of, airports, airlines, and shippers do not always have the knowledge, facilities, and/or equipment to adequately move perishables so that cold chain integrity is maintained. There are always stories about shipments left on hot tarmacs and refrigeration/cooling facilities that are inadequate or run by people who are not trained to use proper settings.

One challenge is the wide variety of products handled. Cold chain requirements vary between fish, meats, vegetables, fruits, and flowers, and within each category itself. Cherries certainly have different requirements than peaches. For that reason, a program that emphasizes best practices is critical, especially given the fact that the logistics market for food is growing as more perishables travel longer distances for an ever expanding and wealthier world population. WorldACD market analysts expect an annual increase in worldwide air cargo volume of around 5.5 percent by 2020. While airport authorities are not typically involved with the specific handling of cargo, some like Miami International Airport in Miami, Florida, play key roles in cold chain best practices.

Recognizing the importance of perishables shipments to their business, stakeholders are increasingly developing cold chain best practices. Airports and air carriers offer several examples.

#### Lufthansa Cargo and PCF

The largest cold chain facility in Europe is the Perishable Center at Frankfurt (PCF) at Frankfurt International Airport in Germany. There, approximately 120,000 tons of perishable goods are handled 24 hours per day/365 days per year. Reports indicate that up to 700 tons of fresh products are handled on a daily basis during peak times.

In accordance with European Union (EU) regulations on importing goods, the PCF is a "port of first entry" that imports, checks, stores, and processes temperature-sensitive goods from third countries into the EU.

The PCF encompasses 9,000 square meters of warehouse space. It operates as an EU border inspection post, and is deemed one of the most sophisticated handling gateways in the world.

Fresh cargo such as meat, fish, vegetables, and flowers are stored at temperatures ranging from -25°C to +25°C in 20 temperature-controlled storage rooms. These chambers utilize a fast cooling system that cools down fruits and vegetables as quickly as possible. For example, its vacuum cooling system can cool down fresh flowers from South America and South Africa



Brussels Airport is the first to be designated by IATA as a pharma hub and is the biggest community of certified pharma shippers. (Photo courtesy of Brussels Airport.)

to 2 to 5°C within 20 to 30 minutes.

According to PCF, its workers are welltrained, experienced, and equipped to deal with different product groups. Electroniccontrolled processes monitor quality control and constantly record data that monitors the temperature history of the products.

Integrity in the cool chain is also strictly maintained because PCF warehouses are located a short distance from aircraft. Thermal transportation with automatic temperature control, as well as vacuum and fast cooling systems, helps to effectively avoid quality deterioration.

All of these aspects benefit worldwide carrier Lufthansa Cargo, which is a major customer at PCF. To market its quality handling of perishables, the carrier has implemented a perishables program called Lufthansa Fresh/td.

The program's main focus is to optimize the appearance and shelf life of produce. Best practices in the Fresh/td program include: controlled temperature on board aircraft (depending on aircraft type), reduced transport times between aircraft and storage, storage mostly in temperature-controlled surroundings and at the Lufthansa Cargo hub in Frankfurt at PCF; documentation of the transportation chain; Fresh/td to Door -direct delivery straight to the recipient's door in selected European markets; and consulting service offered by Lufthansa perishable cargo experts.

Training is a key component to Fresh/td. Jacqueline Casini, Lufthansa Cargo spokesperson, says, "The processes of our Fresh program (such as documentation, acceptance, and handling) are included in different training programs, depending on the target group, such as handling and sales."

Some of that training includes an examination, such as build-up of cargo. There is also training offered by the International Air Transport Association (IATA) that is attended



Perishables account for 73 percent of the imports at Miami International. (Photo courtesy of Miami-Dade Aviation.)

by, for example, handling agents. "And at all stations, the product – especially temperature-sensitive cargo – needs to be handled according to our documented Lufthansa Cargo processes for Fresh," she adds.

While PCF does its own training, everyone handling Lufthansa Cargo cold chain shipments must be trained on all processes and meet IATA and Lufthansa Cargo requirements that are described in the carrier's manuals. "PCF personnel attend different training depending on the target groups working there," Casini explains. "They also follow the trends in the industry by attending different training programs and conferences."

To help maintain the cold chain, special equipment may also be employed.

"At some stations we are using covers to protect the shipments for the transport from the warehouse to the aircraft and especially at Frankfurt International, we are trying to reduce the time out on the tarmac to a minimum by using parking positions directly in front of the PCF," Casini notes. Lufthansa Cargo also has customers that regularly use new materials designed to protect perishables from any number of elements. For example, new materials might be employed to protect berry shipments in areas of extreme sunlight. "But, we have many different commodities being transported with varying requirements and also different requirements from different customers. We are currently not offering a foil or a cover worldwide," she adds.

The bottom line is all regulatory requirements need to be covered. "We are in close contact with all our partners in the supply chain to improve processes such as cooperation with authorities in Frankfurt and within the Aircargo Community FRA," Casini says.

#### **MIA Equation**

While airport authorities are not typically involved with the specific handling of cargo, some like Miami International Airport (MIA) in Miami, Florida, play key roles in cold chain best practices. Chris Mangos, MIA spokesman, explains, "While we do not internally manage what happens inside cargo facilities, and do not serve in the capacity of handlers, as can be seen in airports outside the United States, where MIA greatly differs from many airports is our interaction with all in the air cargo community. In this case, that's our interaction with the perishables import community."

For years, MIA marketed its prominence as the leading airport in the Americas in perishables products via trade shows, advertising, and even in-country logistics workshops. While this holds true today, three years ago MIA began a product diversification and promotion program whereby each product line is examined individually and MIA officials look for ways to further expand import of the product. The reason was to maintain the airport's competitive edge in perishables, particularly since the commodity encompasses 73 percent of the airport's imports.

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The largest cold chain facility in Europe is the Perishable Center at Frankfurt International Airport in Germany. (Photo courtesy of Lufthansa Cargo.)



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Part of that effort includes holding Perishables Logistics Seminars in which MIA officials go to other countries to promote MIA's role in transporting that market's specific product from point of origin via MIA to its final market. "The program now includes members of U.S. federal regulatory agencies who travel with us on these ventures to promote compliance with packaging, labeling, transport procedures, and pest and contraband control," Mangos says.

In July 2018, MIA officials will hold these seminars in Guayaquil and Quito, Ecuador, where officials will address such topics as ocean to air movement requirements (each facility handling in-bond cargo must have approved pest-proof packaging material on hand, a quarantine bin present in each designated cargo breakdown/manipulation area inside the cooler, and Pest Proof mesh material), and growers and shippers at origin responsibilities. The goal of these seminars is twofold. MIA officials explain the products and the volumes of these products they handle, and that MIA is the leader in handling such products - a position it desires to maintain.

"We include the advantages of using MIA – the amount of expertise this airport and trade community has, the size and experience our federal agencies have in handling perishables, and the trade and transport community's size and relevance," Mangos says.

Finally, and more recently, MIA officials are examining certain perishable products that are being transported via marine transport for cost purposes, but not reaching their full potential for sale in distant markets. "This was the birth of our pilot Sea-to-Air Program with U.S. Customs and Border Patrol (CBP) to get those products into seaports in South Florida from their origin in Central America."

How it works is, once in South Florida, the products are trucked to MIA and transported over the Atlantic to Europe. There is no need to open the containers so the product is not exposed to temperature elements on the tarmac.

While the Sea-to-Air Program is still in its infancy (having only been soft-launched in early 2017 as a trial program in conjunction with MIA, CBP, PortMiami and Port Everglades in Ft. Lauderdale), MIA officials are examining its initial results and shortfalls. They are also looking at what possible strengthening is needed in the supply chain so that the program can be enhanced to include other perishable product types, other points of transshipment inside Europe, and accordingly, transshipment via MIA to Asia as well.

"There is a need to first strengthen the product supply and its consistency of export via sea," Mangos explains. "This consistency of frequency and volume of arriving product will dictate how much dedicated lift can be procured by an air carrier on this end."

The receiving end in Europe requires a dedicated party ready to work with the product once it arrives. "The element of challenge in the new program is that a new mode of transport (sea) has been added to the mix and obviously we are not going to receive product on a consistent basis," he says. "Those kinks need to be worked out, one piece at a time, before we can say there is a decisive period of measure in place and a growth potential ahead." In addition to fully examining its perishables business, MIA has also focused on pharma and has become the second airport in the world, behind Brussels Airport, to be designated by IATA as a pharma hub by becoming IATA CEIV pharma certified. This is the result of partnering with pharma logistics players at and around MIA, its "push" to get companies into the CEIV (Center of Excellence for Independent Validators) certification program, and finally, the creation of a global association of CEIV certified partners in Pharma.Aero, as a co-founder of the association together with Brussels Airport.



#### IATA Perishable Cargo Regulations Manual

An important element of best practices in the air cargo perishables business is the International Air Transport Association's (IATA) Perishable Cargo Regulations (PRC) manual. This guide is regarded as an essential reference for all parties involved in the packaging and handling of temperature-sensitive products.

Included in the manual are up-to-date airline and government requirements pertaining to the transport of perishable cargo; requirements on handling, marking and labeling; necessary packaging requirements; information on the necessary documentation required when transporting perishable cargo; and a comprehensive classification of hundreds of perishable commodities.

The manual is endorsed by the IATA Live Animals and Perishables Board (LAPB) and underpinned by the expertise of major airlines and scientific data supplied by research institutions. The Shipping Perishables Cargo course offered by IATA trains professionals in both the handling of perishable cargo and the practical knowledge of the most up-to-date regulations.

#### Major Role for Brussels

Part of best practices is working with the entire shipping community, determining weak links in the supply chain, and deciding how to overcome them. By using a similar approach implemented by perishables shippers and expanding upon it, Brussels Airport (BRU) has developed a program that has transformed it into Europe's life science gateway. Located in the middle of one of Europe's strongest pharma clusters, today BRU is Europe's premier pharmaceuticals air cargo hub. The program includes live tracking of shipments, and GDP certification of the entire supply chain.

Nathan De Valck, Cargo and Product Development Manager, Brussels Airport Company, explains that the program was initiated by creating a local quality management and training program based on the European Good Distribution Practice (GDP) guidelines. "This created a quality improvement program that supports the handling of pharmaceutical shipments. This later resulted in the CEIV Pharma program of IATA. Soon after creating

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this local program, we partnered with IATA, and BRU became the pilot and the first airport to go through the IATA community certification program," he explains. "Based on that, we built up a community of certified companies through training programs where stakeholders were educated in the specific needs and requirements of handling pharma shipments."

The second aspect of the program was quality handling practices and the validation of processes. "That helped us generate a positive momentum in our community," De Valck says.

Not only is BRU the first airport to be designated by IATA as a pharma hub, it is still the biggest community of certified pharma shippers.

"We have received so many requests from airports asking about our best practices and how they could improve their handling practices that we decided to create a global cooperation group," De Valck adds. That group was launched by BRU and MIA and is called Pharma.Aero. Based upon the CEIV program, the new group focuses on achieving excellence in reliable end-to-end air transportation for pharma shippers worldwide.

"What makes it unique is we have invited pharma shippers and all industry stakeholders to be part of the group," says De Valck who is also chairman of Pharma.Aero. "A prerequisite to becoming a member is they must embrace IATA CEIV program standards."

The focus of the group is global. "We identify potential areas for improvement and solutions by sharing best practices," he says. This includes route certification/development of pharmaceutical trade lanes, implementation of best practices and sharing of market knowledge and expertise.

Not only is BRU the first airport to be designated by IATA as a pharma hub, it is still the biggest community of certified pharma shippers. "We've been doing this for last 15 months and it's been very successful," he states.

The membership of Pharma.Aero is growing rapidly. Among those that have joined are Johnson & Johnson, Pfizer, MSD, Miami International Airport, Singapore's Changi International Airport, Sharjah International Airport (UAE), Hong Kong International Airport, Mumbai International Airport, as strategic board members. Brussels Airlines, Singapore Airlines, AirBridgeCargo Airlines, Amerijet, Expeditors, and DHL Global Forwarding are some of the full members. **②** 

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## PLANNING FOR FOOD SAFETY IN DESIGN AND CONSTRUCTION

Address challenges upfront by choosing right materials, systems, and processes.

#### By Sheryl S. Jackson

reparing for a BRC or SQF audit requires a complex review of processes, policies, employee training and documentation, but successful compliance with food safety guidelines can begin with the building itself – design, construction, and materials used.

While warehouses that deal with frozen product or packaged product that is never opened don't have to meet the same requirements, there is an ongoing trend for refrigerated warehouse owners to build processing areas into or next to their facilities to ease the complexities of transportation.

"We are seeing more cold storage operators offering this value-added service, which makes it important to be aware of the more stringent health and safety guidelines that food processors must meet," says Dan Powers, CEO of Fisher Construction Group. Whether it is new construction or retrofit of an existing facility, the challenge is to make sure the space can be easily cleaned, he says. "This means washable ceilings, floors and walls, proper floor drainage, no flat ledges that can collect water or food debris, minimal utilities in the room, and temperature controlled separately from the rest of the facility."

"I come from the food processing and packing industry where I ran the SQF process and experienced an endless number of audits," says Jim Kinane, Senior MEP/Process Engineer for Fisher Construction Group. The most important step a construction company representative can take is to understand what the needs of the food processor or warehouse owner are in terms of audits and compliance requirements, he adds. He notes that floor design is critical to effective cleaning. Not only do floors need to be sloped properly so water flows into drains, but the type of floor covering is important. "We use a polymer floor coating that rolls up at the wall to be sure that when employees sweep or spray the area during cleaning, no food particles or water can collect in the joints between the floor and the wall," Kinane explains. Elimination of any amount of standing water is important because it supports bacteria growth.

The process to clean the room requires materials that can handle hot water and corrosive cleaners, says Chris Mann, Regional Vice President for Primus Builders. "Food grade light fixtures that are sealed tight and waterproof outlets are essential for the area," he says. Everything in the room must also have enough room between the equipment and the floor or wall to allow cleaning behind or under any equipment or any other fixture in the room and to make sure that water is able to flow freely to the floor drains. Even handrails, which are always round, must be 2 inches off the wall, he adds. Equipment is placed on legs up off the floor so it is easy to clean beneath and exposed utilities are limited for easier cleaning and less opportunities for micro-organisms to build up. (Photo courtesy of Fisher Construction Group.)

"In terms of achieving a BRC or SQF standard, pay careful attention to the routing of sanitary drainage piping," suggests Marko Dzeletovich, P.Eng, President of Coldbox Builders. "Try to avoid running sanitary piping above areas with exposed product in them, and when below grade, try to place clean outs and piping outside of production rooms. By keeping sources of contamination away from exposed product areas a lot of potential hazard can be eliminated," he adds.

"Remember that industrial waste and sewage cannot be mixed," Mann says. "Keeping lines separate will eliminate the risk of bacteria from sewage from entering the clean area."

Wastewater and how it needs to be handled is an often overlooked issue when a PRW looks to add a food processing area, according to Powers. "Can the water supply handle the volume of wastewater the facility will produce and what level of treatment does it require while onsite?" he asks. "It's important to work with the municipality to determine local standards and requirements."

How loading docks will be used and where they are located is another factor to consider when adding any type of food processing into a PRW, Mann points out. "You cannot share docks for raw and finished product," he says.

When considering co-processor space, cold storage owners should always compare the cost of retrofitting an existing building to building new space, Powers suggests. "Most people are surprised to learn that construction of food processing space costs 40-50 percent more than cold storage space," he says. Specialized materials, additional structural space to house utilities outside the clean room



The beveled corner between wall and floor and the stainless steel IMP wall with flashing on the top edge to prevent material buildup make for easy cleaning. (Photo courtesy of Fisher Construction Group.)

and separate systems for temperature control, drainage, and ventilation add to the cost.

However, retrofitting an existing space can also come with hidden costs.

"The toughest challenge for a facility that was built and has been operating without accreditation by BRC or SQF would be the state of repair of the facility and the ability for the operator to ensure the facility can be properly cleaned," Dzeletovich says. "In my experience, this typically means patching holes in insulated walls, patching floors that are not smooth and impervious, repairing concrete curbs that are broken, and eliminating crevices and spots where dirt and bacteria can accumulate or are hard to keep clean," he says. "Exposed insulation needs to be sealed with a coating or covered with a light gage metal liner." He also cautions, "When covering insulation with a liner, be sure to allow for adequate venting and avoid creating an air heat trap between the insulation and liner which can result in condensation."

Condensation is another potential challenge for facilities trying to meet facility food safety standards, Dzeletovich says. Condensation can form due to vapor leakage through the building envelope which allows warm moist air to infiltrate into a cool dry room or when there is inadequate insulation between two environments creating a cold surface for moisture in the air to condensate.

Designing and constructing the space correctly from the beginning saves the PRW owner time and money, but the "sticker shock" of expenses associated with processing space may tempt people to find ways to save. "I have seen many food processing facilities cut corners on the building design or construction, only to have to go back and fix problems in a few years – at a higher cost than they would have paid originally," Kinane says.



Floor design, such as this epoxy floor with a stainless steel drain, is critical to effective cleaning. (Photo courtesy of Fisher Construction Group.)





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Bonar Engineering, Inc. PO Box 60009, Jacksonville, FL 32236 Ensuring that a facility is built to help achieve food safety standards is critical for cold storage owners and food processors.

He recommends using a company that is familiar with the requirements of the food safety standards. "For example, our crews know that they can't use wire brushes during construction or retrofits because undetectable pieces of wire might break off and be left behind, and they understand that we can't use diesel generators to run equipment when working in an operational plant." Understanding the standards allows the contractor to help the owner comply with them, he adds.

Upfront planning with the food safety standards in mind is critical, says Dzeletovich. "Before proceeding with design and details, we organize a list room by room and then alongside the facility operator, we meet with the food safety regulator or food standard authority to review the plan with them," he says. "Creating this scope of work with a controlled environment professional who understands food safety principles, design and construction will yield a practical approach to retrofit." By involving regulators early in the process, and even inviting them to periodically review the site as construction progresses, to make sure that standards are addressed leads to a swifter approval process, he adds.

Ensuring that a facility is built to help achieve food safety standards is critical for cold storage owners and food processors, Kinane points out. "If a processor is selling to a retailer who follows specific food safety standards, whether it be BRC, SQF or other standards, they won't buy unless it can be proved through audit and certification that the process complies with the same standards. The goal is to build facilities that are easier to clean and keep clean, helping the processor meet the required standards."

**SHERYL S. JACKSON** is a freelance writer based in Alpharetta, Georgia, who specializes in industry issues and trends.

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## GCCA ESTABLISHES BRAZIL OFFICE

Partnership with ABIAF to add value to Brazilian cold chain companies.

#### By Alexandra Walsh

hrough an agreement with ABIAF (Associação Brasileira da Indústria de Armazenagem Frigorificada) that was signed at the end of 2017, GCCA is launching a new office in Brazil. The objective of GCCA Brazil will be to deliver services, resources, and programs in partnership with ABIAF that will add value to all Brazilian cold chain businesses.

GCCA leadership in Brazil has been key to this success. Director Presidente of Friozem Logistica and Past Chairman of the WFLO, Fabio Fonseca, and CEO of SuperFrio and the newly appointed WFLO Board Member (and current Chairman of ABIAF), Francisco Moura, have been integral to the establishment of GCCA Brazil through their guidance and strategic advice.

Moura explains that ABIAF initially undertook a three-year partnership with GCCA, with a mandate that was limited to a few issues, and that partnership ended in December 2017. The members, the primary cold storage companies in Brazil, then decided that a new and stronger partnership with GCCA was the right direction to achieve the industry's goals. "Since January 2018, we have been working together in this new partnership that we believe will foster more growth for the cold storage industry in Brazil, and make the companies much better."

Moura notes, "The cold chain in Brazil has grown very fast in the past few decades with private equity funds investing in the sector. This is helping create a better and more competitive environment, and companies are looking for professionalism, management and technical best practices, and new leadership."

"While I was working so closely with the GCCA staff as a board member and chairman of the WFLO, I dreamt that one day we could have something similar to GCCA in Brazil," Fonseca recalls. "I observed the GCCA doing a wonderful job helping PRWs deal with so many issues from safety to regulations to new technology."

#### **Quick Progress**

One major milestone accomplished by GCCA Brazil/ABIAF includes a successful Food Safety and Regulatory Roundtable in Sao Paulo in February 2018. A representative of the Ministry of Agriculture, Dr. Mauricio Goes, attended and participated in a question and answer session during which many Brazilian members vocalized their concern over various issues.

The roundtable led to the launch of the GCCA Brazil & ABIAF Food Safety and Regulatory Technical Committee, chaired by Vivianne Moreira Leite, CAP Logistica Frigorificada. The main objective of the committee is to monitor and influence legislation and regulations impacting the Brazilian cold chain industry, recognizing the need for industry advocacy related to food safety and regulatory issues under the Brazilian Ministry of Agriculture. The industry has expressed that current regulations are overly burdensome and do not align with industry best practices as supported by the association.

Moura says the hope is that the Food Safety and Regulatory Committee will unite the GCCA Brazil/ABIAF members in defining a unique agenda to deal with a government that is substantially impacted by huge bureaucracy, rules that make no sense to warehouses, and other problems. "We selected a great leader and food safety specialist in Leite, and our members are very excited." "Today we are struggling with the lack of technical reference in the current legislation," Leite explains. "Cold storage facilities are categorized as meat establishments and must follow the same guidelines as the meat processing industry even though we know that these guidelines are too strict for the health risks involved in our processes. We also face many problems with the wide and varied judgments and interpretations of these guidelines by inspectors, and we are proposing a nationwide change in the current regulations based on technical and practical arguments."

In addition, a GCCA Brazil Management Committee has been appointed to assist with GCCA Brazil and includes Fonseca, Luiz Aires of Log Park, and Patricia Moreira Leite of Ap Rio Serviços de Logistíca Ltda /Frimorite Frigorífico (formerly Bomfrio). The three experts will hold monthly meetings and will be responsible for providing guidance to the GCCA Brazil and ABIAF executives.

The association is also in the process of recruiting a fulltime, salaried Brazil representative who will operate out of Sao Paulo to provide member services and operational guidance to achieve the goals of the association.

Commenting on the impact GCCA Brazil will have on ABIAF and the Brazilian cold chain industry, Moura says, "ABIAF lacked technical support and focused management, and GCCA has just solved these problems. I do think all Brazilian cold chain companies will have the opportunity to improve management, leadership capabilities, and technical expertise. We will have more sustainable growth, intensify supply chain optimization, and improve our relationship with government agencies." Moura added that service to ABIAF members has already improved greatly since January and expects the trend to continue as more initiatives are implemented.

"GCCA brings together the PRWs, transportation, and construction companies and this is such an important network. We will be able to host events that will enable our customers to better understand our industry and the services we can provide," Fonseca adds.

"We believe the impact will be major and

positive for both GCCA and ABIAF," Leite contends. "Exchanging experiences, expertise, and knowledge can bring many benefits to the Brazilian cold chain industry, both short term and long term. We hope that from this partnership, we can commit to the highest standards of quality and performance. We are sure that this partnership will bring innovative ideas that will break old paradigms and be a fresh start for the cold chain industry as a whole." @

ALEXANDRA WALSH is a Senior Publishing Consultant with Association Vision and Managing Editor of COLD FACTS.

EMAIL: awalsh@associationvision.com



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## FOOD MAX

With approximately 44 million tons of food lost between farm and fork in the United States alone – enough to feed every American for three months – the temperature-controlled warehousing and logistics industry has taken on the responsibility of working towards a solution.

Members of the GCCA are at the forefront of this initiative, working with customers, food banks, and other charities that rescue food that might otherwise go into a landfill.

This case study showcases a GCCA member's solution to maximize food resources.

RLS Logistics, a New Jersey-based temperature-controlled transportation and logistics provider, has always been interested in helping reduce waste, notes Greg Quast, Vice President of Operations, Freight Consolidation, at RLS.

"We've always worked with shippers to help them find better ways to ship their product to avoid damage in the first place," Quast points out. "From shrink wrapping suggestions to pallet configuration ideas, these preventive measures have saved a lot of food from being destroyed. But after shipping, the problem has always been where to donate the products we ship if there is damage."

Quast says that without the knowledge of a network of people who could receive frozen and refrigerated product, they really had no one to contact. And traditionally, food banks only have the ability to handle dry goods, and therein lay the challenge.

"When our company's Rhonda Whittaker took on the program, she became the driving force behind making the donations happen. Sometimes it takes quite a bit of time to make a donation happen and her perseverance and passion is really why we have been successful," Quast says. "I used to watch thousands of pounds of food go to waste because it's more cost effective to dump it than it is to ship it back to the dock and re-wrap the pallet," explained Whittaker. "Coordinating donations was a long process and often a game of chance."

Whittaker says the OS&D (Over, Short, and Damaged) team had to find a local charity that was on the same route as the driver, open at the right time, and had the facilities to care for refrigerated foods. "It was a huge coordination scramble. While the team had the right idea, they needed a faster, more reliable way to get the food to the people who needed it most."

After years of scrambling to find food banks, Whittaker finally connected with the Food Cowboy Foundation and MealConnect. These two companies specialize in creating a network of local food banks in proximity to a truck driver. As a nationwide service, they provide contacts and coordinators that bridge the communication gap between logistics companies and the food banks.

Using both MealConnect and Food Cowboy to facilitate donations, RLS managed to donate more than 16,000 pounds of edible food saved from landfills, or close to 4000 meals, in just the first three months of 2018. In total, RLS has donated nearly 14,000 meals in the past few months through their work with around a dozen food banks from coast to coast.

"I'm able to connect pallets to food banks in as little as 10 minutes, and RLS has easily surpassed what we salvaged all of last year in just a few months by utilizing these logistical networking programs," Whittaker is thrilled to report.

Quast readily admits that for RLS, it would be easier to solve the problem of damaged product by just making a quick call and having the driver dispose of it. "However, when you look closer, there are several factors that drive us to find homes for this food," Quast notes. "First and foremost is the waste. Every day we see people around the world and at home starving. This is good food that often times is rejected because of a small tear in the box or even a crease. Second is the burden it puts on our carrier. They must now deal with an issue that could delay them in getting to their next stop or reload and it costs them time. And last is the effect it has on others in the system from the shipper who worries about where it will be disposed of to the poor guy who owns the dumpster that is now full of product."

In short, Quast says when RLS donates rather than dumps, it's more of a win than a loss.

We want to hear from you! Contact GCCA Director of International Programs Richard Tracy at rtracy@gcca.org and tell him what your company is doing to be part of the war on waste. @

#### **The Food Cowboy Foundation**

The Food Cowboy Foundation has recently become a GCCA Strategic Partner as part of the association's mission to forge a universally strong cold chain where every product retains quality and safety through each link. Food Cowboy was selected as a Strategic Partner in this important mission because of the foundation's ability to use its communications services to enable businesses to swiftly, safely, and productively move surplus food out of the cold chain as donations to charities feeding people in need.

Food Cowboy has an extensive database of charities able to receive food donations of various sizes, and its success in reducing the amount of food wasted relies on an increasing number of businesses in the cold chain accessing its services. A strategic partnership with GCCA will increase Food Cowboy's visibility among its members while also increasing the visibility of the problem of food waste and of the role that GCCA members can have in its solution. The foundation hopes that this partnership will result in an increase in the amount of food that Food Cowboy is able to help donate to the hungry people in communities throughout the country.



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### MEMBER NEWS NEWS FROM MEMBERS OF GCCA CORE PARTNERS

**BELLINGHAM COLD STORAGE** has sold a majority stake in its company to The Joshua Green Corporation purchased a majority stake in. Since its founding on the Bellingham, Washington waterfront in 1946, Bellingham Cold Storage has been wholly owned by the Talbot family. After this sale, JGC will own a majority of the company, and the Talbot family will remain shareholders. Doug Thomas will remain president and CEO.

Siblings Stowe and Jane Talbot are third-generation owners of Bellingham Cold Storage. In late 2017, they decided to look for an investment partner that would enable the family to continue its involvement in the company at a reduced level while also encouraging its future growth. After a thorough search for suitable partners, the Joshua Green Corporation stood out as the best candidate. The Talbots selected JGC for its business acumen, financial resources and, most of all, the values it shares with BCS.

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**CATHAY PACIFIC** announced a new partnership with **VA-Q-TEC**. va-Q-tec's advanced passive thermal containers, which are designed to maintain a constant temperature during transportation for more than five days, will be a strong addition to Cathay Pacific Cargo's Pharma LIFT portfolio by providing its global customers with an excellent solution for moving life-saving pharmaceuticals by air freight.

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CHILTERN COLD STORAGE celebrated its 25th birthday by buying a limited-edition Mercedes-Benz Actros1. Choosing an all-silver finish to commemorate the silver anniversary, the truck is one of just 100 Actros1 models being built. It was supplied by East Anglia's Orwell Truck and Van. While the truck has been assigned to long-serving driver Wojciech Pospiech, Chiltern Founder and Managing Director Paul Jackson took the Actros out for a spin. The result, he said, was "stunning," and described the Actros1 as "a fantastic looking truck which is exceptionally comfortable and offers huge reserves of power, yet still returned a very acceptable 9 mpg." Pospiech will use the Actros1 on regular runs to and from Naples and Milan.



#### THE INTERNATIONAL DAIRY FOODS

**ASSOCIATION** named A. Bailey Wood Jr. to the expanded position of Vice President of Communications, Public Relations and Marketing. Wood will be responsible for developing and implementing a broad range of marketing and public relations activities to support the association's strategic direction and enhance its position as a thought leader in the food and beverage industry.





LINEAGE LOGISTICS, LLC acquired Service Cold Storage. Located in Central Wisconsin's Stevens Point, the SCS facility is less than five years old and spans over 11 million cubic feet of temperaturecontrolled storage space. Construction on a significant expansion is underway that will bring the facility footprint to nearly 20 million cubic feet. **METL SPAN** hired Chad Draxler as Vice President of Engineering. He brings with him more than a decade of experience from Steel King Industries and ADC Custom Products. The company also hired Craig Storch as Director of Engineering. A graduate of Portland State University with a Bachelor of Science in Civil Engineering, Craig brings a deep knowledge of engineering and experience with IMPs, steel buildings, CAD and project management. They will fill the shoes of Rahim Hakimi, who retired from his role as Vice President of Engineering after 35 years of service.

**PREFERRED FREEZER SERVICES** opened its newest facility, Big Bear Los Angeles. The new facility marks the company's seventh in the Los Angeles area and thirty-eighth in the United States. It has nearly 95,000 frozen pallet spaces and 32 dock doors.

**REED BOARDALL** appointed Graeme Richardson as Managing Director of its Transport Division. With expertise in operations management, logistics, and supply chain management, Richardson was previously with National Holidays Ltd, where he was a director. Before that, he spent five years with Tesco in a variety of roles. **@** 



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### ASSOCIATION NEWS NEWS ABOUT GCCA CORE PARTNERS

**GCCA** released a *Cold Chain Customer Research Report* during the Global Cold Chain Expo in June. The report highlights the perceptions food companies have of their third-party cold chain providers and how cold chain providers can improve their services and relationships with these partners. Over 270 refrigerated and frozen food companies engaged in a Cold Chain Customer Survey last September. Those results combined with data from a series of customer focus groups GCCA conducted over the past few years culminated in the report.

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Energy is the second highest cost in the industry behind labor. Managing energy costs is a high priority for **IARW** members and one of the reasons the association established a goal in its latest strategic plan to reduce energy consumption across the industry by 10 percent. One initiative identified by the board to achieve this goal is to create the Energy Excellence Recognition Program, which focuses on creating an "energy culture" at the facility level. The program encourages and recognizes companies for their best practices in this area. To submit facilities into the program, visit the Energy Excellence Hub on the GCCA website.

As part of a USDA-funded project for Southeast Asia, **WFLO** led a group of nine Indonesians and five Filipinos on a cold chain study tour in Manila and Cebu. Working in collaboration with the Cold Chain Association of the Philippines (CCAP), this educational opportunity increased the awareness of the delegation of best practices for cold chain operations as well as future trends. While in Manila, WFLO staff held a GCCA Cold Chain Connection, which brought together cold chain professionals from the Philippines, the United States, Indonesia, Singapore, Vietnam and Australia.

Immediately following a recent **IACSC** Board of Directors Strategic Board Retreat in the Dominican Republic (DR), two IACSC Board members, Marko Dzeletovich and Tim Nguyen, were part of a group that volunteered their time to provide consultative services to the Punta Cana airport, the Santo Domingo Airport, Caribe Cargo Company, two privately run airport terminals, and the Global Foodbank.



The **IRTA** Board of Directors recently held a meeting in conjunction with the Global Cold Chain Expo in Chicago. The board took further steps to lead the cold chain by exploring the development of a certification program based on the STF Guidebook, for carriers. **②** 

## THE GCCA COLD CHAIN CUSTOMER RESEARCH REPORT IS NOW AVAILABLE!



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## COLD CHAIN INNOVATIONS

#### NEW FIRE PREVENTION SYSTEM FOR AUTOMATED WAREHOUSES

When GCCA member NewCold decided to open its first fully automated cold storage warehouse in the United States, one of its challenges was to select the right fire-protection solution. The use of traditional fire sprinkler systems in automated high-bay warehouses is not an option because sprinklers decrease the high-cube utilization unique to automated warehouses.

NewCold knew it wanted an oxygen reduction system that prevents fires from starting, as this was already a key component in NewCold facilities around the world. The solution was provided by GCCA member Wagner, a leader in fire safety and prevention, and a technology it utilized called OxyReduct<sup>®</sup>.

Rather than reacting to fires after they occur, the system offers a patented oxygen reduction solution to prevent the threat before it materializes. Using existing ambient air to produce nitrogen for fire prevention, it provides maximum protection in an eco-friendly, cost-effective way.

The advantages of OxyReduct over sprinklers are protection of stored products from contamination, or damage or loss from fire, smoke, water, and other extinguishing agents. "Our goal always is to create efficient warehouses with safe working environments," notes Jonas Swarttouw,



U.S. Country Manager, NewCold. "While utilizing OxyReduct doesn't save us money upfront -- the operating costs are higher than a sprinkler system – it does significantly decrease the probability of damage by fire and is part of our risk management strategy."

Cold Chain Innovations, a column brought to you by Tippmann Innovation, features the latest technologies, cutting-edge solutions, and innovative practices that the cold chain industry has to offer. Featured in each issue of COLD FACTS Magazine, the Cold Chain Innovations section gives readers thought-provoking ways to optimize their supply chain and improve operational efficiencies. The information presented in the Cold Chain Innovation section is sourced from GCCA members. To feature your news, press releases or submit your idea for a future Cold Innovation article, contact Laura Poko at Ipoko@gcca.org or call 703.373.4300.

### NEW MEMBERS NEW MEMBER COMPANIES OF GCCA CORE PARTNERS



#### IARW-WFLO WAREHOUSE MEMBER

Service Cold Storage Fort Lauderdale, FL United States



IARW ASSOCIATE MEMBERS Controlled Azane Refrigeration Tustin, CA United States

Mandich Group VC/Investment Group Miami, FL United States

**Modern Material Handling, Co. Inc.** Greenville, SC United States Prosperio Group New Lenox, IL United States

Pacific Cooling Services S.A. Pacoolse Gaybor Quayaquil, Ecuador

**Tel-Tru Manufacturing Co.** Rochester, NY United States



#### GCCA STRATEGIC PARTNER

Food Cowboy Foundation Bethesda, MD United States



IACSC MEMBERS Innovafoods, S.A. Guatemala, Guatemala

**Zero Zone, Inc.** Ramsey, MN United States



IRTA MEMBERS Pacific Cooling Services S.A. Pacoolse Gaybor Quayaquil, Ecuador

**Seldat Distribution, Inc.** Plainfield, NJ United States

Service Cold Storage Fort Lauderdale, FL United States @

## 2018-2019 CALENDAR

JULY 16-18, 2018

WFLO Institute: Latin America Mexico City, Mexico

JULY 17, 2018 GCCA Brazil Cold Chain Connection Sao Paulo, Brazil

JULY 29-AUGUST 1, 2018 2018 GCCA Assembly of Committees Washington, D.C., United States

OCTOBER 18, 2018 GCCA Brazil Annual Conference Sao Paulo, Brazil NOVEMBER 5-7, 2018 IACSC Conference & Expo Las Vegas, Nevada, United States

#### NOVEMBER 11-13, 2018

GCCA Latin America Cold Chain Congress Lima, Peru

FEBRUARY 10-13, 2019 55th WFLO Institute East Atlanta, Georgia, United States

MARCH 3-6, 2019 WFLO Institute West Los Angeles, California, United States APRIL 7-10, 2019 128th IARW-WFLO Convention Santa Ana Pueblo, New Mexico, United States

JUNE 10-12, 2019 2019 Global Cold Chain Expo Chicago, Illinois, United States

JULY 28-31, 2019 GCCA Assembly of Committees Washington, D.C., United States

\*For more details go to www.gcca.org/events

## Have a cold chain question? We have an answer for you!



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2. Submit your question online

If you're not a member or unsure how to post in the GCCA Online Community, contact the GCCA Inquiry Service by calling GCCA headquarters at +1 703-373-4300 or submitting your question using our online form at www.gcca.org/inquiry-form

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### COOL PEOPLE PROFILING INFLUENTIAL PEOPLE CONNECTED TO THE COLD CHAIN INDUSTRY



#### FRANCOIS DOWLING

Thirty years ago, Francois Dowling started as an accountant at CCS Epping and recently retired from CCS Logistics in Cape Town, South Africa, as Compliance and Projects Manger. He also served for several years on the WFLO Board of Directors.

#### What has GCCA meant to you and how valuable was it to be connected to a global group of your peers?

**FRANCOIS DOWLING:** The GCCA had regularly assisted our company in arranging site visits to, and discussion opportunities with, European and American members when we were contemplating operational and/or structural changes, or introduction of new technology such as handling equipment and warehouse management systems.

The various manuals published by the GCCA were useful in assessing the efficiency of our own processes, while the ongoing publication of white papers on relevant issues provided food for thought and benchmarks to measure our activities. The inquiry service offered access to experts who were always willing to assist.

In this regard, I believe that my inquiry a few years ago about freezing and storing a whole whale carcass caused quite a stir among the scientists followed by a clear message to not even consider it, given the specific issues! The growing population and growth in the emerging middle class in South Africa specifically, and Africa in general, is creating growing demand for frozen and temperature-controlled food products to be stored and distributed, creating opportunity for growth in the industry.

CF: What are some of the major events or milestones in the development of the South African cold chain industry that you think had the greatest impact?

**FD:** Cost of land/ownership in South Africa is high, forcing PRWs to optimize use of limited space. When I started out in the Industry 30 years ago, the standard storage method was block-stacking of product in steel crates, with obvious disadvantages.

Customer demands for improved service levels, faster stock-turns, increasing labor costs and food safety standards drove mechanization. South African PRWs followed European practice, installing mobile racking supplemented with drive-in and singledeep static racks to optimize space. This direct access to individual pallets combined with WMS tracking movements and use of heated-cab reach trucks brought service and cost efficiencies.

Another major event was the inconsistent electricity supply experienced around 2008, coupled with large annual tariff increases thereafter, which forced the Industry to change behavior in respect to scarce resources. This drove down consumption and created the opportunity to consider alternative processes.

## CF: What was it like for you serving on the WFLO's Board of Directors?

**FD:** It had been a great experience meeting industry leaders and technical specialists from the United States, Europe and elsewhere, and having open discussions about the issues confronting our Industry.

Additionally, travelling to the different venues for annual conventions and board meetings afforded me the opportunity to visit nearby refrigerated warehouses, meeting on-site executives and having discussions regarding operational, maintenance, labor and safety issues in general, and sharing ideas on solutions and possible implementation back home.

#### CF: What trends are you seeing, and what predictions would you make, with regard to the growth of 3PLs in South Africa and Africa in general?

**FD:** The growing population and growth in the emerging middle class in South Africa specifically, and Africa in general, is creating growing demand for frozen and temperaturecontrolled food products to be stored and distributed, creating opportunity for growth in the industry. A challenging feature is that major retailers are consolidating their supply chains, including fresh and frozen products, in large distribution centers in large facilities in the major cities.

While smaller, stand-alone regional businesses will continue competing in this market, successful 3PLs have to provide a national presence with facilities in all large urban centers and increase their capacity, (one-stop) service offering and service levels generally. This is leading to increased competition, consolidation, and growing capacity.

This trend will repeat in Africa immediately to the north of South Africa, as South African retailers move into these markets, duplicating their local model, but opportunities will open for PRW 3PLs as the market and focus on optimal post-harvest processes and preservation of foodstuffs grows. **@** 



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