



# DELIVERING A SUSTAINABLE, RESILIENT PERISHABLE-GOODS SUPPLY CHAIN



A plan for growth and transformation in the European cold chain





## THE COLD CHAIN MATTERS

By safely and efficiently storing and transporting perishable goods, the cold chain feeds a fast-changing population, fuels trade and economic growth, and provides a vital frontline in adapting to climate change.

In the past 5 years, the European cold chain has been seriously tested, but it has proved resilient. It kept food on the shelves through the pandemic, the energy crisis and the supply chain disruption of the war in Ukraine. In 2021, over a few weeks, cold chain professionals built a unique storage and transportation infrastructure that delivered life-saving vaccines to more than 350 million people.

There is a new awareness of the importance of cold chain logistics. We have also learnt the cold chain faces specific challenges and opportunities. For this reason, our organisations have come together to set out this manifesto for action.

We call on all candidates seeking election to the European Parliament, the incoming EU Commission team and the national representatives convening in the Council of Europe to recognise the importance and positive role that cold chain businesses play in the European economy and society and commit to working with us to secure positive outcomes for the future of our vital supply chains.

## THE COLD CHAIN EXPLAINED

The cold chain is a network of companies that store and transport perishable goods in a secure, temperature-controlled environment. Cold chain exists at every stage of the supply chain, from the point of production to manufacturing and storage and ultimately on to retail or catering establishments and people's homes.

Managing goods through the chain is a highly specialised job undertaken by dedicated and skilled professionals. The overriding priority is to ensure product safety and quality; by achieving this, the cold chain provides certainty to producers, maximises availability, and protects consumers.

The cold chain relies on specialist buildings and equipment, produced and maintained to high

standards, and constantly seeking innovation and improvement in performance and efficiency from dedicated suppliers.

In the food sector, the cold chain is the first defence against post-harvest food waste, ensuring most of the food produced is delivered to consumers. This maximises the opportunity to bear down on food waste and reduces the burden on agricultural production and land use to feed Europe's growing population.

The success of the cold chain in Europe is seen in contrast to the continuing harm seen in significant parts of the Global South, where between 30 and 70% of food never makes it to consumers, almost entirely because of the lack of robust cold chain.

The cold chain supports a **food sector** that contributes **€800 billion** to the European Economy<sup>1</sup>

**2.9 billion tonnes** of **food stuffs** were transported by European registered HGVs<sup>2</sup>



# COLD CHAIN IS VITAL TO A RESILIENT AND SUSTAINABLE FOOD SYSTEM

Providing security of food supply has been one of the founding objectives of the European Union, and in recent times, the Farm to Fork Strategy has provided direction to the ambition to make food systems fair, healthy and environmentally friendly. Cold chain operators believe that the Strategy must be reviewed and renewed to ensure better recognition and support for the importance of storage and transportation infrastructure.

In the EU, nearly 29 million tonnes of food waste are generated annually, and at the same time, more than 32 million people cannot afford a quality meal every second day. Cold chain operators have played a vital role in developing food redistribution systems and initiatives across Europe. Helping to ensure food at risk of waste in one part of the chain is made available for use is a significant opportunity and for all in the supply chain.

## We call on policymakers to support the following principles in future strategy and policy making

- Cold chains prevent food waste. Investing in cold chain is a vital frontline in ensuring we consume more of the food we produce. We seek further engagement on how EU policy can facilitate this.
- Cold chain is central to European food security – businesses willing and able to invest in new and existing infrastructure and transportation capacity must be supported and incentivised.
- Clear, consistent and proportionate regulations on food safety, health and safety and environmental standards are vital to the success of European cold chain – logistics businesses must have a seat at the table when policy changes are considered.
- Changing regulatory standards for construction, equipment and fluorinated-gas use bring big opportunities for cold chain, but there are risks and trade-offs, these must be fully understood at every stage.
- European businesses, academics and development agencies play a key role in building the cold chain across the world. The EU must work with them to support investment in infrastructure, common standards, and skills development in emerging markets across the world.

## 42 million tonnes

of **meat** produced in the EU was transported and stored by cold chain businesses<sup>3</sup>

## 160 million tonnes

of **milk** produced, and processed in drinking milk, cheese, butter and other products<sup>4</sup>





# COLD CHAIN WILL THRIVE IN A DECARBONISED EUROPEAN ENERGY SYSTEM

Modern cold chains are highly efficient. Our warehouse estate has driven continuous improvement in using less energy for more product stored. We have also seen major increases in the use of renewable energy, from investments in on site renewable energy generation. Transportation companies are making game changing investments the use of renewable fuels, electrification, and engine efficiency both for the vehicle engine and the refrigeration technology on the vehicle.

Nonetheless, keeping food and pharmaceuticals safe and preventing waste is an energy-intensive endeavour, and it is the shared ambition of businesses across the cold chain to reduce the carbon impact of operations.

Cold chains rely on a secure, consistent, affordable energy supply. The recent energy crisis showed the vulnerabilities of our existing energy system, which will continue. As the drive to decarbonise our energy systems intensifies, we must ensure that the lessons of that period are learnt. There must be a clear prioritisation of food and pharmaceutical supply chain infrastructure in crisis planning for future energy shocks, and we must ensure now that cold chain operators are incentivised to invest in renewable energy generation and smart grid integration.

## We call on policymakers to support the following principles in future strategy and policy making

- Cold chain is critical infrastructure and must be prioritised at times of energy shortage. Energy must remain consistently available and affordable for cold chain users.
- The decarbonisation of transport (and mobile refrigeration) has sweeping implications for food supply chain, and cold chain transportation companies must be fully consulted and supported at all stages of transition.
- Energy efficiency provides massive opportunities for increasing resilience and reducing emissions in cold chain operations it must be encouraged and incentivised.
- There are major opportunities for energy generation (solar, wind, anaerobic digestion, hydro) and storage to be co-located with cold chain infrastructure, barriers to making this possible such as zoning restrictions, should be reduced and removed across Europe.
- The inadequacy of the energy grid is holding back cold chain innovation and investment across the EU, the future of a more responsive grid could see big opportunities for demand response in cold chain.

Cold chain stored and transported, from the  
**4.6 million tonnes**  
of fishery products<sup>5</sup>

**78.7%**  
of food goods transported  
within the EU travelled  
less than 300km<sup>6</sup>





## COLD CHAIN ENABLES EUROPEAN TRADE AND ECONOMIC GROWTH

The EU single market has driven the prosperity of Europe for more than 50 years, the modern cold chain has evolved within it and facilitated the transformation of our food industry. It has also made it possible for European businesses to buy and sell food worldwide. Cold chain businesses must be consulted as the EU looks to the next phase of its food and trading relations.

In recent years, we have seen how global trade is susceptible to geopolitical and other disruptions; it is therefore vital that food security and resilience are critical features of future trade policy.

This must include properly appreciating the capacity and quality of maritime, road, rail, air freight and warehousing infrastructure to transport and store food and pharmaceuticals. As well as ongoing efforts to reduce the non-tariff barriers to safe, legal, trade flows between markets across the world.

Cold chain facilitated total intra and extra EU food exports at

**€513 billion**

... and facilitated imports from outside the EU valued at

**€110 billion**

### We call on policymakers to support the following principles in future strategy and policy making

- Cold chain provides a gateway to the world for EU food and pharmaceutical importers and exporters from across the world.
- Too much food trade is slowed down or prevented by trade frictions, especially the implementation of sanitary and phyto-sanitary rules – we will promote digitisation and 'trusted trader' eco-systems.
- We will promote the improvement of cold chain infrastructure from reefer plug-in points to warehouse construction and transportation hubs across Europe's Port network.



## COLD CHAIN PROVIDES JOBS FOR TODAY AND TOMORROW

Cold chain, as a specialist part of the transport and logistics in the food and pharmaceutical supply chains, providing a variety of rewarding, skilled and reliable work. The companies represented by the associations supporting this document represent at least 120,000 jobs across the European Union. The cold chain is an indispensable part of the food industry that employs more than 29 million people across agriculture, processing, wholesale, retail and services<sup>8</sup>.

From operational roles driving trucks and operating warehouse equipment, to systems, computing and management roles, a career in logistics is a great choice for people of all ages.

However cold chain is vulnerable, like all of logistics, to the skills and labour shortages across Europe – we must promote opportunities in our sector.

### **We call on policymakers to support the following principles in future strategy and policy making**

- As Europe debates the future of work, we will represent and promote the importance of cold chain logistics as a career opportunity for all people.
- We will champion opportunities to improve productivity, especially changing the nature of manual and adopting new automation and artificial intelligence across cold storage and transport.
- We must ensure that people are aware of the range of fulfilling lifelong careers available in cold chain, and they have access to quality education and practical training about all aspects of supply chain operations and management, before and during their working life.





## FIND OUT MORE ABOUT THE COLD CHAIN IN EUROPE AND THE WORLD



### Asociación de Explotaciones Frigoríficas, Logística y Distribución de España

- Total companies in membership: 53
- Total warehouse storage space: 7 million m<sup>3</sup>
- Total employees in member companies: 20,000
- <https://www.aldefe.org>



### BE Cold

- Total companies in membership: 27
- Total warehouse storage space: 4,700,000+ m<sup>3</sup>
- Total employees in member companies: 818
- <https://www.becold.be>



### European Cold Storage and Logistics Association

- Total companies in membership: c.1000
- Total warehouse storage space: c.105 million m<sup>3</sup>
- Total employees in member companies: c.120,000
- <https://ecsla.eu>



### Global Cold Chain Alliance

- Companies in membership: 1500+
- Total warehouse storage space: 198,000,000+ m<sup>3</sup>
- Total employees in member companies: Unknown
- <https://www.gcca.org>



### Greek Cold Storage and Logistics Association

- Total companies in membership: 180
- Total warehouse storage space: Unknown
- Total employees in member companies: c.5000
- <https://www.cold.org.gr>



### La Chaine Logistique du Froid

- Companies in membership: 100
- Total warehouse storage space: 8.5 million m<sup>3</sup>
- Total employees in member companies: 50,000
- <https://www.lachainelogistiquefroid.fr>



### Schweiz Verband Für Kühl- Und Tiefkühl-Logistik

- Total companies in membership: 36
- Total refrigerated vehicles: 1.5 million m<sup>3</sup>
- Total employees in member companies: Unknown
- <https://svtl.ch/>



### Transfrigoroute International

- Total companies in membership: c.1500
- Total refrigerated vehicles: c.20,000
- Total employees in member companies: Unknown
- <https://transfrigoroute.eu>



### Verband Deutscher Kuehlhaeuser & Kuehllogistikunternehmen

- Companies in membership: 232
- Total warehouse storage space: 22 million m<sup>3</sup>
- Total employees in member companies: 80,000
- <https://www.vdkl.de>



### Vereniging Van Nederlandse Koel- En Vrieshuizen

- Total companies in membership: 150
- Total warehouse storage space: 14 million m<sup>3</sup>
- Total employees in member companies: 9,000
- <https://www.nekovri.nl>



## SOURCES

- <sup>1</sup> Key Figures on the European Food Chain 2023 Edition – Eurostat Nov 2023 p6
- <sup>2</sup> Key Figures on the European Food Chain 2023 Edition – Eurostat Nov 2023 p70
- <sup>3</sup> Key Figures on the European Food Chain 2023 Edition – Eurostat Nov 2023 p33
- <sup>4</sup> Key Figures on the European Food Chain 2023 Edition – Eurostat Nov 2023 p35
- <sup>5</sup> Key Figures on the European Food Chain 2023 Edition – Eurostat Nov 2023 p48
- <sup>6</sup> Data and Trends EU Food and Drink Industry 2023 Edition – Food and Drink Europe p15
- <sup>7</sup> Key Figures on the European Food Chain 2023 Edition – Eurostat Nov 2023 p71
- <sup>8</sup> Key Figures on the European Food Chain 2023 Edition – Eurostat Nov 2023 p6

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THE COLD CHAIN MATTERS

