



GLOBAL COLD CHAIN
ALLIANCE®



Cold Chain Connection

Antwerp

Sponsored by



18 June 2024

Programme



Industry Programme

- Welcome & Introduction – Julie Hanson, GCCA
- Fresh Produce Market Insights – Anouk Sijmonsma, IFPA
- Trade Status & Developments – Philippe Beaujean, Port of Antwerp Bruges
- European Advocacy, Elections & Key Files – Shane Brennan, GCCA

Networking Reception & Dinner

About GCCA

One Global Voice



GLOBAL COLD CHAIN
ALLIANCE®

Warehousing, Construction, and Transportation



GLOBAL COLD CHAIN
ALLIANCE®



C E B A

Controlled Environment
Building Association



Vision

Establish a universally robust cold chain, ensuring the preservation of quality and safety throughout every link.

Mission

To foster growth within the industry and attain a leadership position within the cold chain sector.



Global Footprint



1500+

MEMBER
COMPANIES
WORLDWIDE



92

COUNTRIES

1,200+
FACILITIES



6 OFFICES WORLDWIDE

AFRICA, BRAZIL, EUROPE, INDIA, LATIN AMERICA, USA

Industry Global Footprint



**+/- 800
MIO M³**



**90+
COUNTRIES**



**Y/Y
GROWTH**

International Collaboration



Key Strategies & Priorities



Business Services

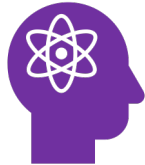
How GCCA Supports Businesses



International networking



Best Practices & Quality Standards



Cold Chain Knowledge & Education

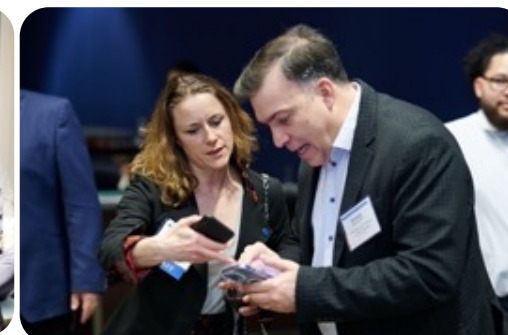


Market Research

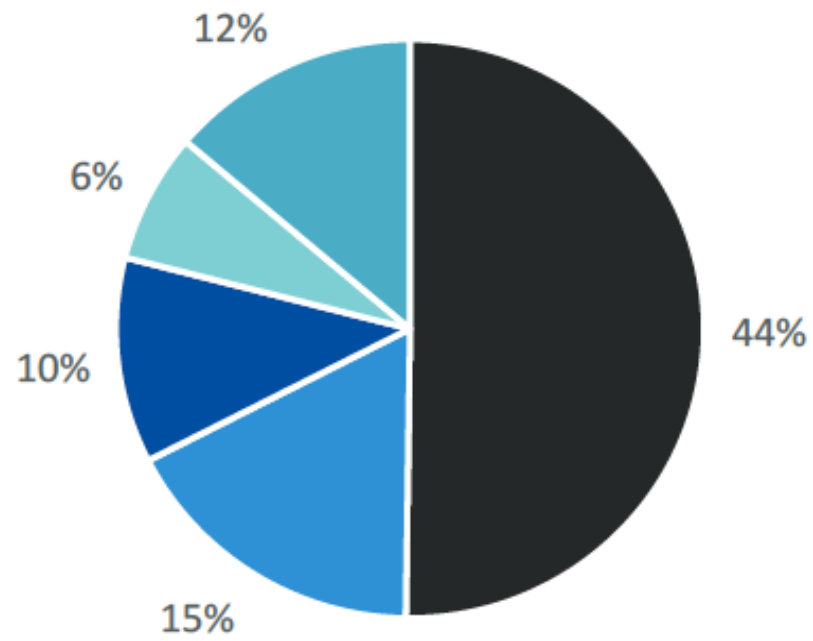


Advocacy & Communications

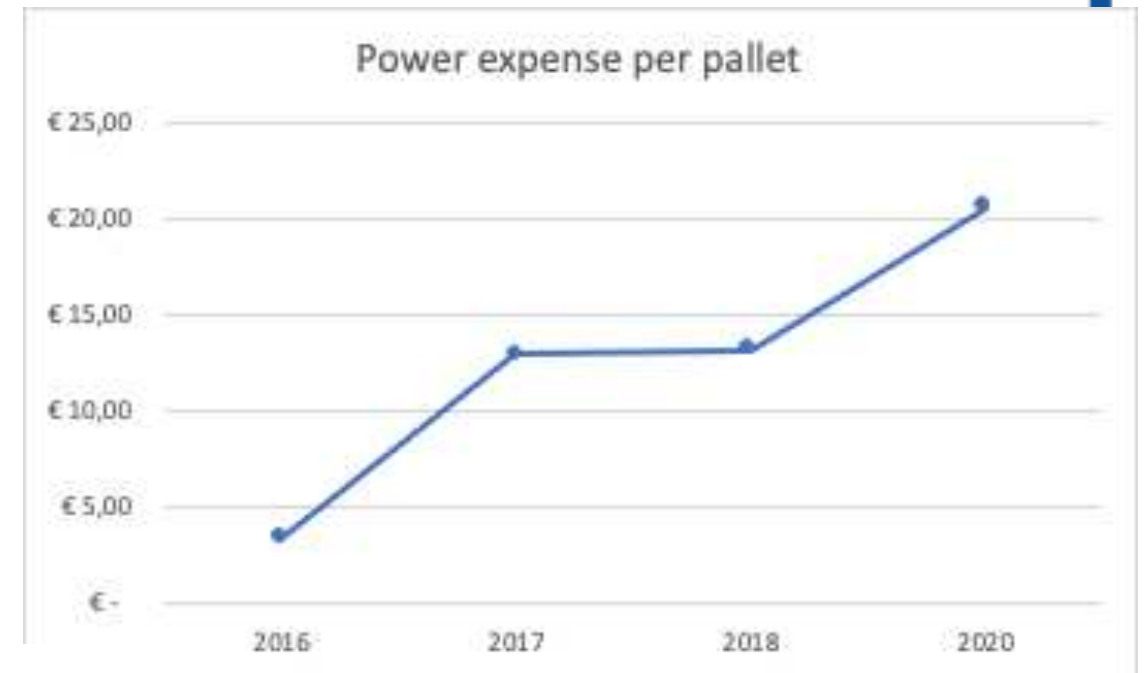
Keeping the Cold Chain Connected



Cold Chain Index



- 1. Labour
- 2. Energy & utilities
- 3. Maintenance & Repairs
- 4. Equipment rental
- 5. Property expenses



Productivity & Benchmarking Report



- **Warehouse Profile**

- Inventory
- Space usage
- Pallet throughput

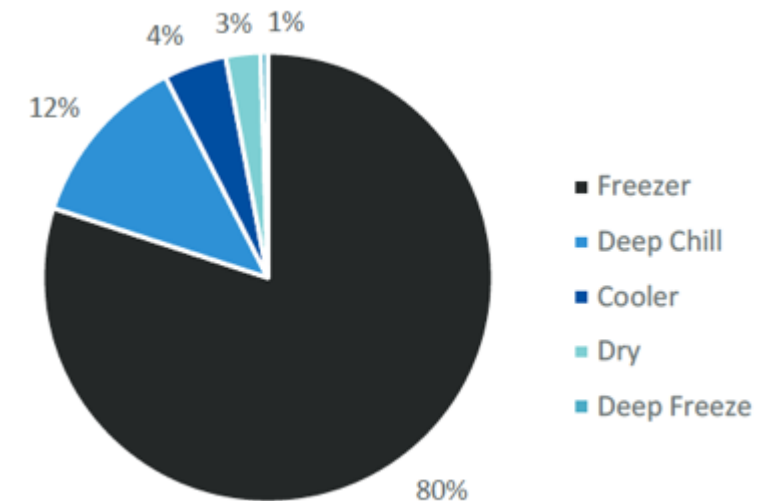
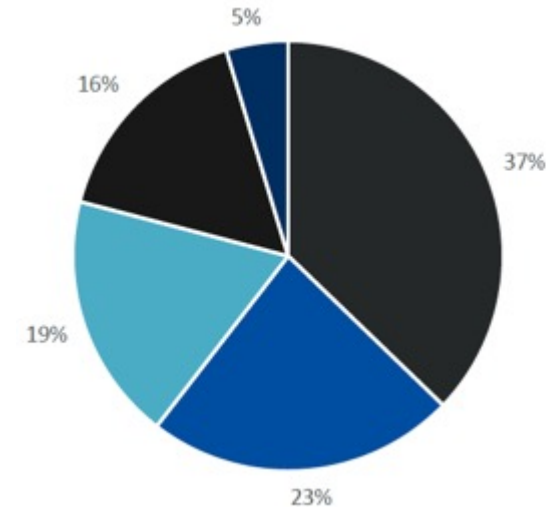
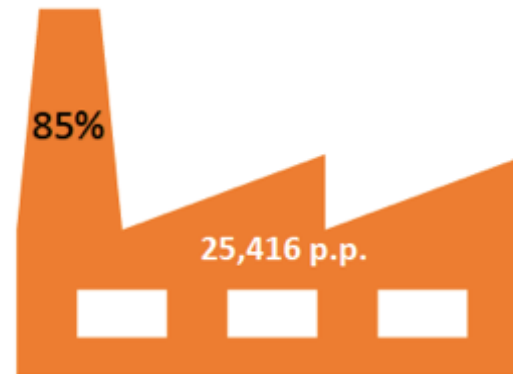
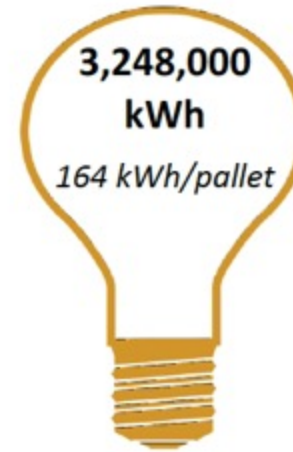
- **Operations**

- Labour
- Energy
- Equipment
- Value-added services

- **Finance**

- Revenue & expenses

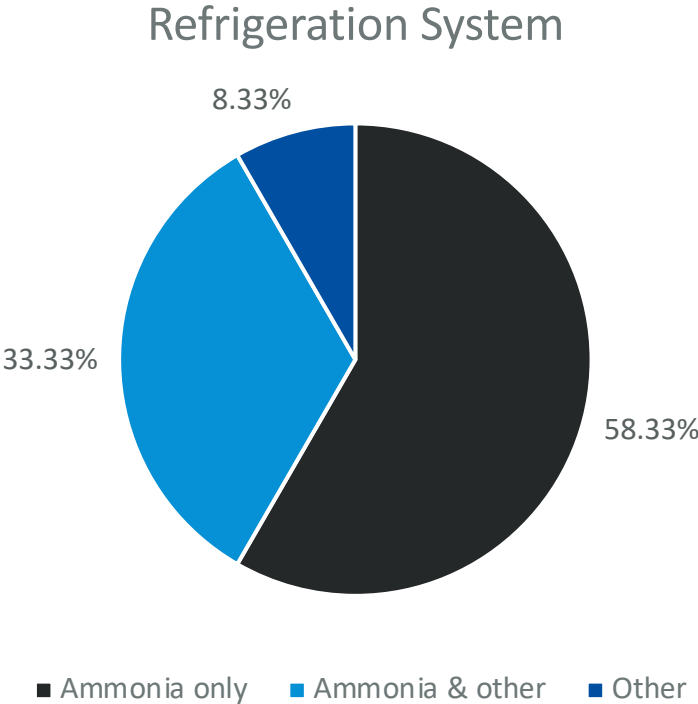
- **Sustainability**



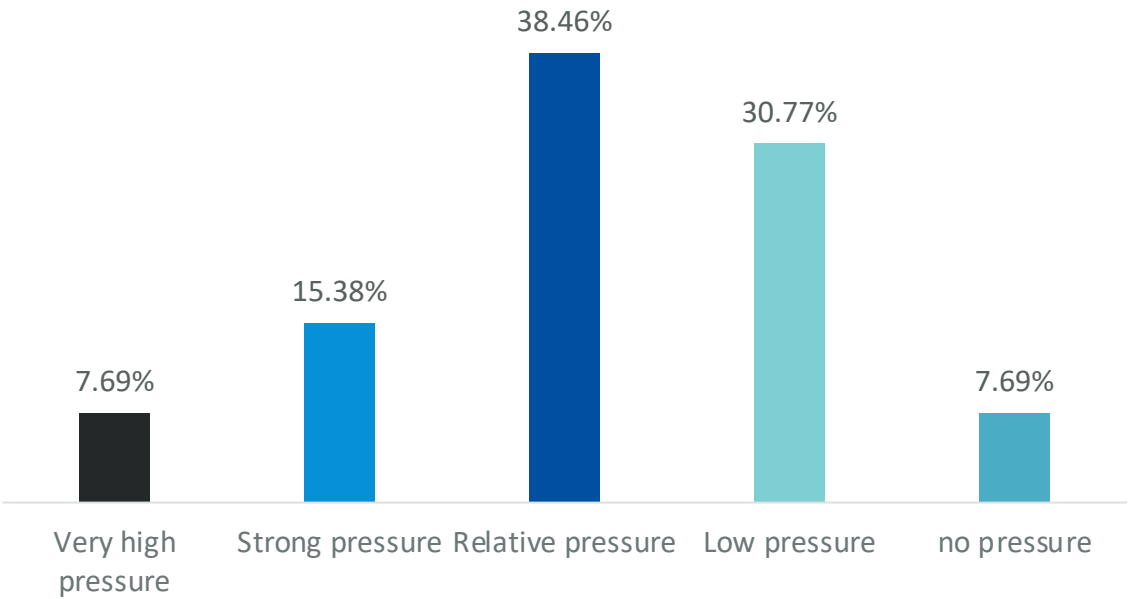
Carbon Footprint Survey



241 Mt CO₂e



Pressure from customers for sustainability



Energy Excellence

- Measure your current energy performance
- Get analysis report
- Receive advice on areas of improvement
- Follow progress
- Promote efforts to customers



Education & Training



COLD CHAIN INSTITUTE EUROPE

2-4 September 2024 - Rotterdam

In-class experience; taught by field experts



Advocacy Priorities

1

Cold Chain is Vital to a Resilient and Sustainable Food System

- Delivering food security
- Preventing food waste

2

Cold Chain will Thrive in a Decarbonised European Energy System

- Critical infrastructure
- Transitional Support
- Renewable generation
- Energy grid investment

3

Cold Chain Enables Trade and Economic Growth

- Reduce trade barriers
- Cold chain at ports

4

Cold Chain Provide Jobs for Today and Tomorrow

- Promote careers
- Champion automation
- Workable immigration

WE SEEK

- recognition for the valuable role we play
- a seat at the table where key decisions are made
- proportionality and consistency in regulation
- workable timelines for decarbonisation transition
- incentives and removal of barriers to investment
- improvements in necessary infrastructure we rely on



Global Cold Chain Development

International Development Projects




111+
PROJECTS IN




67+
COUNTRIES

Thank you to our Sponsor!



BETTER SOLUTIONS IN FIRE PROTECTION



Fresh Produce Market Insights

Anouk Sijmonsma
Regional Manager Europe
International Fresh Produce Association

IFPA's Strategic Commitments to the Industry

Anouk Sijmonsma



INTERNATIONAL
**FRESH
PRODUCE**
ASSOCIATION™

**Create a
vibrant future
for all.**

We grow prosperity for the world
of fruit, vegetable & floral.

ADVOCATE



Advocacy • Foundation

CONNECT



Business Networking • Data & Insights

GUIDE



Expertise • Solutions

Vision

Mission

Objectives

Our Objectives: Advocate, Connect & Guide

Advocate

Advocacy

Purpose:
Public and impactful champion of my business and industry

Policy

Campaigns

Foundation

Purpose:
Create access to fresh produce to grow a healthier world

Foundation

Connect

Business Networking

Purpose:
Grow my business and be connected to the industry

General Events

Special Interest Events

Tools

Giving & Recognition

Purpose:
Giving to something greater

Committees

Awards

Guide

Resources

Purpose:
Resources and information

Research Reports

Broadcast

Newsletters

Education

Purpose:
Leadership development and training

Professional Development

Training



IFPA Councils & Committees

Grower Shipper Council	Finance & Business Management Council	Australia & New Zealand Council	Allied Associations	Organics Committee
Fresh Cut Processor Council	Food Safety Council	Brazil Council	Business Solutions Roundtable	Political Advisory Committee
Wholesaler-Distributor Council	Marketing & Communication Council	Chile Council	DEI Committee	Produce Foodservice Committee
Retail Council	Supply Chain Council	Mexico Council	Floral Committee	Product Identification Committee
Foodservice Council	Sustainability Council	South Africa Council	GP&FS Committee	Talent Advisory Committee
CEA Council	US Government Relations		Global Development Committee	Womens Fresh Perspective Committee



2024 Global Industry Trends

Anouk Sijmonsma



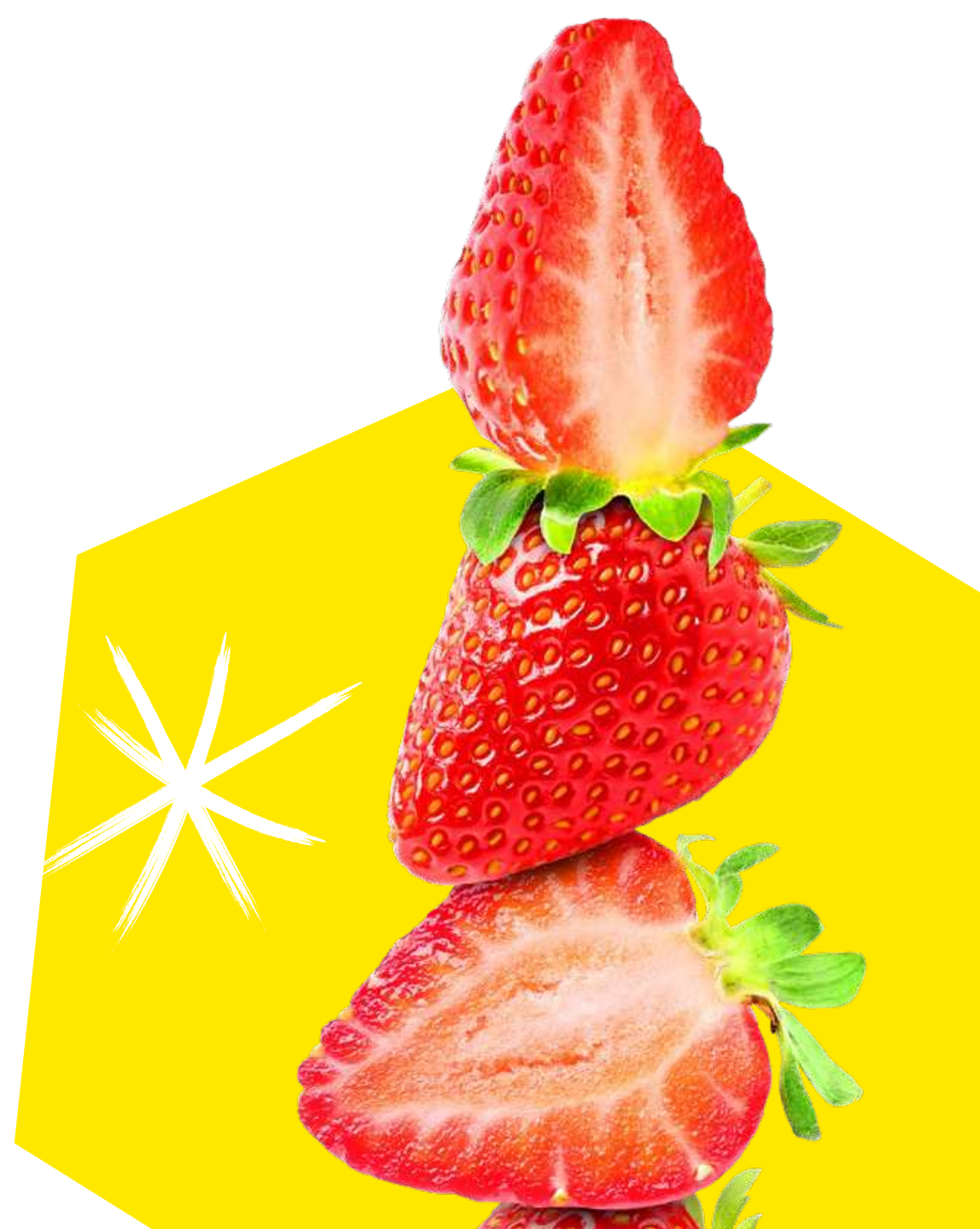
THE GLOBAL PRODUCE INDUSTRY

01



Global Growth

Fresh Fruit Market 2022-2030 (CAGR)	Fresh Vegetable Market 2022-2032 (CAGR)
+3.6%	+3.3%
\$757.65 billion USD in 2030 (\$570.94 billion USD 2022)	\$895.22 billion USD by 2032 (\$650.2 billion USD 2022)



Sources: Skyquestt.com, Precedence Research

Global Perspective – Fresh Fruit Market

Major contraction hit fruit's
trade export value

-\$6 Billion
2021-2022

\$140B 2022
\$146B 2021

Regions with Top Increased & Decreased Exports
(% change from 2021 to 2022)

EXPORTS		IMPORTS	
Chile	+19%	India	+17%
United Arab Emirates	+17%	United Arab Emirates	+12%
Mexico	+10%	Mexico	+9%
Egypt	+8%	United States	+8%
Morocco	+6%	Saudi Arabia	+7%
Iran	-31%	Viet Nam	-36%
Viet Nam	-22%	Hong Kong	-26%
Spain	-18%	Belgium	-17%
Netherlands	-16%	Russian Federation	-15%
China	-16%	Germany	-10%

■ indicates one of the largest export or import regions



Sources: wtocenter.vn, Produce Blue Book, FAO.org, east-fruit.com

Global Perspective – Fresh Vegetables Market

Vegetables are experiencing the opposite of fruit – **growth in export trade value**

+\$2 Billion
2021-2022

\$85B 2022
\$83B 2021

Regions with Top Increased & Decreased Exports
(% change from 2021 to 2022)

EXPORTS		IMPORTS	
Egypt	+26%	Viet Nam	+44%
India	+19%	China	+27%
Turkey	+17%	United Arab Emirates	+20%
Morocco	+12%	Thailand	+18%
Canada	+12%	Italy	+16%
Spain	-8%	Russian Federation	-15%
Italy	-7%	Germany	-10%
Netherlands	-4%	India	-8%
Belgium	-3%	Netherlands	-6%
Germany	-1%	Belgium	-1%

■ indicates one of the largest export or import regions



Sources: wtocenter.vn, *Produce Blue Book*, FAO.org, east-fruit.com

U.S. Imports Perspective

Imports help ensure that fresh fruit and vegetables are available year-round in the U.S.

% of U.S. Fresh Fruit And Vegetable Supplied By Imports
(2007 to 2021)

Fresh Fruit

50% → 60%

Growth in share primarily driven by blueberries, raspberries, and tomatoes

Fresh Vegetables

(excluding potatoes, sweet potatoes, and mushrooms)

20% → 38%

Growth in share primarily driven by asparagus, avocados, bell peppers, broccoli, cauliflower, cucumbers, and snap beans



Sources: freshproduce.com, USDA



China Imports Perspective

% of Chinese Fresh Fruit And Vegetable Supplied By Imports
(2021-2022)

Fresh Fruit



Increase in fruit imports

Fresh Vegetables

(excluding potatoes, sweet potatoes, and mushrooms)



Decrease in vegetable imports

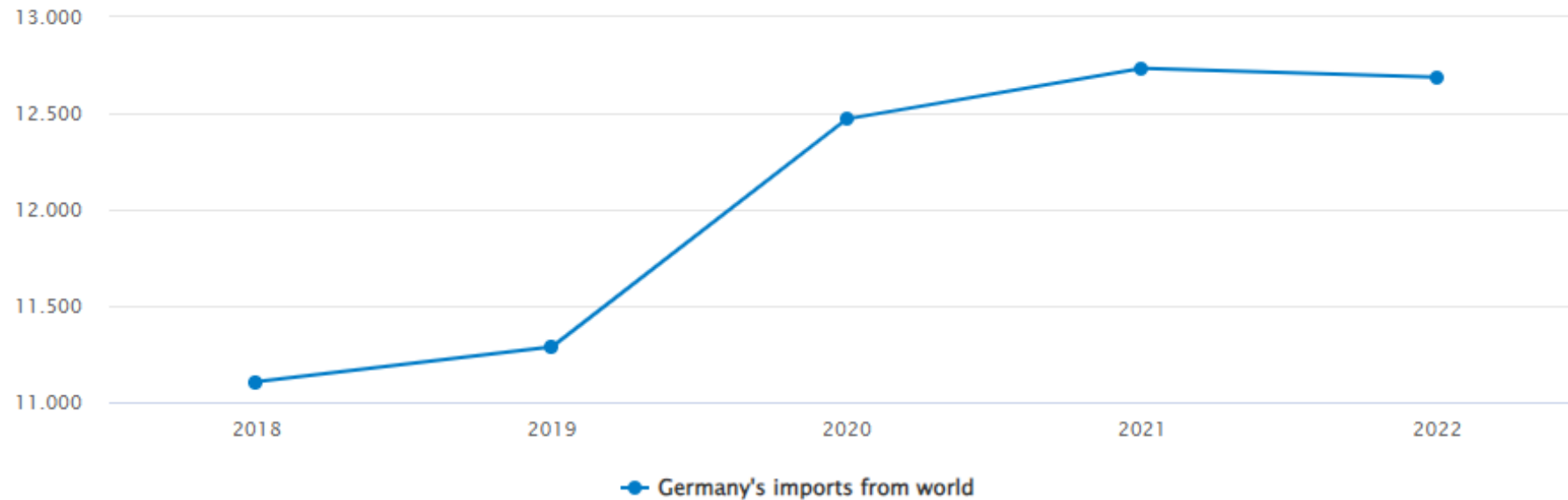
Sources: English. [www.gov.cn/archive/statistics/202302/28/content_WS63fdfo2ec6doa757729e7615.html#:~:text=China%20imported%20337%2C000%20tonnes%20of,11.5%20percent%20year%20on%20year.](http://www.gov.cn/archive/statistics/202302/28/content_WS63fdfo2ec6doa757729e7615.html#:~:text=China%20imported%20337%2C000%20tonnes%20of,11.5%20percent%20year%20on%20year.https://www.producereport.com/article/chinas-2022-fruit-import-export-statistics-released#:~:text=In%202022%2C%20China%20imported%207.33,third%20consecutive%20year%20of%20declines.)
<https://www.producereport.com/article/chinas-2022-fruit-import-export-statistics-released#:~:text=In%202022%2C%20China%20imported%207.33,third%20consecutive%20year%20of%20declines.>



Germany Imports Perspective

Figure 3: Germany's imports of fresh fruit and vegetables from the world

in € million



Sources: [https://www.cbi.eu/market-information/fresh-fruit-vegetables/germany-o/market-potential#:~:text=Germany%20is%20the%20third%20largest,%2C%20United%20Kingdom%2C%20EFTA\).](https://www.cbi.eu/market-information/fresh-fruit-vegetables/germany-o/market-potential#:~:text=Germany%20is%20the%20third%20largest,%2C%20United%20Kingdom%2C%20EFTA).)

U.K. Imports Perspective

% of Fresh Fruit And Vegetable Supplied By Imports
(2021-2022)

Fresh Fruit



Fresh Vegetables

(excluding potatoes, sweet potatoes, and mushrooms)



Sources https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c826%7c%7c%7c%7co8%7c%7c%7c2%7c1%7c1%7c1%7c2%7c1%7c2%7c5%7c1%7c1



STATE OF THE ECONOMY

02



Global Perspective

The produce industry should brace for a second consecutive year of global economic slowdown with regained momentum expected in 2025.

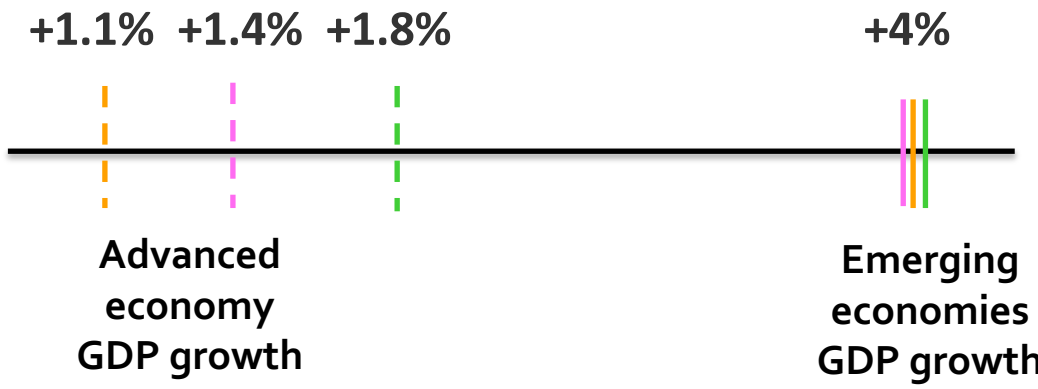
GDP Growth

+2.7%
2024



+2.8%
2023

The diverging growth trend between advanced and emerging economies is expected to widen this year



U.S. Perspective

Higher wages from a tight labor market fueled consumer spending, creating the fastest economic growth the U.S. has seen in nearly two years.



Consumer spending accounts for more than two-thirds of U.S. economic activity.



However, inflation and increased personal taxes have partially offset wage growth, resulting in disposable income after taxes falling 1% leading to consumers tapping their savings to fund spending.

While higher-income households saved the most during COVID-19, economists estimate that these excess savings will run out by Q1 of 2024.

Lower-income households allocated most funds to cost of living (e.g., food, housing, and clothing).



U.S. Perspective

Saving money and reducing expenditures are the top consumer priorities for 2024

On top of rising cost of living, **food prices at and away from home continue to climb**, even though the rate of increase is slowing.

+5.8%

*2023 Food
Prices*

+2.9%

*2024 Forecasted
Food Prices*

To survive these higher prices and inflationary climate, consumers are...



**Shopping
grocery channels**



**Seeking cheaper
alternatives**



**Exploring private
labels**

OPPORTUNITIES:

- Produce companies = prioritize affordability to help consumers deal with expenditure limits.
- Supermarkets = communicate value and quality clearly and effectively.
- Understand the market and consumer priorities to develop targeted solutions aligned to consumer needs.

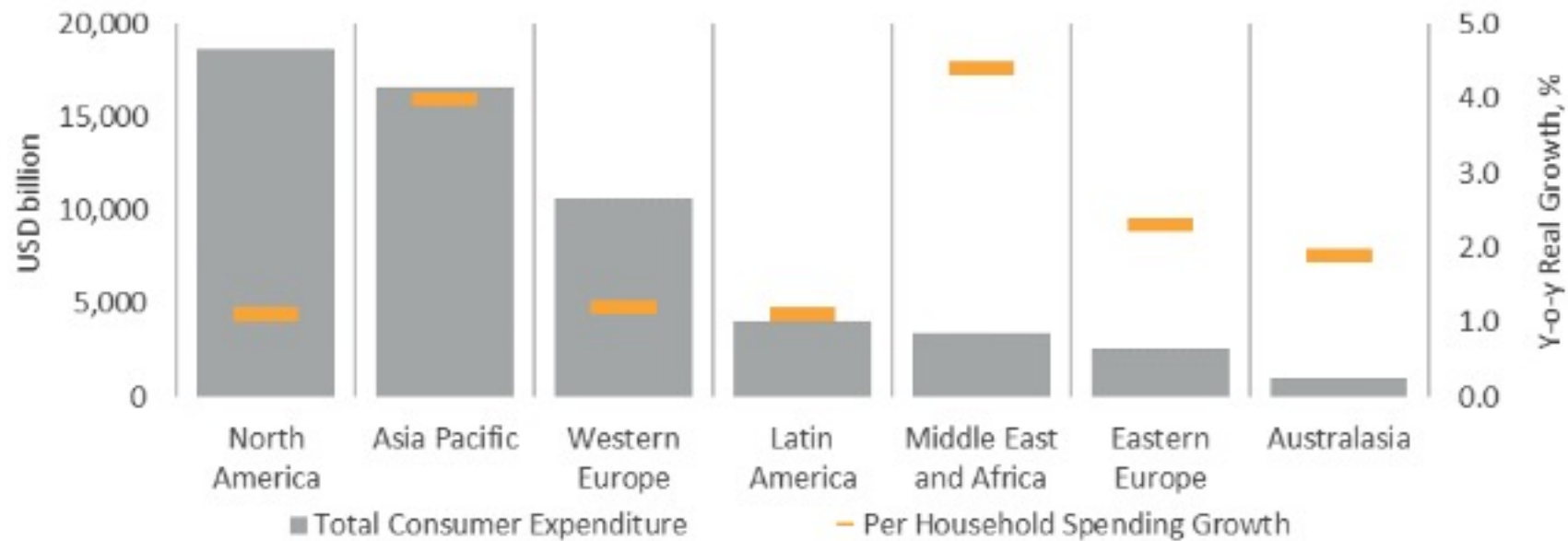


Sources: ers.usda.gov, Euromonitor International



Asia Perspective

Forecast Total and Real Growth in Consumer Expenditure by Region 2024

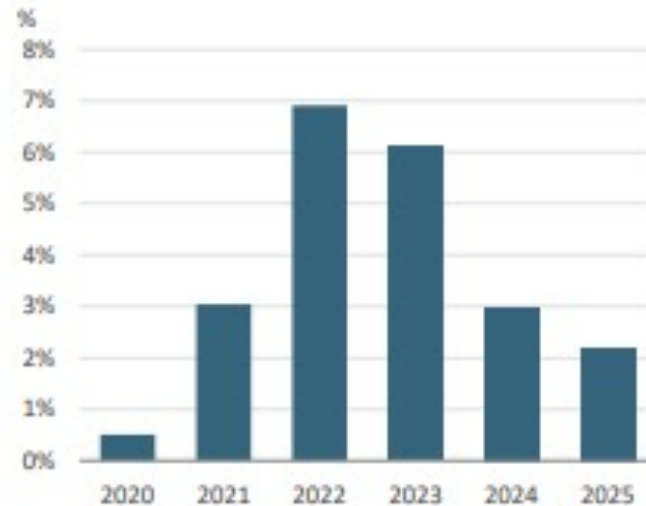


Source: Euromonitor International from national statistics

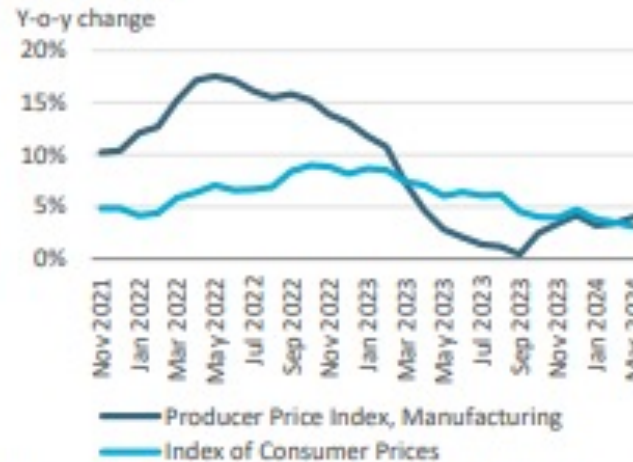


Germany Perspective

Inflation Rate 2020-2025



Producer Price and Consumer Price Indices 2021-2024



Real Retail Sales Index, Seasonally Adjusted 2021-2024

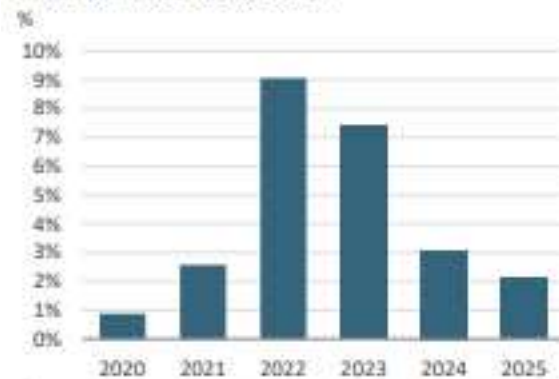


Source: Euramanitor International from national statistics, Eurostat, OECD, UN, IMF, International Financial Statistics, International Energy Association



U.K. Perspective

Inflation Rate 2020-2025



Source: Euromonitor International from national statistics, Eurostat, OECD, UN, IMF, International Financial Statistics, International Energy Association

© Euromonitor International

Producer Price and Consumer Price Indices 2021-2024



Real Retail Sales Index, Seasonally Adjusted 2021-2024



Passport

INDUSTRY HEADWINDS

03



Industry Headwinds to keep a pulse on in 2024...



Climate Change

Unpredictable weather extremes jeopardize crop quantity and quality stability.



Sustainable Packaging

New laws pose risk of shipments being detained at port if exporters are unaware.



Polarization

Social responsibility, political affiliation, and sustainability initiatives motivate consumers to purchase or recoil.



Access to Labor

Declining fertility rates and decreasing international migration is slowing the U.S. population growth.



Mergers & Acquisitions

Purchasing power is strengthening for large retailers as the market continues to consolidate.

OPPORTUNITIES:

Reframe climate messaging from merely reducing carbon footprint to actively regenerating and giving back to the world.

Demonstrate meaningful and measurable progress towards sustainability targets.

Getting the message right when discussing political, social, or sustainability issues, is important and may ultimately strengthen customer loyalty.

Find creative ways to combat labor issues.

Identify ways to compete on value and quality rather than price.



Scan to read more on climate change on IFPA's website

Sources: IFPA, Euromonitor, Maersk, BLS.gov

OPPORTUNITIES TO GROW SALES

04



Consumers continue to pay higher prices for good experiences, premium, shared value products and tailored solutions.

In 2024, customer experience and high-quality products will become a strategic priority.

OPPORTUNITY:

AI and advanced analytics can enhance the customer experience and improve satisfaction and loyalty by...

- Creating tailor-made offerings at dynamic price points.
- Using virtual and augmented reality (VR/AR) for marketing.
- Tracking and reacting to the emotional state along the customer journey.

Highlighting locally grown, organic and sustainably grown produce will lead to higher sales opportunities because consumers are willing to pay more for what they value.

- Regardless of country, locally grown, organic and sustainably grown command a premium in the marketplace.

Scan for IFPA's study on leveraging digital tools for the produce consumer





Did you know?

Over HALF of the produce industry's marketing budgets are allocated to trade shows for B2B sales...

...But advertising and social media channels have the greatest reach for consumers.

Scan for more
information on IFPA's
marketing benchmarks



OPPORTUNITY:

- Adjust marketing budgets from a heavy emphasis on business-to-business sales to focusing on further reaching consumers.



Getting in with Gen Z and Boomers pose big opportunities.

Gen Z fast facts:

- Projected to have 17% of the spending power in the U.S. by 2030 (\$44 billion USD)
- Will make up 23% of the global workforce by 2024
- Grew up with technology
- Seeking real people and relatable stories
- Rely heavily on reviews

Boomer fast facts:

- Will make up 33% of the population by 2030
- Higher purchasing power than Gen Z
- Least likely generation to feel represented in ads



Scan for IFPA's and Technomic's study on the future of foodservice

OPPORTUNITY:

- Utilize digital tools to spread marketing messages to attract Gen Z.
- Expand produce channels to healthcare and senior living facilities to reach Boomers.



Sources: Accenture; blog.gwi.com; ecocart.io



The rising importance of retail media networks is opening possibilities for personalizing produce sales.

Today's Challenge

The produce industry and retailers need to **create activation strategies centered around personalized ads** and offers to drive high consumer engagement

RMNs are the Answer...

- With the help of AI, better data analysis will enable retailers to re-evaluate loyalty programs, media strategies and supply chain
- Retailers can also build high profit revenue from these businesses

OPPORTUNITY:

- Bring wider awareness to produce products and more customized messaging for consumer targets by layering on demographic and psychographic market data to reveal key shopper differences across regions.




Source: McKinsey



Personalized nutrition is opening doors to new ways of using produce for optimized healthcare.

Nutrigenomics (the study of the effects of nutrients on the expression of an individual's genetic makeup)



led to the Creation of Produce Prescription Programs medical treatment or preventative service, fulfilled through food retail, for patients with diet-related health risks or conditions, food insecurity, or challenges in access to nutritious foods.

Produce Prescription Program OPPORTUNITIES:

- Enable better access to healthy produce with no added fats, sugars, or salt, at low or no cost to the patient.
- Designed to improve healthcare outcomes, optimize medical spending, and increase patient engagement and satisfaction.



With fruit often being the #1 snack food, snacks are a great platform to drive demand for fruits and veggies.



Did you know?

According to IFPA research, children begin cooking with their parents at about 10 years old and **only about half** of snacks given to children are healthy snacks.



Scan for IFPA's
retail snacking
study

OPPORTUNITY:

- Engage children in snack preparation and encourage them to prepare and snack on fresh produce at an early age
- Refine messaging to include the fun of preparing and eating healthy options
- Consider partnering with recreational venues (sporting events, cinemas, etc.), to offer packaged fresh produce (apple slices, celery/carrot sticks with dip) for sale
- In marketing comms, show fresh fruit/vegetables being used at picnics and outdoor activities with light exercise



Thank You



State of Trade & Opportunities

Philippe Beaujean
Shippers & Forwarders Manager
Port of Antwerp Bruges

Port of Antwerp-Bruges

Trade Status & Developments

GCCA

18/6/2024



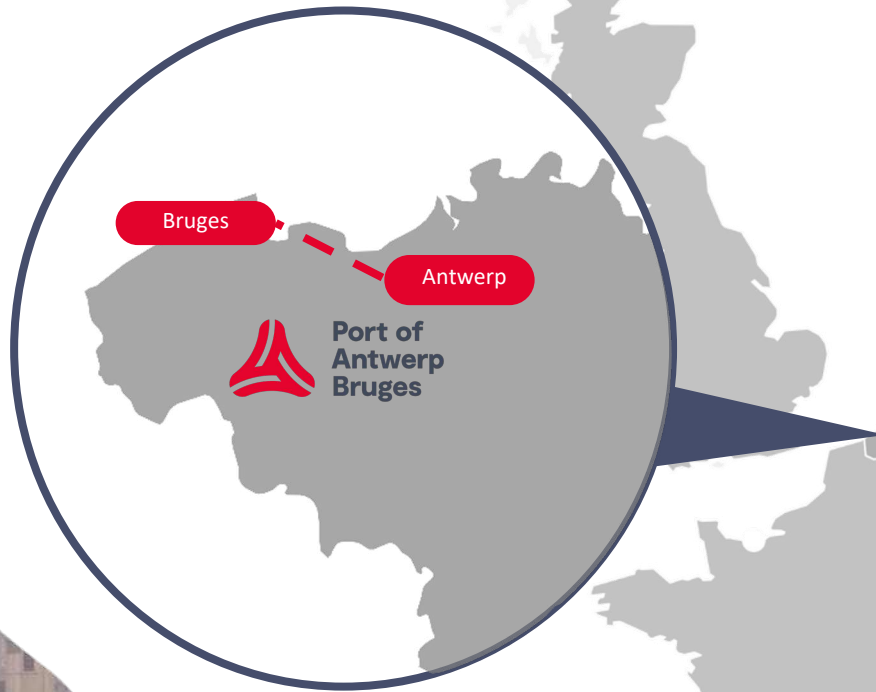
Port of
Antwerp
Bruges



Contents

1. Port of Antwerp-Bruges
2. Figures
3. Geopolitical Developments





**A global port
in the heart of Europe**

**One port
Two sites**





2nd largest
port in **Europe**

13th largest
port **in world**



Number one **export**
port in Europe



20k **seagoing vessels**/year



Largest **car handling** port in Europe
3.56 mio new cars/year



Largest integrated
chemical hub in Europe



48k **barges**/year



15% of EU **gas** market
1,000 km **pipelines**



Important **cruise** port in Benelux
1 mio passenger movements
169 cruise ships/year



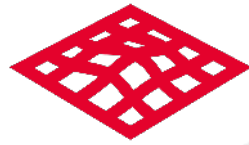
Total throughput
271 mio tons/year



42k loaded cargo **trains**/year
80 destinations



Belgium's most important
economic driver



14,322
Hectares



1,400
Companies



€ 20,8 billion
Added value

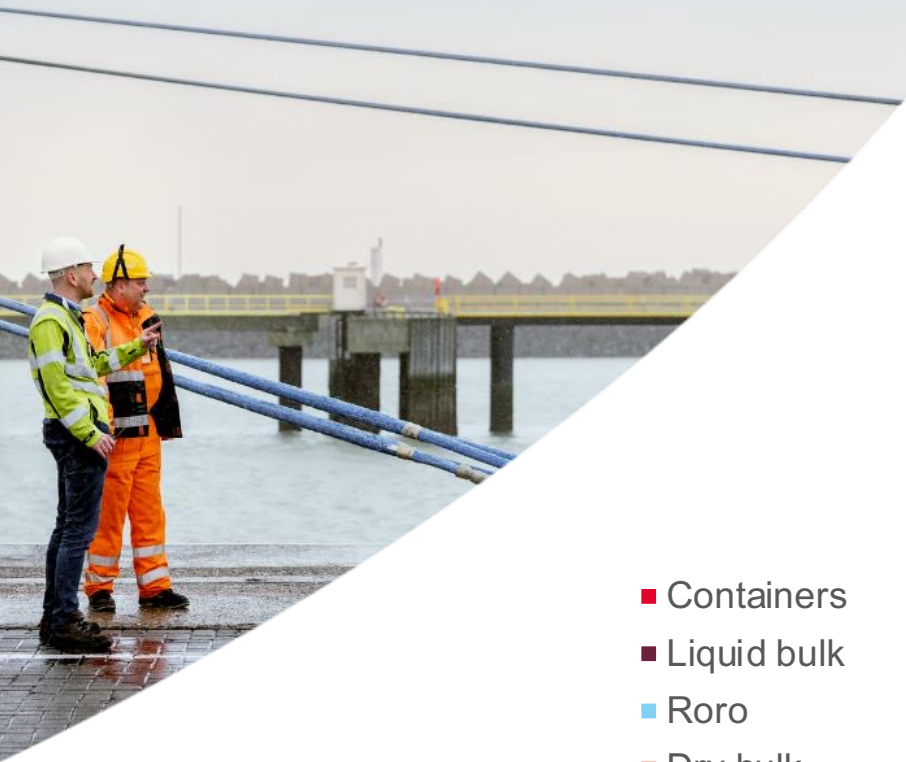


4.5%
GDP

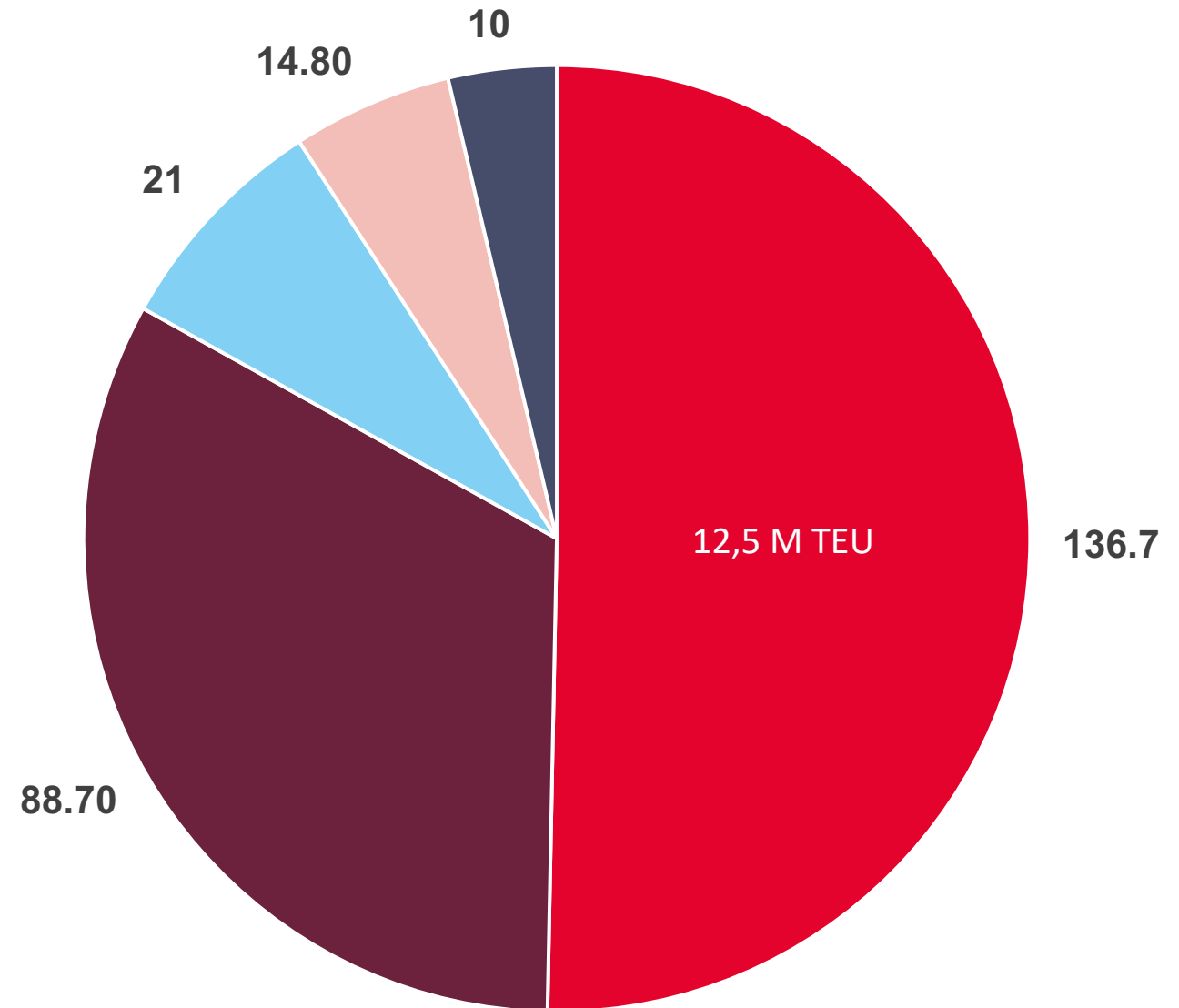


164,000 **jobs**
Direct and indirect

Throughput of 271 mio tonnes in 2023



- Containers
- Liquid bulk
- Roro
- Dry bulk
- Conventional general cargo





466.590 tons
perishables
conventional



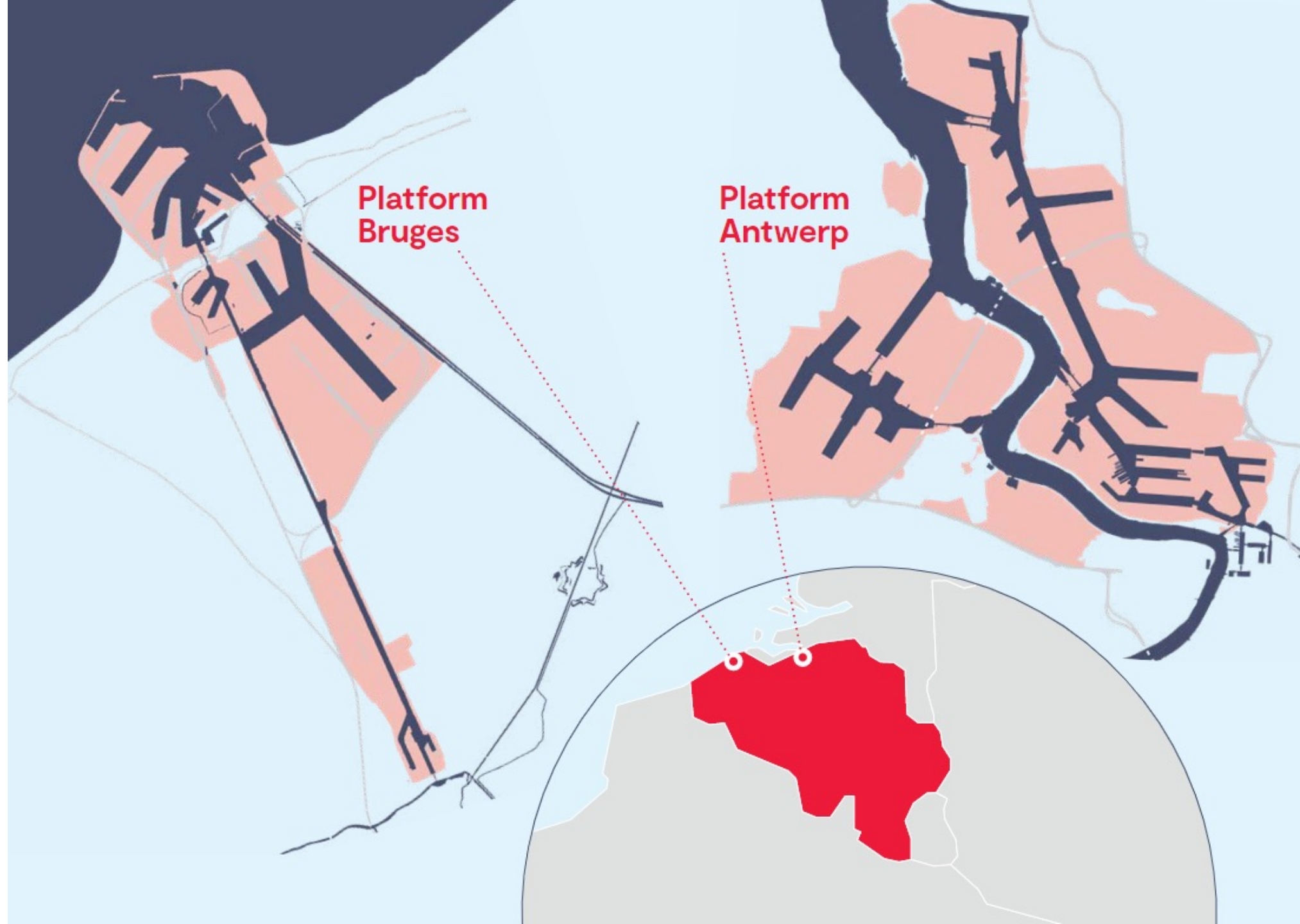
1.064.946 Reefer
containers handled



+175.000 T° controlled
pallet places



10.024 Reefer plugs
Container terminals



Antwerp platform

Container terminals

- 1 ACOT
- 2 DP Antwerp Gateway
- 3 MPET PSA Antwerp
- 4 PSA Europaterminal
- 5 PSA Noordzeeterminal

Border inspection posts

- 12 GIP Linkeroever
- 13 GIP Rechteroever

Dedicated warehousing & VAS

- 6 BNFW
- 7 Eurofruitports
- 8 Seafrigo Coldstorage
- 9 I.D.P
- 10 Luiknatie Coldstores

Reefer terminals (containers & conventional)

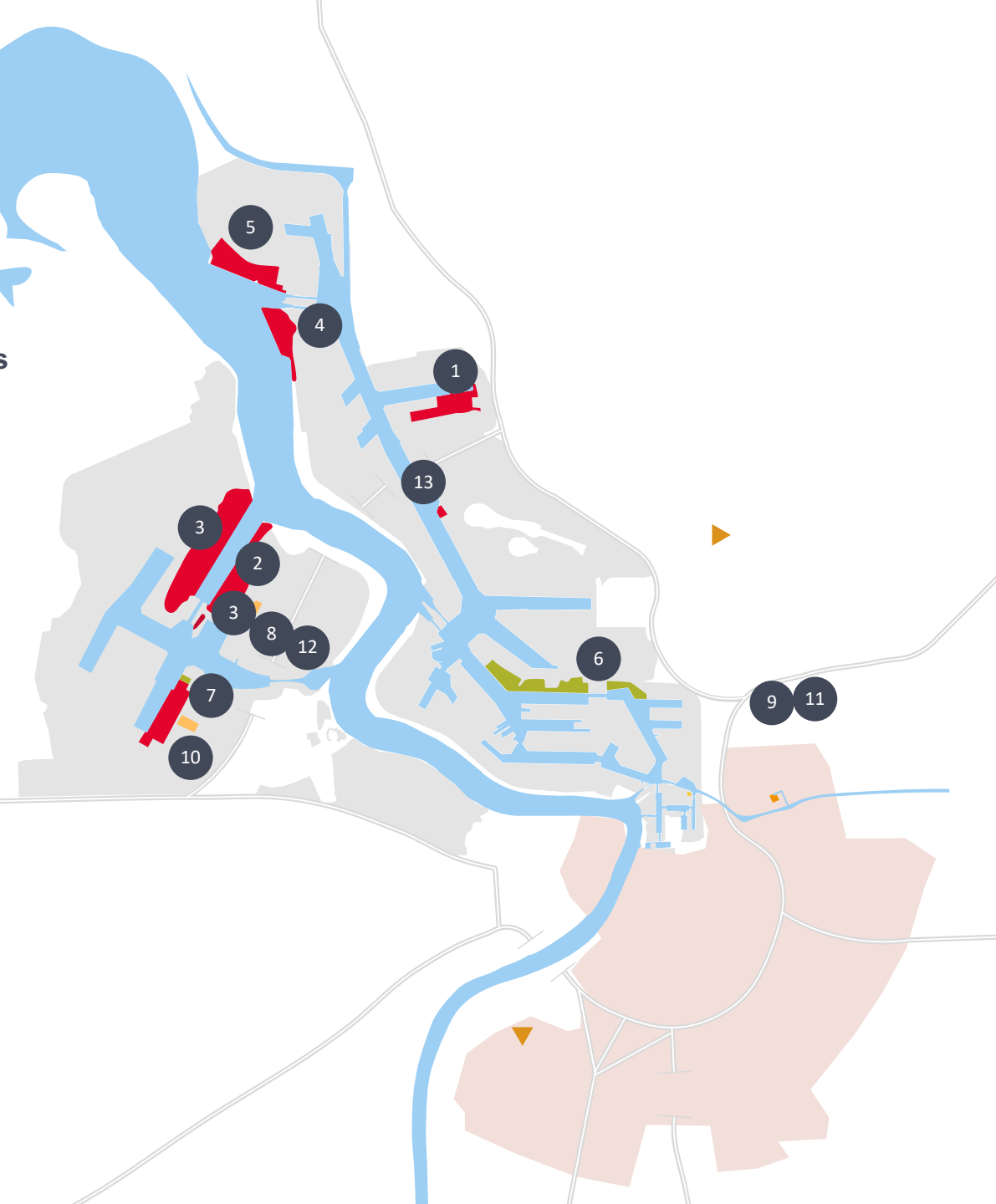
- 6 BNFW
- 7 Eurofruitports

Phytosanitary inspection posts

- 8 Seafrigo Coldstorage
- 6 BNFW
- 9 I.D.P
- 11 Keurpunt
- 10 Luiknatie Coldstores
- 12 GIP Linkeroever

Veterinary inspection posts

- 10 Luiknatie Coldstores
- 12 GIP Linkeroever



Zeebrugge platform

Container terminals

- 1 CSP Zeebrugge

Dedicated warehousing & VAS

- 2 BNFW
- 6 ECS
- 7 Flanders Cold Center (BNFW)
- 8 Zeebrugge Food Logistics
- 9 Vlaamse Visveiling
- 10 Northfreeze

Reefer terminal (container & conventional)

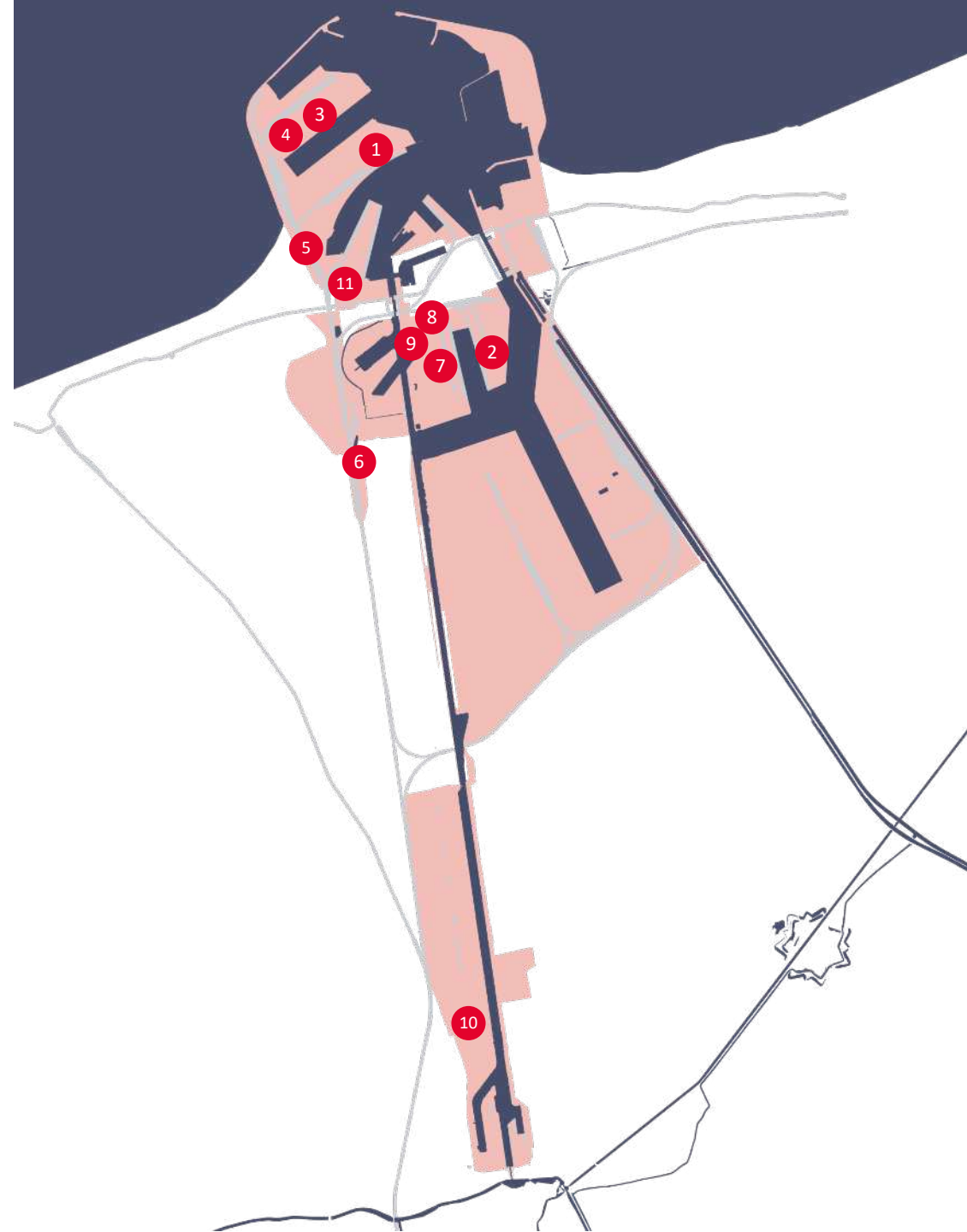
- 2 BNFW

ConRo terminals

- 3 CLdN
- 4 PSA Zeebrugge
- 5 P&O

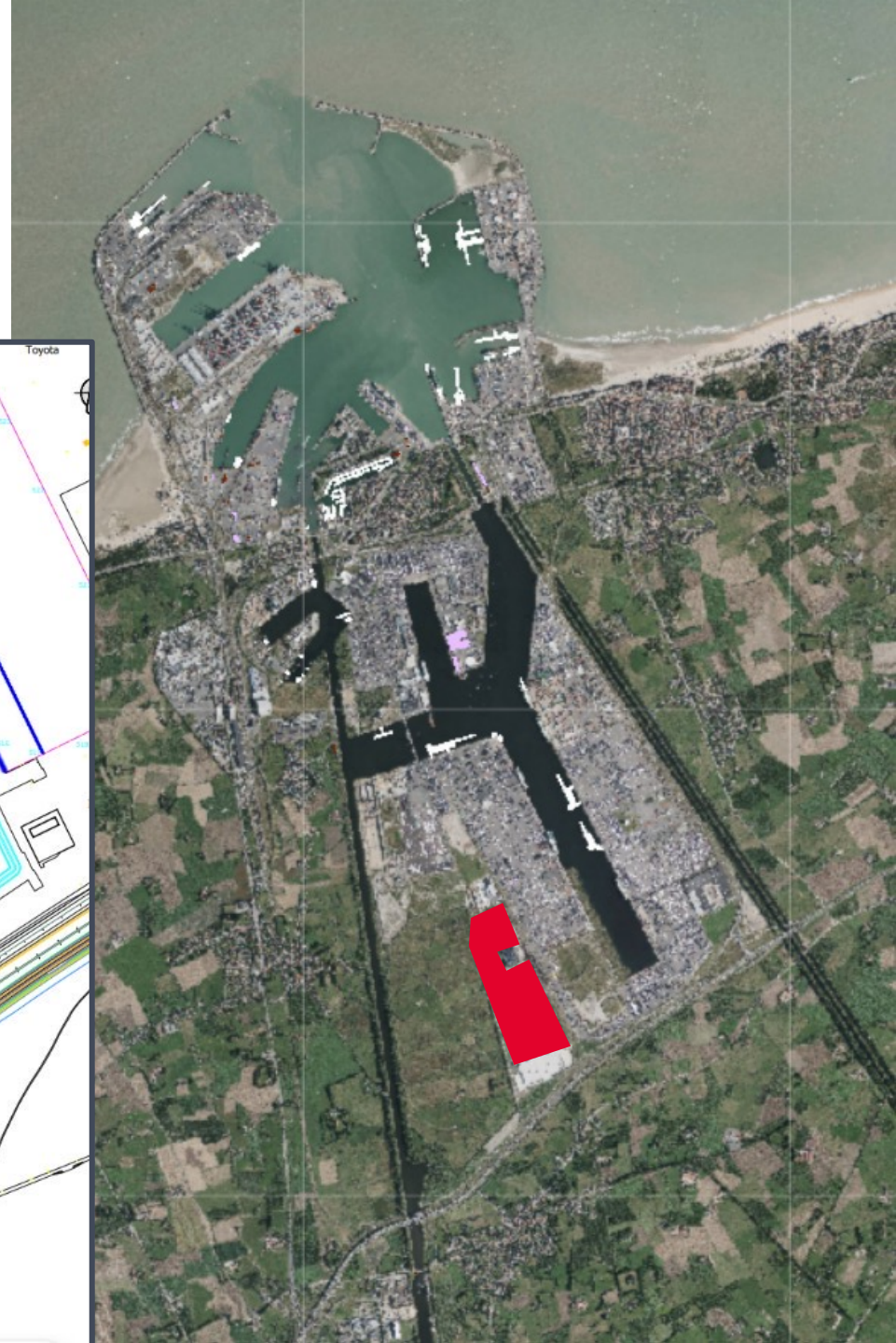
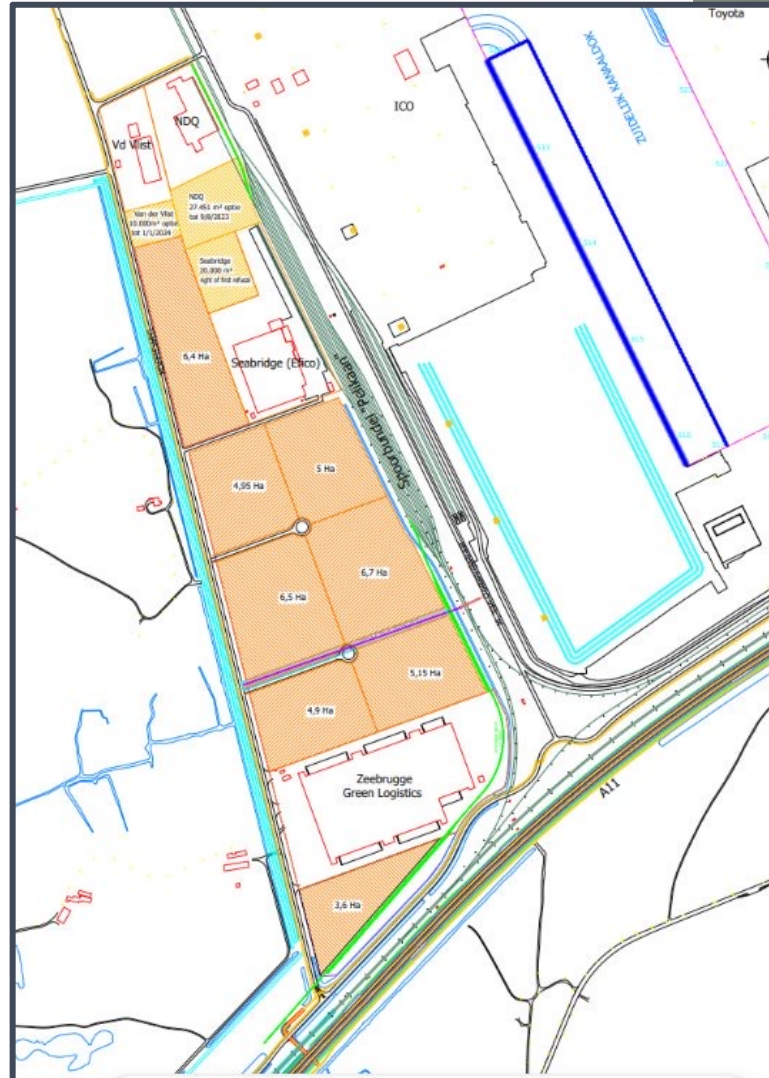
Border Inspection Post

- 11 GIP



Maritime Logistics Zone ZBR

- 43,2 ha (cumulatief)
- Scope: 3 segments based on GAP-analysis
 - CO₂-related activiteiten (phase 1)
 - RoRo: high&heavy (phase 2)
 - FM(C)G (phase 3)



Figures

Results Q1 2024 Port of Antwerp Bruges



Results

January – March 2024

Total freight volume
70.4 million tonnes



+2.4%



19 cruise ships



liquid bulk 22.8 mio tonnes

-0,9%



dry bulk 3.5 mio tonnes

-12.1%



4,855 seagoing ships

-1.8%



containers 36.8 mio tonnes

+8.6%



conventional breakbulk 2.3 mio tonnes

-7.8%



roro 5 mio tonnes

-6.9%



containers 0.4 mio TEU

+6%



reefer containers

+9,6%



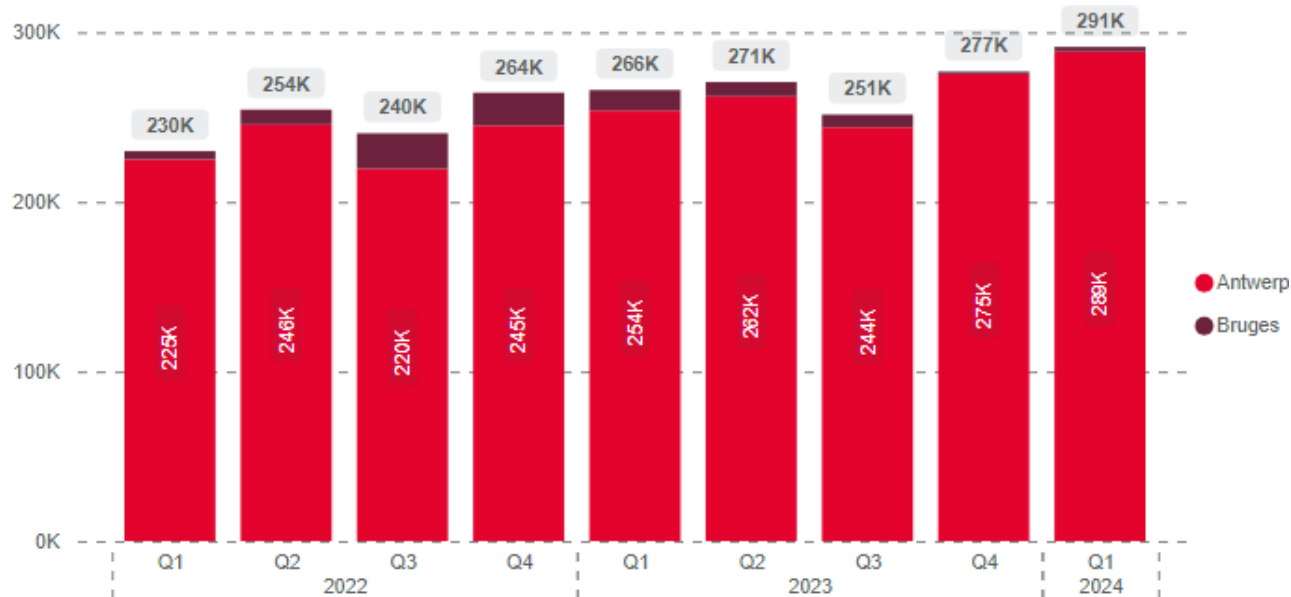
new cars 0.86 mio

-5.5%

Evolution reefer container volumes (in TEU)

Platforms Antwerp & Bruges, evolution Q1/2022 till Q1/2024

Evolution reefer volumes by platform

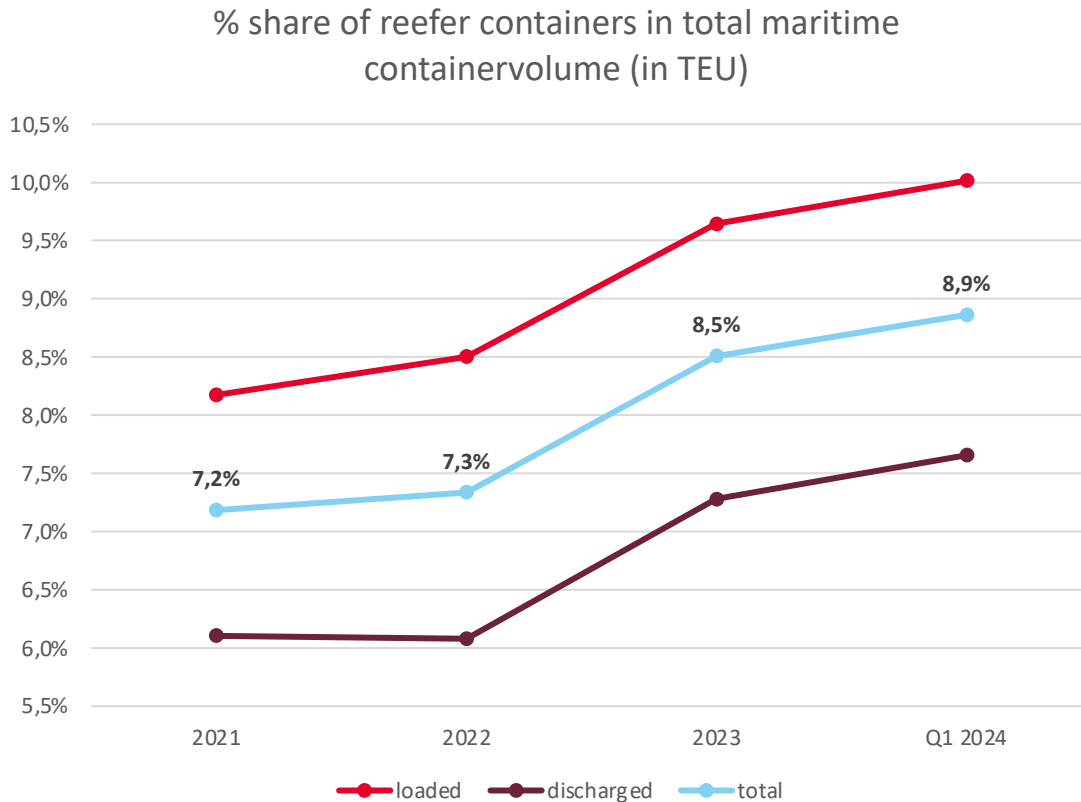


In Q1 2024, a record volume of 291,389 TEU reefer containers was handled (operating reefers) at Port of Antwerp Bruges

- This represents an **increase with +9.6%** compared to the same period last year
- Platform Antwerp shows a record volume of 288,638 TEU reefer containers, +14% compared to Q1 2023
- At platform Bruges, only a small volume of 2,751 TEU was handled, or -77% less

Evolution reefer container volumes (in TEU)

Evolution % share of reefer containers in total maritime containers



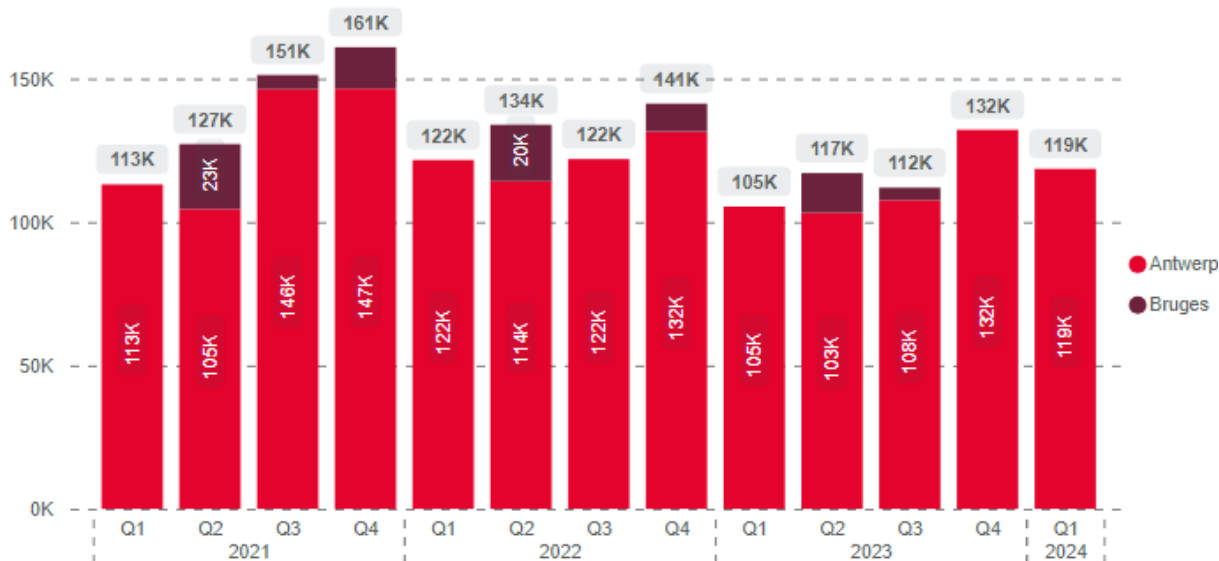
The share of operational reefer containers is steadily increasing :

- In Q1 2024 the share of operational reefer containers of total maritime containers reached 8.9% (from 7.2% in 2021), mainly due to the growing share of loaded reefer containers (share of 10% in Q1 2024).
- Reasons are the excellent position of the port with specialized terminals, coldstores and logistics service providers, as well as an attractive maritime position with various FPOC liner services from Latin America and Africa and short transittimes to the US, China and Singapore. Also we notice a growing consumer demand for healthy food, a trend that has been accelerated since the pandemic.

Evolution reefer conventional volumes (in Tons)

Platforms Antwerp & Bruges, evolution Q1/2022 till Q1/2024

Evolution reefer volumes by platform

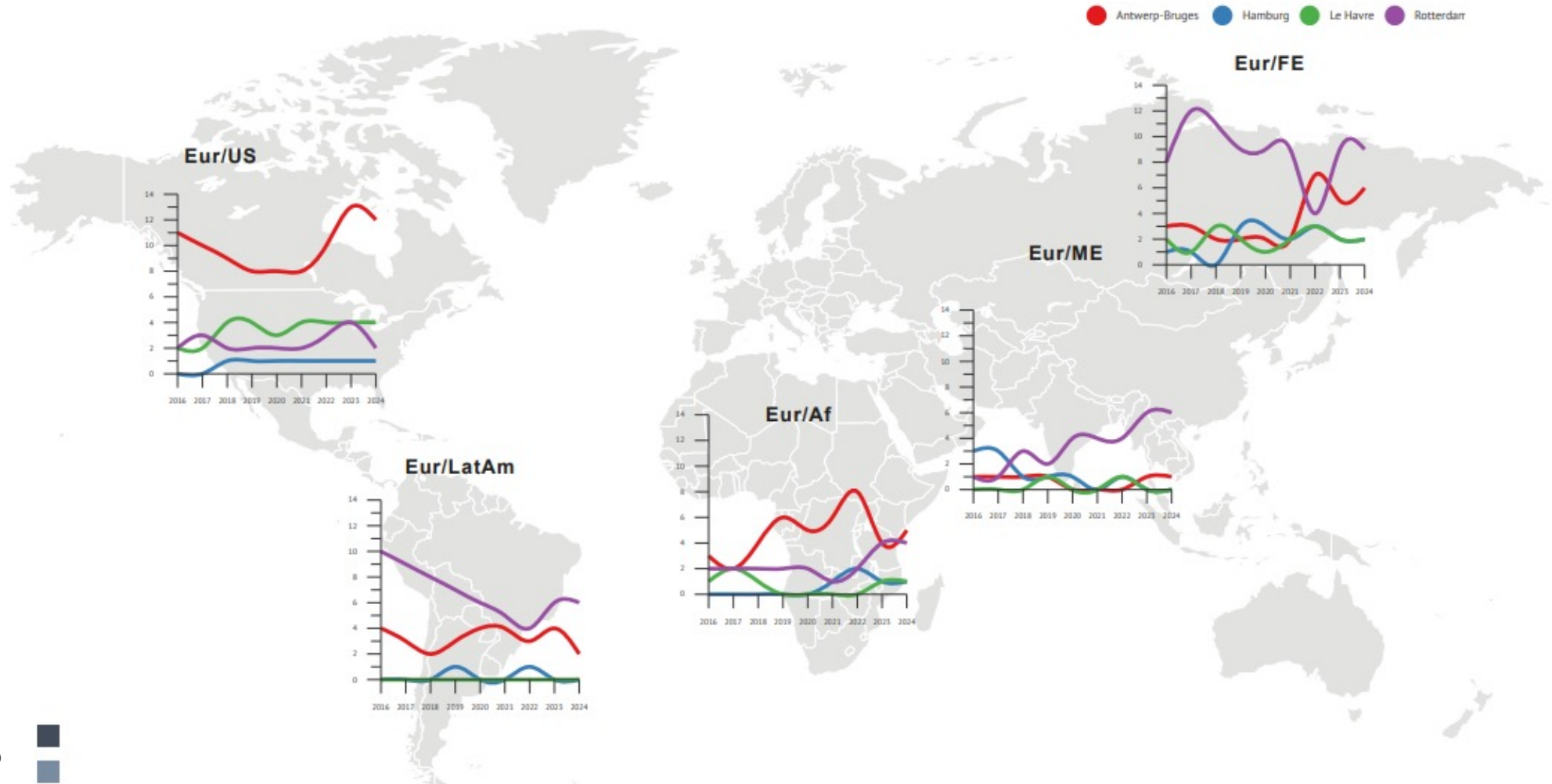


In **Q1 2024**, **118,534 Tons of conventional reefer volumes** were handled at Port of Antwerp Bruges

- This represents an **increase of +12.5%** compared to the same period last year.
- In Q1 2024, the conventional reefer volumes were handled on terminals BNFW and Eurofruitports of the Antwerp platform.
- At platform Bruges, conventional reefer volumes are seasonal and there was no throughput in the first quarter. The seasonal kiwifruit conventional volumes from New Zealand typically arrive in Q2 and Q3 at the BNFW terminal.

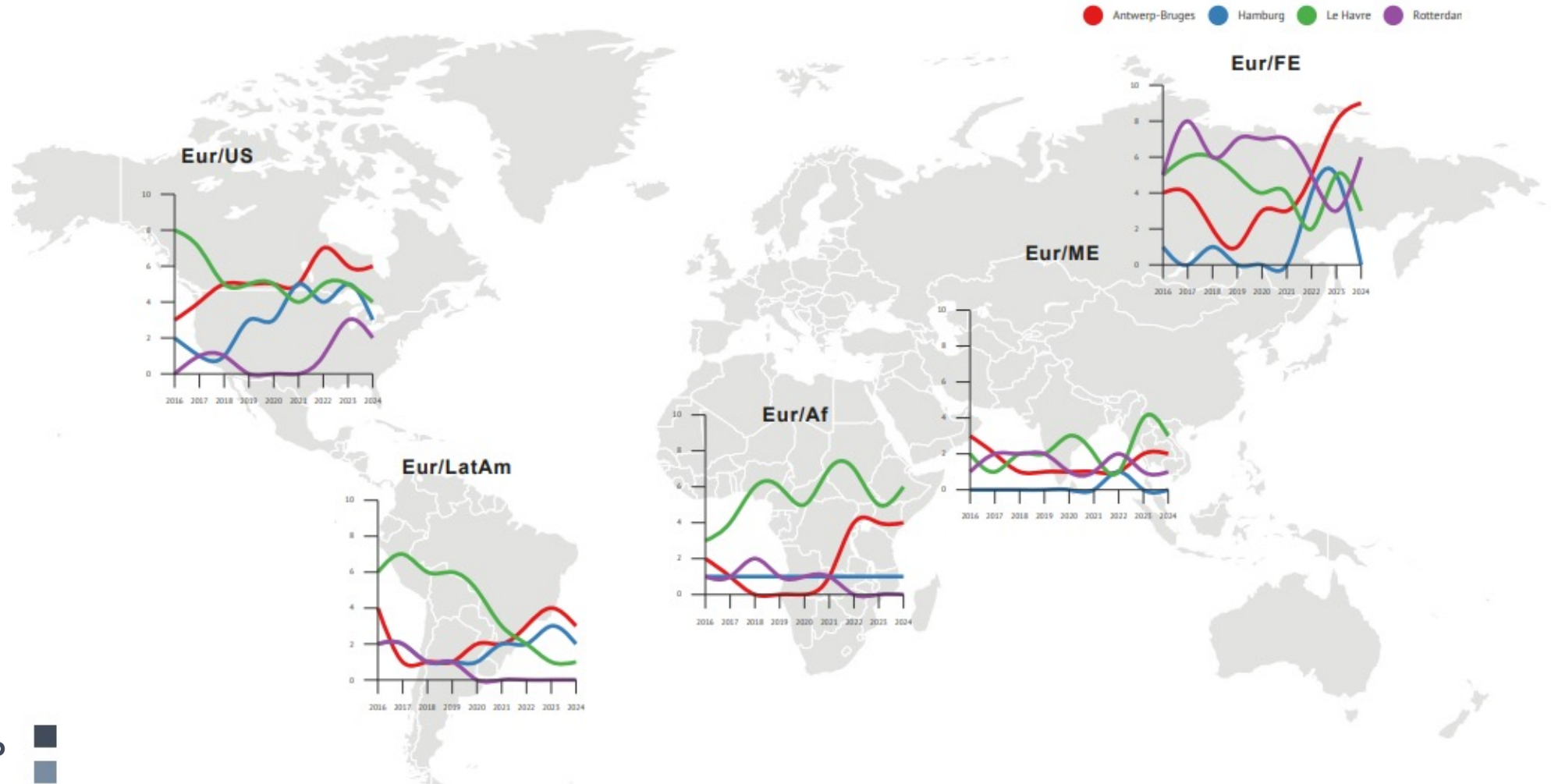
Maritime connectivity container liner services

Number of FPOC First Port of Calls per range port – status April 2024

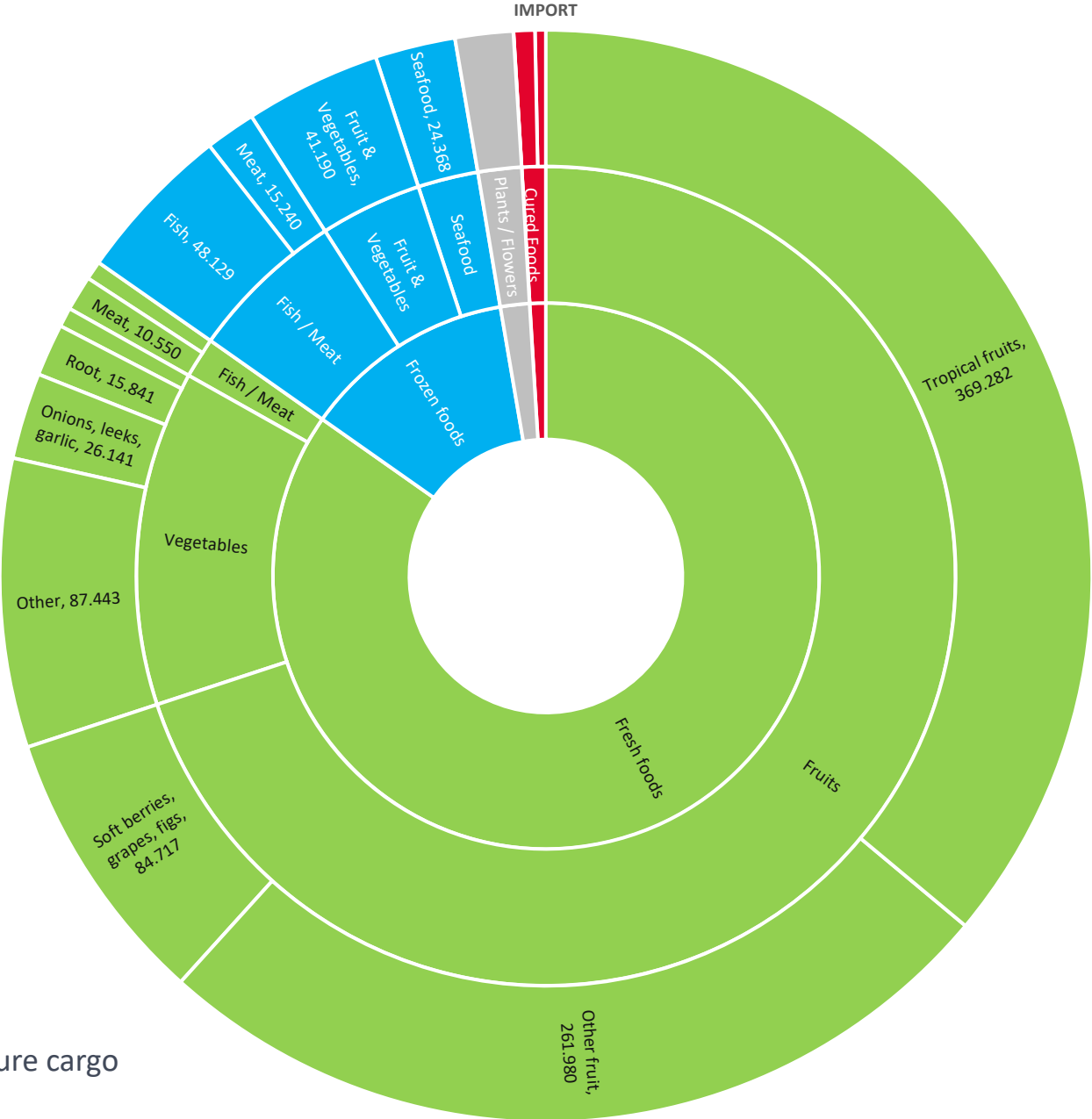


Maritime connectivity container liner services

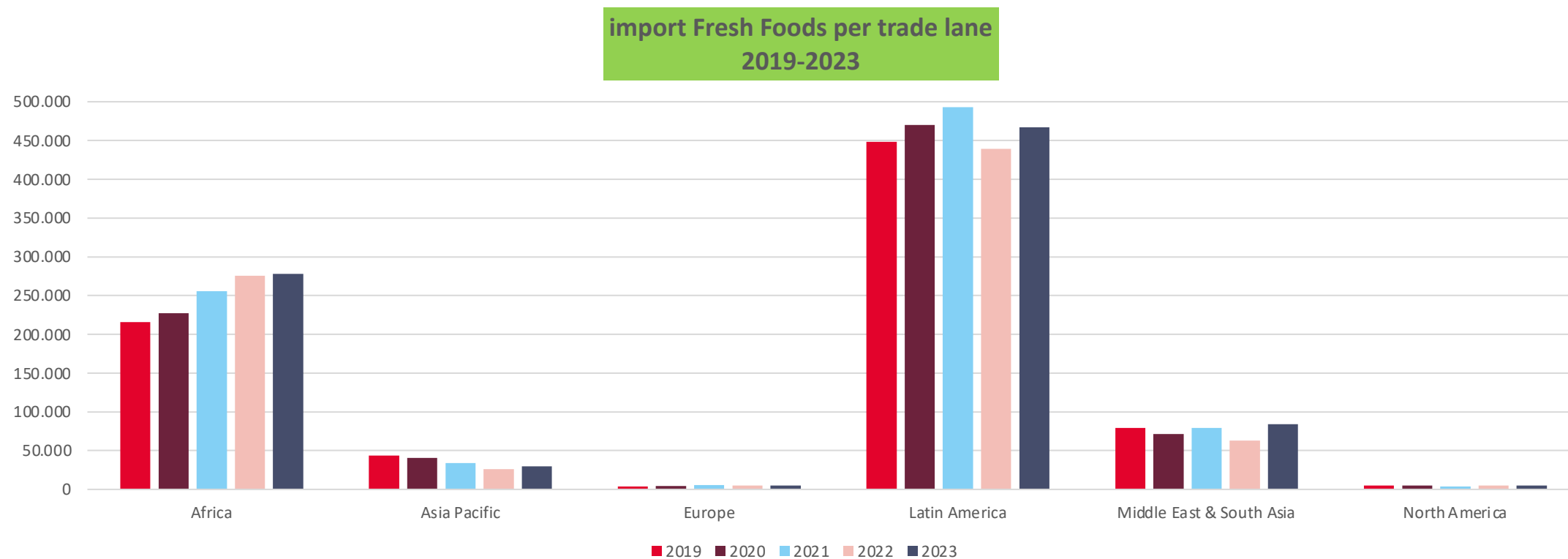
Number of LPOC Last Port of Calls per range port – status April 2024



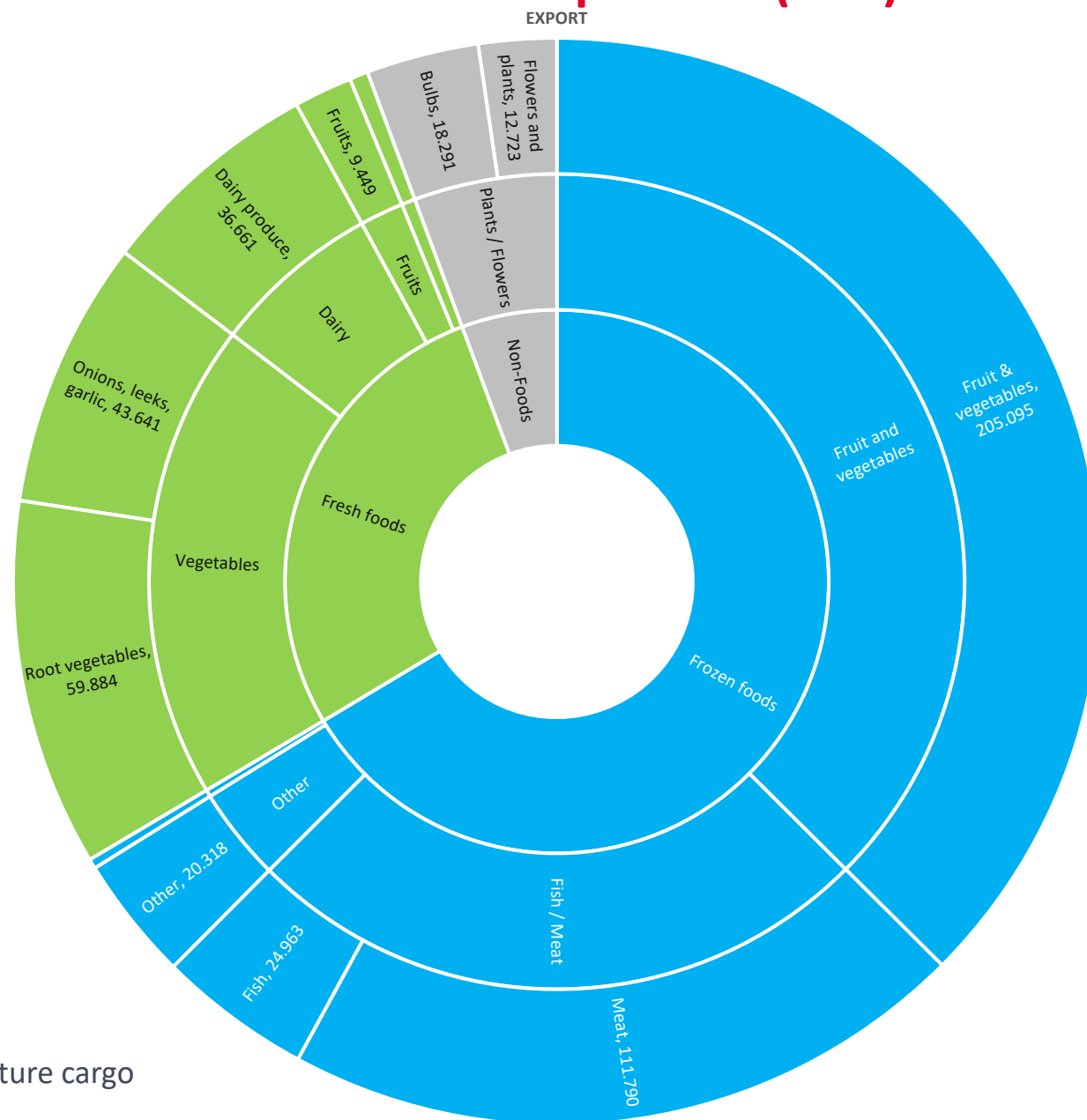
Import of temperature controlled trade in NW-Europe 2023 (TEU)



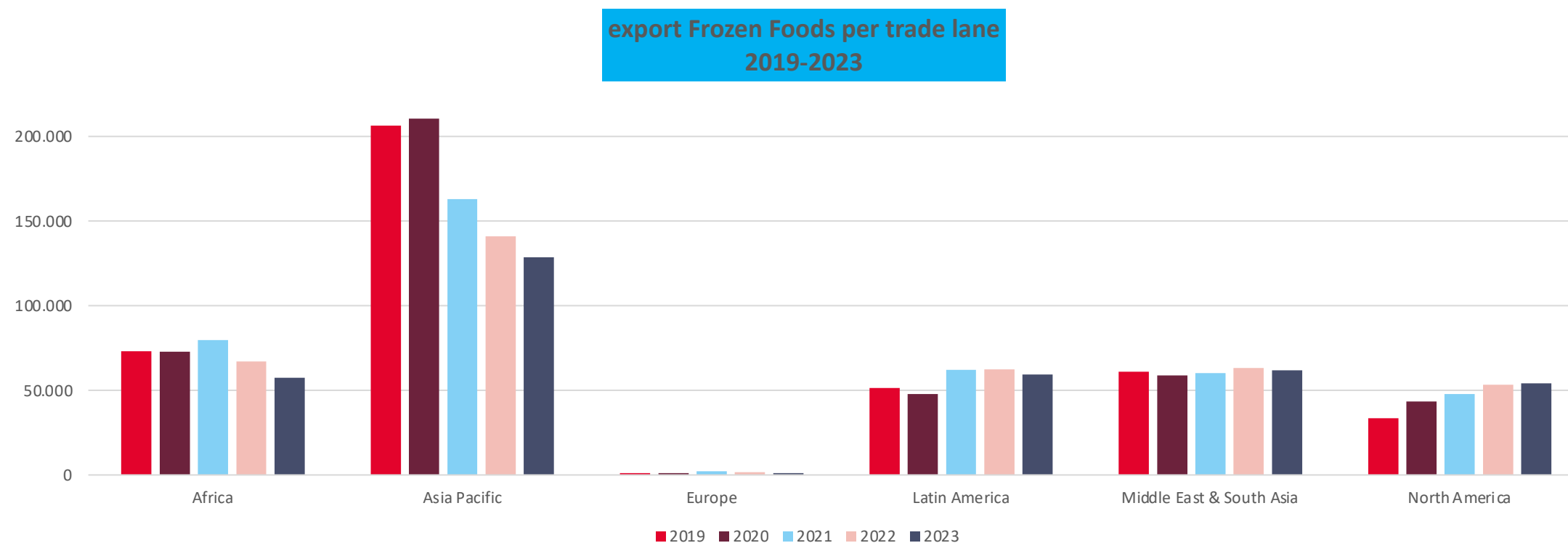
Import of temperature controlled trade in NW-Europe 2019-2023 (TEU)



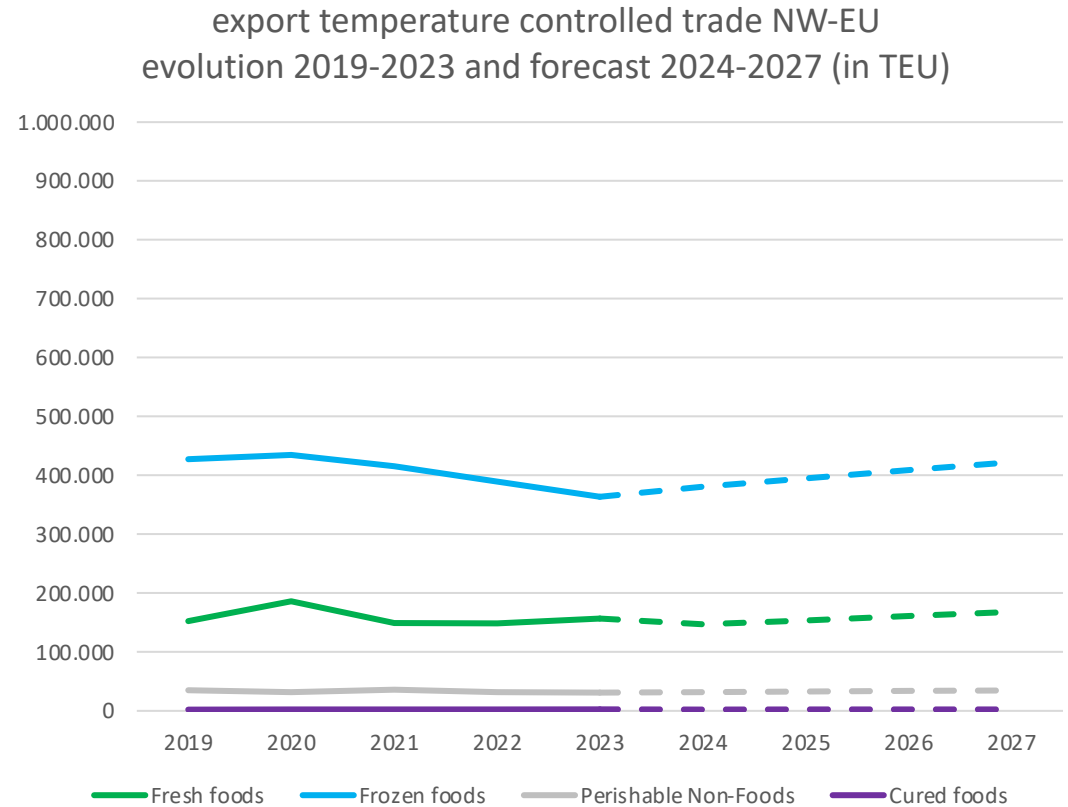
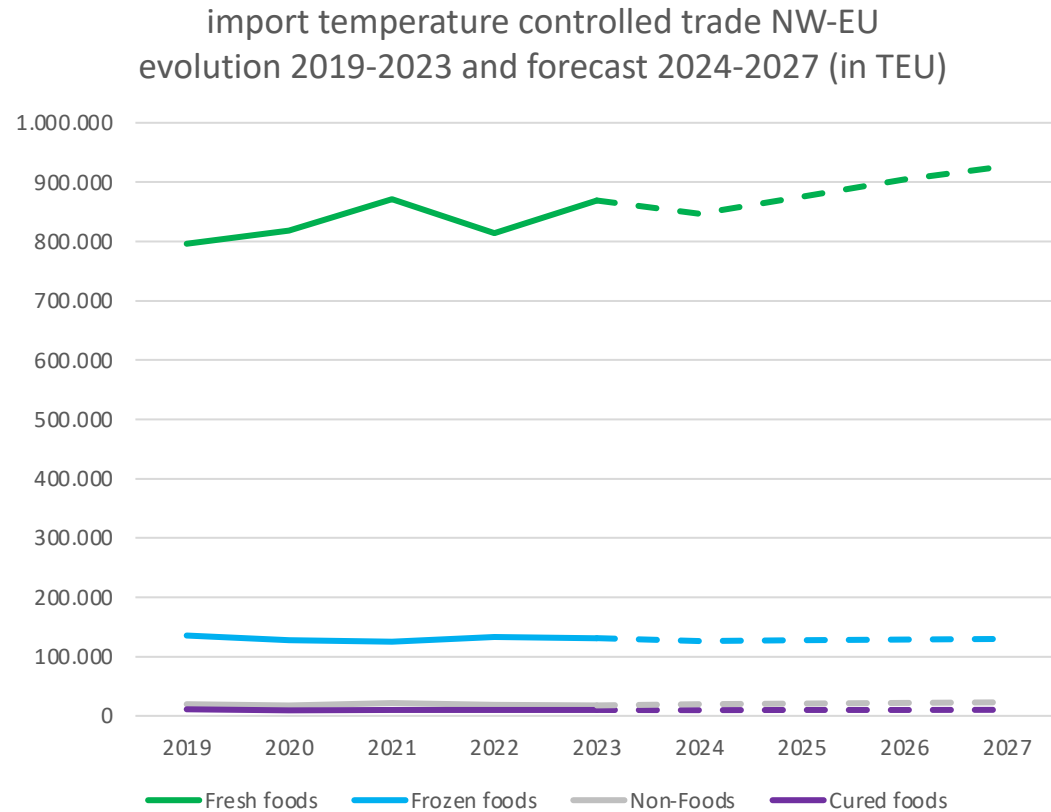
Export of temperature controlled trade in NW-Europe 2023 (TEU)



Export of temperature controlled trade in NW-Europe 2019-2023 (TEU)



Import / export temperature controlled trade NW-Europe evolution 2019-2023 and forecast 2024-2027



2024: A Challenging Year



Port of
Antwerp
Bruges

Another year of geopolitical instability

- **Escalating Hamas-Israel conflict** impacting the world economy and energy markets. The wider region produces 35% of world's oil exports and 14% of its gas exports;
- Ongoing **Russia-Ukraine war** with sanctions impacting trade flows. NATO-Russia tensions.
- **China-Taiwan** tensions ongoing.
- **US-China** tensions ongoing.
- **Europe-China tensions**: anti-dumping enquiries and duties
- **Europe-US** tensions: tariff rate quotas on steel & aluminium extended by Biden until 31 December 2025, rather than abolishing the Trump-era taxes. The EU reopens its WTO case versus US regarding the Section 232-tariffs. EU companies have only limited access to IRA.
- **India** plans to file a WTO case against the EU concerning CBAM.
- **Ecuador**: internal drug war. Further escalation possible.
- **World economy fragmenting into rival blocs** : Friendshoring and nearshoring
- Pressure on the **internal EU-market**: France and Germany subsidising more than smaller EU-countries.
- **Election year**: Taiwan (13 Jan); India (Apr-May); Belgium (9 June & 13 Oct), EU (6-9 June); France (30 June – 7 July); UK (4 July); USA (5 Nov)



EU shocks China with EV duties of up to 38 percent

China launches anti-dumping probe into EU pork imports

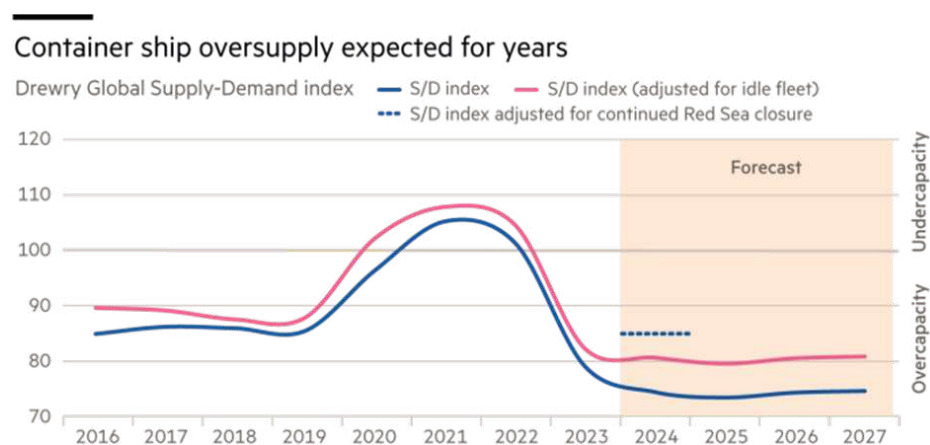
2024: The Ultimate Election Year Around the World

National elections are scheduled or expected in at least 64 countries, as well as the European Union, which all together represent almost half the global population.

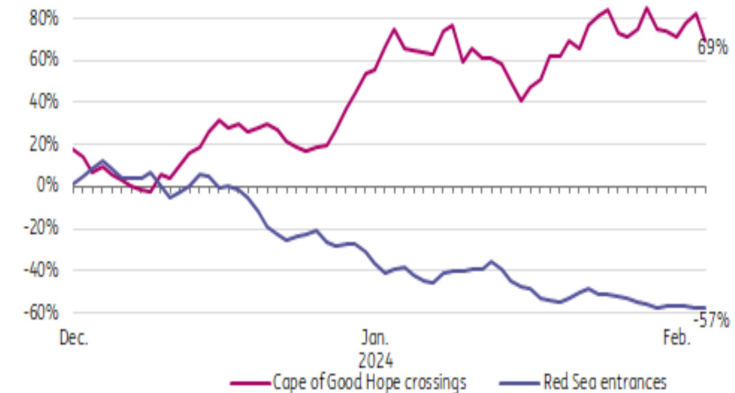


Red Sea crisis disrupting supply chains

- Red Sea and Suez Canal cover one-third of global container traffic and 12% of global goods trade.
- Container shipping lines report **delays** of 7 to 14 days on Asia-Europe trade. Vessels don't make it to Asia on time to start their rotation again.
- Export **volumes** are increasing from SE Asia.
- Empty container **shortages** due to repositioning delays.
- Irregular arrival of vessels does not lead to congestion.
- **Container rates** from Asia to Europe increased sharply in May prompting speculations peak season has arrived early in 2024.



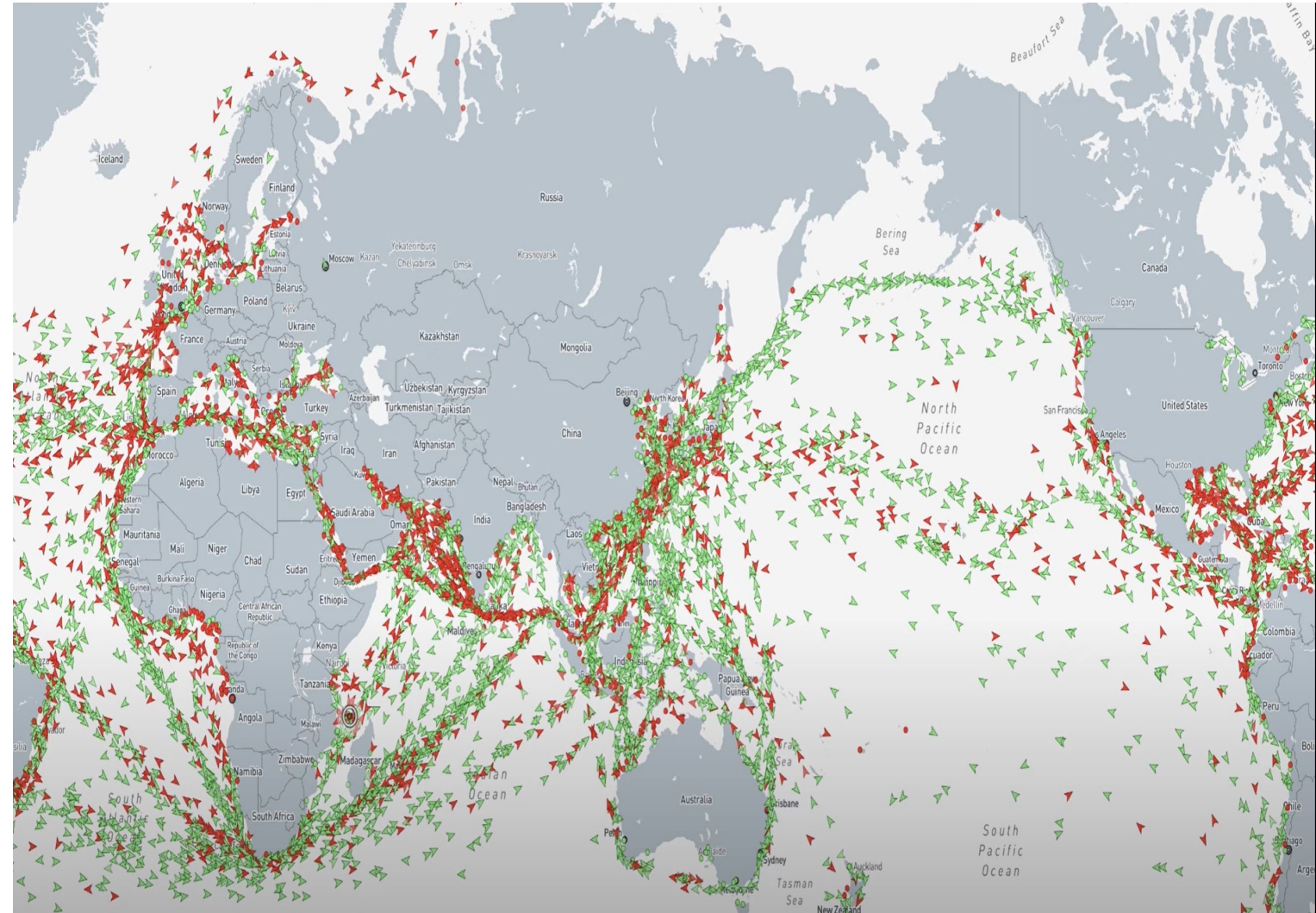
Source: Drewry
© FT



IMF Port Watch, ING Research

Geopolitical conflicts have spilled into the seas

- There are **many maritime chokepoints/trade arteries**:
 - Hormuz
 - Malacca and the Singaporean straits
 - Taiwan Strait
 - The first island chain
 - Panama Canal
 - European gateways (Gibraltar, Sicily channel, ...)
- The means to track and **strike** ships are diversifying and becoming more **accessible** (drone observation & strikes, anti-ship ballistic missiles, etc.)



Thank You

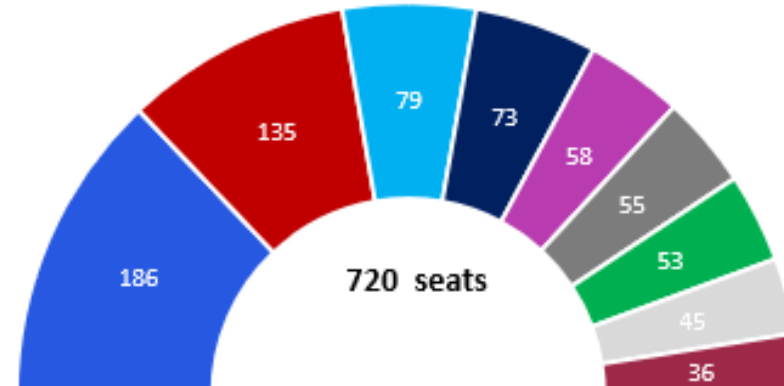
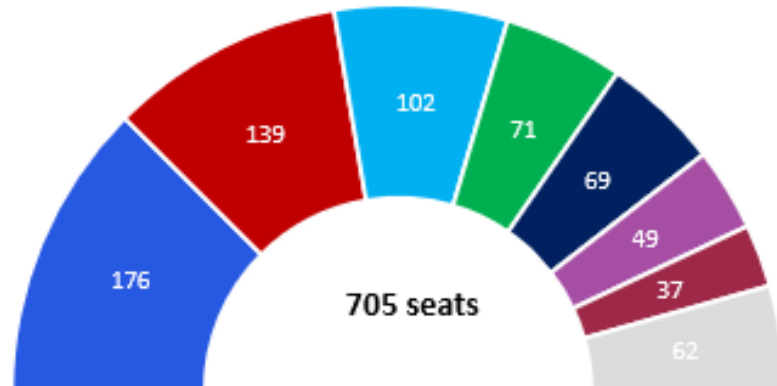
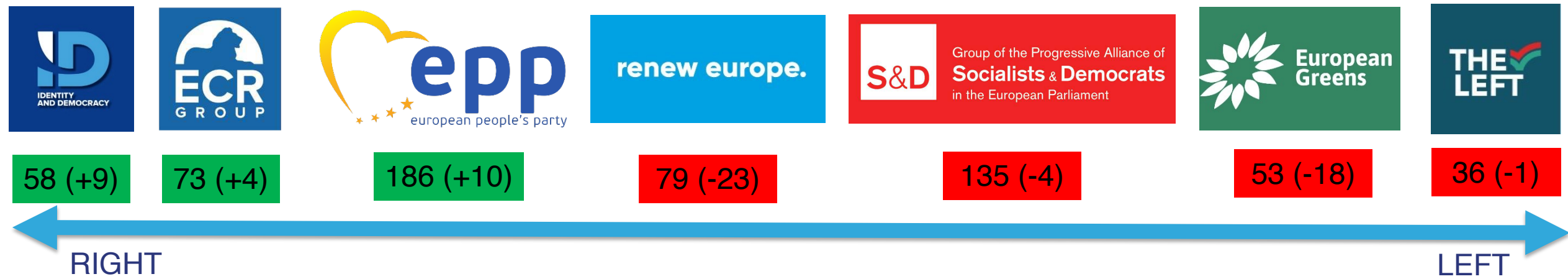


Port of
Antwerp
Bruges

WHAT'S NEXT AFTER THE EUROPEAN ELECTIONS

Shane Brennan
SVP Global Communications

'THE CENTRE HELD'



■ EPP ■ S&D ■ RE ■ ECR ■ ID ■ Others ■ Greens/EFA ■ NI ■ Left- GUE/NGL

A LOT OF POLITICS TO PLAY OUT



FRENCH ELECTIONS



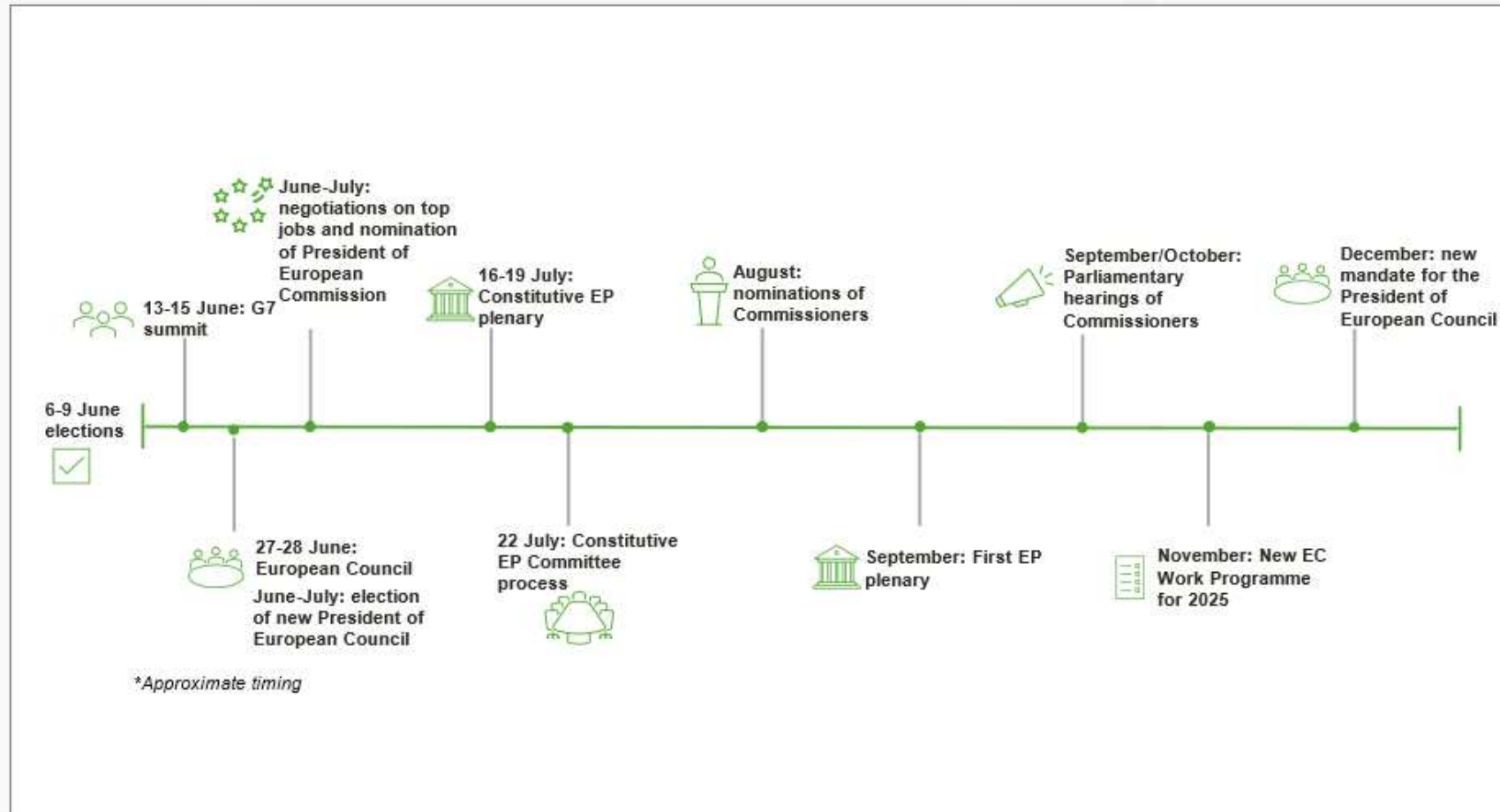
APPOINTMENT OF EU
COMMISSION



OTHER INTERNATIONAL
ELECTIONS



Next Steps Towards the New EU Political Cycle



THE POST ELECTION AGENDA

GEOPOLITICS

EU / CHINA / US

ENLARGEMENT

UKRAINE/RUSSIA

DEFENCE

ECONOMIC SECURITY

COMPETITIVENESS

GREEN TRANSITION

2050 NET ZERO
COMMITMENT HOLDS

FINANCING

CIRCULAR ECONOMY

ENERGY POLICY

ENERGY SOVEREIGNTY

RENEWABLES / MARKET
REFORM

CONNECTIVITY & GRID

EMISSIONS TRADING

FOOD POLICY

FOOD SOVEREIGNTY

FARMER SUPPORT / CAP

TRADE PROTECTIONS

FUTURE OF FARM TO FORK?

TRANSPORT

INTERNAL COMBUSTION
PHASE-OUT CARS AND
VANS

EURO VII ENGINES


FUEL_EU AND EU ETS FOR
SHIPPING



READY TO ENGAGE



DELIVERING A
SUSTAINABLE, RESILIENT
PERISHABLE-GOODS
SUPPLY CHAIN

 A plan for growth and transformation in the European cold chain



OUR 4-POINT PLAN FOR GROWTH AND TRANSFORMATION IN THE EUROPEAN COLD CHAIN

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

We call on the EU to put food security at the heart of the Farm to Fork Strategy and to ensure that providing clear, proportionate regulations and strong incentives to businesses that offer storage and transportation capacity is recognised as a fundamental objective.

■ COLD CHAIN WILL THRIVE IN A DECARBONISED EUROPEAN ENERGY SYSTEM

Cold chains rely on secure, consistent, and affordable energy. The recent energy crisis exposed our energy system's vulnerabilities, which will persist. As Europe pursues decarbonization, it must prioritize food and pharma supply chain infrastructure in resilience planning and incentivize cold chain operators to invest in renewables and smart grid integration.

■ COLD CHAIN ENABLES EUROPEAN TRADE AND ECONOMIC GROWTH

Cold chain businesses must be consulted as the EU develops future trade policies to ensure that food security and resilience are at the heart of future trade policies. It must prioritize the capacity and quality of infrastructure for transporting and storing food and pharmaceuticals.

■ COLD CHAIN PROVIDES JOBS FOR TODAY AND TOMORROW

As Europe debates the future of work, it must recognise the importance of logistics as a rewarding career path. There are transformational innovations emerging that will bring productivity and safety benefits for all. These should be incentivised, and we must work now to ensure people at all stages have access to the skills and training needed for the logistics jobs of tomorrow.



ENGAGEMENT PLAN



DG TRADE	DG TRANSPORT
DG SANTE	DG ENVI

Committee on Agriculture and Rural Development	Committee on Environment, Public Health and Food Safety
Committee on Internal Market and Consumer Protection	Committee on International Trade
Committee on Industry, Research and Energy	Committee on Transport and Tourism



ANTWERP DECLARATION



The call for a business case
for investments in Europe
is supported by:

1234
organisations



25
sectors

841
Companies



348
Associations and Unions



45
Other



The Antwerp Declaration for a European Industrial Deal

*"There is an urgent need for clarity, predictability, and
confidence in Europe and its industrial policy."*

The undersigned companies and organisations¹ express their full support for a **European Industrial Deal** to complement the Green Deal and keep high quality jobs for European workers in Europe. As very clearly stated by the Belgian PM Alexander De Croo: "We need our industry for their innovation capacity. To come up with tomorrow's climate solutions. That is why Europe should not only be a continent of industrial innovation but should remain a continent of industrial production"².

To meet climate neutrality by 2050 and the recently communicated 2040 target, Europe's electricity production will need to multiply, and industry investments will need to be a factor six higher than the previous decade. This enormous challenge comes just as both large companies and SMEs face the most severe economic downturn in a decade, demand is falling, production costs increase, and investments move to other regions. A US economy that benefits from the financial support from the Inflation Reduction Act (IRA) and its use of accessibility, a Chinese overcapacity and increasing exports to Europe all increase the pressure for the European industry even more. Our companies face this challenge every day. Sites are being closed, production halted, people let go. Europe needs a business case, urgently.

An Open Strategic Autonomy for a competitive and resilient EU is crucial for the transition of Europe in an ever-changing geopolitical landscape. It can however only be achieved if also basic and energy intensive industries remain and invest in Europe. Without a targeted industrial policy, Europe risks becoming dependent even on basic goods and chemicals. Europe cannot afford this to happen.

Our Declaration calls to Member State Governments, the next European Commission and Parliament to:

1. **Put the Industrial Deal at the core of the new European Strategic Agenda for 2024-2029.** We call for a comprehensive action plan to elevate competitiveness as strategic priority and create the conditions for a stronger business case in Europe. The action plan needs to include actions to eliminate regulatory incoherence, conflicting objectives, unnecessary complexity in legislation and over reporting. We ask to develop an Omnibus proposal to take corrective measures on all relevant existing EU regulations as the first piece of legislation to be presented in the next EU institutional cycle.
2. **Include a strong public funding chapter with a Clean Tech Deployment Fund for Energy Intensive Industries** closely coordinated with a simplified State Aid framework, while respecting the Single Market rules. This should allow public de-risking of private investment into clean technologies through both CAPEX and OPEX support, with guarantees to ensure the retention and creation of quality jobs in Europe and propose a competitive and sustainable tax level across Europe.
3. **Make Europe a globally competitive provider of energy.** The costs of energy in Europe are simply too high to compete and are not only driven by commodity prices but also by regulatory charges. The next European Commission should prioritize new projects for abundant and affordable low carbon renewable and nuclear energy. We need a real EU Energy Strategy with concrete actions that enable cross-border electrical power, grid expansion for hydrogen and other renewable & low-carbon molecules, and partnerships with resource-rich countries.
4. **Focus on the infrastructure Europe needs.** Target the Recovery and Resilience Facility and Structural and Regional Funds to integrate and build a worldclass EU Energy, digital, CCUS and recycling infrastructures as soon as possible, make these important Projects of Common European Interest. De-bottleneck cross border transport and develop trans-European networks. Remove permitting obstacles for industrial transformation projects. This transformation will also require significant numbers of skilled workers that are currently in short supply. Targeted programmes will be necessary to make these available quickly.
5. **Increase the EU's raw materials security** through scaling up domestic mining, sustainable processing and recycling capacity for crucial raw materials, combined with new global partnerships. Scale up renewable carbon and circular carbon feedstocks, including the expansion and fast permitting of advanced chemical recycling technologies. Develop a Circular Carbon Strategy that incentivises Carbon Capture and Use (CCU), bio-based feedstocks, basic metals, minerals and advanced materials necessary to reach the aims of the Green Deal. Free trade agreements or other types of agreements should secure vital supplies for industry, enable access to new markets and increase exports. The EU should look at all policy instruments against unfair competition to ensure a real level playing field for EU industries both on the domestic and international markets, including carbon leakage protection.
6. **Boost demand for net zero, low carbon and circular products.** Empower consumers (businesses and private) to choose net-zero and circular products, based on transparent product and environmental carbon footprints. Lead the way through public procurement and private buyer initiatives endorsed by the EU. Expand the scope of the Net Zero Industry Act and the Critical Raw Materials Act. Grow sales potentials by improved market access in international markets.
7. **Leverage, enforce, revive, and improve the Single Market** for the transition of integrated value chains, including measures to address increased fragmentation caused by national implementation of European legislation. Create a single market for waste and recycled materials and also a true European energy market. Improve enforcement of existing measures focusing on imports.
8. **Make the innovation framework smarter,** including fostering high-quality science, technological innovation, and collaborative policies that prioritise openness and pragmatic outcomes while embracing innovative approaches like regulatory sandboxes. Promote digitalization as a prerequisite for groundbreaking research and to enhance efficiency. Protect IP rights to bring a competitive advantage to Europe. Focus on the transfer from demonstration to innovation and first of a kind commercial technologies.

9. **A new spirit of law-making.** Let entrepreneurship thrive to find the best solutions to overcome challenges. Legislation should create incentives for businesses to invest in clean technologies. Avoid that the Green Deal policy targets are followed by prescriptive and detailed implementing regulations. Prevent over-reporting, ensure coherence, stay tuned with industrial reality and integrate legislative proposals through a stronger Secretariat General and Regulatory Scrutiny Board which systematically applies a Competitiveness Check and a European Innovation Stress Test against which each new legislation and policy initiative should be evaluated. Use robust data and scientific evidence for effective policymaking. Assess the cumulative impact of legislation.

10. **Ensure the structure allows to achieve results.** Install a First Vice-President responsible for the delivery of the European Industrial Deal and for ensuring the seamless integration of legislation and alignment with the agenda of the next European Commission, overseeing the key DGs for the Industrial Deal in one integrated approach.

In the 2023 State of the Union Address, President von der Leyen already said "As we enter the next phase of the European Green Deal, one thing will never change... We will keep supporting European industry throughout this transition." This needs to be a European approach, instead of twenty-seven different national incentives, by keeping and strengthening the integrity of the internal market while keeping global competition better into account.

We need to keep industry in Europe because the industry will deliver the climate solutions Europe needs. Solutions that citizens and governments can use, but that can only be invented and implemented with speed and scale by the industry, and the support from governments. Only with a strong industrial fabric and strengthened social dialogue in Europe, can we ensure that the green transition will be a Just Transition, as agreed in the Val Duchesse tripartite declaration. A competitive European industry, based on a European Industrial Deal, is the "conditio sine qua non" for the successful delivery of the EU Green Deal. It is also the only way to show to the rest of the world that the Green Deal works for all.

Support the declaration:
antwerp-declaration.eu



QUESTIONS?

Next Events



- **2 September: Cold Chain Connection, Rotterdam**
- **September 2-4: Cold Chain Institute, Rotterdam**
- **7-8 November: Cold Chain Connection, Warsaw**

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