



GCCA AFRICAN COLD CHAIN CONFERENCE

22-23 August 2024
Cape Town, South Africa



GLOBAL COLD CHAIN
ALLIANCE®



**GCCA AFRICAN
COLD CHAIN CONFERENCE**

22-23 August 2024
Cape Town, South Africa

State of Global Cold Chain





GCCA AFRICAN COLD CHAIN CONFERENCE

22-23 August 2024
Cape Town, South Africa

Paul Gibbons

CEO CCH
GCCA Board Member



State of Global Cold Chain - Africa Challenges

Africa faces significant challenges in developing and maintaining robust cold chain infrastructure:

1. Infrastructure Deficits: Many regions lack adequate refrigerated storage facilities, transport vehicles, **and reliable electricity**, hindering the preservation of perishable goods.
2. Logistical Constraints: **Poor road networks** and insufficient transport systems make it difficult to transport goods without compromising their temperature requirements.
3. Technological Gaps: **Limited access to advanced refrigeration** technologies and monitoring systems contributes to inefficiencies and product losses.



Countries: Ghana, Ivory Coast, Senegal

As part of this USDA-funded Emerging Markets Program (EMP), GCCF will assess the technology, operations, and investment in cold chain logistics and food safety in Senegal, Cote d'Ivoire, and Ghana. Based on this assessment, GCCF will implement a series of technical trainings, a study tour, and consultations in addition to developing a cold chain mentorship program with established operators from North America.



**GCCA AFRICAN
COLD CHAIN CONFERENCE**
22-23 August 2024
Cape Town, South Africa

State of Global Cold Chain - Africa Key Initiatives and Innovations

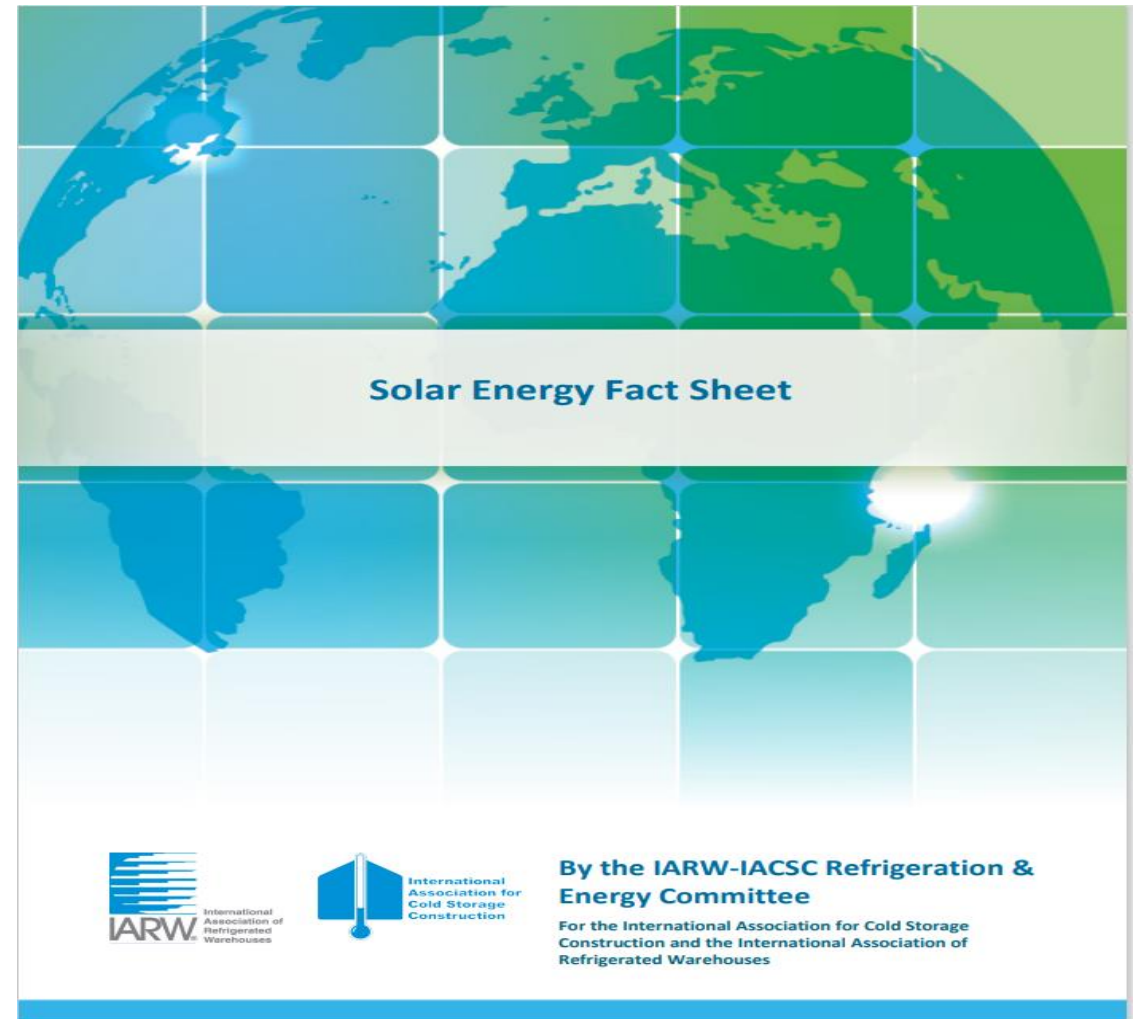
1. **Public-Private Partnerships:**

Governments and private sector collaborations are expanding cold chain infrastructure investments across Africa, leveraging international funding and expertise.

2. **Solar-Powered Solutions:**

Innovations in solar-powered refrigeration are overcoming electricity challenges, providing sustainable cold storage solutions in remote areas.

3. **Mobile Technology:** Mobile apps are enhancing cold chain visibility and efficiency by enabling real-time monitoring of temperature and humidity during transportation.



**GCCA AFRICAN
COLD CHAIN CONFERENCE**
22-23 August 2024
Cape Town, South Africa

State of Global Cold Chain – Key Facts

- 1. ****Market Size and Growth****: The global cold chain market is expanding rapidly, projected to reach over \$340 billion by 2028, growing at a CAGR of around 12% ([Source: Market Research Future](<https://www.marketresearchfuture.com/reports/cold-chain-market-1581>)).
- 2. ****Sector Distribution****: It spans various sectors, with food and pharmaceuticals dominating. For instance, **the food industry alone constitutes over 70% of the cold chain market.**



State of Global Cold Chain – Promoting Global Trade

- the GCCA is campaigning for the FRIDGE Act in the US , which is a legislative amendment to the Farm Bill currently before Congress – it would require Federal Government to make money available for infrastructure investment in developing markets (including Africa)
- the GCCA met with the EU’s Chief International Trade negotiator to talk about reducing barriers for imports and exports to the EU in April (before meeting the EU Commission)
- the GCCA has made significant progress in securing changes to the rules governing storage and transportation rules for food exports from Brazil



(GCCA Delegation to Congress)



**DEVELOPING THE
GLOBAL COLD CHAIN**
GCCA Farm Bill Initiative introduced in the U.S. House and Senate.



**GCCA AFRICAN
COLD CHAIN CONFERENCE**
22-23 August 2024
Cape Town, South Africa

State of Global Cold Chain – Move to -15 degrees



- The Movement to -15C campaign was launched at COP 28. It now has over 30 companies, associations and global brands supporting it. GCCA was a founding supporter.
- Further studies are being undertaken and prepared in Australia, Europe, and the United States
- More pilots are needed, and regulatory/consumer trust issues must be addressed, but there is big potential.

Nomad Foods, the largest frozen food brand owner in Europe, has published study results stating that its breaded chicken, fish, and vegetable line portfolio is unaffected by long-term storage at temperatures higher than 18C.

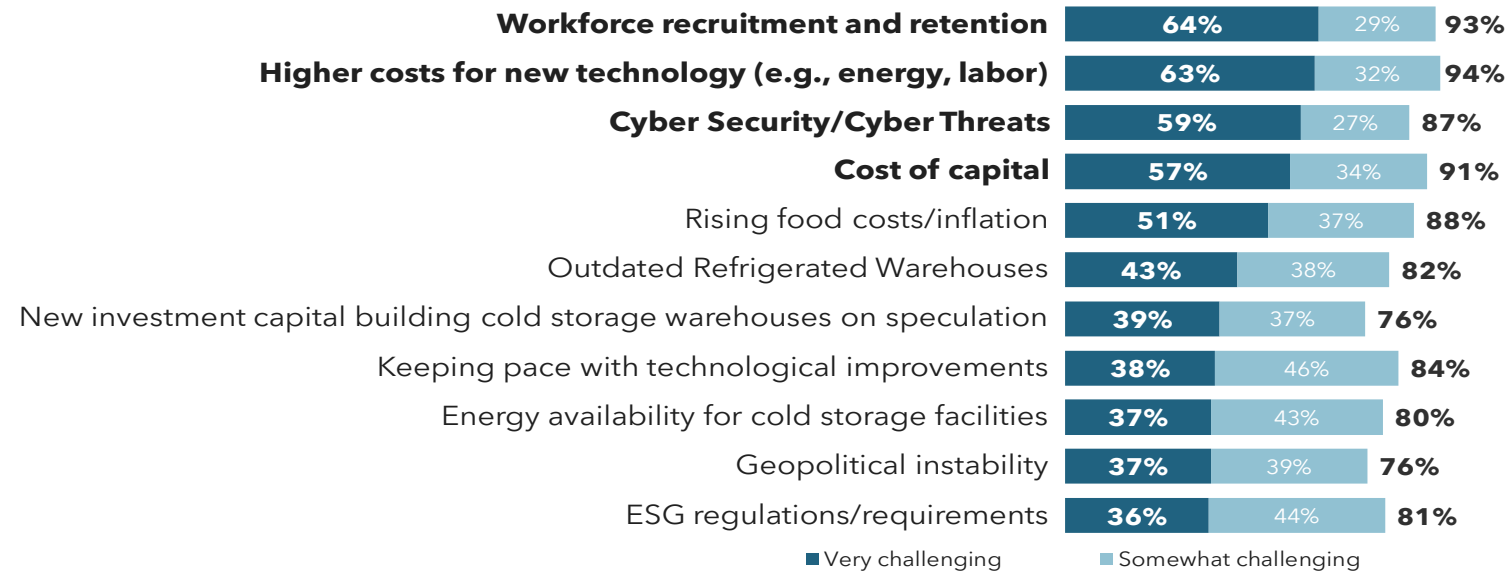


**GCCA AFRICAN
COLD CHAIN CONFERENCE**
22-23 August 2024
Cape Town, South Africa

State of Global Cold Chain - Top Challenges

Top Industry Challenges

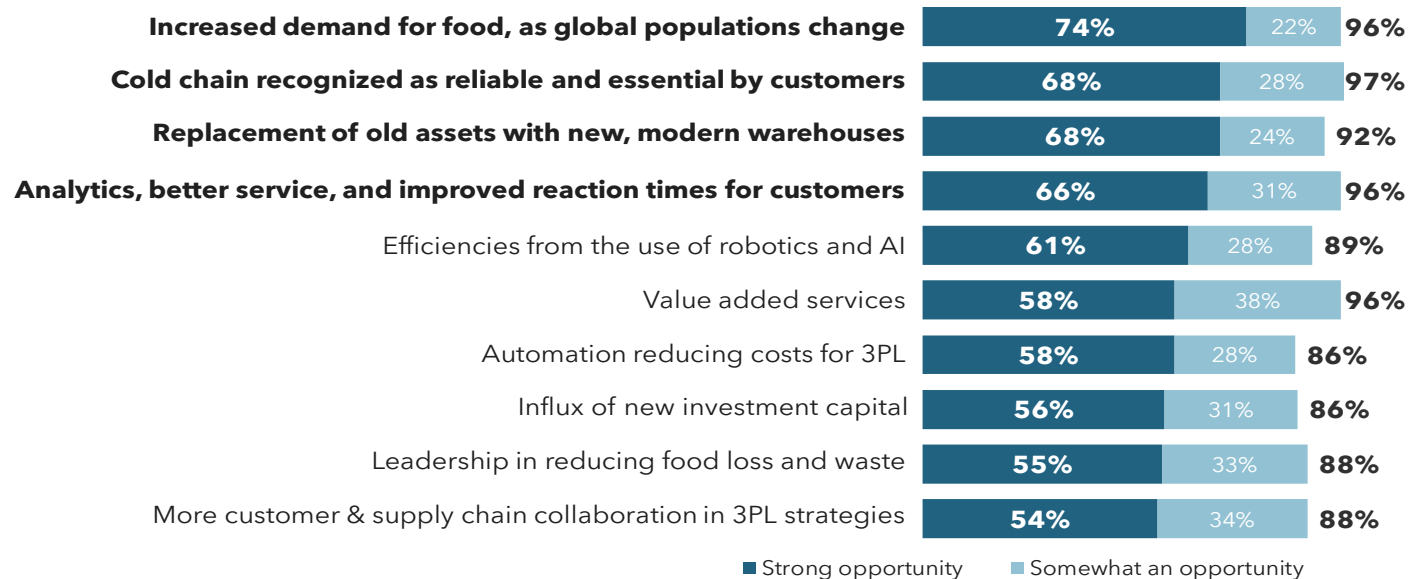
- **Workforce recruitment/retention, higher costs of new technology, cyber security, and cost of capital are the top challenges facing the industry.**



State of Global Cold Chain - Opportunities

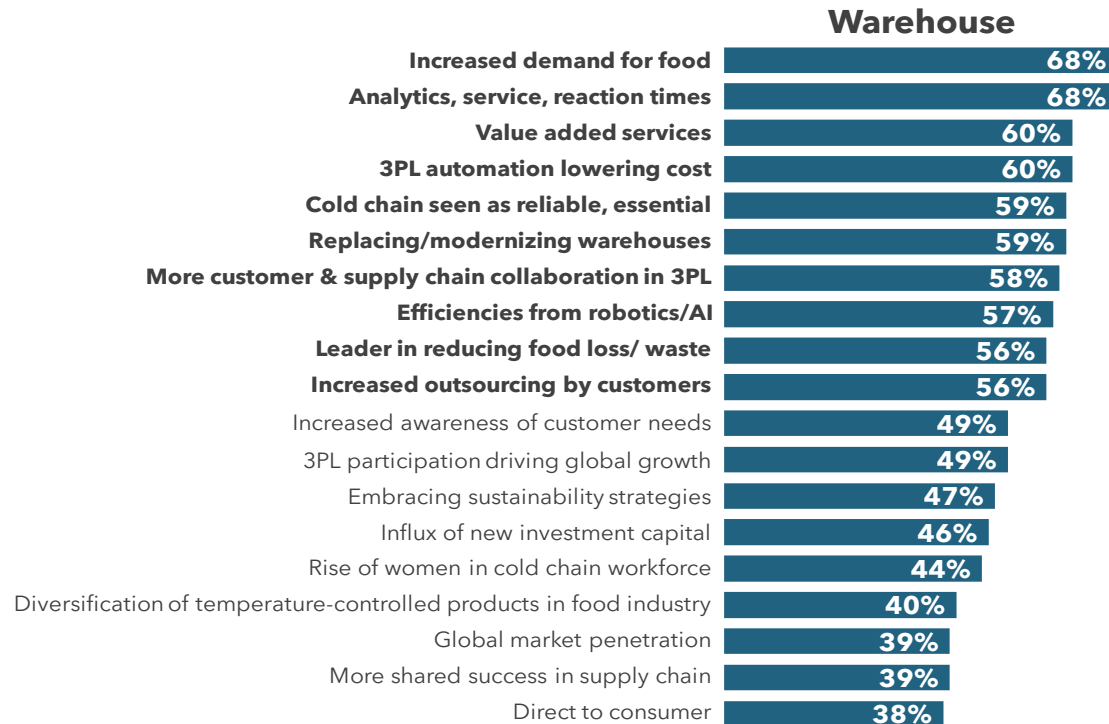
Top Industry Opportunities

- “Increased global demand for food” is viewed as the top opportunity for the cold chain industry, followed closely by improving customer perceptions, modernizing/replacing warehouses, and improved analytics, service, and reaction times for customers.



State of Global Cold Chain - Opportunities Warehouse

Top Industry Opportunities: Warehouse



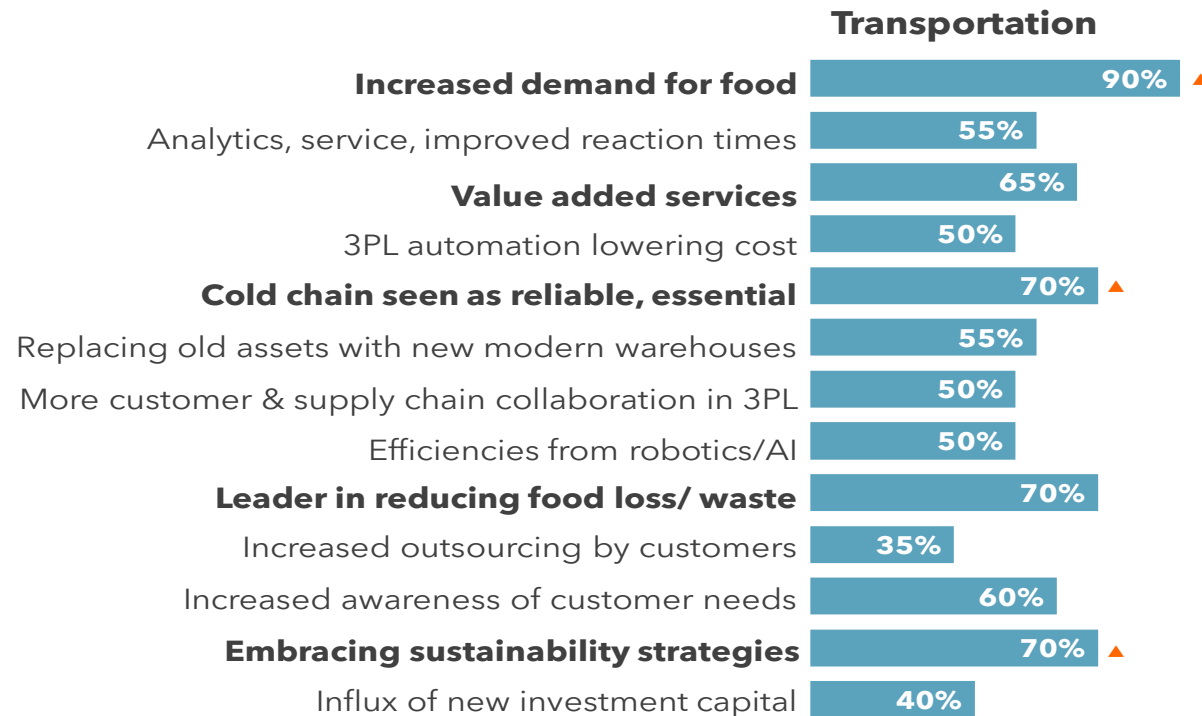
Beyond an 'increased demand for food,' top opportunities for **Warehouse** members are customer-centered: improving services, lowering costs, and positioning the cold chain as essential to customer success.

% 'Strong opportunity'



State of Global Cold Chain – Opportunities Transport

Top Industry Opportunities: Transportation



Beyond an 'increased demand for food,' top opportunities for **Transportation** members include improving services, positioning the cold chain as essential to customers, reducing food waste, and embracing sustainability.

*Rank ordered by
Warehouse opportunities*



State of Global Cold Chain – Conclusion

- In conclusion, while the cold chain industry in Africa faces numerous challenges, it plays a vital role in **food security, creates opportunity for economic growth**. By investing in infrastructure, technology, and innovative solutions, stakeholders can accelerate the development of a sustainable and resilient cold chain network across the continent, benefiting millions of lives and supporting overall economic development.





GCCA AFRICAN COLD CHAIN CONFERENCE

22-23 August 2024
Cape Town, South Africa



GLOBAL COLD CHAIN
ALLIANCE®