

Outbreak

How cold chain logistics are adapting to the rising threat of animal disease in the global food trade.

COVER
STORY
22

10

Inside the Make America Healthy Again Movement

14

The Future of Refrigeration

18

Post-Pandemic and Pro-AI:
Human Resources in 2025

26

Growth Is Trending for
Asia-Pacific Cold Chain

30

Go Fish: Cubic33 Group Builds in
Chile for Emergent Cold LatAm

34

State of the Association: 2025
Mid-Year Executive Update



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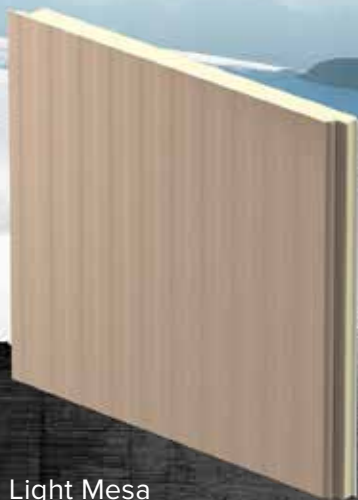


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DEPARTMENTS

- 36 Association News
- 40 Cold Chain Development
- 42 Calendar
- 44 Member News
- 45 New Members
- 48 Cool Solutions
- 50 Ad Index

COLUMNS

- 6 Leadoff



FEATURES

10

Inside the Make America Healthy Again Movement

What U.S. food policy means for the cold chain.

By Kerri Marbut

14

The Future of Refrigeration

Global action intensifies on HFC phase-down.

By Shane Brennan

18

Post-Pandemic and Pro-AI: Human Resources in 2025

HR leader Brooklyn Miller on recruitment, retention, and the emergence of AI.

By Alexandra Walsh

22

Outbreak

How cold chain logistics are adapting to the rising threat of animal disease in the global food trade.

By Shane Brennan



26

Growth Is Trending for Asia-Pacific Cold Chain

Modern cold chain infrastructure is essential to meet evolving needs.

By Isobel Davidson

30

Go Fish: Cubic33 Group Builds in Chile for Emergent Cold LatAm

Cubic33 Group builds largest frozen food warehouse in Chile for Emergent Cold LatAm.

By Keith Loria

34

State of the Association: 2025 Mid-Year Executive Update

A message from GCCA CEO Sara Stickler.



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MESSAGES FROM GCCA LEADERS

WELCOME TO THE JULY-AUGUST EDITION OF COLD FACTS. I'M HONORED TO BE INTRODUCING THE SUMMER ISSUE OF THE MAGAZINE AS CURRENT CHAIR OF THE GLOBAL COLD CHAIN FOUNDATION (GCCF) BOARD OF DIRECTORS.

In partnership with leaders from GCCA Warehouse, GCCA Transportation, and the Controlled Environment Building Association, the GCCF has delved deep, over the past six months, into a long-term strategic planning process. This means re-examining our core mission, vision, and strategic pillars, speaking directly and candidly to our members and stakeholders, hosting workshops, and gathering insights and data.

During this time of reflection, one thing has become clear: the value of the GCCF and our dedication to education, research, international development, and food waste reduction initiatives are more important than ever. However, even with this level of dedication, the world is constantly changing. Change requires organizations like ours to offer unique perspectives and benefits to remain relevant.

The first and most essential aspect of the Foundation is our commitment to education. Building on the 60-year bedrock of our Cold Chain Institute program in the United States, we have taken huge steps forward in expanding the Institute globally, into Europe, Latin America, Brazil, and Australia. The



3-year Institute curriculum is designed for motivated cold chain professionals looking to bolster a lifelong career in the temperature-controlled industry.

Upon graduation, how can the GCCF best utilize their knowledge and skills? We are committed to putting our Institute graduates to work within the Alliance, maintaining their engagement by connecting them with committees and task forces to execute strategy as well as participate in the purpose-driven work of the Foundation, like international development and food waste reduction initiatives.

The beauty of being involved in associations and foundations like GCCA and GCCF is the access to resources and data that is trusted, science-based, and neutral. Studying



COLDFACTS

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the cold chain to better understand the scope and needs of the industry is the second priority of the Foundation.

We must identify specific and targeted areas where the global cold chain requires strengthening and develop resources to help the industry do just that ... without “boiling the ocean.” Focused, targeted, and strategic research and data gathering will provide valuable information on what matters most to you, and we are ready to unleash the power of our people and our experts, like the Council of Scientific Advisors, in that research.

The GCCF is also uniquely positioned to have a tremendous influence on global issues like food waste reduction, post-harvest food loss, sustainability and food safety, safer storage options for perishable goods, overall industry growth, and determining high-impact investment opportunities.

As an organization, we must shift our perspective, becoming more proactive in determining where our international projects can have the biggest impact. This means more strategically and thoroughly concentrating on the issues noted above, while also connecting the amazing network of non-profit organizations worldwide that work tirelessly to end food insecurity.

With mass amounts of global food waste existing in parallel with unprecedented levels of food insecurity, I am dedicated to positioning the Foundation to be a bold and solutions-oriented leader, with a future that includes more proactive approaches to grants, partnerships, and other funding to continue and expand our great work.

Food waste is, in essence, a logistics problem that requires a logistics solution. The GCCF and the greater Alliance are just the partners to collaborate on solutions for these big issues.

There are certainly challenges in the non-profit space, but I truly believe there are *more* opportunities. I challenge each and every one of you to lean in, get involved, and join me in advancing our mission.

Have a wonderful summer, and see you at Convention. ☺



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INSIDE THE MAKE AMERICA HEALTHY AGAIN MOVEMENT

What U.S. food policy means for the cold chain.

By Kerri Marbut

The Make America Healthy Again (MAHA) movement is quickly becoming a focal point for U.S. food policy in the Trump Administration. What began as a call for better public health is evolving into a comprehensive push to reform how food is produced, labeled, and distributed, with the potential to impact not only consumer behavior but also agriculture, manufacturing, logistics, and cold chain operations.

The central goal of MAHA is straightforward: the American diet, characterized by large consumption of “ultra-processed” foods, is a major driver of chronic disease, and reforming the food system is essential to improving public health.

The MAHA movement encompasses a range of public health concerns that go beyond the food system, including the use of pharmaceuticals. As MAHA-aligned policies take shape at both the state and national level, they are beginning to reshape the entire food supply chain, including how food products are formulated, handled, and preserved from farm to fork.

The movement, which originated as part of U.S. Secretary of Health and Human Services Robert F. Kennedy Jr.’s presidential campaign platform, centered around the connection between diet and chronic illnesses such as obesity, diabetes, and cardiovascular disease.

It hasn’t come without stark criticism and calls to adhere to science-based research.

The initiative quickly gained momentum beyond the campaign, driven by public concern over food safety, ingredient transparency, and the prevalence of ultra-processed foods. Shortly after Kennedy’s confirmation, President Trump issued an executive order establishing the Make America Healthy Again Commission, chaired by the Secretary and tasked with evaluating the U.S. food system and recommending reforms.

The commission brings together a broad group of executive branch leaders, including Secretary of Agriculture Brooke Rollins. In April, the U.S. Department of Agriculture held a joint event with Health and Human Services, outlining the vision for a healthier America, including the alignment of nutrition-related programs with American-grown produce.

While MAHA was born out of concerns

about the health effects of food additives and food processing, its scope has widened. Today, the movement addresses regulatory gaps in food labeling, questions about FDA-approved ingredients, and a broader debate over how food quality influences national health outcomes. It has transformed into a policy framework that seeks to bring American food standards closer in line with those seen in other nations.

From its campaign origins, the movement has quickly moved into policymaking. Early momentum came from the establishment of the Congressional MAHA Caucus, which laid the groundwork for legislative action. Since then, more than 100 food-related bills have been introduced in at least 36 states, many of them echoing MAHA’s goals.

In Texas, Senate Bill 25, dubbed “Make Texas Healthy Again,” requires warning labels on packaged foods containing any of 44 specified ingredients, including dyes, emulsifiers, and artificial sweeteners that are banned or discouraged by health agencies in Australia, Canada, the European Union (EU), or the United Kingdom (UK).

Meanwhile, Louisiana’s Senate Bill 14 would prohibit school meals from containing certain additives like artificial food dyes and sucralose and require products with these ingredients to carry QR-code-based labels linking to the manufacturer and safety data.

Both bills await gubernatorial signatures and represent some of the most assertive



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MAHA-aligned measures to date.

Globally, MAHA-style regulations are not a new concept. The E.U. bans several dyes and preservatives that are found in U.S. foods and Canada requires clear front-of-pack warnings for products high in sodium, sugar, or saturated fat.

The Food and Drug Administration banned Red Dye 3 in January, shortly before President Trump took office, and in April announced a plan to phase out petroleum-based dyes, targeting Red Dye 40, Yellow Dye 5, Yellow Dye 6, Blue Dye 1, Blue Dye 2, and Green Dye 2. The food industry is already witnessing shifts in the use of artificial and petroleum-based dyes, with the Kraft Heinz food company announcing in June that it will remove all artificial dyes from its products by 2027 and will not launch any new products that utilize artificial coloring.

As MAHA-inspired reforms push food manufacturers to eliminate synthetic preservatives, artificial dyes, and other chemical additives, the role of cold storage and refrigerated transport becomes even more critical. Without certain additives, many foods have shorter shelf lives and greater sensitivity to temperature and handling conditions, which could lead to an increased reliance on cold chain infrastructure to preserve freshness, extend usability, and maintain food safety.

At the same time, there is a shift in consumer demand toward fresh foods, which can be best achieved through the use of the cold chain. The cold chain is essential to meeting this demand, ensuring that perishable items are safely delivered to consumers.

While much remains uncertain, the direction of change is clear: food is becoming a central focus of public health policy. What lies ahead could be a complex environment, but also one rich with opportunity for the cold chain. As demand rises for fresh and minimally processed foods, the cold chain industry stands poised to play an increasingly vital role in America's food system. ☞

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Randel Has New Role at Texas Tech



The Global Cold Chain Alliance, Global Cold Chain Foundation, and Controlled Environment Building Association congratulate Lowell Randel, Senior Vice President of Government and Legal Affairs, on his new role as Executive Director, Agriculture and Resource Policy Advocacy Program (ARPA) through Davis College of Agricultural Sciences & Natural Resources at Texas Tech University.

Randel has guided GCCA's government affairs and policy work for 16 years. His many accomplishments include introducing the FRIDGE Act into the Farm Bill – the first piece of legislation written by GCCA; guiding Food Safety and Inspection Service collaboration, including key wins like the 50-mile rule and partial presentation; his work with the Occupational Safety and Health Administration

(OSHA) and building a partnership that resulted in GCCA being named an OSHA Alliance Ambassador; and the response and support plans developed during the COVID-19 pandemic to ensure GCCA members were eligible for relief and loans.

The GCCA and our members are excited for Randel's new leadership opportunity, and we look forward to continuing our close relationship. In addition to academic training, a goal of the ARPA program is to create a one-year postgraduate fellowship program, placing students in key policy and advocacy leadership roles.

Thank you to Lowell Randel for his many years of dedication to our members, stakeholders, partners, and communities that have benefited from his commitment to the cold chain and safe, sustainable food options.



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THE FUTURE OF REFRIGERATION

Global action intensifies on HFC phase-down.

By Shane Brennan

Government representatives from around the world gathered in Bangkok, Thailand, for the annual Meeting of the Parties to the Montreal Protocol in July 2025. The focus: assessing global progress in phasing down hydrofluorocarbons (HFCs) and planning next steps. The GCCA participated, hosting an education session and engaging with officials about the implications of policy decisions on the cold chain.

Nearly 40 years have passed since the 1987 Montreal Protocol was adopted to eliminate chlorofluorocarbons (CFCs), which were causing significant depletion of the ozone layer. That agreement was a landmark success in coordinated global environmental action. CFCs have now been mostly eliminated and replaced by HFCs or natural refrigerants such as carbon dioxide, ammonia, and propane.

However, HFCs – while ozone-friendly – have high global warming potential (GWP). GWP compares the climate impact of a gas to carbon dioxide (CO₂), which has a GWP of 1.

Some older HFCs had GWPs exceeding 4,000, while newer versions in widespread use – such as in refrigerated transportation – still often have GWPs around 2,000.

The industry continues to innovate, with lower-GWP HFCs and natural refrigerants gaining traction.

To address the climate risks associated with HFCs, the Kigali Amendment to the Montreal Protocol was adopted in 2016, setting a binding timetable for phase-downs. This amendment is now the centerpiece of international collaboration on refrigerants.

Global Obligations and National Regulations

Global negotiations can feel far removed from day-to-day cold chain operations, but these meetings shape the legal and commercial frameworks companies must navigate. They also offer valuable opportunities to engage directly with regulators, clarify practical impacts, and advocate for balanced approaches that maintain safety, performance, and environmental integrity.

Implementation approaches vary widely.

Most countries pursue two core strategies:

- **Quota systems:** Restricting the availability of high-GWP refrigerants to encourage adoption of low-GWP alternatives.
- **Product bans:** Prohibiting the sale of equipment that uses high-GWP refrigerants. These pose the greatest challenges to cold chain operations.

While the frameworks are similar, they vary significantly in the details, and as parties met in Bangkok, much of the focus was on sharing ideas and experience.

Phase-Down Obligations Under the Kigali Amendment

GROUP	EXAMPLES OF COUNTRIES	BASELINE YEARS	INITIAL REDUCTION	FINAL TARGET	FINAL YEAR
Group 1 (A5 - I)	China, Brazil, South Africa	2020 – 2022	10% by 2029	80% reduction from baseline	2045
Group 2 (A5 - II)	India, Pakistan, Iran, Saudi Arabia	2024 – 2026	10% by 2032	85% reduction from baseline	2047
Non-A5 (Developed)	U.S., EU, Canada, Japan, Australia	2011–2013	10% by 2019	85% reduction from baseline	2036
Optional/ Non-Parties	Countries yet to ratify or opting out	N/A	None	Voluntary or pending	N/A

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National Implementation: A Comparative Overview

POLICY AREA	UNITED STATES	EUROPEAN UNION	CHINA
Lead Authority	EPA – AIM Act	European Commission – F-Gas Regulation	Ministry of Ecology and Environment (MEE)
Baseline Years	2011–2013	2009–2012	2020–2022
Reduction Target	85% by 2036	95% by 2050; 79% by 2030	80% by 2045
Regulatory Instruments	Quota system, sector bans, labeling, reporting	Quota system, product bans, labeling, pre-charged controls	Quota licensing, refrigerant catalog
Sector-Specific Provisions	Transport refrigeration not restricted	Transport review deferred to 2027	Alternative pathways in development
Key Legal Tools	AIM Act of 2020	EU 517/2014; updated 2024	HFC Control Plan 2022
Industry Concerns	Warehouse classification, tech readiness	Fast bans outpace tech readiness	Balancing cooling demand and tech change
Enforcement & Penalties	EPA enforcement, civil penalties	National enforcement, fines	Licensing and registration penalties
Innovation Support	EPA and DOE grants	EU Innovation Fund, Horizon Europe	Gov’t R&D and pilots
Rules for Industrial and Commercial Refrigeration	EPA rules under the AIM Act restrict refrigerants with GWP >150 in new systems, but current implementation is under review and a petition has been submitted to reclassify cold storage.	The EU F-Gas Regulation bans placing on the market new commercial refrigeration equipment with refrigerants >150 GWP, effective in most categories. Industrial systems face phased restrictions.	China uses a licensing system for new industrial/commercial equipment. Specific bans are less detailed, but regulatory guidance encourages adoption of low-GWP and natural refrigerants.

Making the Case for Proportionate Implementation

Effective climate action must align with technical realities. In refrigerated transportation, finding alternatives to high-GWP HFCs remains difficult. Systems for mid- and large-capacity vehicles must meet stringent safety, size, and performance standards. While low-GWP technologies exist in prototype form, they are not yet commercially viable at scale.

Recognizing this, the U.S. Environmental Protection Agency (EPA) has not restricted higher-GWP refrigerants in truck refrigeration. Similarly, the European Union deferred a potential ban in transport refrigeration until 2027 to allow more time for innovation. GCCA’s education session in Bangkok focused on anticipating this 2027 deadline, educating country representatives about the realistic implications of an unrealistic timeline for banning vital technologies.

China has so far focused on foundational market mechanisms, prioritizing emissions tracking and data accuracy over product-specific restrictions.

Cold storage facilities face similar pressures. A recent industry petition in

the United States challenged the EPA’s classification of warehouse systems under the same rule as commercial and retail refrigeration. GCCA supported the petition, specifically calling for cold storage operations to be categorized as an industrial use alongside food processing facilities and not alongside commercial/retail refrigeration. This is necessary to avoid unintended supply chain consequences.

Balancing Progress and Practicality

Global climate regulations are intensifying, and implementation is accelerating. For cold chain operators, the challenge is to meet these evolving expectations while safeguarding food safety, product integrity, and operational reliability.

Policy frameworks must allow time for technological maturation and provide investment certainty. The pace of phase-down should follow the innovation curve, especially in safety-sensitive and high-performance sectors like refrigerated transportation and industrial warehousing.



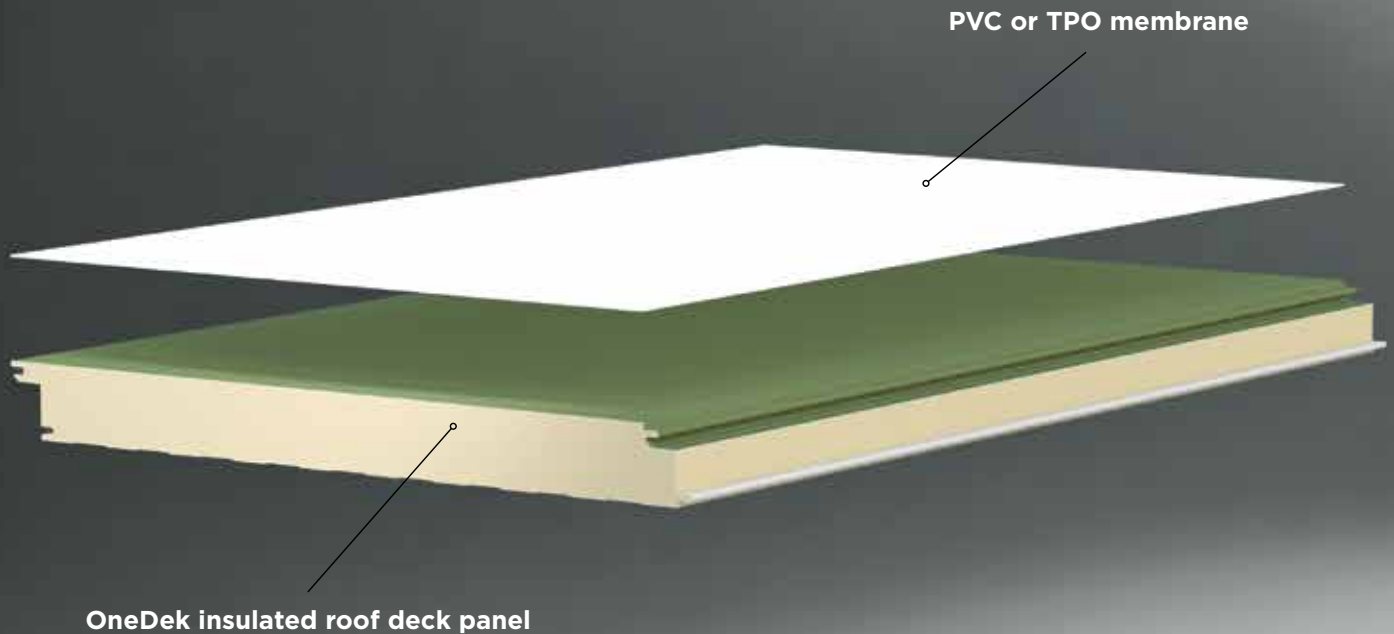
GCCA continues to advocate for practical, science-based, and industry-informed implementation of refrigerant regulations. Engagement with global regulators is essential to ensure that compliance pathways are realistic, proportionate, and aligned with industry capability. ☞

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Brooklyn Miller (third from the right) on a recent visit to a new facility in McAllen, Texas, to tour the site and meet staff. (Photo courtesy of Envision Cold.)

POST-PANDEMIC AND PRO-AI: HUMAN RESOURCES IN 2025

HR leader Brooklyn Miller on recruitment, retention, and the emergence of AI.

By Alexandra Walsh

The height of the pandemic in spring 2021 was a time of intense focus on the role of human resource leaders, and *COLD FACTS* featured the first cover article dedicated to the work of HR teams. Their training, skills, and ability to improvise and think outside the box were tested like never before. On a typical day, HR's attention could pivot from vaccines to social inequity to virtual recruiting and onboarding, all while serving as a consoler, therapist, and cheerleader.

Fast-forward four years, and HR leaders face many of the same problems, with one big difference: artificial intelligence.

Although still in its early stages, one HR expert supports the idea that AI will revolutionize the human resources industry.

COLD FACTS recently interviewed Brooklyn Miller, the Chief Human Resources Officer at Envision Cold, about recruitment and retention trends, AI, remote work, and other current topics.

Q: Can you share any emerging trends or patterns in recruitment and retention?

A: I currently work for a forward-thinking cold storage operator and developer. From my perspective, the most significant trend for corporate-based indirect labor is remote work. We have approximately 30 corporate employees who have the option to work from home. During the hiring process, being able to offer remote work doesn't restrict us to a specific geographic area. However, in our industry, an important aspect of work-from-home policies is that they do not apply to the front-line workers.

I came from a fully remote role, so I understand what it's like to waste time commuting to town. We offer many positions that are

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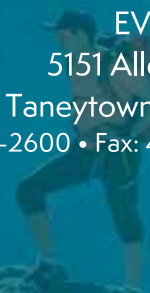
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eligible to work from home. There's no doubt it's a strong selling point when recruiting corporate-level leaders.

Down the road, I see a need for hourly, remote administrative staff. You'll be able to tell if they're working or not, and I think it can be a positive for both the company and employee – however we are not there quite yet.

That being said, remote work would never have been a conversation before the pandemic.

Q: Did any changes implemented during the pandemic remain part of your HR culture?

A: We see now the many positives of having part of your workforce work remotely. Work-from-home policies greatly expand our geographic recruiting reach. Before the pandemic, our recruiting was limited to the Atlanta, Georgia, area. Now, corporate-based candidates can come from nearly anywhere, and we can have staff all over the country.

Q: Does the company have a Diversity, Equity, and Inclusion (DEI) policy, and have there been any policy changes in recent months?

A: The company has acquired 11 operations, none of which had any DEI policies. We now have five staff on the HR team, and we are proud of the progress we have made on the DEI front.

We have a section on DEI in our employee handbook, have a very diverse workforce, and my entire staff is female. One thing we are passionate about is encouraging people to take roles at different sites and levels, and that has led to our first female General Manager.

We have one HR manager who oversees four sites along the U.S./Mexican border, where most team members do not speak English. She is bilingual, and in her previous role, she was a DEI coordinator. Because of that, she brings a fresh perspective to our HR initiatives. When it comes to DEI, due

"We see now the many positives of having part of your workforce work remotely. Work-from-home policies greatly expand our geographic recruiting reach. Now, corporate-based candidates can come from nearly anywhere, and we can have staff all over the country."

to our diverse workforce, we're in a good position simply by choosing the right people for the job.

Q: Can you offer examples of how artificial intelligence (AI) can be used in recruitment? Do you have any concerns about AI in HR?

A: My team's understanding of technology is deeper than mine, which encouraged me to explore tech.

If you spend a lot of time writing policies, as I do, AI is your friend, and I'm a fan. I love to write, and many of our policies come from traditional writing methods. But once you start working with AI, there's no going back ... the communication aspect is incredible.

Artificial intelligence also has a role in recruitment. We have just one recruiter who hires at every level from C-suite executives to forklift operators. I think AI will be a huge time saver in the form of resume screening. While still in its early stages from a recruiting perspective, it's not very expensive and could reduce hours in our recruiter's day. I worry we might miss something on a resume, but the time saved makes it worthwhile.

We are excited to explore more AI applications. I work for a forward-tech looking company, and so far, they're open to letting us try new things in the world of AI.

And, it's helpful that it doesn't cost much.

Q: Can you share an HR case study or program?

A: In terms of labor efficiencies, we see our company as forward-thinking and recognize the need for a job-sharing program – where two (or more) workers share the duties of one full-time job, each working part time – as well as warehouse administrative remote work, but what message does that send to the majority of our team — the core and heart of our organization — the guys in the freezer?

We want to offer more than just a job to our front-line workers. The goal is for them to gain the industry skills they need to advance beyond the freezer, if that's what they want. For example, that could be a lateral move to shipping and receiving or a transition to an office role.

I'm proud of creating a career path for warehouse team members, and it is essential to our investors. There are significant pay increases in the conduit to supervisory and leadership roles. It's also been beneficial in retaining the best workers. ☞

ALEXANDRA WALSH is a Senior Publishing Consultant with Association Vision and Editor-in-Chief of *COLD FACTS*.

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OUTBREAK

How cold chain logistics are adapting to the rising threat of animal disease in the global food trade.

Brazil confirmed its first-ever case of Highly Pathogenic Avian Influenza (HPAI) in a commercial chicken flock in May 2025. Though not an unusual global event, the news sent a jolt through international supply chains. Brazil is a key player in poultry exports, and global markets reacted with bans and restrictions imposed almost immediately.

“Our clients were very concerned about the cancellation of their contracts, knowing they had many shipments already en route to their destination,” says Vivianne Leite, Chair of the GCCA Food Safety Committee in Brazil and a Director at CAP Logística Frigorificada. “They knew that the suspension, according to the market, would trigger a chain reaction in the manufacturing process.”

The incident reflects a broader reality: outbreaks of animal disease are becoming more frequent and disruptive. For the temperature-controlled logistics sector, these events aren't just veterinary crises – they're trade disruptors, supply chain stress tests, and reputational risks.

Leite notes her company accepted all recommendations following the outbreak. Even after being HPAI free for 45 days, they still receive daily reports from the Ministry of Agriculture.

Another challenge was rearranging and maximizing stock to find room for the client's product. “It's interesting that we were struggling with space availability in the last year and a half. Our clients changed their strategy, storing products in containers instead of using our warehouses,” says Leite. “I even decided to turn off two chambers in order to store dry products in them.”

As animal-borne threats like African Swine Fever (ASF), (HPAI), and Foot-and-Mouth Disease (FMD) increase, how is the cold chain coping?

A Decade of Disruption

Over the past decade, there has been a significant increase in both the frequency and severity of major animal disease outbreaks. The World Organization for Animal Health (WOAH) estimates up to 20% of global production is lost annually due to animal diseases. There is no single cause of this increase. Still, factors such as high-density farming, wildlife migration, habitat loss, and the expansion of trade in live animals and animal products are considered contributing factors.

Three major diseases dominate recent history:

- FMD: A recurring threat in Africa, Asia, and the Middle East, FMD caused South Africa's beef exports to drop by 20% in 2022. The disease costs the global economy more than \$10 billion annually.
- ASF: Beginning in China in 2018, ASF led

to the culling of more than 200 million pigs – approximately 40% of the global pig stock – resulting in an estimated \$130 billion in losses by 2020. Global pork supply chains saw price spikes, trade shifts, and protein substitutions.

- HPAI: Once seasonal, HPAI is now a constant risk. Between 2021 and 2023, more than 800 million birds were culled globally. In the United States, losses exceeded \$1.2 billion. Export bans in Brazil, France, and Poland have impacted producers, leading to ripple effects on meat and egg prices.

Other emerging threats include:

- Lumpy Skin Disease: Spread to more than 25 countries since 2019. India lost 2 million cattle in 2022, sparking severe milk shortages.
- Brucellosis and BSE (mad cow disease): These diseases continue to cause sudden export halts such as Brazil's BSE-linked suspension of beef exports to China in 2021.
- New World Screwworm: It's a growing threat in Mexico and Central America, triggering movement restrictions and export scrutiny.

These outbreaks prompt emergency responses including culling, biosecurity upgrades, movement restrictions, surveillance, and vaccination. However, these measures are costly, reactive, and inconsistently applied.

Small producers bear the brunt and heartache of lost animals and revenue, but it falls to cold chain companies to find ways to ensure supply chain continuity. In doing so, temperature-controlled logistics operators face increasing regulatory complexity, certification burdens, and real-time tracking demands.

Regionalization vs. Blanket Bans

When disease is detected, importing countries must decide whether to block all products from the affected country or only those from specific regions. While WOAH promotes “regionalization” – accepting products from disease-free zones – this depends on the credibility of data, traceability systems, and real-time monitoring.

“Our industry relies on traceability,” explains Dr. Stephen Neel, Vice President of Global Food Optimization at Lineage. “The 3PL industry has the responsibility to verify which countries, states, and products

are eligible and/or ineligible for trade to any company, and then to verify that all shipping routes are through eligible areas. We do this by working closely with the producer/supplier to verify lot codes, slaughter locations, and slaughter dates to verify eligibility as animal outbreaks ebb and flow, grow or expire based on eradication efforts at the production locations. Mistakes are costly. Such measures place a heavy operational burden on cold chain companies.”

Vaccination Dilemmas

Vaccination can help control disease spread, but global trade acceptance is inconsistent. Many countries hesitate to import meat from vaccinated animals, fearing they may not be able to distinguish between vaccination and infection. This hesitancy creates complex certification challenges, including proving vaccine types, maintaining separate supply lines, and additional quarantine periods – all of which increase costs and delay shipments.

In October 2023, faced with repeated HPAI outbreaks in major duck production zones, the French authorities launched a targeted duck vaccination strategy. The decision was underpinned by research that showed vaccination could dramatically reduce outbreak numbers and economic losses.

“There has been a study by the veterinary school of Toulouse (France), which shows that they had, I think, 10 outbreaks last year, and if they did not vaccinate, they would have had 700 outbreaks,” said WOAH Director General Emmanuelle Soubeyran. “The cost of the vaccine, the surveillance, and vaccination, was 10 times less than the cost of the outbreaks.”

Despite domestic success, the decision had swift international consequences. Following the announcement, both the United States and Canada temporarily halted poultry imports from France. Officials expressed concern that vaccinated birds could carry and spread the virus without symptoms, complicating outbreak detection. While a precaution, the trade bans exposed ongoing tension between disease control and international trade realities.

Hidden Protectionism

Some disease-related trade restrictions are suspected to mask protectionist policies. In 2014, Russia banned all EU pork exports after ASF was found in wild boars in Lithuania



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and Poland. The World Trade Organization (WTO) later ruled the blanket ban scientifically unjustified.

In May, speaking at an international conference, WTO Representative Dr. Rolando Alcala reported that since 1995, more than 600 complaints have been filed with the WTO regarding trade restrictions imposed due to animal health. Over a third of these were directly related to non-compliance with WOA standards.

Building trust in harmonized animal disease control standards often flounders in the face of stronger protectionist or political motivations.

Developing Country Gaps

Many low- and middle-income countries struggle to meet the technical demands of regionalization and certification. A 2021 FAO study found only 30% of African nations met WOA reporting standards. This leads to precautionary bans from risk-averse importers, even when outbreaks are limited.

Botswana – long praised for beef quality –

faced repeated export suspensions due to its inability to satisfy EU traceability standards during FMD outbreaks. Despite low case numbers, trade was halted until surveillance systems were upgraded.

From Coping to Resilience

Cold chain logistics have adapted impressively, improving traceability, revising routes, and bolstering compliance capacity. Resilience, however, remains a work in progress.

Some positive trends are emerging. ASF containment in parts of Europe shows that cross-border cooperation works. HPAI protocols are becoming more harmonized, improving predictability. Disease-free zones enable limited trade continuity, even during outbreaks.

Yet challenges remain – fragmented national responses, politicized trade decisions, and rapidly evolving animal health threats test even the most robust supply chains.

What Comes Next?

The next outbreak is inevitable. The question

is whether the global food system, and its cold chain backbone, can continue the broad trend of rapid intervention, coordinated response, and robust, trusted systems.

For governments, this means aligning more closely with international science-based standards, investing in veterinary infrastructure, and committing to transparency.

For the cold chain industry, it means building agility and traceability into every link, from farm to fork. Digital documentation, geofenced logistics, and end-to-end visibility must become the norm, not the exception.

Cold chain professionals are not just logistics providers – they are critical enablers of food security, trade stability, and public health. In an era of recurrent animal disease, their role has never been more vital. ☞

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The advertisement features a large, modern cold storage facility at night, illuminated by blue and white lights. In the foreground, a white Agility Recovery cold storage container is prominently displayed. The container has the company logo and a yellow warning symbol. Overlaid on the image are two text boxes: a large blue one at the top left with the headline "When Storms and Outages Hit, We Keep the Cold Chain Running." and a smaller white one at the bottom right with the text "Scan to talk to an Agility expert about your outage risks." next to a QR code.

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PT MGM Bosco Logistics, in Bantar
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GROWTH IS TRENDING FOR ASIA-PACIFIC COLD CHAIN

Modern cold chain infrastructure essential to meet evolving needs.

By Isobel Davidson

The cold chain industry is experiencing growth as an overall trend across the Asia-Pacific region. There are clear distinctions, however, between dominant markets such as mainland China, India, Japan, South Korea, and Australia, and the emerging markets of neighboring nations.

Market increases over recent years have been significant. Savills research in 2023 showed that, overall, the Asia-Pacific cold chain industry's Compound Annual Growth Rate (CAGR) from 2017 to 2022 was a strong 29.6%, a rate that Savills attributed to increasing household incomes, the rise of urban and middle-class populations, shifts in consumption preferences towards more perishable and higher-quality foods, and the e-commerce and online grocery sales boom.

Industry growth potential seems clear, too. The region's average per capita availability of cold storage space remains significantly lower

than the average in the United States and United Kingdom, with much of the existing stock smaller in size and less automated.¹

"Across the Asia-Pacific region, demand for investment in temperature-controlled logistics and storage continues to accelerate," says Adam Thocher, GCCA Senior Vice President, Global Programs and Insights and GCCF Executive Director. "Whether a country is a developed or emerging market, or a net importer or exporter of food, the need for modern, scalable cold chain infrastructure is critical to meet evolving consumer and trade demands. As capital

markets increasingly recognize the strategic importance of food resilience and supply chain efficiency, access to both public and private financing is becoming a key enabler of growth across the region."

Australia

According to a 2024 report from commercial real estate services and investment firm CBRE, Australia's refrigerated warehouse capacity increased from approximately 8.4 million m³ in 2020 to 10.2 million m³ in 2023, with an estimated cold chain market size of \$8 billion (AUD) in 2024.

The report suggests that demand is being driven by solid growth in Australia's food and pharma industries alongside one of the strongest forecast population growth rates in the developed world. (The population is expected to increase by 15% between 2023 and 2033.)²

Refrigerated Warehouse and Transport Association of Australia (RWTA) Executive Officer Marianne Kintzel reports that the Australian cold chain is demonstrating remark-

able adaptability in 2025, driven by strong export volumes, diversification efforts, and strategic responses to global trade dynamics.

Japan

In Japan, the population is expected to decrease by 5% between 2023 and 2033. However, CBRE still expects demand to grow in several high-population areas that lack cold chain facilities such as Aichi, Saitama, and Chiba.

Pressure on capacity overall is extremely high. Cold storage usage rates indicate that, by the end of 2024, Tokyo, Yokohama, and Kobe all had usage rates approaching or exceeding 100%. CBRE research reveals that 33% of Japan's total cold storage floor space is located in facilities that are at least 40 years old, indicating a likely increase in demand for the redevelopment and rebuilding of older facilities.³

South Korea

In marked contrast to Japan, South Korea's cold storage industry is reportedly experiencing a period of overbuilding. In 2024, new supply for cold storage in South Korea represented only 44% of 2023 levels, and in the leasing market, cold storage rents declined in 2024 due to prolonged vacancies.⁴

Eunhye Park, Deputy General Manager of the Korea Cold Chain Association, notes that while investment in cold storage warehouses has halted due to oversupply, the focus of current investment is import and export logistics services for fresh agricultural products, and the development of refrigeration equipment using natural refrigerants. Park explains that due to government regulations on High GWP HFCs Refrigerant use, refrigerants used in industrial refrigeration equipment and reefer trucks must have a GWP of 1,500 or less from 2028, and a GWP of 750 or less from 2030.

Singapore

In the emerging cold chain markets of the Asia-Pacific region, capacity is generally very tight, and demand for cold chain services is anticipated to grow significantly over the next decade.

Singapore's cold chain perishables market is expected to double by 2034, as a rising population and affluence drive increased fresh food consumption. Additionally, e-commerce is expected to double between 2023 and 2030, according to Cushman & Wakefield.

The majority of Singapore's cold warehouse capacity is currently in western regions close to major seaports like Jurong Port and Tuas Mega Port and in northern regions near the Singapore causeway and Sembawang wharves.⁵

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Philippines

Investment continues in the emerging Philippines market, including I Squared Capital's recent acquisition of Royal Cold Storage. The global infrastructure investor states that the cold storage sector in the Philippines benefits from strong macro tailwinds. This includes population growth, rapid urbanization, and maturing consumer preferences that are fuelling an increasing need for cold chain infrastructure. Double-digit annual growth in the sector is expected over the next decade.

The Philippine government is also investing in the cold chain. In June 2025, the Department of Agriculture announced the allocation of \$53 million to build approximately 100 cold storage facilities to extend the shelf life of fruits, vegetables, and other high-value crops.

Indonesia

Indonesia has significant growth opportunities for fulfilment, e-commerce, and last-mile delivery businesses. Start-up companies are emerging with capital from both domestic and international investors, says Hasanuddin Yasni, Chairman of the Indonesia Cold Chain Association.

"As a maritime and archipelagic country, Indonesia faces the challenge of providing nutritious food at affordable prices in all areas. The main trend in demand for cold chain services is in food delivery and storage that can be ordered online," says Yasni. "Cold package delivery services for food and pharmaceutical products between islands, cold chain facilities at loading, unloading, and transfer ports, and the provision of cold logistics in production areas are the main focus of investment."

Cold chain operators in Indonesia are innovating to reduce operational energy costs and improve efficiency.

"Solar panels and alternative energy sources are solutions being gradually implemented to support the sustainability of energy needs," says Yasni. "Digital systems for monitoring the performance and maintenance of refrigeration machinery and equipment, as well as digital storage systems (WMS) and cold delivery systems (TMS), are evolving from various technologies provided by manufacturers and are being developed with appropriate platforms. AI and automation systems are



NewCold in Melbourne, Australia.

gradually being implemented and are opening opportunities in the near future."

Yasni states that these technologies have reduced logistics costs as a percentage of GDP from 24% to around 17%, and efforts are underway to further reduce this to 9% to 1% over the next five years.

Regional Challenges

Against this backdrop of overall regional growth, different cold chain markets in the Asia-Pacific region are navigating specific and distinct challenges.

In Korea, some ongoing cold chain development projects have modified their designs to convert cold storage space to dry storage to address persistent vacancy issues caused by the surge in supply in the early 2020s. There are even instances of completed facilities undergoing part conversions from cold to dry storage, such as Bucheon Naedong and Bundang Yatap.

According to a recent Savills market analysis, however, the challenges from oversupply are near-term, and the long-term fundamentals of Korea's cold chain market remain robust.⁶

In Australia, the cold chain is grappling with significant structural challenges, particularly within the transport and logistics sector. In June 2025, Don Watson Transport, one of Australia's best-known refrigerated transport firms, announced its closure after 77 years of

operation in a decision attributed to ongoing economic pressures including high operating costs, labor shortages, and slim profit margins.

This closure follows the high-profile liquidation of Scott's Refrigerated Logistics in early 2023. The RWTA suggests key concerns for the sector include rising costs, unsustainable contract margins, driver shortages, and aging fleets.

"Australia's cold chain is a vital service, adaptable, and resilient. Export performance in beef, dairy, and seafood remains strong, supported by strategic market diversification," says Kintzel. "However, the collapse of another major logistics provider highlights the need for industry-wide reform. Investments in innovation, workforce capability, and international trade development will be critical to ensuring long-term resilience in our sector."

Trade

International trade continues to prove a strong opportunity for Australia's cold chain. Food product manufacturing exports reached \$35 billion (AUD) in 2023, up from approximately \$18 billion in 2013.⁷ And in April 2025, Australia exported more than 127,000 tons of beef, a 21% year-on-year increase.

Despite the 10% tariff introduced by the U.S. administration, exports from Australia to the United States surged 37% while exports to China climbed 62%.

Australia's dairy export value rose by 15% over the past year to \$3.7 billion, buoyed by demand in key Asian markets, especially China. RWTa reports that in the medium term, demand is expected to stabilize, and lamb exports are expected to soften due to changing dietary trends, heightened competition, and trade normalization.

CBRE anticipates new and emerging markets for Australia's exports in the Middle East, the United Kingdom, Brazil, and India.

Elsewhere in the region, international trade is central to cold chain growth. Japan's Ministry of Land, Infrastructure, Transport and Tourism data shows that domestic inbound frozen food stock volume registered a 63% increase between 2011 and 2023. Singapore exports about 60% of locally manufactured food and imports 90% of its food supply.⁸

"Trading food remains of fundamental importance to economies across the Asia

Pacific bloc," comments Shane Brennan, Senior Vice President Strategy, Partnerships and Policy at GCCA. "Food producers continue to exploit demand for their products, especially the seafood exports of the Association of Southeast Asian Nations and the beef and pork production of Australia.

"However, there has been some turbulence, mainly a result of the United States' attempt to reposition its trade balance with markets across the region. The short-term impacts are unpredictable, and in the long term, we can expect efforts to find new trading partners both within the bloc and with a diversified portfolio of markets." 🌀

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ENDNOTES

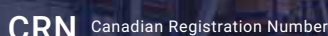
- ¹ Savills - Asia Pacific Cold Storage Markets Spotlight June 2023
- ² CBRE report – *Australia Cold Chain Logistics 2024*
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FINALIST

By Keith Loria

Go Fish: Cubic33 Group Builds in Chile for Emergent Cold LatAm

Emergent Cold LatAm, one of the fastest-growing refrigerated storage and logistics providers in Latin America, aimed to expand a cold storage facility in Talcahuano, a Chilean region known for seafood and fruit production.

The company selected Cubic33 Group, based in Barcelona, Spain, for the project. Once completed, the facility would be the largest frozen food warehouse in Chile and one of the largest in Latin America, with 37,000 pallets and 323,000 square feet of space.

“We built cold storage for Emergent in Spain in 2015, and they knew that we had operated in Peru,” says Gonzalo Chivite, Chief Operating Officer and Partner for Cubic33 Group. “So, in 2019, we built Emergent’s first project in Peru.”

Following the COVID-19 pandemic, Emergent wanted to grow, and this was one of the first projects it initiated. The company had recently acquired Friopacífico in the region, and it intended to modify and expand the facility.

Joaquín Del Campo, Managing Director for the Pacific Region at Emergent Cold LatAm, emphasized the strategic significance of this investment, noting the company’s dedication to supporting Chile’s seafood and agriculture sectors is unwavering.

“The rise in mackerel quotas, along with expanding Coho salmon and individually quick frozen fruit production, necessitates upgraded temperature-controlled storage capacity – this new facility perfectly meets that need,” Del Campo says.

Cubic33 Group built the largest frozen food warehouse in Chile and one of the largest in Latin America, with 37,000 pallets and 323,000 square feet of space. (Photo courtesy of Cubic33 Group.)



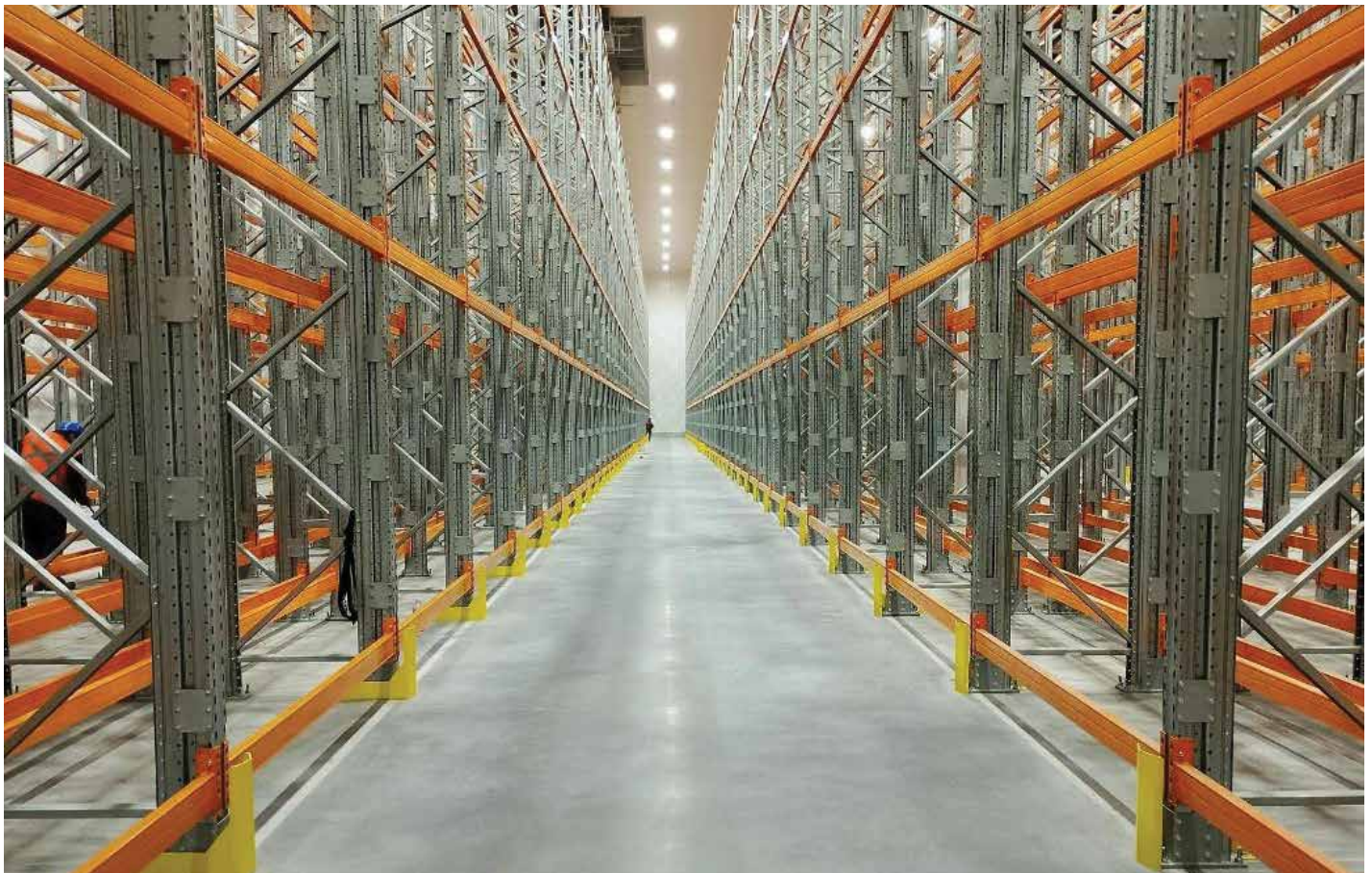
Chivite explains that the facility in Talcahuano, Chile, was designed to store and process products at high risk of spoilage, leading to a new processing and distribution approach that became a game-changer in the industry.

“We had exactly 12 months to deliver because the fishing season was starting in January of the following year, and the project would only be worthwhile if it was ready for the fishing season,” Chivite says. “It started in December 2023, and we had no permits yet, but we needed to be done in a year.”

Cubic33 exceeded expectations by completing the facility in just 10 months, two months ahead of the end of the fishing season.

To ensure smooth operations, the Cubic33 Group team frequently met with local authorities to proactively secure necessary regulatory approvals and collaborate on solutions to potential challenges before they occurred.

“We had full collaboration,” Chivite says. “The steel mill in the city was closing, so a lot of families were losing their jobs. Suddenly, this project emerged, offering job opportunities to those who may have recently lost their own. As a result, certifications and permits went smoothly, and the city officials were welcoming and helpful throughout.”



Steel-fiber reinforced concrete slabs reduced the number of construction joints and created more storage space. (Photo courtesy of Cubic33 Group.)

Innovation on the Job

Emergent Cold LatAm's Talcahuano facility incorporated numerous new technologies, materials, and methodologies to improve the efficiency and effectiveness of the building.

"Many things that were common to us were not done over there," Chivite says. "Many of the controls were completely new for that market."

For example, Chivite highlights the use of steel-fiber reinforced concrete for the slabs, which allowed the team to reduce the number of construction joints and create areas up to 10,000 square feet where joints weren't necessary.

"Other innovations included heated slabs and rapid doors associated with air curtains, which reduced air exchange between environments and minimized ice accumulation inside the chambers," Chivite says. "While a number of these solutions are common in the United States and Europe, this was the first time they were implemented in Chile."

Top Challenges

One of the biggest challenges of the project was the tight schedule. Chivite pointed out that the period between investment approval and the first day of operation was very

short, requiring the team to work on design, obtaining permits, and starting construction simultaneously.

Component availability also posed difficulties, as the Chilean market lacked many of the required items, forcing the team to import goods from more than 25 different locations. Being in a relatively remote area meant that transporting these materials to the site demanded meticulous planning.

Weather further complicated progress, as construction began during the rainy season. Approximately 70% of the project was completed in heavy winds and rain, making tasks like earthworks and footing installation more challenging.

Additionally, Talcahuano is located in one of the most seismically active regions in the world. As a result, approval, review, and execution times took longer due to heightened safety requirements.

"The local culture had methods for managing the project that were challenging," Chivite says. "The construction's overlapping activities were not common practice for the local subcontractors. The only way to meet the deadlines was to bring people in from overseas."

The project imported the metal structure from Brazil, insulated panels from Spain, doors from Italy, and other materials from Japan and elsewhere.

"The logistics were really tough," Chivite says. "We had to leverage all our networks worldwide to meet the deadline. If we had missed that date, the project would have been delayed by a year."

International Team

Chivite credits a multicultural and diverse team with helping to successfully complete the project as the local workers were not accustomed to the methodologies of building so quickly.

"The project involved providers and an engineering team from 13 nations," Chivite says. "Both the local population and the engineering and management team underwent a mutual adaptation process – locals familiarized themselves with new construction methods and cultural practices, while the external team adjusted to the realities of the local market."



Left: The project imported the metal structure from Brazil, insulated panels from Spain, doors from Italy, and other materials from Japan and elsewhere. (Photo courtesy of Cubic33 Group.)
 Right: Cubic33 exceeded expectations by completing the facility in just 10 months. (Photo courtesy of Cubic33 Group.)

Sustainable Mindset

The project was specifically designed to achieve the highest EDGE (Excellence in Design for Greater Efficiency) certification and successfully reached this goal through significant sustainability efforts: 46% energy savings, 51% reduction in water use, and 37% lower embodied carbon in materials.

Furthermore, the facility's structural and electrical design was carefully planned to maximize the use of the entire roof surface for the installation of solar panels.

"This was a general concern for Emergent, so we proposed from day one that we would approach this sustainably," Chivite says. "All the things like the treatment of water, the insulation, and electrical consumption were considered as part of the design. We wanted to get the maximum level of certification with EDGE."

A Job Well Done

The completed building features four chambers, and since the first chamber was finished early, the first pallets could be installed sooner than originally planned.

"That was part of the design strategy – all of the refrigeration system was designed to allow segregation, so you could disconnect the chambers," Chivite says. "When we realized we could deliver earlier, we used that design feature to deliver perhaps not 100% of the building but some of the building's capacity sooner."

Emergent considered the project a success and brought back Cubic33 Group to complete an expansion in December 2024, which is now fully operational.

"We were quite happy with the result," Chivite says. "The biggest thing is to have an American client and be the bridge to what they expect to have in the U.S. market and adapt those specs and standards to build in Chile. Having their support went a long way." 🌐

KEITH LORIA is an award-winning journalist who has been writing for major newspapers and magazines for close to 20 years, on topics as diverse as sports, business and technology.

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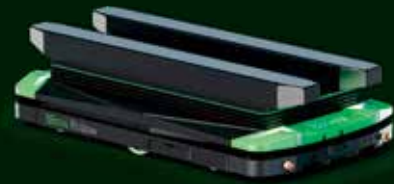
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STATE OF THE ASSOCIATION: 2025 MID-YEAR EXECUTIVE UPDATE

A Message From the CEO

By Sara Stickler

I joined GCCA as President and CEO in September 2024, and appeared onstage days later at our 133rd GCCA Annual Convention in Bonita Springs, Florida. At the time, I positioned myself as GCCA's incoming "coach" – invested in the best possible outcomes, using the best possible team.

Essentially, we want a winning season. Halfway through 2025, we have refined and refocused our key priorities to position ourselves to win – and that means setting a high bar for member value.

To lead the industry, we must know the industry. GCCA is building back and expanding our data, benchmarking, and market intelligence activities, because we know that we need to be THE authority on the state of the temperature-controlled supply chain.

We are investing in updated technical guidance, market data, and best practices. Your association must serve as your primary

resource for the answers to your pressing cold chain questions. Our increased research and technical guidance efforts mean building trust and reliability, both within our membership and with external stakeholders – ultimately, all links of the chain.

As part of our focus on leading through facts and data, we will be building a Center of Excellence in the Temperature Controlled Supply Chain (GCCA CoE). The new Center will utilize our experts and Council of Scientific Advisors (CSA) to deliver much-needed industry reports and benchmarking, as well as industry-leading best practices and technical guidance in third-party cold chain logistics

and supply chain. This data will help our members make informed decisions that will move your business forward, and will speak to the current state of the cold chain.

We are actively working on a new strategy to begin robust collection by the end of Q4, releasing new resources in 2026.

In addition to the GCCA CoE, we will be re-energizing our Committee & Taskforce model to ensure our activities are being driven by the leaders in our industry – YOU. Our committee model will feature opportunities for technical best-practice development, opportunities for functional collaboration, and forums on sharing best practices.

We must ask for more. We are finalizing our global legislative and regulatory priorities that will proactively drive our advocacy work forward, with regional approaches to ensure we are protecting and strengthening the industry around the globe. As we experienced during the COVID-19 pandemic, the cold chain is critical. We must build new, and

strengthen our current, relationships with agencies, regulatory bodies, and legislative bodies – not while we are responding to a crisis, but now.

We must be direct in demanding investments in our industry. We must ask for common-sense policies that will allow for the continued flow of goods. As logistics professionals, we are excellent at preparation – so let's prepare now so we are ready for the next crisis that emerges.

Our time and our talents must be shared with the next generation of cold chain leaders. Through our Foundation, we remain committed to developing all aspects of the cold chain workforce. We have grown our Cold Chain Institute program to six locations and are launching new initiatives to engage graduates after they walk across the Institute stage to receive their Institute diploma

– keeping them connected throughout their career. We know that continued learning opportunities for your teams are vital for your own business success.

Let's not just tell the cold chain story ... let's lead the cold chain story. Recently, new voices have entered the conversation, sharing their opinions on the impact and growth opportunities in the cold chain. We need to ensure that the right stakeholders come to GCCA, get to know us, and become a part of the greater story.

One of our goals in the coming months is to better our external communications and highlight the impressive work that our members do. As the leaders in the cold chain, it's important our voices and knowledge rise to the top of the conversation.

We have great stories to tell, so let's get loud.

We are ready to move forward.

Implementing new ideas is never easy work, but new ideas energize me and the GCCA team. I commend our Global Cold Chain Alliance, Global Cold Chain Foundation, and Controlled Environment Building Association (CEBA) Boards of Directors for their commitment to strategic planning and prioritizing of member-value activities, setting the stage for our new phase. Our dedicated staff is working hard to align our operational systems so we can deliver the best value for your membership and the best, most up-to-date industry information.

This is an exciting time to be part of the GCCA as we provide leadership and excellence for a resilient cold chain. ☺

SARA STICKLER is President and CEO of GCCA.

EMAIL: sstickler@gcca.org

ANNOUNCING

Power Construction Cold+Food Group

Formerly United Insulated Structures

We're proud to announce that United Insulated Structures has officially changed its name to Power Construction Cold + Food Group. While the name is new, our team, mission, and commitment to delivering design+build solutions for the cold storage and food industries remain unchanged.

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ASSOCIATION NEWS

NEWS ABOUT GCCA CORE PARTNERS



THE ROAD TO SAN ANTONIO

Cold chain leaders gather for the 2025 global GCCA Convention.

For 134 years, cold chain professionals have gathered to learn, share, and connect. Details are being finalized for this year's content-driven program at the GCCA Convention, held in San Antonio, Texas, September 15-17, 2025.

Hosted at the La Cantera Resort and Spa, the annual convention convenes cold chain leaders from around North America and the world. Programming is designed for temperature-controlled warehousing, transportation, logistics, and design and build professionals who will attend alongside industry suppliers supporting the cold chain with value-added services and innovative products.

This year's convention will host speakers, sponsors, and attendees from around North America and the world, discussing key opportunities and challenges for the global cold chain – including topics like cybersecurity, change management, market and

economic development, regional priorities, emerging technologies, and ongoing trade and tariff fluctuations.

“Our industry and our members are both innovative and pragmatic,” says Sara Stickler, President and CEO of GCCA. “Together, we are developing and embracing new technologies, investing in safer and more sustainable food supplies for our communities, and growing our businesses to serve growing global populations. Demand for temperature-controlled environments will only increase, and we are ready to supply best-in-class solutions to emerging challenges. The annual GCCA Convention

is the ideal place to collaborate on these solutions, and ensure we are responding to challenges efficiently and at the level of excellence this industry is known for.”

Read more to find out what's in store for 2025.

Expert Keynotes on Economy, Cybersecurity, and Change Management

As Chairman and CEO of Sage Policy Group and one of the nation's leading economists, **Dr. Anirban Basu** advises top organizations across sectors, including construction, banking, real estate, and government. He has served in prominent roles such as Chair of the Maryland Economic Development Commission and Chief Economist for several major associations. A dynamic speaker, he is known for blending deep economic insight with engaging commentary.

Cybersecurity continues to be at the forefront of cold chain logistics – the need for continuity and data protection builds customer

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SCAN ME





trust in logistics operations. A renowned technologist, entrepreneur, and international security expert with more than 25 years of leadership in cybersecurity, counterterrorism, and global risk management, **Matt Devost** is the perfect expert to detail the need for a more secure cold chain.

As CEO and Co-Founder of OODA LLC and Founder of the Hack Factory, Devost guides organizations in navigating complex security and technology challenges while fostering innovation and strategic resilience.

“When change comes at us from every direction, it can feel like our only option is to play defense. Not so,” says **Geoff Colvin** with Fortune, GCCA’s 2025 closing keynote. “The best leaders I’ve reported on have found ways to embrace a world of continuous disruption and build a powerful competitive advantage in the process.”

Colvin is optimistic about the future as he unpacks step-by-step how we can all respond faster to change and even get ahead of it as individuals, teams, and enterprises. He will provide actionable takeaways to convention attendees, helping leaders face inevitable change ... smarter.

Engaging Speakers, Engaging Session Topics

This year’s convention planning included an official Call for Speakers to round out educational session programming. This year’s attendees will hear from peers and thought leaders on topics like supply chain market analyses, AI and emerging technologies, food loss and waste reduction, legal claims and processes, and more.

Innovation Showcase

Attendees have a unique opportunity to directly connect with top industry solutions providers and learn more about new equipment, construction trends, automation solutions, and other technologies that are moving the cold chain sector forward.

The Innovation Showcase highlights more than 50 companies and provides ample time to connect at coffee and refreshment breaks as well as one-on-one meetings.

Emerging Technologies: GCCA Tech Talks

The thought leaders presenting during Convention Tech Talks provide attendees with high-level insights and case studies on emerging technologies and solutions deployment for warehouses, transportation, and builders, and offer valuable inside perspectives on the industry’s ongoing technical evolution.

Innovation Showcase Exhibitors

- A&E Construction Co.
- Advance Storage Products
- Agility Recovery
- Albany Door Systems
- APSM
- Blue Yonder
- Boltrics
- Brinkmann Constructors
- Brucha
- Datex
- Engineered Corrosion Solutions
- Ergodyne
- Evapco Inc.
- FCL Builders
- Frazier Industrial Company
- GAF
- Gleeson Constructors & Engineers, L.L.C.
- Greek Design|Build
- Green Span Profiles
- Griffco Design/Build, Inc.
- Innovative Refrigeration Systems
- Jamison Door Company
- KPS Global
- M&M Carnot
- Metl-Span
- Motive
- MRBraz & Associates, PLLC
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- QuickFreeze
- Rack Builders
- Ramp Systems, Inc.
- RefrigiWear Inc.
- Rite-Hite
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- Royal 4 Systems, Inc.
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- Stellar
- Technique Roofing Systems LLC
- Ti Cold
- Tippmann Group
- Vapor Armour
- ViewPoint Logistics
- Viking Cold Solutions, Inc
- Wagner Fire Safety
- WDS Construction
- Westfalia Technologies, Inc.

Convention Cold Chain Café

GCCA's Cold Chain Cafés provide an environment that convenes attendees in intimate groups to discuss the critical issues facing their businesses and the supply chain industry. Café participants choose from a variety of topics, joining moderated tables for intensive 20-minute conversations with peers before switching to another table and topic of interest.

Past Café discussions have included supply chain disruptions, traceability, food security, electrification of transport, macroeconomic trends, and more.


Deepen Your Connections: Networking and Social Events

Pickleball pro? Golf great? Valuable volunteer? Our San Antonio program offers multiple opportunities to connect, like breakfasts and coffee breaks on the showcase floor, group social events, and opportunities to give back to the community.

The La Cantera resort will also host several receptions, including the opening night and theme party – pack your cowboy boots.

See You in San Antonio

As the cold chain industry continues to evolve – through global policy decisions, continual technology advancements, workforce needs, and economic uncertainties – we must remain connected, educated, and ready for change.

The GCCA Convention is the ideal opportunity to connect and collaborate on future-focused solutions – register now. 

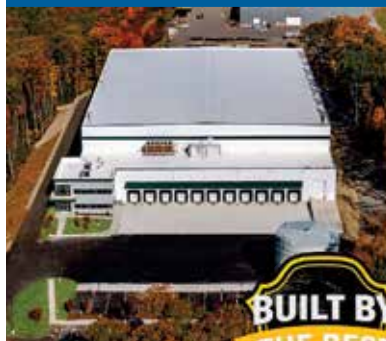


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COLD CHAIN DEVELOPMENT

NEWS ABOUT GCCF INTERNATIONAL PROJECTS

This column features news about key projects of the Global Cold Chain Foundation (GCCF) and its work with members, aid organizations and international development partners to help emerging economies and lower-income countries meet the challenges that arise when growing a safe and efficient global cold chain.

NEW PROJECTS

Danone Institute North America (DINA) Sustainable Food Systems Initiative Focus on Food, 2025 – 2027

Partnered with Michael's Energy, University of Arkansas Sam M. Walton School of Business, and Feeding America

GCCF has been awarded a new project by the Danone Institute North America (DINA) to support energy efficiency practices in food banks in the United States. Through this grant, GCCF will partner with Feeding America, University of Arkansas Sam M. Walton School of Business, and Michael's Energy to implement a pilot study to reduce energy consumption in U.S. food banks operating refrigerated storage by leveraging expertise in refrigeration and energy usage from the private cold storage sector. This will allow food banks to reallocate energy savings toward more impactful initiatives including purchasing additional food or essential equipment.

ACTIVE PROJECTS

Agricultural Trade and Climate Smart Innovations (ATraCSI) Project, 2023 – 2027

Partnered with Improving Economies for Stronger Communities (IESC)

GCCF is delivering a series of virtual training modules covering cold chain management; packaging techniques; hygienic handling and operations; national and international regulations; perishable goods inspection processes; emergency management; and new technologies to cold chain operators, processors, and inspectors. Dr. Eduardo Molina, Sustainable Packaging Expert on the Council of Scientific Advisors delivered the training on Packing and Packaging. A cohort of cold chain operators from El Salvador, Honduras, and Guatemala also participated in the GCCF Cold Chain Institute LatAm in July.



From left to right: Mark Biewald, Feeding America; Vaughn Engler, Michael's Energy; Dr. Janeth Gabaldon, University of Arkansas; and Amanda Brondy, GCCA were pictured at the kick-off for GCCF's new grant from the Danone Institute North America.

Cambodia Cold Chain Technical Assistance, 2025

Partnered with LixCap

In collaboration with LixCap, GCCF is supporting a strategic review for a private cold storage company in Cambodia. This initiative builds upon previous feasibility and construction advisory assessments led by GCCF and LixCap in 2019 and 2020, expanding efforts to enhance Cambodia's cold chain infrastructure. This project consists of a commercial and operational assessment, evaluating market demand, operational efficiency, and investment potential. GCCF provides industry expertise, technical evaluations, and investor outreach, leveraging its extensive network to support strategic planning on this project.

West Africa Emerging Markets Program, 2024 – 2025

With the support of members in the United States, Canada, Lebanon, and South Africa, GCCF is delivering valuable mentorship to operators in West Africa. Each month, mentors meet with their mentees from Ghana, Senegal, and Mauritania to advise on best practices in various aspects of the cold chain. Additionally, the Cold Chain eCampus hosts a series of virtual trainings specifically for the West African cold chain industry. A virtual workshop and additional on-site consultations for local operators are also planned for later in 2025.

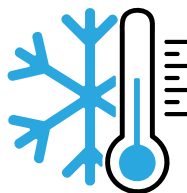


Left: The team supporting GCCF's grant from Danone Institute North America (DINA) Sustainable Food Systems Initiative Focus on Food presented the project at the kick-off in Boulder, Colorado, in June. Right: GCCF Consultant Marco Antonio Leon Félix delivered training on the hygienic handling of perishable products to participants from Honduras, Guatemala, and El Salvador.

Ongoing Industry Support to Reduce Food Loss and Waste

GCCF has completed recording the five-course virtual training that will be housed in the GCCF Cold Chain eCampus. GCCF participated in a Community of Practice Meeting held by the Global Foodbanking Network alongside GCCA members Emergent Cold LatAm and BigCold Kenya. The meeting highlighted solutions for how food banks can work with GCCA members on cold chain needs.

GCCF is developing a toolkit for members that will provide information on how to donate product and provide ideas on activities that members can take to support their community with food rescue. The toolkit will include regional policy-specific resources. GCCF is exploring how to expand the pilot of the STOR app; how to measure and record the magnitude of dump/destroy orders; and will roll out a champions program for food waste reduction. 🔄



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**GCCA Cold Chain
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21-23 July | Washington, D.C. US

6-7 October | Ottawa, Canada

CEBA PROFESSIONAL

4-6 August | Chicago, IL US



**GCCA AFRICA
COLD CHAIN CONFERENCE**
20-21 August 2025
Durban, South Africa

GCCA AFRICA COLD CHAIN CONFERENCE

20-21 August | Durban, South Africa



GCCA LATIN AMERICA COLD CHAIN CONGRESS

27-28 August | Santiago, Chile



GCCA CONVENTION

15-17 September | San Antonio, TX US



CEBA CONVENTION & EXPO

3-5 November | Las Vegas, NV US

UPCOMING GCCA, GCCF, AND CEBA EVENTS



GCCF COLD CHAIN INSTITUTES

14-16 July | Mexico City, Mexico

19-21 August | Sao Paulo, Brazil

2-4 September | Rotterdam, The Netherlands



GLOBAL COLD CHAIN ALLIANCE

COLD CHAIN CONNECTION

15-16 July | Toronto, Canada

16 July | Mexico City, Mexico

6-7 August | St. Louis, MO US

2 September | Rotterdam, Netherlands (Reception Only)

October | Curitiba, Brazil

7 October | Cologne, Germany

16 October | Singapore, Singapore

29 October | Guatemala City, Guatemala

13-14 November | Paris, France

Find out more at www.gcca.org/events/event-calendar

MEMBER NEWS

NEWS FROM MEMBERS OF GCCA CORE PARTNERS

COLD SUMMIT is expanding in Europe with the formation of Cold Summit Europe. The company has appointed Harld Peters as President. He brings over 30 years of international experience in global supply chain management and the services industry, having held senior leadership roles at top companies such as UPS and, most recently, serving as President of Lineage Europe.



KARIS COLD's Stockyards warehouse is significantly upgrading to a first-of-its-kind cold storage facility within the City of Chicago. It will soon offer a large amount of cold and frozen storage capacity in its nearly 100,000 square-foot insulated building alongside docks, stalls, and parking for autos and trucks. Twelve murals depicting classic Chicago and South Side scenes by artist David Banegas have been commissioned to add to the Karis Cold Stockyards warehouse.



LINEAGE, INC., is expanding its Louisville-Winstead cold storage facility in Louisville, Kentucky. Once completed, the expansion is expected to add more than 82,000 square feet and approximately 10,300 pallet positions across two convertible rooms to the existing facility.



PLM FLEET, LLC, has expanded its footprint in the Northeast United States with new branches in Rochester, New York and Philadelphia, Pennsylvania.



RLS LOGISTICS has expanded its Delanco, New Jersey, cold storage warehouse, which is scheduled to go live later this summer. The project adds over 6,750,000 cubic feet of temperature-controlled space and includes advanced refrigeration systems, roughly 8,000 new pallet positions, and high-density racking, improving throughput and enhancing RLS' ability to serve large-scale distribution and case picking operations.



THERMALCRAFT, a California-based specialty contractor serving temperature-controlled construction markets, today announced the opening of its Nashville, Tennessee, office and the appointment of two industry leaders, Gavin Lowery and Evan Dahl as managing principals.



TI COLD and **KARIS COLD** recently broke ground on a new \$60 million cold storage facility for PermaCold Logistics in Darien, Georgia. This advanced cold storage complex will have a clear height of 50 feet and feature a flexible, convertible design that maintains temperatures ranging from 40 degrees to minus 10 degrees Fahrenheit. The facility will also incorporate an environmentally friendly refrigeration system. Additionally, structural steel pallet racks will accommodate more than 30,000 pallet positions. ☎

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NEW MEMBER COMPANIES OF GCCA CORE PARTNERS

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Enns Industrial Refrigeration

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TSL Projects Inc.

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Philadelphia, Pennsylvania, United
States

Tramery Rack Yasteel

Santo Domingo, Dominican Republic



The Global Cold Chain Foundation (GCCF) Council of Scientific Advisors is an eminent group of food scientists, logistics, and packaging experts from around the world. The Council provides cutting-edge research and advice to members of the Global Cold Chain Alliance and its Core Sectors.



Dr. Michael Jahncke

Virginia Tech University,
Fish Products Expert
COUNCIL CHAIRMAN



Dr. Donald Fenton

Kansas State University,
Refrigeration Engineering
Expert



Dr. Jeffrey Brecht

University of Florida, Cool-
Climate Fruit & Produce Expert



Dr. Brian Fugate

University of Arkansas, Supply
Chain Management Expert



Dr. Patrick Brecht

PEB Commodities, Refrigerated
Transportation Expert



Dr. Cody Gifford

University of Wyoming, Meat
Products Expert



Dr. Stephanie Clark

New Mexico State University,
Dairy Products Expert



Dr. Faris Karim

Kansas State University,
Ammonia Contamination & Food
Toxicology Expert



Dr. Paul Dawson

Clemson University, Poultry
Products Expert



Dr. Eduardo Molina

Virginia Tech,
Sustainable Packaging Expert



**Dr. Barbara Rasco, BSE,
Ph.D., JD**

University of Wyoming,
Food Safety & Food Safety
Regulations Expert



Dr. Donald Schaffner

Rutgers, The State University of
New Jersey, Microbiology Expert



Dr. Debjit Roy

Indian Institute of Management,
Logistics & Operations Expert



Dr. S. Paul Singh

Michigan State University,
Packaging & Labeling Expert



Dr. Victoria Salin

Texas A&M University, Agriculture
Economics Expert



Dr. Elhadi Yahia

Universidad Autónoma de
Querétaro, Mexico, Postharvest
Technology, Tropical Fruit &
Produce



Dr. Subramaniam Sathivel

Louisiana State University,
Frozen Food Quality Expert

Have a burning cold chain question?
Submit an inquiry to the Council of Scientific Advisors
at www.gcca.org/inquiry

COOL SOLUTIONS

SCIENTIFIC ANSWERS TO COLD CHAIN CHALLENGES

This section highlights a cold chain question and answer submitted through the GCCA Inquiry Service to the team of experts on the GCCF Council of Scientific Advisors (CSA) and the roster of advisors. Submit your cold chain questions to the Council of Scientific Advisors at www.gcca.org/inquiry.

Q: We've been asked by a third-party auditor to present a "General HACCP" for all products received, stored, and shipped. While we have HACCP programs in place for the seafood we handle, we also have other incidental items that do not require HACCP programs. Is there a general document that we could refer them to instead?


A: HACCP is used to ensure food safety in Time/Temperature Control for Safety (TCS) foods. However, the formats are different for seafood, meat, and poultry. Fruits and vegetables are under the FDA Food Safety Modernization Act (FSMA), which is also a different format.

For example, the difference between a food safety plan under FSMA and a HACCP Plan is that a Food Safety Plan includes process, preventative controls, sanitation preventive controls, allergen preventive controls, and supply chain preventive controls to address potential hazards. The HACCP program has Critical Control Points (CCPs) that are equivalent to process preventative controls.

A general HACCP Plan for these different TCS foods is challenging. A possible approach to this query is perhaps to focus on Sanitation Standard Operating Procedures (SSOPs) and Good Manufacturing Practices (GMPs). I have encountered situations where customers have been asking for HACCP, but what they really want to know is if a firm has

a sanitation schedule.

It will be important to know what the other products are in the facility. These can then be grouped by risk, and either a single or multiple plans can be developed, depending on the findings from the risk assessment. Depending on risk, a HACCP plan may not be required, but a hazard analysis will still need to be completed. The CSA has experience addressing similar situations in the past and is willing to assist.

This answer was provided by Dr. Michael Jahncke, Chairman of the Council of Scientific Advisors, and Dr. Barbara Rasco, Food Safety & Regulations Expert from the University of Wyoming. 

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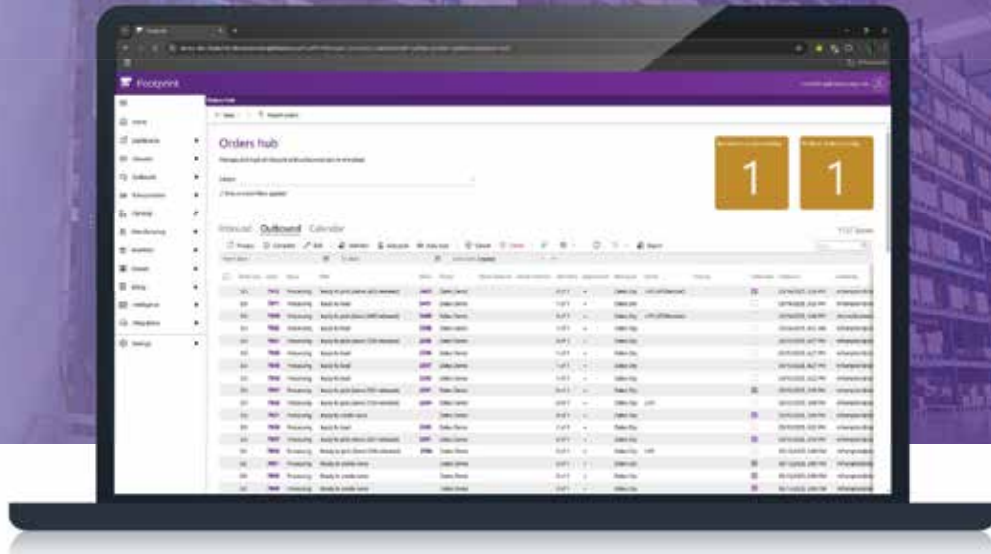
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AD INDEX

Agility Recovery... **Front Cover**
Wrap, 25

All Weather
Insulated Panels **17**

BRUCHA Corp. **7**

Catalyze **37**

Colmac Coil
Manufacturing Inc. **29**

Datex **49**

ESI Group USA. **15**

Evapco, Inc **19**

Jamison Door
Company **Cover 3**

Kingspan Insulated Panels. . **11**

Marcus & Millichap **50**

Metl-Span **3**

Patrick Hughes, Ltd. **41**

Polyguard Products .. **Cover 2**

Power Construction. **35**

Primus Builders, Inc. **50**

RefrigiWear **9**

Rytec High
Performance Doors **48**

Stellar **21**

Stow US Inc. **33**

The Kaiser-Martin Group. . **44**

TI Cold **39**

Tippmann Engineering. **13**

Tippmann Group **27**

Twintec/Kalman Floor
Company **Cover 4**

Vapor Armour **5**

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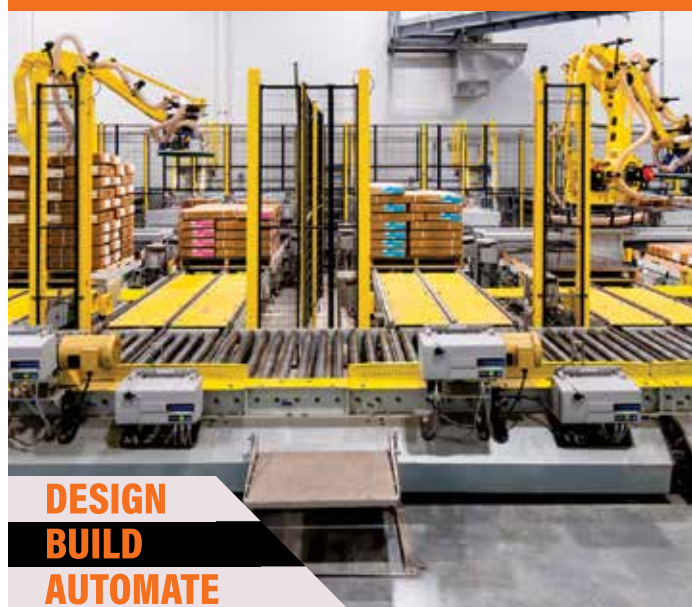
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