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CORRECTION

In the 2025 GCCA Warehouse Guide, released in August, a misprint occurred with regards to United States Cold Storage (U.S. Cold Storage) directory entries. On multiple pages in our state by state listings, U.S. Cold facilities were listed in the correct geographic locations, however, the U.S. Cold name was replaced with "Valley Cold Storage." A corrected and updated digital version is posted online at www.gcca.org



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LEADOFF

MESSAGES FROM GCCA LEADERS

THE CONTROLLED ENVIRONMENT BUILDING ASSOCIATION (CEBA) IS A PROUD PARTNER IN THE GLOBAL COLD CHAIN ALLIANCE, AND IT IS MY HONOR TO SERVE AS CHAIR.

This year has been a year of excellent growth and much-needed organizational transformation, with long days and nights spent working to align ourselves with the full Alliance. This work best ensures our collective future success, best serves our growing active CEBA membership, and best represents the overall temperature-controlled construction community. This work is hard, but *the work is worth it*.

As we make essential long-term decisions, our overall mission remains – we are committed to promoting our value to the temperature-controlled and controlled environment building industry, developing future talent, reinforcing industry expertise, sharing best practices, and supporting the overall needs of a global cold chain.

In November, we will gather in Las Vegas, Nevada, for the 45th CEBA Conference and Expo. Our conferences are known for being the ultimate face-to-face opportunity to connect and network. New and ongoing relationships result in powerful business decisions and personal friendships.

However, CEBA has also been a place of learning for 45 years, presenting state-of-the-art content, innovative solutions and technologies, and speakers who are thought leaders in cold chain and construction. We also use the conference to celebrate the outstanding work of our Built by the Best Award recipients, and I look forward to congratulating the 2025 winners on stage.

Our CEBA Professional Training and Certificate program, CEBA Pro, has had a remarkable year delivering professional training and recognition for cold chain building specialists. In 2025, 69 students received the CEBA Pro recognition from our Atlanta and Chicago programs, bringing the total number of certificate holders to 110. These awardees are our current and future trailblazers, making decisions that not only improve their own companies but also our entire industry.

We continually evolve and improve the curriculum to reflect developments in controlled environment design and construction, ensuring we are advancing the best in our cold chain workforce. This means new faculty, consistent re-evaluation of presentations and item bank review, and collaborating with the GCCA Education and Training Committee to guarantee the CEBA Pro program remains up to date with industry best practices.

As a Board, we know customers should choose CEBA members to spearhead their projects. Distinctive, specialized expertise matters in controlled environment construction, and it is CEBA that sets these high standards. Along with continued messaging about our members' offerings, new opportunities are being discussed including more technical resources, enhanced promotion, and additional leadership opportunities within the association.

Recent work illustrates the collaboration among Alliance members. We continue to share our expertise in joint committees and increase our voices as thought leaders and experts in controlled environment building; necessary steps as we position the Alliance to lead the future of the cold chain.

Additionally, with this issue of COLD FACTS, you will find a copy of our annual **GCCA & CEBA Cold Chain Innovation Showcase & Buyers Guide**. This guide serves as a “who’s who” of the specialist contractors and suppliers leading the controlled environment building sector and is an excellent resource for customers and potential business partners.

I am always available to our community as we move forward in 2025, 2026, and beyond. It's an exciting time to be one of the most important links in the cold chain – see you in November. 🌐



SAM TIPPMANN
CHAIR, CONTROLLED ENVIRONMENT BUILDING ASSOCIATION (CEBA)

COLDFACTS

COLD FACTS magazine is published every other month by the **Global Cold Chain Alliance (GCCA)**, an organization that unites partners to be innovative leaders in the temperature-controlled warehousing, transportation and logistics industry.



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Design by SWALLIS Design, Dallas, Texas, USA.

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YOUR VOICE

A new era of GCCA advocacy combines global thought leadership with targeted action that delivers results.

By Shane Brennan

Members gathered in San Antonio, Texas, for the GCCA Annual Convention, hear from GCCA's new global advocacy team on how we're building on strong foundations to make sure the cold chain's voice is heard where industry-shaping decisions are made.

GCCA is proud of its long tradition of advocating for our essential industry, earning a reputation as a reliable, influential partner to governments. That credibility was built in the United States through work with federal regulators and leaders on Capitol Hill.

In recent years, we've expanded our presence in Canada, Brazil, and Europe. Our goal now is to lock in those gains, elevate our profile, and extend our reach.

A Well-Defined Agenda

Being an influential global voice for the cold chain requires focus and a clear framework. The GCCA Board has adopted a Legislative

and Regulatory Priorities Framework built around three strategic themes:

- **Resilient Infrastructure** – Advance investment, safety, energy security, and preparedness to keep facilities and operations strong.
- **Safe and Secure Trade** – Enable smooth cross-border movement, modern inspection processes, and recognition of the cold chain's role in food and pharmaceutical safety.
- **Sustainable Supply Chains** – Champion policies that cut food waste, improve emissions tracking and reporting, support energy efficiency, and enable realistic decarbonization.

Making an Impact

Creating this framework was an opportunity for us to take stock of our ongoing work and confirm that, while contexts vary, the core challenges and opportunities the cold chain offers are remarkably consistent worldwide. In San Antonio, colleagues shared examples of progress already underway.

Safe and Secure Trade

In 2025, GCCA secured a key change that allowed U.S. cold warehouses to be designated as inland inspection facilities (I-houses) even when they are located more than 50 miles from a port of entry. This seemingly small shift opens the door for more third-party logistics facilities to offer high-value services to customers.

We're pursuing similar modernization of import clearance rules to ease congestion in Brazil, Canada, Africa, and Europe.

We also see major potential to reduce regulatory burdens and improve the reliability

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and productivity of export processes in the United States and beyond. We're working with the U.S. Department of Agriculture and the inspection authorities to explore ways to streamline export inspections for cold storage warehouses and transportation hubs – a model that, if successful in the United States, can be replicated globally.

Resilient Infrastructure

This summer, GCCA hosted the first European Parliament roundtable on food security focused explicitly on the cold chain. Attended by Members of the European Parliament, European Commission officials, and other stakeholders, the event supported the forthcoming EU Stockpiling Strategy within the broader Preparedness Agenda. Our priorities are investment in new cold chain infrastructure, reliable access to affordable energy, and support for innovative technologies.

Across governments and international forums, logistics infrastructure is increasingly recognized as central to economic and geopolitical resilience – and we're ensuring the cold chain's needs are prioritized.

Sustainable Supply Chains

As governments balance sustainability ambitions with growth and resilience, we're positioning the cold chain as a practical, solutions-oriented partner.

In the United States, we support legislation that highlights and rewards cold chain businesses that enable food redistribution.

In the United States and Europe, we're working to ensure phasedown rules for refrigerants are realistic for cold storage transport and warehousing, and that Scope 3 emissions accounting treats cold chain operations fairly and consistently.

By leveraging our unique position as the only global voice for businesses that own and operate the cold chain, we pair global thought leadership with targeted, tactical action that delivers results.

GCCA Retains New Washington, D.C.–Based Advocacy Advisors

GCCA has retained Torrey Advisory Group (TAG) to support U.S. advocacy. The TAG team brings more than 20 years of experience in food and agriculture policy for high-profile clients.

Stay Engaged

To learn more about GCCA's advocacy work – or to receive our regular updates for the United States, Canada, and Europe – contact Kerri Marbut at kmarbut@gcca.org.

SHANE BRENNAN is Senior Vice President for Strategy, Partnerships and Policy at GCCA.

EMAIL: sbrennan@gcca.org

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THE SOLUTION PROVIDER'S PERSPECTIVE

Leading industry suppliers offer their unique point of view on trends and advancements shaping cold storage design and construction.

Three leaders with expertise in the supplier and solution provider segments of temperature-controlled construction share their perspectives with COLD FACTS on topics ranging from the vast potential of AI to the uncertainties created by tariffs and trade riffs.

Trade Disruptions

"I don't like disruptions to trade," says Bob Tippmann, President, QuickFreeze. "The very public nature of the tariff negotiations are frustrating because nobody knows what to expect. Consequently, there's a rush to get product across the Mexican and Canadian

borders, not knowing where we would land on all these different tariff issues."

On the other hand, Tippmann says he was very excited about the prospect of reciprocal tariffs, and he thought it was great that other countries would be encouraged to lower their own tariffs. Then the reality of the reciprocal

numbers settled in. "I remember vividly that there was a 30% tariff on the product that we're shipping, and the reciprocal tariff was 10 or 12%," he says. "It turns out the tariff rate was based on a trade imbalance. A great idea – I only wish the implementation had been more precise."

Trade uncertainty affects future capacity but risk can be minimized through flexible design, says Todd Steffen, SIOR, Partner/Market Leader at industrial real estate experts KBC Advisors. "Planning for expansion now provides you with the flexibility to take advantage of opportunities as they arise," he says. "For instance, port regulations could shift to change portside capacity needs. Economics

may also change in an effort to avoid tariffs.”

As an equipment builder, Brian Kelly, Vice President of Refrigeration at Mayekawa USA, Inc., says they have noticed that vendor lead times have not come back to “normal” pre-COVID lead times and delivery. “The lead times are still extended to this date and impact various items such as motors, starters, velocity frequency drivers, and valves,” says Kelly. “Tariffs have not negatively impacted lead times, however, the tariffs have increased costs on the project budget.”

Impactful Trends

As he is mainly concerned with blast freezing equipment, a trend that Tippmann really likes is warehouses designed so that the blast freeze equipment is located in the warehouse portion of the building, rather than in a separate room.

“They’re able to install that equipment at floor level instead of trying to go five or six levels high with dangerous-to-handle pallets that aren’t shrink-wrapped because they’re being frozen,” Tippmann says. “Being able to do it all at floor level is something that I see everyone adopting.”

Steffan believes the adequate power needed

to fuel cold storage will be dwarfed by the data center, which traditional technologies will not be able to support. “We will need to expand power and infrastructure to include analyzing transportation data and modeling other factors so that the right decisions can be made on where to locate capacity.”

Kelly notes, “Internet of Things (IoT) sensors can monitor equipment and read in real time, vibration, temperature, and power usage data. You can log data in cloud servers and send alerts via SMS in real time to plant operators and management in the event of an alarm or failure.”

Of the sensors in the market, the one that Tippmann is most excited about is infrared.

“About six years ago, I plugged in some infrared cameras for the first time and started looking at the temperature readings from an analytical point of view to see how we could apply that in the freezer,” Tippmann says. “I determined that while I was able to sense the freezing of a pallet with this infrared camera, the amount of data required to make a universal sensor know when a pallet was frozen was about the equivalent of the number of pallets that are frozen in the United States each year. It was unattainable.”

That’s why Tippmann is excited about smaller AI programs like one purpose-built for infrared. “We’ve been getting really great results with a much smaller data set.”

Keeping Up With AI

“Artificial intelligence and the Internet of Things are being implemented, and it is very exciting for our industry!” says Kelly. “AI and machine learning are analyzing trends to predict when a piece of equipment is likely to fail or alert when performance starts to degrade before any negative impact on the system, such as downtime, occurs.”

Kelly says the potential return on investment is in fewer unplanned outages and unnecessary service, extended equipment life, product loss prevention, and regulatory compliance.

When it comes to site selection for cold storage construction, Steffan says design should be based on where capacity is needed. “You identify sufficient pools of cold food production in frozen and chilled sectors and analyze everything, including transport costs to cold storage facilities. This is the information needed to make the design successful.”

Today, AI models can identify current food



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production locations and can also analyze future cold food pallet locations, Steffan says. “Consider the time needed to design and construct a cold storage facility and look ahead five years – you need to design for the capacity required then.”

Steffan says it’s compelling when industry peers who have been around for 30 years say this kind of insight just wasn’t around before, at least not the whole picture.

At this stage, Tippmann’s experience with AI is trust but verify. “Sometimes it seems like a little bit of a mystery black box that you feed data into, and most of the time it comes back,” he says. “But you need to build in safeguards, and you need to design for the times when AI just straight up lies to you.”

Tippmann advises keeping that in mind when designing or employing products that utilize AI technology, especially when applied to something as important as the safety and security of a nation’s food supply.

State of the Market

“When it comes to the potential of what AI can do, I don’t know that even Elon can see 24 months ahead. If you look at where AI was 24 months ago and where it is today, it’s night and day,” says Tippmann.

“With the advances in technology over the past five years, we can get very good results with a much smaller data set. I can make good decisions with less input through AI today than I could five years ago with machine learning,” says Tippmann. “And that’s directing the development of the equipment that we’re designing and building now for smaller AI programs like the one purpose-built for infrared that we’re excited about.”

“Buildings today must be leased to generate a profit for the developer, rather than competing with an existing facility. Add 8,000 square feet that’s not necessarily justified, and you have a blood bath of pricing wars versus location,” says Steffan. “That is the crux of where to put capacity. You must match capacity design with the needs of the market, whether producing for export or importing.”

Steffan says what interests him is the relationship between food producers and 3PLs. “There is a real opportunity for those two groups to come together, to discuss future production and capacity needs, and talk strategically about where capacity might really be needed.”

“I think that for a while during COVID, we seemed pretty indispensable with all the

The Architectural Perspective

Two architects specializing in temperature-controlled design/build share with COLD FACTS a trend that excites them and their outlook for 2026.

Describe a design trend that excites you, and an example of its real-life application.

“Package refrigeration systems are popular, especially with the growing availability of options that utilize a variety of refrigerants. Their benefits include efficient installation during construction and simplified maintenance through standardized components.

“A Saxum Development’s building for Arcadia Cold in Joliet, Illinois, showcases this trend with the use of pre-manufactured penthouse refrigeration units. These units are convertible, allowing for flexibility as the building’s needs evolve over time.”

Kate Lyle, Principal, Lamar Johnson Collaborative

“Automated storage and retrieval systems and robotic picking are becoming more standard in new cold storage construction. These systems improve inventory accuracy, labor efficiency, and turnaround times – especially critical for high-throughput environments like e-grocery and meal kit fulfillment.

“The design of a project in Arizona was recently completed and is currently under construction. The facility will service a diversified clientele across the state and multiple platforms. The facility has a freezer, cooler with multiple temperature zones, and dry storage. The product is stored in multiple-level racking systems and distributed by a conveyor system from a multiple-level pick module. The

building has been designed with flexibility to expand the square footage of each area with infrastructure in place to convert cooler to freezer and dry to cooler. Sensors are utilized to monitor and control each of the temperature-sensitive areas.

Michael Cody, Practice Leader/ Director, Industrial Cold and Food, Ware Malcomb

What’s your forecast for the cold storage design/build market in 2026?

“I predict that in 2026, the location for new cold storage construction will increasingly be influenced by access to reliable power. While proximity to food sources or to population have traditionally driven site selection, energy availability is a critical factor in future development decisions.”

Kate Lyle

“We predict the cold storage design/build market in 2026 to remain strong, driven by several converging trends and structural shifts in supply chains, food logistics, and healthcare. Here’s our prediction based upon our recent deal flow, opportunities, and industry momentum.

“Key 2026 design build trends include a shift to spec-to-suit over speculative builds to reduce vacancy risks; more customized builds; accelerated adoption of automation-first facilities, especially in urban or high-throughput environments; modular, multi-temp, convertible temperature zones for added flexibility; and smaller, high-tech cold storage hubs built closer to population centers to support rapid grocery and meal kit delivery.”

Michael Cody

media coverage of the cold chain delivering vaccines, and the demand from food producers to expand their stores,” says Tippmann. “I believe all that attention really put our industry in the spotlight, drawing in people who didn’t know what they were doing and will likely cause us problems in the future.”

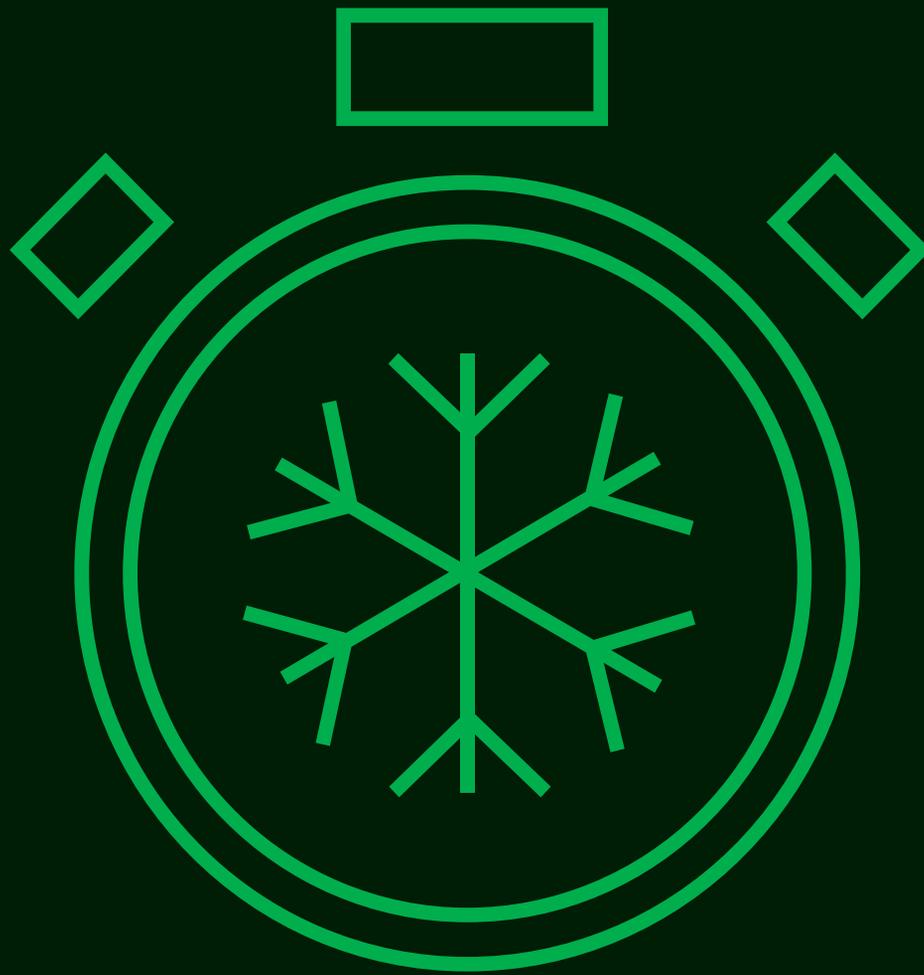
Tippmann says he doesn’t know when the recovery will be over from all that overbuilding.

“There are still a few markets that have a lot of capacity to store pallets, and there’s

still going to be recovery in a couple of those markets that were very attractive three years ago and now are sitting at 50% capacity,” Tippmann says. “But luckily, people are going to continue to eat food. So, I think it’ll be all right.” ☺

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

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THE NORTH AMERICA COLD CHAIN MARKET

Adapting to emerging challenges and grasping new market opportunities.

By Isobel Davidson

Cold chain markets in the United States and Canada have experienced particularly high visibility over the past 18 months, as Lineage’s initial U.S. public offering coincided with the completion of several major new facilities and expansions in both countries.

Market Growth

The industry had previously flown under the radar, however, the past two years marked a milestone reached following a long period of market growth. Analysts point to multiple growth drivers, including the surge of online grocery shopping. In the United States, 28% of shoppers now buy groceries online at least once per month, according to Capital One Shopping research, and in Canada, urban centers like Toronto and Vancouver are leading increased demand for quick and convenient delivery.

In addition, U.S. frozen food sales jumped

by 22% in 2020 and have stayed well above pre-pandemic levels, according to Wide Moat Research. Meanwhile, Canada’s population growth has been robust, and a recent IQVIA white paper found that 45% of the top 20 U.S. drugs by sales need cold storage.

These are strong numbers and a basis for confidence in the medium term. However, Eben James, Chief Executive Officer of Ontario-based Trenton Cold Storage, points out that a shift linked to global economic uncertainty has begun. “Overall, there is a move now to a more conservative approach to investment, and a more conservative mandate

from private equity and pensions. At the same time, businesses have started building private space again over the past two or three years: there is a softening in the 3PL market.”

Demand and Capacity

James considers that, overall, the current demand for cold chain services in Canada is holding fairly flat. While some customers’ cold storage needs have reduced, demand for Trenton’s small order pick has been growing stronger.

A similar stability in demand is reported in the United States. Stephen Draper, Co-founder and Chief Operating Officer at Envision Cold, assesses that the current demand for cold chain services is not materially different from that experienced in recent years.

In terms of cold storage capacity, GCCA’s most recent “Top 25” report on refrigerated warehousing and logistics providers (published in April 2025) found that the Top 25 members in North America are operating

a combined capacity of 5 billion cubic feet (141.5 million cubic meters). This has risen by 629 million cubic feet since 2024.

A number of major projects, both completed or underway, are contributing to this significant and ongoing increase in storage capacity. In August 2025, Americold announced the opening of a 335,000-square-foot import-export hub in Kansas City, Missouri, in partnership with Class I railroad Canadian Pacific Kansas City. And Miami's position as a major gateway for perishable goods into the United States is set to be further reinforced with the opening of a cold storage and phytosanitary facility at Miami International Airport in 2027, part of a \$141 million public-private partnership between the airport and PortMiami.

Canada is also seeing exciting new projects come to fruition. The recent acquisition by Congebec Cold Storage of Bradner Cold Storage is a strong signal of an intention to reinforce and continue growth in a Canadian-owned business.



Similarly, Conestoga Cold Storage continues to push the boundaries of innovation with the opening of its new 96 million cubic foot facility in Halton Hills, and Trenton Cold Storage has added a further 26,000 pallet positions to its cold storage portfolio with a new state-of-the-art facility in Moncton, New Brunswick, in Canada.

International companies are also bringing major investments. Lineage announced earlier this year that recent acquisitions and expansion projects in Canada will grow its network by 13 million cubic feet and more than 68,000 pallet positions; Americold announced in May 2025 that it is breaking ground on its first import-export hub in Canada, serving Port



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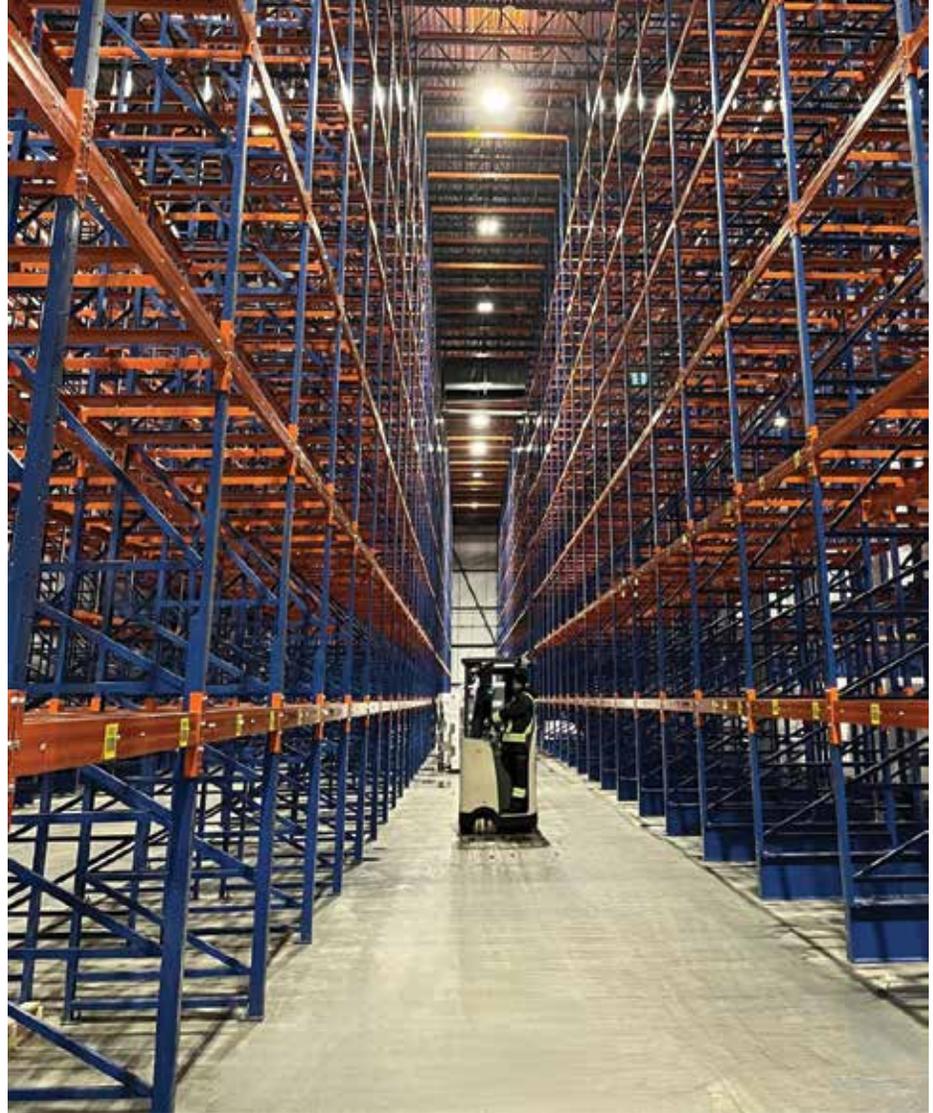
With significant capacity expansion in recent years, industry observers have noted a change, in both Canada and the United States, from undersaturation of the cold storage market to an emerging position where substantially more space is now available in the market. “It’s a pivotal moment for the industry,” Draper explains. “The major events over the past five years have driven a significant influx of new capacity into the market. We will need time to absorb the excess capacity – at least the next one to two years. While older warehouse facilities in strong markets still bring meaningful value, some outdated and obsolete facilities will likely need to be repurposed. This, combined with steady consumer growth, should help restore occupancy rates to more historical levels.”

International Trade

A range of impacts linked to the Trump Administration’s international trade policy are emerging for the cold chain market in Canada. Changes occur within the context of a solid perishable goods trade position. Data from Statistics Canada shows post-pandemic volume growth for many Canadian exporters of perishable foods, and imports of perishable foods have generally been stable since the start of the pandemic (although meat imports have seen more year-on-year volatility).

James reports that the effects of the recent tariff changes between the United States and Canada have been mixed. “We have garnered some business because of tariffs, and we have lost some business because of tariffs,” he says. “The lost business was in mature products where tariff changes were the straw that broke the camel’s back. I think we will see North American supply chains increasingly moving to an approach where product for Canada is produced in Canada, and product for the U.S. is produced in the United States – it’s a move from globalization towards regionalization.”

Draper also reports notable impacts for the U.S. cold chain industry as a result of changing tariff policy. “The most consistent feedback we hear from customers is that they struggle to plan effectively due to the uncertainty and frequent shifts in tariff policy. The constantly changing narrative makes it difficult for them to make confident deployment decisions, which often leads to hesitation and delayed action.”



GCCA Senior Vice President of Strategy, Partnerships and Policy Shane Brennan notes, “There is no doubt that the recent trade tensions between the United States and Canada have had operational impacts on trade flows and consumer-demand patterns. However, at times of trade tension and disruption, quality logistics companies prove their worth, and cold chain businesses on both sides of the border have done just that.”

Considering the medium-term impacts of tariff policy changes, Brennan remains optimistic. “The industry is anticipating suppression in consumer demand driven by cost inflation and shifts in purchase and supply. However, the trade links between the United States and Canada remain of fundamental importance to both economies. If trade remains difficult, then manufacturers, retailers, and traders will be best served by investing in ensuring they have resilience built into their supply chains.”

Cold Chain Outlook

Looking to the future, James anticipates cold chain operators will return to a laser-like focus on energy supply and costs. “This issue

is off the front-burner for now,” he explains, “but I expect that how cold chain operators consume and generate energy will become a high priority for our industry again in the years ahead.” He also foresees inflation in the United States and in Canada, with pressure on interest rates and increased costs for customers due to tariffs and a reduction in labor availability in the United States.

For Draper, longer-term growth opportunities in the United States remain strong. “Many markets still require additional infrastructure, and the overall upside in cold chain demand continues to outweigh the short-term challenges certain regions are facing.”

There is no doubt that this is a time of change across North America, but the temperature-controlled logistics industries, in both the U.S. and Canada, are well-positioned to adapt, to address emerging challenges, and to seize new market opportunities. 🌐

ISOBEL DAVIDSON is a media consultant in the food and logistics industries.

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CEBA

BUILT BY THE BEST **CASE STUDY**

By Keith Loria

A Next-Gen Cold Facility Storage: Evans General Contractors brings RL Cold facility to life.

Evans General Contractors has completed one of the most advanced cold chain storage facilities in the country, delivering a \$100 million, 285,000-square-foot build-to-suit project for RL Cold.

The project sits on a 29-acre site within the 450-acre Pender Commerce Park in Wilmington, North Carolina, a location strategically chosen for its proximity to the Port of Wilmington, one of the fastest-growing and most productive ports on the U.S. East Coast.

What sets this project apart is not just scale, but its remarkable adaptability and advanced design features. The facility features a wide range of temperature-controlled environments, deep dock configurations, and customizable thermal zones, enabling it to support a diverse range of product categories – from proteins and produce to pharmaceuticals. It also includes in-rack blast freezing capabilities, very-narrow-aisle (VNA) racking systems, and value-added services such as repacking and labeling, making it a fully integrated cold chain hub.

Getting Started

Evans had successfully delivered multiple projects for RealtyLink, the parent company of RL Cold. So, when RealtyLink began exploring a speculative cold storage facility in the area, it engaged Evans early on for conceptual and budgetary pricing.

“As the project advanced, Evans transitioned from budget-level estimates to a true Guaranteed Maximum Price proposal,” says Liz O’Connor, Vice President of Pre-



The project sits on a 29-acre site strategically chosen for its proximity to the busy Port of Wilmington, North Carolina. (All photos courtesy of Evans General Contractors.)

construction for Evans. “Ultimately, Evans was awarded the design-build contract and partnered closely with RL Cold to refine and deliver the project design.”

The project began as a speculative cold storage facility, designed with freezer, cooler, and cold dock space and equipped with ALTA Expert refrigeration units.

“LEED certification was always a core goal, and sustainability was embedded in the design from the outset,” O’Connor says. “The project initially followed a straightforward path with strong synergy among the owner, design, and construction teams. However, once the project

was fully designed and permitted, a tenant signed on, shifting the scope from spec to build-to-suit. This required significant design modifications, including specialized refrigeration systems, LEED Gold certification, a blast freeze component, and the VNA racking.”

These changes presented complex challenges, but through close coordination and proactive problem-solving, the team successfully adapted, maintaining the project’s momentum and delivering a high-performing facility.

Preconstruction efforts started in late 2021, about seven months before breaking

ground. Construction lasted approximately 13 months, with the project completed on time and within budget, despite the introduction of scope changes midway.

Sustainability and ESG Commitments

From the outset, Evans and RL Cold committed to making the Wilmington facility one of the most modern and sustainable cold storage projects in the country. The building was designed to achieve LEED Gold certification, showcasing a comprehensive suite of sustainability measures.

The project incorporates a 1-megawatt rooftop solar array, which helps offset the significant energy demands of a cold storage warehouse. Water conservation was also a major focus, with a 50,000-gallon rainwater capture system designed to collect rain and condensate for reuse, significantly reducing potable water consumption.

At the heart of the cooling system is an ammonia/CO₂ cascade refrigeration plant with adiabatic cooling, a state-of-the-art solution that improves efficiency while significantly lowering water usage.

The facility's high-reflectance TPO (Thermoplastic Polyolefin) roofing and concrete hardscapes help limit heat absorption and reduce the urban heat island effect. At the same time, electric vehicle charging stations support both passenger cars and refrigerated transport trailers, allowing trucks to reduce diesel emissions during idle periods.

Energy efficiency extends throughout the interior as well. The building is illuminated entirely with LED lighting and paired with an enhanced thermal envelope and premium insulation systems, the warehouse achieves up to a 32% improvement in energy performance compared to conventional cold storage buildings.

The use of low-emission adhesives, sealants, and flooring materials also contributes to healthier indoor air quality and aligns with modern green building standards.

The building incorporates low-VOC materials, low-carbon footprint components, recycled content, and transparent product declarations, contributing significantly to its LEED Gold certification.

Taken together, these features make the Wilmington facility one of the most sustain-



The facility features a 90-foot-deep cold dock.



The new warehouse includes in-rack blast freezing capabilities and very-narrow-aisle (VNA) racking systems.

able cold storage operations in the United States, setting a benchmark for environmentally responsible industrial design.

Engineering Challenges

A significant challenge arose when the project transitioned from speculative to build-to-suit after obtaining permitting.

“The tenant’s operational needs required major design revisions – ranging from advanced refrigeration systems to adding

blast freezing capabilities with VNA racking – without derailing the timeline,” O’Connor says.

Evans managed more than 160 change orders, spanning scope modifications, manpower allocation, equipment procurement, and schedule adjustments. Thanks to rigorous design coordination meetings and an emphasis on open communication between the developer, tenant, and subcontractors, the team was able to adapt seamlessly, avoiding costly delays.

The project incorporates a 1-megawatt rooftop solar array, which helps offset the significant energy demands of a cold storage warehouse.



From a construction standpoint, the project pushed boundaries in both engineering and coordination. The VNA slabs, engineered and poured by Fricks, were installed atop 40 psi under-slab insulation in eight-foot-wide strips throughout the freezers and QFM room.

To keep the project on schedule, Evans coordinated daily slab pours, carefully managing curing times while simultaneously maintaining site access for other trades. This level of coordination was crucial in a project where nearly every sequence overlapped with critical-path activities.

Operational resilience was another core focus. The facility features backup power systems that can operate the refrigeration equipment at 75% capacity for up to 24 hours during an outage, ensuring product integrity is protected even in emergencies. Life safety systems are also fully backed by emergency generators, a necessity in a facility storing millions of pounds of perishable goods.

Key Features

The facility features a 90-foot-deep cold

dock, a blast freezer operating at -10°F with slating and de-slating areas and VNA racking, two -10°F storage freezers, a water storage tank and pump house, 10,000 square feet of office space integrated into the 277,300-square-foot warehouse, and advanced CO_2 refrigeration systems.

The facility incorporates a transcritical CO_2 refrigeration system designed by M&M Carnot, marking RL Cold's most efficient cooling system yet.

A Collaborative Team

The project relied on an all-star roster of subcontractors, with 25% of all trades members of the Controlled Environment Building Association (CEBA). From design consultants and field crews to equipment suppliers, Evans tapped both local talent and national expertise, ensuring best-in-class execution at every stage.

"The success of the project was driven by the strength of collaboration," O'Connor says. "Evans and RL Cold had a strong, trusted partnership, reinforced by seamless coordina-

tion with subcontractors and consultants. This high level of teamwork ensured that challenges were met head-on and that the project's goals were achieved without compromising quality, budget, or schedule."

A Model for the Future

Combining cutting-edge refrigeration technology, resilient backup systems, sustainability measures, and flexible design, this cold chain facility is both a logistical powerhouse and a model of modern industrial development.

With Evans delivering the project on time, on budget, and to an uncompromising level of quality, RL Cold's Wilmington facility stands as a benchmark for future cold storage projects nationwide. 🌀

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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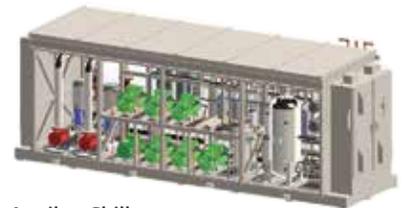
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ASSOCIATION UPDATES

ADVOCACY IN EUROPE

GCCA meets with the European Parliament in Brussels.

GCCA staff and leadership, members of the European Parliament (MEPs), and industry leaders gathered on June 25 to address vulnerabilities in the food supply chain. The event took place amid the European Parliament's development of a new EU Preparedness Union Strategy, which includes proposals for a coordinated approach to food stockpiling and crisis readiness.

The meeting called on European policymakers to prioritize investment in temperature-controlled logistics, strengthening the continent's food supply chain resilience. The roundtable was hosted by Adrian-George Axinia MEP (Romania) and featured contributions from MEPs Daniel Buda, Maria Georgiana Teodorescu, Sander Smit, and Piotr Muller, as well as Romanian lawyer Gheorghe Piperea. Industry participants included representatives from GCCA, the European Cold Storage and Logistics Association, national cold chain associations, and major companies such as Americold, DP World, Gdansk Cold Store, Group GTS, Jodifrost, Port of Antwerp Bruges, and Thermotrafic.

Discussion focused on the designation of cold chain logistics as critical infrastructure, the recognition of cold chain professionals as essential workers in crisis scenarios, and the

removal of barriers to investment in infrastructure and capacity. Participants also addressed trade facilitation, energy efficiency, automation, and incentives to drive innovation.

This roundtable follows a 2024 industry-wide "Call to Action" from cold chain stakeholders, urging European policymakers to support businesses in delivering food security and supply chain resilience.

ADVOCACY IN THE UNITED STATES

GCCA Policy Forum gathers in Washington, D.C.

In late July, GCCA members came together in Washington, D.C. for the organization's annual U.S. Cold Chain Policy Forum and congressional fly-in. The program included

an update on GCCA's advocacy priorities, a presentation from the Occupational Safety and Health Administration on regulations and enforcement data; keynotes from the Department of Agriculture and Small Business Administration; breakout sessions on tax, transportation, labor, and insurance policy; and interactive workshops on food traceability from GS1 US and supply chain cybersecurity from BIO-ISAC.

Additionally, members visited Capitol Hill to discuss cold chain investments, the FRIDGE and REINS Acts, labor policy, and regulations reform with congressional representatives and staffers including Rep. Randy Feenstra, Rep. Tracey Mann, Sen. Adam Schiff, Rep. Sam Graves, Sen. Raphael Warnock, Rep. Austin





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CONVENING ACROSS THE GLOBE Insights from GCCA Summer Conferences in Sao Paulo, Durban, and Santiago.

Brazil Cold Chain Congress: June 11-12 in Sao Paulo, Brazil

More than 130 cold chain leaders gathered in June in Sao Paulo for the 2025 Brazil Cold Chain Congress. The program included speakers on topics like navigating regulatory change; tax and policy updates shaping Brazil's cold chain; mitigating emerging risks and avian influenza implications; expanding market reach – export vs. domestic distribution strategies by Arfrio S.A. Armazéns Gerais Frigoríficos, Brasfrigo Oficial, Friozem, and Movecta; innovating with suppliers; harnessing tech trends like AI, zero-waste logistics, and next-gen infrastructure; and driving investment and market consolidation insights from Icestar, Emergent Cold LatAm, and more.

The Brazil Congress also hosted a signature GCCA Cold Chain Café roundtable, networking, and excellent opportunities for peer sharing and collaboration.

Africa Cold Chain Conference: August 21-22 in Durban, South Africa

The 2025 Africa Cold Chain Conference, held in Durban in late August, was attended by 120 delegates. The program kicked off with tours focusing on port optimization and improving efficiency at the Durban port and Maydon Wharf fruit export market.

Conference sessions featured a keynote address by Dewald Olivier of Red Meat

Industry Services, as well as presentations on topics such as AI and technology, creating more efficient cold chain logistics networks in Africa, trade issues, and energy efficiency.

Highlights included an appearance and inspirational speech delivered by the South African Minister of Agriculture, John Steenhuisen MP. The Minister commented on Africa's population boom and food security, post-harvest loss, needed reforms in port efficiency, energy policy, building Africa's voice in global trade, rural economics, and the technologies needed to move the industry forward while being accessible to all.

This year's event also hosted the South Africa Advisory Committee, other committee meetings, and several impactful networking receptions.

Latin America Cold Chain Congress: August 27-28 in Santiago, Chile

The 2025 GCCA Latin American Cold Chain Congress in Santiago de Chile, Chile, convened 113 attendees, representing eight countries and 51 unique companies. Key industry leaders, experts, and stakeholders convened to address the most pressing challenges and opportunities within the region's temperature-controlled logistics sector.

Sessions explored leveraging logistical advantages at Latin America's key ports, implementing intelligent energy solutions to reduce costs and environmental impact, and the critical role of automation and AI in developing the next generation of warehouses for emerging markets.

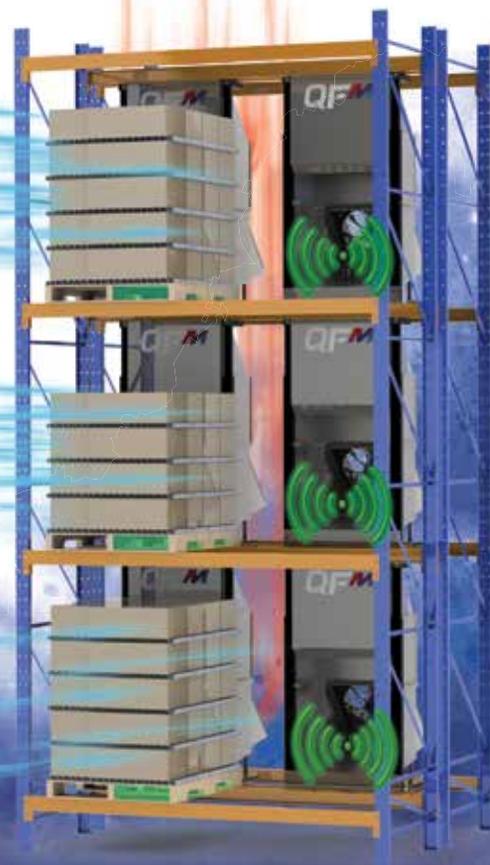
Discussions also tackled the current global landscape, with a focus on navigating trade disruptions and identifying new routes and markets for perishable goods. A significant presentation highlighted the Bioceanic Corridor as a transformative logistics opportunity for trade between the Atlantic and Pacific.

Panels and presentations also emphasized that strengthening cross-border partnerships is essential for building a more resilient and synchronized regional cold chain. 🌐





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The 45th Annual CEBA Conference & Expo will be held November 3-5, 2025, at the world-famous Caesars Palace Hotel in Las Vegas, Nevada, United States. The annual event is dedicated not only to building exclusive professional relationships but also to learning about the lifecycle of controlled environment facilities, from pioneering design and state-of-the-art construction to building optimization and strategic maintenance.

Convening a global delegation of the controlled environment construction industry's most influential minds, the conference is an essential meeting point where builders, designers, engineers, and facility owners and operators converge. Professionals from across multiple sectors utilize this time together to set the agenda for the future of the industry.

The CEBA Conference and Expo provides a forum where professionals can access the critical intelligence, best practices, and strategic connections needed to excel. Attendees leave not just with new ideas but also with actionable strategies to enhance project delivery, improve operational efficiency, and drive business growth in a rapidly evolving market.

2025 General and Educational Sessions

General sessions at the CEBA Conference & Expo provide attendees with an overview of the industry and CEBA's priorities for members (and potential members!). This year, experts will take the main stage to discuss vital topics with the full audience, including:

- President and CEO & CEBA Chairman's Welcome Messages
- Trends and Market Forces Panel
- Innovations in Controlled Environment Construction Panel
- 2025 Built by the Best Awards





Education sessions provide a thorough examination of the latest innovations in controlled environment design and building. This year's education sessions will include topics like:

- Sustainability, energy efficiency, energy environmental impacts, and energy conservation strategies that can be implemented in the construction process
- Food safety
- Breaking barriers: the food service industry
- Next-gen tools & technology
- Principles of product safety regulation and risk mitigation
- Strategies/practices to meet evolving consumer demands

2025 Keynote: Economic Forecaster and Former CNBC Chief Economist Marci Rossell

Marci Rossell is a world-renowned economist and financial expert who speaks candidly on the nexus of economics, politics, culture, and the media. As the lively Chief Economist for CNBC and the former co-host of the well-known “pre-market” morning news and talk show *Squawk Box*, Rossell is revered for making complex economic issues relevant to people’s lives, families, and careers.

Rossell discusses America’s current and future role in the global economy, factors responsible for recessions, how Washington

influences Wall Street and the markets, and the specific forecast for the near future of the U.S. economy. She is well-versed in the stock market, investor behavior, consumer confidence, and what accountable capitalism looks like this year and beyond.

Prior to her career in broadcast journalism, Rossell served as Corporate Economist and Investment Spokesperson for Oppenheimer Funds, one of the nation’s largest mutual fund companies. She began her career as an economist with the Federal Reserve Bank of Dallas, earning a Ph.D. in Economics from Southern Methodist University. Before moving to Wall Street, she served as an expert witness for Deloitte & Touche in court cases involving economic issues.

With a knack for making complex topics more digestible, Rossell’s authentic, high-energy persona offers an insider’s perspective on key factors of economic disruption.

Construction Café

The Construction Café is the CEBA Conference’s “roundtable discussion” part of the schedule. Participants engage in meaningful

conversations with peers; with more than 10 topics available, these sessions are designed for quick, 20-minute exchanges. At each session’s end, the group shares tools and ideas developed during their talks.

The Café offers CEBA conference attendees the opportunity to engage in more in-depth discussions on highly detailed topics important to them. Topics include:

- AI in Construction
- Automation & Software
- Controlled Environment Design & Consumer Trends
- Economic Trends
- Emerging Segments (Non-Food Channels)



- Emerging Technology
- Energy & Efficiency
- Fire Safety
- Next Generation Refrigeration
- Pre-Construction Trends
- Recruitment & Retention
- Real Estate & Development
- Safety & Risk Mitigation
- Sustainable Building Design

Built by the Best Award

Celebrating its 10th anniversary in 2025, the CEBA Built by the Best Award acknowledges GCCA members around the globe for their expertise and innovation in constructing, renovating, and/or modernizing controlled environment buildings across the world. Buildings recognized with the Built by the Best seal represent some of the most inno-



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Finalists and award winners are highlighted on stage during the CEBA mainstage program. Winners are chosen from award categories like *Controlled Environment*, *Cold Storage & Distribution Warehouses*, and

Special Works Projects (Small Expansions, Tenant Improvements, Maintenance, Retrofits, and Renovations).

This award is open to project teams from any country, comprising contractor/design-build companies and processor/end-user/warehouse/third-party logistics companies that meet specific criteria.

The 2025 CEBA Expo

The CEBA Expo is where construction innovation takes flight. This year's show floor will feature the latest technologies, solutions, products, and services from some of the most respected names in the industry. Products and services featured at this year's expo include but are not limited to: Cold Storage Contractors, Doors, Energy Efficiency Solutions, Fire Detection Systems, Flexible Walls, Flooring, Insulated Panels and Insulation, Materials Handling, Racking, Refrigeration Solutions, Roofing Networking, and more.

Making Connections

Prominent social activities, receptions, and the exhibit hall all give members and industry suppliers access to build partnerships with construction/design-build, warehousing and food processor decision makers. Other networking opportunities include the CEBA Golf Classic, our conference opening night reception, happy hour, and a poolside networking reception. @

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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.

ACTIVE PROJECTS

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

Partnered with Improving Economies for Stronger Communities (IESC)

GCCF delivered 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 in Central America. A cohort of 12 cold chain operators from El Salvador, Honduras, and Guatemala also participated in the GCCF Cold Chain Institute LatAm in July. Additional activities are underway, including technical assistance for design and energy efficiency as well as virtual refrigerated transportation training.

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 involves 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.



Dr. Janeth Gabaldon (left) and Vaughn Engler (right) conducted the energy audit at the Food Bank of the Golden Crescent.

Powering Food Banks Project, 2025 – 2027

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

GCCF is leading an initiative to support energy efficiency practices in food banks in the United States. Through this grant, GCCF and team are implementing a pilot study to reduce energy consumption in select food banks operating refrigerated storage by leveraging expertise in refrigeration and energy usage from the private cold storage sector. In July, Dr. Janeth Gabaldon (University of Arkansas), Vaughn Engler (Michael's Energy), and Madison Jaco (GCCA) traveled to Texas to perform onsite energy audits. The two pilot food banks also completed GCCA's Energy Excellence Recognition Program survey. Together, the survey and audit will be used to develop actionable recommendations, which GCCF and team will work to implement in collaboration with other association members and food-related organizations.

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 training sessions specifically designed for the West African cold chain industry. A virtual workshop and additional on-site consultations for local operators are also planned for October and November 2025 in the Ivory Coast, Senegal, and Ghana.

COLD CHAIN DEVELOPMENT

NEWS ABOUT GCCF INTERNATIONAL PROJECTS



Left: The Powering Food Banks team conducted an energy audit at the Food Bank of the Golden Crescent in July.

Right: The Powering Food Banks team conducted an energy audit at the Food Bank of the Rio Grande Valley in July.

Ongoing Industry Support to Reduce Food Loss and Waste

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 has also completed recording the five-course virtual training that will be housed in the GCCF Cold Chain eCampus.

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

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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 are working on getting a facility through the planning commission. Does GCCA have any talking points or fact sheets available that address ammonia safety?

A: Ammonia has excellent thermodynamic properties, including a low boiling point, a high heat of vaporization, and a low production cost. For that, ammonia is considered an effective and efficient refrigerant. Ammonia's impacts on the ozone layer or contributions to global warming are minimal, so ammonia is considered a natural and environmentally friendly refrigerant. However, its toxicity is still a very important subject.

Ammonia toxicity impact can be minimized if these six steps are followed:

1. Design a refrigeration system to prevent ammonia leak.
2. Establish a well-documented crisis management plan.
3. Establish a strong employee safety training program.
4. Train employees on how to deal with ammonia leak.
5. Provide a suitable PPE to the employee.
6. Establish a good preventive maintenance plan for the refrigeration system.

This answer was provided by Dr. Faris Karim, Ammonia Contamination & Food Toxicology Expert from Kansas State University. 

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MEMBER NEWS

NEWS FROM MEMBERS OF GCCA CORE PARTNERS

AMERICOLD, in a partnership with the Canadian Pacific Kansas City (CPKC) railway, opened a cold storage warehouse in Kansas City, Missouri, in August. The new \$127 million facility is near the Centerpoint Intermodal Center in South Kansas City and features on-site food inspections by the U.S. Department of Agriculture to eliminate delays at the Canadian and Mexican borders, according to Americold. The location holds strategic importance for CPKC's Mexico Midwest Express as the only single-line rail service for refrigerated goods between the United States and Mexico, according to Americold. The Kansas City property is the first of several chilled import-export hubs that Americold plans to build across North America with direct links to railroad networks.



AMERICOLD announced that its president, Robert Chambers, has been appointed as its next CEO and a member of its board of directors, effective September 1. Chambers takes over from CEO George Chappelle, who retired.



COASTAL GROUP opened a \$41.8 million, 125,000-square-foot cold storage facility in Missouri, featuring 15,500 pallet positions, 55,600 square feet of freezer space, and 29,300 square feet of cooler space. The warehouse is located within a 10-hour drive of 70% of the U.S. population.



DP WORLD begins construction on a state-of-the-art cold storage facility in Egypt, marking a significant investment in the country's logistics

and trade infrastructure. The facility, valued at approximately \$29 million, addresses the growing demand for modern, energy-efficient cold storage solutions in Egypt, particularly for agricultural exports and frozen food sectors, supporting both local and international markets. The new cold storage facility will cover 16,194 square meters (174,311 square feet) and feature eight independently controlled temperature chambers with the capacity to accommodate 25,000 pallet positions, suitable for chilled and frozen products. The facility will be equipped with an advanced ammonia refrigeration system, adhering to international standards.



SNOWMAN LOGISTICS LIMITED is constructing a new temperature-controlled warehouse in Pune, India. The facility is built-to-suit by Whitecastle Infra, a regional

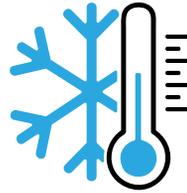
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developer. The warehouse, with a capacity of 5,900 pallets, is scheduled to be operational by June 2026. The cold storage facility is designed to store products for local industries, including ice cream, chocolates, dairy products, quick service and fast food restaurants, coffee chains, meat, poultry, seafood, and pharmaceuticals.



VERTICAL COLD STORAGE expanded its Medley, Florida, facility to become a fully licensed, customs-bonded warehouse. This is the company's first facility that enables importers of frozen beef, pork, and poultry to defer duties and tariffs while products are stored. Through the customs-bonded storage, businesses can hold inventory in a duty-free status until the products are sold into the U.S. market or re-exported. The facility is strategically based near Port Miami and Miami International Airport, which offer direct access to one of the largest gateways for perishable imports in the United States. @

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2025 INDUSTRIAL - NATIONAL INVESTMENT OUTLOOK

Online Grocery Market Share (2024 Sales)



New Consumption Patterns Becomes Fully Ingrained, Aiding Cold Storage Demand

Historic delivery was extended through 2023. Online grocery sales topped \$1.5 billion for the sixth straight month this April, driven by a notable year-over-year increase in food delivery. Should this trend continue, the grocery segment would rank as the largest e-commerce category by 2025 – a dynamic that would foster future demand needs for temperature-controlled facilities. As such, the outlook for the cold-storage sector remains positive amid a period of supply-induced headwinds. During the 18-month span ended in March, developers added 1.4 million square feet, which is a record high for the year-to-date period during back-to-back years. This volume of new capacity is expected to be absorbed in the near future, as demand for cold storage continues to grow.

- ✓ Discussion of how evolving trade policies may impact the industrial sector
- ✓ Supply and demand forecasts for 36 major US markets
- ✓ Breakdown of sector trends by vintage, size and other property characteristics

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