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Food Trade in an  
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# LEADOFF

## MESSAGES FROM GCCA LEADERS

**H**APPY DECEMBER TO OUR MEMBERS AND INDUSTRY LEADERS ACROSS THE GLOBE. AS WE BRING THIS REMARKABLE YEAR TO A CLOSE, MY HOPE IS THAT YOU HAVE THE OPPORTUNITY TO SLOW DOWN, CONNECT WITH LOVED ONES, AND THINK ABOUT YOUR PERSONAL AND PROFESSIONAL ACCOMPLISHMENTS OVER THE YEAR. I AM ALSO HONORED TO REFLECT ON THE COLLECTIVE ACHIEVEMENTS OF GCCA AND THE EXTRAORDINARY MOMENTUM WE HAVE BUILT TOGETHER.

In January, I gathered our full staff to discuss our working styles, how we see GCCA today, and how we want to shape an expanded association that best serves our core constituents. We've been setting the stage all year — refining systems, reallocating resources, and most of all, listening to our members' needs and aspirations.

Below are my top five takeaways from my first full year as your President and CEO:

### 1. We represent the best in the industry — our members are THE experts.

With almost 900 members across the warehouse, logistics, transportation, and supplier sectors and 1,500 facilities, our companies and our people represent critical links of the global temperature-controlled supply chain.

This year, I visited more than **25 member facilities and offices** across **nine countries** and **10 states**, and held **24 focus groups** with our GCCA Warehouse, Transportation, and GCCF Board Members

Not only did I witness facilities' operations firsthand, but I also gained invaluable insight into broader cold chain industry challenges and opportunities. Our members are open, honest, and incredibly generous in sharing their expertise. These frank discussions lead to meaningful action. What I learned from you directly informed decisions on pressing concerns, member priorities, and the evolving needs of this industry.

We also celebrated countless member stories, including business expansions, new partnerships, and groundbreaking achievements that strengthen the global cold chain. Our members excel at innovation. These new ways of thinking were major highlights during my visits. With dedicated maintenance and continuous improvements, our members' incredibly strong operations will continue to utilize resources and facilities efficiently for decades.

### 2. We must be better at celebrating GCCA's accomplishments.

Even as we refine our topline strategies, we remain dedicated to delivering exceptional value to all professionals in the cold chain. Whether through insights from leading experts, cutting-edge educational programs, best-in-class networking, or trusted market intelligence, we want to ensure GCCA membership supports your business success every single day.

I am extremely proud of our **2025 programming** — in-person conferences and congresses, Cold Chain Connections, training institutes, and other learning and networking forums. Across the globe, engagement remained exceptionally strong, underscoring a continued appetite for knowledge-sharing, innovation, and collaboration.

We strengthened our **industry alliances and partnerships**, spanning advocacy and policy relationships, industry collaborations, training and education offerings, special interest groups, and more.

The **Global Cold Chain Foundation (GCCF)** also advanced its mission, navigating new challenges and opportunities. From progress on international project funding to new priorities in food waste reduction and energy audits, GCCF continues to deliver programs with global impact.

We also achieved important internal milestones: staffing enhancements, operational improvements, and expanded core competencies, all designed to better serve you.

## 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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For more information on GCCA initiatives and activities, follow us on social media.

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### 3. We are a remarkable champion of good policymaking around the world.

In 2025, we reset our expectations and expanded our plans for policy and advocacy to more fully reflect our global membership. While we remained steadfast in our long-time policy priorities, we also adapted to new leadership, evolving global values, and real-time conversations with members about what comes next.

We are proud of the recent meaningful impact of our global advocacy. Through meetings with **U.S. agency and legislative officials, European Union ministers, Brazilian MAPA leadership**, and work on regulations in Africa on rail transport and the Kenyan Meat Control Act, we ensured that the voice of the cold chain was clearly heard.

This year, GCCA contributed to critical dialogues on **trade facilitation, digitization, decarbonization, and cross-border regulatory alignment**, helping shape the policies that underpin secure and efficient global supply chains. What comes next is not only the continuation of this important work but also the reprioritization of what is most important to our members and stakeholders. Our priorities are cold chain specific — focusing on issues about temperature-controlled logistics and operations.

- Resilient Infrastructure, which includes infrastructure investment, emergency preparedness, energy security, cybersecurity, and people and facility safety
- Safe and Secure Trade, which includes “Trusted Partner” status for 3<sup>rd</sup> party logistics, digitization of sanitary border controls, food security and traceability, and storage and transport regulations and certifications
- Sustainable Supply Chains, which includes food waste reduction, climate adaptation and mitigation policy, emissions reporting challenges, and energy efficiency and decarbonization implications

We are deeply grateful to the members who supported our 2025 efforts through their contributions to the **GCCA Advocacy Fund**, strengthening our ability to influence decisions that affect your operations.

### 4. Let’s not be afraid to face change head-on.

Change can be uncomfortable, but it is often essential for growth. This year demanded agility as the world confronted economic uncertainty, shifting global trade conditions, volatile tariff policies, and evolving regulatory expectations. In 2025, GCCA provided up-to-the-minute updates through our **Tariff Information and Resource Center**, helping members stay informed and prepared through every policy shift.

Our Boards of Directors also undertook the significant work of evaluating the structure and future of our alliance. After thoughtful deliberation, **IARW and IRTA will move towards a merger** to form a unified Global Cold Chain Alliance. Beginning in 2026, **CEBA will transition outside of GCCA** — an important decision that allows both organizations to refocus, thrive, and deliver for their members. These changes reinforce our commitment to strengthening the association, honing our priorities, and delivering maximum value to warehouse operators, logistics providers, transportation partners, suppliers, associates, and innovators across the cold chain.

While change is challenging, it also brings new opportunities. We are ready and well-prepared to focus on building expertise, expanding services, and increasing your member value.

### 5. Let’s get started.

We are entering the new year with bold and exciting plans. In the coming year, we will advance an ambitious agenda to help build the temperature-controlled supply chain of the future — digitally integrated, sustainable, resilient, and grounded in sound global policy.

We will expand our market intelligence initiatives, strengthen benchmarking programs, deepen collaborations with governments and trade organizations, and elevate the innovative projects driven by our members.

The future of global commerce will not be shaped solely by technology. It will be shaped by people who innovate, collaborate, and challenge the status quo. The cold chain is not simply a system; it is a lifeline that supports economies, communities, and livelihoods around the world.

Thank you for your dedication, your partnership, and your commitment to the GCCA mission and vision. It is my privilege to serve as your President and CEO, and I look forward to all we will accomplish together in the coming year. @



**SARA STICKLER**  
PRESIDENT AND CEO  
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# MODERNIZING GLOBAL FOOD TRADE IN AN ERA OF INSTABILITY

*Global trade hasn't just been in the headlines this year – it has defined them.*

By Shane Brennan

Around the world, governments are rethinking how open their economies should be, adopting (or reacting to) increasingly assertive “nation-first” approaches. The result is an agrifood trading system that feels less predictable than it has in decades, with long-standing assumptions about how rules are set, interpreted, and enforced, now up for debate.

Amid this turbulence, countries are searching for a new balance: protecting economic resilience at home while ensuring their industries can still compete and grow overseas.

It's not an easy equation to solve. Yet the conversations we've been having with policymakers across multiple regions offer grounds for cautious optimism. In meetings, we're seeing a real appetite for practical, workable reforms that remove friction from trade. This is driven in part by the hard realities facing governments. Public budgets are tightening, skilled regulatory staff are in short supply, and agrifood inspection systems in many

places are under strain. These pressures are accelerating the demand for more innovative, modern approaches.

For GCCA, this moment represents a significant opportunity. As governments seek solutions that both strengthen oversight and support commerce, we are helping shape opportunities for innovation within the bureaucracy that governs food trade. We are making the case for a system based on robust processes that are more efficient, more resilient, and better aligned with the needs of a rapidly changing world.

## **Digitization and Trust: Global Priorities**

Anyone who engages in the food trade knows the red tape can be burdensome. Beyond routine customs procedures, agricultural goods must navigate an additional layer of bureaucracy focused on food safety and consumer protection. These requirements fall under the Sanitary and Phytosanitary (SPS) controls, which govern the movement of animal and plant products worldwide.

SPS systems are highly technical, sensitive, and long overdue for modernization. These paper-heavy processes create delays, cost money, and invite fraud. It is why, despite persisting political tensions, meaningful progress continues in the effort to standardize and digitize the documentation that underpins international food trade.

One of the strongest examples is the International Plant Protection Convention's (IPPC) e-Phyto Solution, which enables countries to exchange digital phytosanitary certificates through a centralized hub. As of September 2025, 96 countries are regularly using the

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digital platform, with traders reporting savings of more than \$80 million due to reduced paperwork and delays. It has taken years of effort, but the impact on the plant trade is real as are the faster movement between markets and fewer administrative headaches.

Digitization of meat and dairy products is progressing too – but at a slower and more complicated pace. Unlike plant health rules, which fall under one global treaty body (IPPC), animal health rules are spread across multiple international organizations, including the World Organization for Animal Health (WOAH) and the Codex Alimentarius.

Certification requirements for animal products also vary widely, from live animals to seafood to processed meats, each with its own risk profile and certification requirements. And because animal products pose higher perceived risks to public health and national biosecurity, governments are cautious about standardization.

Paper documentation and human inspections continue to be the longstanding and trusted way to protect borders. It takes a lot of work and a lot of proof to open minds to the possibility that digital systems can offer more accurate processes and better food traceability.

Even with these complexities, there is progress. WOAH is exploring the development of a global hub for digital veterinary certificates modeled on e-Phyto. Achieving this will take time, but the benefits could be substantial with lower costs, faster processing, improved traceability, and stronger safeguards against fraud.

### **Bilateral Innovation: Reducing Red Tape**

While global work continues, several countries are advancing reforms at the national and bilateral level. A significant example involves the long-standing requirement that veterinary certificates carry a physical “wet” signature from a qualified certifying officer. This rule remains in place across much of the world and is one of the biggest barriers to modernization.

But things are beginning to change. Australia and New Zealand have negotiated bilateral acceptance of digitally signed veterinary certificates. The European Union has invested heavily in its TRACES NT portal, which allows for e-signed certification. GCCA is advocating for these types of practical reforms, which cut costs and reduce delays for cold chain operators.

These incremental steps matter. Over

time, they help shift regulatory systems from exclusively in-person oversight to digital supervision and remote verification, changes that many governments increasingly view as necessary due to budget constraints and staffing shortages. Governments know they need innovation, not least because they increasingly can’t afford or find the people for the regulatory oversight jobs.

In recent discussions with senior Canadian officials, it was clear how much pressure they feel to reduce administrative burdens tied to veterinary certification. Canadian cold chain companies are playing a leading role in testing digital oversight models that could become gamechangers if regulators accept them.

In 2026, accelerating digitization remains a core global priority for GCCA. The Alliance continues pressing for progress in international forums, while also working country by country to remove bottlenecks, reduce costs, and strengthen certainty in the movement of goods worldwide.

### **Trusted Partners: Rebuilding Confidence in the Cold Chain**

The second major theme shaping 2025 is trust – specifically, how governments view cold chain facilities within the import and export system.

Certification and clearance processes for high-risk food products are designed with caution in mind. Their core purpose is to protect public health and national biosecurity, as well as deter fraud. But there’s a smart way to do this—targeted, risk-based, intelligently-led—and a less effective way that creates delays, adds cost, and still fails to stop bad actors.

### **Brazil: Overcoming Regulatory Barriers**

The experience of cold chain businesses in Brazil illustrates this tension. Current regulations largely prevent third-party cold warehouses from storing meat products destined for export after they leave the production facility. In most countries, this type of interval storage is a standard, essential service. Blocking it is both discriminatory and unnecessary.

This problem became more pressing during the recent outbreak of Avian Influenza H5N1 in the Rio Grande Do Sul region. Poultry exports to key markets, including China, were temporarily halted, forcing large volumes of frozen chicken to sit in refrigerated containers for weeks. This is expensive, energy-intensive, and potentially unsafe.

Thanks to persistent advocacy by GCCA Brazil members, attitudes inside Brazil’s Agriculture Ministry (MAPA) are shifting. There is increasing optimism that the role of third-party cold storage will be formally recognized – an important step toward building a more resilient, efficient export system.

### **United States: Reducing Reinspection Burdens**

While U.S. warehouses do not face the same structural barriers as Brazil, they do encounter significant duplicative reinspection requirements. The GCCA’s U.S. Government Affairs Committee is leading efforts to streamline these rules.

Today, many third-party facilities must wait for federal inspectors to “recertify” goods already inspected at the production plant simply because they moved locations. This adds cost, creates delays, and strains an already overstretched federal inspection agency.

GCCA’s Trusted Partner initiative aims to streamline these requirements by recognizing the reliability of compliant third-party facilities. The potential benefits are clear: reduced costs for exporters, fewer delays, more efficient use of federal inspection staff, and strengthened global confidence in U.S. meat exports. Early conversations with USDA and the Food Safety and Inspection Service have been constructive, and progress is anticipated in 2026.

### **Looking Ahead**

While trade policy debates and tariffs dominate the global conversation, the foundation of a competitive, resilient food export economy lies in the logistics operations that move goods safely and efficiently around the world.

GCCA remains focused on the practical, solutions-oriented work that moves the needle: advancing digitization, cutting unnecessary costs, strengthening trust in cold storage facilities, and breaking down the regulatory barriers that slow or block food exports.

These changes may not always make headlines, but they support the economic growth and market access that agricultural producers seek. We will continue to position the global cold chain not just as a service provider – but as an essential partner in sustaining and growing the world’s food trade. ☺

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

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## COLLABORATING IN THE COLD

GCCA and Americold partner to expand and improve the pool of all industry recruits while advancing women in the cold chain.

**D**espite a tough hiring climate, temperature-controlled warehouse operators have continued recruiting to fill new roles resulting from the growth of the global cold chain. Meanwhile, fundamental skills are changing, new roles are emerging, and many traditional jobs are demanding specialized expertise.

GCCA launched the Women in the Cold Chain initiative to address the need for a broad, talented, and diverse workforce. Women in the Cold Chain emphasizes gender diversity in temperature-controlled warehousing, logistics, transportation, construction, and international development. The program aims to strengthen the cold chain industry by attracting, supporting, recognizing, and promoting women's talent and success.

In the past, GCCA has spearheaded programs to recognize women in the cold storage industry, spotlight their roles, and demonstrate the careers available to them in the industry, says GCCA President and CEO Sara Stickler. "Those programs evolved to have a broader, more robust focus on advancing women in the cold chain and ensuring they have the training to be successful – we're trying to keep them in the cold chain by supporting them through professional development and not just recognition."

Stickler adds that Women in the Cold Chain can help best-in-class operators recruit, retain, and advance a skilled workforce, and while the programs discussed focus on women, it doesn't come at the expense of another workforce. "We want to help advance all segments of the industry's workforce and expand the pool of talented candidates available to grow our industry. We need to have as many qualified folks available as possible."

"Women in the Cold Chain is intended also to attract new women to the cold chain, whether they are recent college graduates or young students right out of high school or trade school," adds Lindsay Shelton-Gross, Senior Vice President, Global Communications, Marketing, and Strategic Initiatives at GCCA. "We also hope to appeal to women who might be looking for a career shift or pivot or women who might be returning after an absence from the workforce – Women in the Cold Chain is much more than just a space to collectively talk about your experiences in the industry – it provides thought leadership as well as a high level of professional training."

### Women in Americold

Angela D'Amato serves as Americold's Vice President of Business Development for Europe, where she leads strategic growth initiatives, customer engagement, and development across the region. Her career spans multiple areas of logistics, giving her a broad

perspective on global supply chain challenges.

Cindy Parker is Americold's Director of Operations for District One in the Southeast Region, overseeing nine facilities in Arkansas and driving operational performance, safety, and continuous improvement. Parker has spent her entire career in the cold chain, building deep expertise in operations and facility leadership.

While they might not have similar professional paths, D'Amato and Parker do share a passion and energy to give back to their communities and develop future talent. "How do we enrich and give back to young, aspiring talent? That's why we initially got involved in GCCA's Women in the Cold Chain program – we wanted to make a difference in the lives of young people as well as the broader community," says D'Amato. "That is what led to my immediate connection with Cindy, and then we pursued partnership with the GCCA, which is exciting."

D'Amato adds that Americold launched its own Women in Americold initiative supported by three foundational pillars: professional development, communication engagement and networking opportunities – with elements delivered in partnership with GCCA. "The cold chain industry is evolving rapidly, and talent diversity is essential to meeting global challenges. We find it's even more imperative that women are not just included, but that we're leaders in the industry."

GCCA echoes this commitment. "Our partnership with Americold is intended to help provide professional development and thought leadership opportunities for women in the cold chain to share their expertise and knowledge," says Stickler. "We're elevating them in their expertise, not just for being a woman, but because they are the best person qualified to be in that role. And that's smart business."

### Inaugural Events

D'Amato notes that ultimately, Americold's partnership with the GCCA reinforces shared values: advancing women in logistics, creating visibility, and building a community. "We sponsored the inaugural Women in Cold workshop at this year's GCCA Convention, because we're investing in a movement that aligns with our internal Women in Americold initiative."

The inaugural workshop was a breakout session held during lunchtime with about 40 women attending. Developed specifically for women executives, senior leaders, and high-

potential emerging leaders in the cold chain industry, the three-hour interactive workshop was created to empower the participants to define their leadership style and the energetic, emotional, and reputational impact they have on others.

"It was significant for women to get other women together, says Parker. "The presentation about making ourselves visible and empowered was important."

D'Amato reports she helped host a similar event at Anuga, the food industry trade fair in Cologne, Germany, a month after the U.S. workshop. It was also a breakaway session with approximately 40 people in attendance.

"It was so interesting that there were only three women in the room, but all our industry peers in the cold industry joined us," recalls D'Amato. "For us, it's a positive that men, women and our peers are looking at Americold to potentially identify how we could collectively partner to make a difference. It's encouraging."

### C-Suite Buy-In

From the outset, Americold's executive leadership team, led by CEO Rob Chambers and executive sponsor Bryan Verbarendse, President, Americas, committed to making Women in Americold a priority.

"Our first steps were to sit in a room and brainstorm how it could work and determine which affiliations and industry leaders would be partners to accelerate and assist us in being change agents for women in cold," says D'Amato. "Ultimately, it started with top management support and grew when women across the company stood up and said, 'this is how we would like to make a difference, and this is how we could have an impact.'"

Stickler thinks the proposition to the C-Suite to buy into Women in Cold is best proposed as a business decision – without change, you will lose employees who will leave the industry, and that's bad business because you've invested in them, and now that money is wasted.

Parker adds that leadership engagement is accelerated with a clear plan. "Approach the C-suite with solid ideas, and they'll be more open-minded. They need to ensure women have every opportunity to succeed if they want to attract, retain, and grow top talent."

"Leadership needs to be involved as ideally, company employee resource groups are providing recommendations and solutions to the leadership team on how to make the work-



AmeriCold leaders Poonam Patel, Chris Rush, and Anita Nanda sit on Women in AmeriCold's inaugural panel discussion, "Own Your Path," an internal event focused on empowering and connecting all associates. (Photo courtesy of AmeriCold.)

place more accepting of different populations, which in turn will help provide a best-in-class workforce and new opportunities to help the business grow," explains Shelton-Gross.

### Recruiting and Retaining Women

Attracting and retaining top talent requires more than competitive pay – it demands alignment with values. "A talented job candidate who receives offers from multiple companies will look at each company's Environmental, Social, and Governance (ESG) track record; its sustainability, ethical practices, and long-term viability criteria; the contents of its code of conduct; and the direction the company has been heading," Parker points out.

D'Amato concurs and notes that "when millennials and Gen Z evaluate employers, they look at whether the organization reflects their values. Diversity and inclusion are certainly selling points."

"Much as we want to attract the right talent, we want to be the employer of choice when it comes to the job market," explains D'Amato. "It's not only about finding people. It's a two-way street, and we want job seekers to look at our company and think, 'I want to join that business, because I believe they are operating in alignment with my personal values, and I think I can make a considerable difference.'"

For Parker, change is all about reach. "The reach of Women in AmeriCold will be greater than just people who are currently in the working environment. We may not immediately be able to get six-year-old girls to tell their parents that they want to work in the cold storage industry, but we are creating an industry sector that is attractive to talented people."

### Where To Begin?

In the early days, D'Amato says the Women in AmeriCold team spent considerable time reflecting, pausing, and planning. They also had the advantage of several team members with prior experience running diversity programs.

"We started by listening and built something that is reflective of our workforce," advises D'Amato. "Partnering with GCCA will certainly accelerate the scale of our program, so it's important to find partners with links to the industry. But most importantly, listen to your people – the answers lie within your workforce."

Stickler suggests you don't need a full-blown employee resource group or a completely realized process to start a conversation with employees regarding how they feel about coming to work, or how they think the company could better support them.

## Core Pillars of GCCA Women in the Cold Chain

### Attract

To develop and cultivate a skilled, diverse, and inclusive labor force in the cold chain, with a focus on gender diversity.

### Support

To retain a gender diverse workforce in the cold chain through innovative programs and the creation of strategic networks to foster career and personal growth of women in the cold chain.

### Recognize

To celebrate and promote the success and achievements of women, and to highlight the expertise and experience women bring to their work in the cold chain.

### Advance

To develop women's professional and leadership skills in all disciplines and at all levels of the cold chain to achieve career goals and advance the industry.

"It could help the business better support its employees who in turn show up in a better way to deliver for their organization," says Stickler. "Listening to those voices is going to help retain your employees longer so they don't leave you for the company that is doing these things or is announcing they have large resource groups."

### Objectives and Expectations

Women in Americold is built on three pillars – development, networking, and community.

"The goal is to create a culture where women thrive, whether it's within a facility, on the road, or in the boardroom, that's our goal for the short to medium term," D'Amato explains.

Parker emphasizes inclusion over metrics: "We want more women entering and advancing in the cold chain, but success also means women feeling engaged and valued."

Parker suggests, "the ultimate goal is that women at Americold can live up to their full potential and feel that they want to go to work every day, and they belong there."

"Success is women leading teams, speaking at industry events and in panel discussions, and mentoring other women," says D'Amato.

"By highlighting Women in Americold, we're able to demonstrate one way to engage women and female-identifying employees," says Shelton-Gross. "We are hopeful that the partnership helps inspire a larger conversation within the industry to look at solutions-oriented opportunities to attract and retain top talent."

Stickler sees numerous opportunities to bring diverse opinions and skill sets to cold storage and logistics companies. "And those are going to be the kind of viewpoints and talent that we're going to require to build a resilient supply chain. The world is

changing, and we need people in the room who understand and are part of that change, which includes a more diverse population, and begins with as many qualified candidates as possible." 🌀

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

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Constellation Cold Logistics facility in Nijkerk, The Netherlands. (Photo courtesy of Constellation Cold Logistics.)



# EUROPE'S NEW NETWORKS

*While global cold chain mergers and acquisitions have largely eased in developed economies, lively consolidation has continued in the European market.*

**By Isobel Davidson**

**T**he scope for continued transformation within the European cold chain not only presents compelling opportunities for investors and operators, but it is also delivering important benefits for food companies, users of cold storage, and end consumers too.

Carlos Rodriguez, Chief Executive Officer at Constellation Cold Logistics, explains, “There is greater consistency, quality, and security for customers working with the same operator across different countries; and the economies of scale that are made possible can ultimately reduce costs for the end customer.”

Cold chain consolidation is important to sustainable and resilient food supply chains in a fast-changing world. GCCA Senior Vice President of Global Programs and Insights, Adam Thocher, says, “More connected networks mean more efficient movement of food at regional and global levels; and greater resilience when faced with change and disruption.”

Over the past decade, the European cold storage market has seen international platforms pursuing significant buy-and-build strategies. As a result, they have successfully accessed new markets and scale advantages such as process standardization, centralization, and enhanced customer reputation.

However, Europe’s cold storage industry remains only partially consolidated. Analysis by global strategy consultants OC&C has found that large international platforms control roughly half of the total outsourced market capacity. At the same time, founder-led independent operators still hold around 35% to 45% of total capacity (and approximately 50% to 60% share of individual facilities).

A key reason why Europe’s cold chain consolidation historically trailed that of other developed economies, says Thocher, is that the many borders between Europe’s 44 countries have made consolidation less straightforward. “But businesses, markets, and processes are now ready,” says Thocher. “At the same time, similar to the United States over the past decade, there is a swathe of family businesses in Europe that is starting to look to the next chapter.”

OC&C’s research found that in larger and more mature European markets, such as the Netherlands and the United Kingdom, founder-led independent operators only control 25% to 35%, and major operators control 45% to 55% of total outsourced cold storage capacity. Many Southern and Eastern European markets remain in earlier stages of consolidation – in Czechia, large international businesses control as little as 10% of capacity.

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“The opportunities these numbers indicate for further merger and acquisition activity in Europe are exciting, but a strong sense of caution remains.”

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The opportunities these numbers indicate for further merger and acquisition activity in Europe are exciting, but a strong sense of caution remains.

Thocher says, “While Europe has a low-risk profile, the high level of uncertainty felt currently throughout the world is present in Europe, too. Pace of consolidation is much faster in Europe than anywhere else now, but it is still tempered sensibly by uncertainties about how the cold chain will be affected by changes to global trade because of ongoing geopolitical tensions within Europe, and by the impacts of climate change.”

OC&C Partner Casper Roex reiterates this sense of tempered growth and says, “While the industry continues to grow as a whole, there are pockets in the market where demand for cold storage is decreasing. This is primarily the case with red meat, where changing consumer patterns and government regulation are affecting processing volumes.”

The profile of the consolidation activity now taking place in Europe is evolving. OC&C analysis reports that recent activity driven by U.S.-based consolidators has slowed, overtaken by newer buy-and-build platforms such as Constellation and CubeCold, and by organic expansions, such as NewCold.

Roex says, “Businesses based in the United States have shifted gears in Europe from active buy-and-build to managing the existing portfolio. This is mainly because they have focused on other things or other regions in the world. It is not unthinkable that they might return to a buy-and-build strategy in Europe in the future. On the other hand, the PE-backed platforms, Constellation and CubeCold, have been active, and One Frio, a new platform, has recently emerged.”

Notable activity in 2025 includes NewCold’s acquisition of Wilhelm Schüssler Spedition

GmbH, a logistics and integration specialist in Heppenheim, Germany; CubeCold’s acquisition of cold storage operator SG in Northern Italy, and storage and packaging business SivaFrost in Belgium; and Constellation Cold Logistics’s expansion in the Netherlands through the acquisition of family-run cold-storage provider Lau van Haren, and in Denmark through the acquisition of the main cold store of JN-Spedition East located in Køge.

For Carlos Rodriguez, Constellation Cold Logistics is nearing the completion of its core foundation with regard to geography, type of services, commodities, and mix of conventional and fully automated cold stores. He explains, “Constellation is in eight European countries today, within the next year we expect to be operating out of 10 or 12 countries. As we look to double the size of the business over the coming five years, that growth will probably take place within those 10 to 12 countries.”

Strategies have become more focused, says Thocher: “The distinctions between different European nations, and variations between different European markets, mean that networks are competing for the particular market that best suits their operations and business plans rather than focusing predominantly on size.”

Another adjustment in the profile of Europe’s consolidation activity is that the implementation of mergers and acquisitions in Europe is generally taken more slowly. Focus has increased on retaining an acquired firm’s personal connections with employees, customers, and local communities.

Rodriguez sees this as a differentiator for Constellation, and crucial for any cold chain operator’s success in Europe, “Respecting the differences between every European country is a main focus for us. The same customer may have different needs for the different

countries in which they operate. Ensuring that we can function as one company, while respecting local requirements, applying local expertise and empowering teams, is a key challenge but also our biggest opportunity.”

The profile of merger and acquisition activity in Europe is expected to continue to evolve in the coming years. OC&C reports that while approximately 40% of market capacity is in the hands of small independent operators across Europe, in countries such as Italy and Spain, that figure is even higher.

It expects investor focus to shift towards these and other underpenetrated markets, where the potential for platform-building and regional roll-ups remains high.

“The northwestern European markets have been materially ‘grazed’ by consolidators,” Roex explains. “While acquisition candidates are still available, picking the winners is becoming increasingly difficult and expensive. Southern and Eastern Europe are more fragmented and less touched, so they hold more opportunity for buy-and-build in the future.”

Thocher foresees that in the future, Europe’s temperature-controlled logistics networks will increasingly look beyond continental borders, driving improvements in end-to-end supply chain efficiency to everyone’s benefit. “Greater collaboration across the cold chain supports better policies, better opportunities, safe and efficient trade, greater efficiency and sustainability.” @

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# BUILDING THE VERY BEST

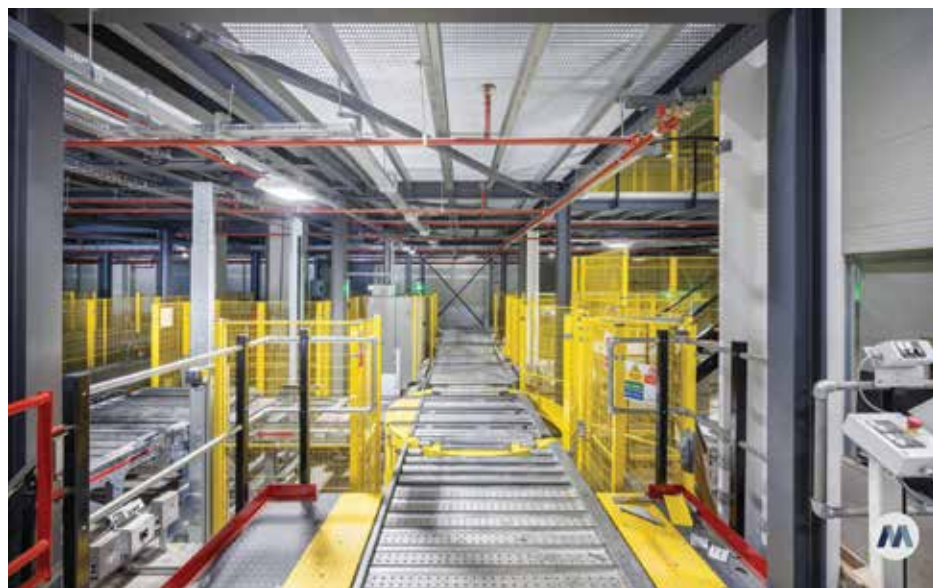
*2025 Built By the Best Award honorees set the standard for specialized, complex construction.*

This November, attendees of the Controlled Environment Building Association's (CEBA) annual conference and expo celebrated the announcement of Built By the Best finalists and winners – a culmination of a year-long campaign and application process for the organization's premier honors for temperature-controlled facilities.

The 2025 Built By the Best Award was the definitive award for innovative controlled-environment construction projects throughout the world. Out of all the impressive submissions, four projects were selected as finalists for the award.

Recognition with a Built By the Best Award represents leadership in design and construction of temperature-controlled facilities, built to the highest standards, including quality, sustainability, and safety. After hearing from finalists during the “Innovations in Controlled Environment Construction” panel and watching finalist and honorable mention videos presented at registration, more than 500 conference attendees in Las Vegas learned even more about the finalists during the closing session prior to the announcement of the winners on November 5.

This year's winners are: Sadel Group's Magnavale Easton cold storage facility in Grantham, United Kingdom; and Griffco Design/Build's Scout Cold Logistics project in Lancaster, Texas, United States.



## New Benchmarks in Warehouse Construction

Sadel Group won in the “Controlled Environment, Cold Storage & Distribution Warehouses” category for its Magnavale Easton project, which has set a new benchmark in Europe for automated frozen storage combining speed, precision, flexibility, operational efficiency, and safety. This project has delivered an advanced cold chain facility, with a fully automated high-bay frozen warehouse at -18°C with 101,000 pallet capacity, including over-height positions.

Innovative design and automation features include ASRS with dual monorails and 3,000m of conveyors across three floors. The facility also benefits from a bespoke control system to ensure uninterrupted flow and a 3.5 MW two-stage refrigeration system to maintain precise temperatures across multiple zones.

Andrew Lawrence, Director of Sadel Group, says, “We are incredibly proud to receive this award, which recognizes the dedication, innovation, and collaboration of everyone involved

Top Image: Sadel Group's winning project for Magnavale Easton cold storage in Grantham, United Kingdom. (Photo courtesy of Sadel Group.)

Bottom Image: Sadel Group won in the “Controlled Environment, Cold Storage & Distribution Warehouses” category for its Magnavale Easton project. (Photo courtesy of Sadel Group.)

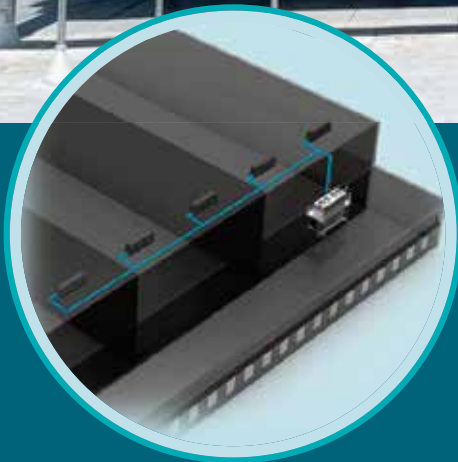


in developing the Magnavale Easton cold store facility, here in the United Kingdom. This project represents years of commitment to pushing the boundaries of cold-storage design, resulting in the most advanced high-bay frozen warehouse of its kind. Our team, along with our trusted partners, has set a new benchmark for efficiency, sustainability, and performance in the sector.”

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## BRINGING VERSATILITY TO LOW CHARGE REFRIGERATION

Top Image: Griffco Design/Build's winning project for Scout Cold Logistics in Lancaster, Texas, United States. (Photo courtesy of Griffco Design/Build.)

Bottom Image: Griffco Design/Build, Inc. won the "Special Works" category for its Scout Cold Logistics project. (Photo courtesy of Griffco Design/Build.)



## Innovating 'Box in a Box'

Griffco Design/Build, Inc. won the "Special Works" category for its Scout Cold Logistics project in Lancaster, Texas, where it met the considerable challenge of delivering an 88,115-square-foot box-in-box cold storage buildout within a 551,000-square-foot warehouse to support a global meal kit brand.

Special features of the facility include multiple temperature zones, separate high- and low-care areas, and three occupancy types. An innovative design incorporates BIM and digital twin modeling, enabling clash detection and 3D visualization. A unique fire code requires a custom smoke/heat system, while extended permitting and rock obstructions were successfully met while staying on time and budget. Sustainability credentials were supported with freon-based split refrigeration, enhanced drainage, and reinforced structure for expansion.

"We are honored to be named CEBA's first Built By the Best Award winner in the Special Works Projects category for Scout Cold Logistics' box-in-box expansion in Lancaster, Texas," says Scott Griffin, Founder & CEO, Griffco Design/Build Inc. "Delivering this complex project



on time and within budget was a true team effort, and we appreciate CEBA's commitment to recognizing innovation and excellence in the Controlled Environment industry."

## 2025 Built By The Best Award Finalists

In addition to the category winners, a selection of entrants was shortlisted as Built By the Best Award Finalists or given Honorable Mentions. These projects include:

### Ti Cold Banks Cold Storage

Ti Cold for its Banks Cold Storage project in Commerce, Georgia (United States) is a scalable, efficient, sustainable, and resilient 210,000 square-foot facility, setting a benchmark for innovation and supply chain advancement. The Banks Cold Storage construction project overcame rocky terrain and 70 weather-impacted days without delay, and the local contractor engaged with Second Chance Employee Program to provide workforce re-entry opportunities.

## Greek Design

### Ocean Kingdom

**Greek Design/Build for its Ocean Kingdom project in Philadelphia, Pennsylvania (United States)** expanded cold storage capacity under budget, enhancing Ocean Kingdom's seafood distribution with direct access to I-95 and Philadelphia International Airport. This project was completed even with challenges like a tight urban site, subsurface obstructions, and FAA crane-height limits – all overcome through careful sequencing, structural tie-ins, and rammed aggregate piers.

## 2025 Honorable Mentions

- Carroll Daniel Construction Company for its Eskimo Cold Storage Project in Gainesville, Georgia (United States)
- Cold Solutions Services East Africa Limited for its facility in Ruiru, Kiambu County (Kenya)
- Coldbox Builders Inc. for its Arla Foods/Condor Properties project in Vaughan, Ontario (Canada)
- Consolidated Construction Co., Inc. for its Midwest Refrigerated Services project in Belvidere, Illinois (United States)
- Fisher Construction Group for its Simplot Freezer project in Rainier, Washington (United States)
- Greek Design/Build for its RL Cold & BGO project in Mount Laurel, New Jersey (United States)

- Primus Builders, Inc. for its Arcadia Cold Storage & Logistics/Saxum Real Estate project in Jacksonville, Florida (United States)

Awards like Built By the Best are not possible without measured, unbiased judging panels. In 2025, this included the service of Tim Nguyen, SubZero Constructors, Joris Olbrecht, Jogrex & Jodifrost, and Kent Johnson, CMC Design-Build.

The 2025 Built by the Best Award once again underscored the extraordinary vision, technical expertise, and collaborative spirit driving the cold chain forward. From fully automated warehouses to complex box-in-box facilities, this year's honorees demonstrated how innovative design and disciplined execution can redefine what is possible in temperature-controlled construction. 🏆

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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

#### **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 Global Cold Chain Foundation (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.

#### **Powering Food Banks Project, 2025 – 2027**

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

GCCF is leading an effort 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 collaboration with the food banks, the project team is identifying priority investments to maximize energy efficiency and working to implement these upgrades with other association members and food-related organizations.

#### **West Africa Emerging Markets Program, 2024 – 2025**

On-site consultations were delivered with 26 companies in Ghana, Côte d'Ivoire, and Senegal in the final quarter of 2025. Consultations were led by GCCA Expert Members from Congebec and CT-Technologies. A

GCCF experts including Nicholas Pedneault of Congebec and Roudy Akiki from CT Technologies meet with SEMIG in Diamniadio, Senegal, to discuss options for cold chain storage investment.



virtual webinar was delivered for Senegalese cold storage operators, investors, and design-build firms in advance of the trip to respond to frequently asked questions on cold storage design and operations in West Africa. As this project comes to a close in December, GCCF will seek opportunities to remain engaged in the region.

#### **Ongoing Industry Support to Reduce Food Loss and Waste**

In November, Mike Newman, the Operations and Food Safety Manager at Summit Cold Storage reached out to GCCF looking to donate 422 pallets, over 200,000 pounds, of frozen pasta. The GCCF team quickly mobilized from West Africa and the United States, and staff reached out to food rescue partners through the Foundation's Food Waste Reduction Initiative.

Within two hours, the donation was accepted by a local Feeding America member food bank. **This donation will help provide a total of 185,002 meals to families in Chicago, Illinois in the United States.** @



GCCF Advisor James Eason offers suggestions during a visit to the site of a new cold storage facility in Tema, Ghana.



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# ASSOCIATION NEWS

## NEWS ABOUT GCCA CORE PARTNERS

### Africa

Transnet Port Terminals (TPT), in collaboration with Transnet Freight Rail (TFR), is exploring a strategic intervention to send by rail import reefer containers directly from Durban to City Deep, Johannesburg, South Africa. This is part of ongoing efforts to enhance national logistics efficiency and reduce congestion at the Port of Durban.

A key enabler of this initiative is the availability of veterinary inspection and release protocols in City Deep, not only in the port of Durban. This regulatory shift would allow for direct rail movement of reefer containers from the port to inland cold storage facilities, reduced dwell time and congestion at the Durban port, improved cold chain integrity through faster turnaround and reduced handling, and reduced vehicle traffic on the 580 km stretch of highway N3 between Durban and Johannesburg.

A pilot project, including Transnet, South African government veterinary services, and GCCA members in Africa, is looking for support to evaluate the regulatory and operational feasibility of this regulatory shift; proposing a pilot consignment of low-risk refrigerated cargo to assess the efficacy of regulatory protocols and infrastructure requirements.



### Brazil

GCCA Brazil recently submitted an official letter to MAPA/DIPOA regarding the regulation of container yards used for storing animal-origin products. The document highlights key food safety and traceability concerns and proposes clearer guidelines for the sector, aiming to strengthen sanitary compliance and the resilience of Brazil's export cold chain.

Brazil has also advanced planning for its 2026 event calendar. A Regulatory Forum is being organized for April 15 in Brasília, followed by the Brazilian Cold Chain Congress on May 27–28, the Brazil Cold Chain Institute on August 18–20, and the Brazil Cold Chain Connection scheduled for November 24–25, supporting the continued development of the national cold chain sector.



*In November, GCCA President and CEO Sara Stickler and Director of GCCA Europe Julie Hason met with founder Lucas Roskam, seeing and hearing about the strategy and offerings of newly opened The ColdHub in the Netherlands.*

### Europe

GCCA joined other leading supply chain representatives, including the International Road Union (IRU), in opposing developing plans to force owners of heavy truck fleets to purchase and operate a minimum percentage of non-fossil-fueled powered vehicles within their corporate fleet.

The proposals floated by the EU Commission are a response to concerns that the current electric vehicle mandates for supply onto the market will not be matched by demand across cars, vans, and trucks. The group recognized the shared challenge but rejected an unworkable policy that would require cold chain operators to buy electric vehicles, even though, especially in the heavy vehicle categories, they lacked necessary infrastructure to support their operations.

GCCA met with senior officials in the office of EU Commission President Ursula Von Der Leyen in November and will be taking part in briefing sessions with Members of the European Parliament in Strasbourg in December.



### GCCA Opens Call for Interest in Committees, Councils, and Special Interest Groups

GCCA is accepting applications for members to serve on 2026 committees and advisory councils. This is a unique opportunity for

members to lend their voices, share their professional expertise, and help shape the future of the global cold chain industry.

Participation in committees is open to all individuals from member companies. These groups play an essential role for GCCA and the Global Cold Chain Foundation (GCCF), providing guidance and support on strategic initiatives while helping the association anticipate and respond to emerging industry trends.

Serving on a committee or council is an opportunity to learn from your professional peers and make a meaningful impact on the industry; engage in focused, high-level discussion; and contribute overall experience to strengthen our organization. This includes gathering and analyzing collective ideas and information, supporting leadership in making well-informed decisions, and shaping priorities that are aligned with the scope of each committee charter.

Interested in serving this year? Visit [www.gcca.org/about/committees](http://www.gcca.org/about/committees) or reach out to James Rogers, [jrogers@gcca.org](mailto:jrogers@gcca.org).



### GCCA Technical Resources: Recent Updates

Over the last three months, there have been multiple updates to GCCA technical resources. These resources are available online for members at [www.gcca.org/resources](http://www.gcca.org/resources)

- New edition of *The Cold Chain – Transportation Best Practices*: a guide for

# ASSOCIATION NEWS

NEWS ABOUT GCCA CORE PARTNERS

food safety and transportation requirements, and offering carriers, loaders, and receivers a clearer understanding of best practices.

- *Revised Fire Protection in Controlled Environments Using Oxygen Reduction Technology*: This serves as a guide for stakeholders who are contemplating oxygen reduction fire prevention systems, and provides new information on current building codes, building standards, control, and monitoring systems.
- *Properly Sizing the Electrical Service for a Refrigerated Facility*: This guide discusses influences on the design size of the electrical main and the mitigating factors to be considered when sizing the main switchboard on a new refrigerated facility. Revised for current building code, electrical codes, building standards, automation systems, and backup power generation.
- Revised web links for the agencies with jurisdiction included in the *Food Safety in Design and Construction General Guidelines*: Intended to be a resource and guide for stakeholders in food storage, preparation, and distribution.
- *Construction Reference Guide – Washdown Environments*: This new publication outlines best practices for the planning, design, and construction of washdown environments used in food and beverage facilities
- New edition of the *Reference Guide of Organizations, Guidelines, and Laws Relevant to Refrigerated Warehouse Construction* provides the organizations, guidelines, and regulations developed for the proper handling and storage of perishable products within the temperature-controlled supply chain, with all chapters revised to current building codes and design standards.
- *Guide to Effective Warehouse Design, Maintenance, and Modernization*: Industry guide for controlled environment warehouse construction with revised web links for the agencies with jurisdiction.

## LatAm

Ewald Heinsen, Vice President of the GCCA Latin America Advisory Council, participated as a speaker at a recent National Trade

Facilitation Committee customs seminar. His presentation, “*The Cold Chain as an Engine of National Competitiveness*,” took place on October 16 in the Dominican Republic. @

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# MEMBER NEWS

## NEWS FROM MEMBERS OF GCCA CORE PARTNERS

**AMERICOLD** announced that its facility in Dublin, Ireland, has been certified by Ireland's Department of Agriculture, Food and the Marine to export to the United States. This certification makes Americold the only dedicated third-party cold storage provider in Ireland with this capability, offering Irish meat producers a compliant and trusted logistics pathway to one of the world's most regulated food markets.



**CORE X PARTNERS** announced that Ron Buford will retire from his role as leader of **CORE X PREMIER**, effective December 12, 2025, concluding a distinguished 46-year career in cold storage. David Charles, currently Regional Partner at CORE X Performance in Salt Lake City, succeeded Buford as President of CORE X PREMIER. Buford first entered the cold storage industry in 1971 when he joined United States Cold Storage in Fort Worth. Buford often told his teams throughout his career, "Customer service is the key." That philosophy guided Buford through 19 years at U.S. Cold Storage, nearly nine years building Texas Cold Storage, and ultimately to founding his own cold storage operation in 2011, which later became CORE X PREMIER. In a testament to the deep roots of his career, Buford spent more than 30 years working in and out of the same Fort Worth facility where he started in 1971—first as an employee, then as a manager, and finally as an owner. Buford served on the board of directors for the Global Cold Chain Alliance (GCCA), including a historic tenure as the longest-serving chairman during the COVID-19 pandemic.



**EMERGENT COLD LATAM** has opened a state-of-the-art cold storage facility in the Guadalajara region. With this new Guadalajara hub, the company now operates 36 warehouses across Mexico. The new warehouse offers capacity for 12,000 pallet positions, enabling the storage of up to 12,000 tons of food under temperature-controlled conditions. Designed for growth,



(Photo courtesy of Maersk.)

the facility is built on land with enough room to double its storage capacity as demand eventually increases.



**MAERSK** inaugurated its Belcon Cold Store facility in Cape Town, South Africa, in October, marking a milestone in the company's continued focus on strengthening South Africa's cold chain logistics network, which is essential for the country's perishable exports sector. "There was a clear need to strengthen South Africa's cold chain infrastructure to minimize produce losses and support the competitiveness of local exporters," says Lubabalo Mtya, Managing Director of Maersk Southern Africa & Islands. "The Belcon Cold Store directly addresses this critical gap in the market." Maersk now operates three cold storage facilities in South Africa – Belcon, Cato, and PreCool – which together form a network featuring 32,000 pallet positions.



**NEWCOLD** is sponsoring 20 athletes, also known as Team NewCold. Among them is Kimberley Bos, who will be defending her World Cup title. In addition, the team also has its sights set on the 2026 Olympics in Milan. Team NewCold, representing the Dutch

Sliding Federation (BSBN) includes one luge, seven skeleton, and 12 bobsleigh athletes. Bram Hage, NewCold Founder and CEO notes, "Team NewCold's growth and continued success is a testament to their passion and commitment to continuously improve, innovate, and grow. We share these values and are proud to support these athletes as they prepare for the 2026 Olympics."



**VIKING**, in a joint venture with Decker Capital, has acquired an eight-building, 198,360-square-foot multi-tenant industrial portfolio in Jacksonville, Florida, for \$26.5 million. The portfolio consists of three "small bay" industrial parks. Large bulk industrial facilities in the market have seen rising vacancy rates due to an influx of large-scale speculative inventory, while the demand for small bay facilities remains strong. Viking Partners Head of Acquisitions Aaron Werbel says, "This second acquisition with Decker, which has an impressive track record in Florida, allows us to immediately implement our targeted business plan of converting existing office space to more functional, and desirable warehouse space." 📍

# 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](http://www.gcca.org/inquiry).

**Q:** Our warehouse is trying to support a food bank in Louisiana with storage for ice cream. It's nine to 11 pallets, but the issue is that our facility is mandated at -5 degrees F (-20 degrees C). The total storage time is two months. Our question is, would this temperature be okay for two months?

**A:** Yes, this is adequate and quite typical! The advice of the *Commodity Storage & Handling Manual* is for up to five months, but this temperature is acceptable for two months of storage.

*This answer was provided by Dr. Stephanie Clark, Dairy Expert from New Mexico State University. 🐄*

Submit your burning cold chain questions to the Council of Scientific Advisors at [www.gcca.org/inquiry](http://www.gcca.org/inquiry) or at [inquiry@gcca.org](mailto:inquiry@gcca.org).

ANNOUNCING

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### Damotech Inc.

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### MHS Lift

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### Big-D Construction Corp.

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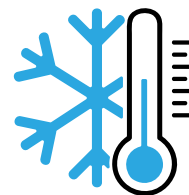


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**CONTACT US FOR A COMPLEMENTARY MIDYEAR REPORT**

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