

# COLDFACTS

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Valuable insights into the global temperature-controlled supply chain

VOLUME ONE, ISSUE ONE | 2026

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2026



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# LEADOFF

## MESSAGES FROM GCCA LEADERS

**W**ELCOME TO THE FIRST ISSUE OF *COLD FACTS* MAGAZINE FOR THE NEW YEAR! WITH NEW EDITORIAL CONTENT IN THE NEW YEAR, WE ARE EXCITED TO RELEASE THIS ISSUE TO OUR MEMBERS AND STAKEHOLDERS.

We have a lot on our to-do list for 2026, but I am optimistic ... with a healthy dose of realism. The world's supply chains, and particularly the cold chain and our food ecosystem, are under intense pressure and heightened expectations. The challenges and opportunities before us are both daunting and exciting.

Geopolitical tensions continue to affect trade routes and redefine risk. Conflict, economic shifts, sanctions, and changing alliances have made resilience more than just a buzzword. For cold chain leaders like our members, the stakes are high. When borders tighten or energy prices surge, temperature-controlled supply chains feel the impact. Yet even in global uncertainty, the mission of the cold chain is clear: protect our customers and their product integrity, ensure continuity, and deliver the same level of quality and trust that has been standard for hundreds of years.

There are bright spots in industry, too. Technology is advancing rapidly. Artificial intelligence, advanced analytics, digitization, and real-time monitoring are no longer future

concepts; they are tools we use to reshape and forecast demand, manage risk, and respond to disruption. Automation is helping offset labor shortages, while sustainability-driven innovation is pushing our industry to think differently about refrigeration, packaging, and energy use.

Progress is not guaranteed. Technology delivers value only when paired with leadership willing to invest, adapt, and learn. New information and access to data are only helpful if managed and integrated into operations. In this issue, you will hear from five outstanding leaders in the cold chain. These examples of global perspectives and insights on topics like tariffs, value-added services, product diversification, and transformative technologies are essential as we face today's challenges and plan for tomorrow's success.

Strategic direction in any industry means making confident business decisions, committing to long-term resilience over short-term comfort, and standing firm on safety and quality, even when costs rise or timelines stretch. In our industry, modernizing systems, prioritizing transparency, and collaborating across borders in a fractured world is difficult. It takes courage to face the future and embrace these challenges, but Adam, Greg, Rafa, Francisco, and Nick are up to the work ahead as you'll read in our lead article on page 14.

## 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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# LEADOFF

## MESSAGES FROM GCCA LEADERS

You will also read about our 2026 GCCA Convention, a “crown jewel” in our global events calendar, on page 24. The Convention is an opportunity to connect with leaders like the ones I noted above and also share concepts with longtime colleagues as well as new connections.

I’m eager to hear from our outstanding main stage keynotes, gather new ideas in our focus session programming, and experience the solutions that are helping modernize the cold chain in our Innovation Showcase. We are excited to offer a strong program along with additional roundtables and exclusive sessions on topics like policy and regulations, insurance, and cybersecurity. We look forward to welcoming you to Scottsdale in April!

As we begin this new year, GCCA’s global priorities are clear:

- Accurate benchmarking and market insights to the industry for a realistic

assessment and forecast for temperature-controlled logistics

- Proactive advocacy for business-friendly, scientifically based regulations that promote safe and secure trade, sustainable supply chains, and resilient infrastructure
- Best-in-class standards and technical information for the most important aspects of temperature-controlled logistics as we both educate and train our current workforces and work to build the cold chain in emerging markets
- Increased awareness and promotion of the cold chain, highlighting the importance of cold logistics and the value of the expertise being provided in third-party warehousing
- Increased recognition and certification programs to highlight the advancements in cold chain, while acknowledging the investments in areas like energy efficiency

We are critical infrastructure – providing safe, reliable service and economic stability for the entire planet. The cold chain is redefining excellence, even in a complex world.

Thank you for your continued commitment to our industry and to our organization. I look forward to seeing you in person at our 2026 events and providing our members and stakeholders with new benefits and ways to engage with the Global Cold Chain Alliance. 🌐



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# A YEAR OF TRANSITION

*U.S. agriculture and food policy takes shape in 2026.*

**By the Torrey Advisory Group**

**A**cross the United States, agriculture and food policy is off to a quick start in 2026. The legislative and policy agenda will be dominated by domestic and international influences. With mid-term elections occurring in November 2026, the stage will be set for new leadership and policy direction heading into 2027.

In anticipation of the changes to come in November, several members of Congress have already announced their retirement or that they will be seeking other positions in office. These changes mean that key leaders like Rep. Feenstra, who is the champion of GCCA's flagship FRIDGE Act, will be leaving Congress. There will be a need to find new champions to support GCCA's work in the next Congress. Key issues, including nutrition, trade and tariffs, agriculture production, Farm Bill, and agriculture workforce issues will continue to be in the spotlight.

## **Nutrition**

During the first week of January, the U.S. Department of Agriculture and Health and Human Services announced the updated Dietary Guidelines for America (DGAs). The new DGAs change the focus of the American diet. Once prioritizing the consumption of fruits and vegetables, low-fat dairy, lean proteins, and limiting saturated fats, added

sugars and sodium, the new DGAs now recommend Americans consume all proteins (including those with high levels of saturated fats) and full-fat dairy products in equal amounts to fruits and vegetables, while eliminating ultra-processed foods and added sugars from their diets.

The DGAs significantly impact how federal programs like school meals are implemented and how Americans are educated about their diet. The changing recommendations will likely affect products moving through the cold chain, perhaps moving away from frozen and prepared foods towards more fresh produce and meat.

In 2026, other major changes will take effect in the Supplemental Nutrition Assistance Program (SNAP). Starting in late January (and continuing throughout the year), six of 18 states will begin to restrict SNAP benefits from being used to purchase items like soda, candy, and unhealthy foods.

The other major change to SNAP comes

from the One Big Beautiful Bill Act (OBBBA), which will shift a portion of the costs of SNAP benefits from the federal government to state governments starting October 1, 2026. If a state cannot fund its portion of the benefits, SNAP participants in that state are at risk of losing their benefits.

A coalition of bipartisan groups representing governors, state legislators, counties, and other local government organizations sent a letter to Congress on January 8, raising concerns about the logistical challenges of implementing the cuts imposed by the OBBBA. This letter is part of a broader effort to reverse some of the changes imposed by the OBBBA and to give states more time to implement the changes and absorb the new costs.

## **Economic Conditions in Farm Country**

At the beginning of this year, the farm economy remains precarious with many farmers facing low prices and significant losses in corn, soybeans, and wheat. According to the American Farm Bureau, commodity producers lost a combined \$34.6 billion in 2025 before crop insurance and other support were provided for distribution to farmers.

At the end of December, USDA announced \$10 billion in new economic disaster payments to row crop growers to bridge the gap between high input costs and market avail-



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ability that has been disrupted by trade and tariffs. An additional \$1 billion will be made available to sugar and specialty crop farmers.

On the flip side, beef prices have been at an all-time high compared to the past 75 years, according to the Kansas City Federal Reserve, due to low herd sizes and high demand. Many leading agricultural economists fear that without additional economic support or new international markets, farmers are in for another year of uncertainty and may incur additional loss.

### Farm Bill

The uncertainty of the nutrition programs coupled with unstable conditions in farm country will be driving forces of a potential new Farm Bill. House and Senate Agriculture Committee Republicans are saying publicly that they would like to see a Farm Bill pass into law in 2026 to finish what was started in the One Big Beautiful Bill Act (OBBBA). They have characterized the remaining provisions in the Farm Bill as about 20% funding and 80% policy and have said there is some

flexibility to fund issues left out of OBBBA and further address the economic conditions imposed by tariffs.

Democrats on Capitol Hill are not enthusiastic about a Farm Bill that limits conversations about nutrition programs and farm programs addressed in OBBBA, seeing both issues as critical to getting their support to pass the bipartisan threshold required in the Senate.

The path forward is still very uncertain, with little indication that the Senate has a plan for a comprehensive farm bill. It is still unclear whether the House will try to move a partisan or bipartisan bill through committee, and if House leadership has agreed to a floor vote. As with years past, the Farm Bill will expire at the end of September, and further Congressional action will be required in 2026 to suspend permanent law and avoid skyrocketing commodity prices.

### Trade and Tariffs

The Supreme Court of the United States is expected to release its decision in early 2026 on whether President Trump's International

Emergency Economic Powers Act (IEEPA) tariffs, applied against nearly every country in early 2026, have legal standing. The decision, regardless of outcome, will greatly affect trade policy going forward from both the U.S. government and its trading partners. This includes the first review of the U.S.-Mexico-Canada Agreement that is due in July. Details of how the three parties will engage in the review are limited, but it's anticipated that the United States will seek to make changes to certain parts of the agreement around tightening rules of origin for products beyond autos.

It's also expected that the first review will not result in a unanimous agreement between the countries to automatically renew the agreement for another 16 years.

Based in Washington D.C., the Torrey Advisory Group provides strategic advice and representation on behalf of the Global Cold Chain Alliance. To find out more about GCCA advocacy work contact sbrennan@gcca.org. 

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# DRIVING THE COLD CHAIN

Opportunities and obstacles in the temperature-controlled logistics outlook for 2026 and beyond.

**W**e are living in unpredictable times, with change seeming to be the only constant. At the start of a new year, *COLD FACTS* magazine asks industry thought leaders about the opportunities and obstacles they see on the horizon for the temperature-controlled supply chain in 2026 and beyond.



Adam Forste, Co-Chair of Lineage



Greg Laurin, President of Conestoga Cold Storage



Francisco Moura, CEO of SuperFrio Logística Frigorificada



Nicholas-P. Pedneault, CEO of Congebec



Rafael Rocha, Senior Vice President, Emergent Cold LatAm

## Change and Opportunity

“In essence, 2026 is a pivotal year for cold storage: an opportunity to lead through technology, sustainability, climate preparedness, and by enabling the evolving needs of food supply chains,” begins Francisco Moura, CEO of SuperFrio Logística Frigorificada.

Automation and digitalization in warehouses will accelerate this year, adds Moura. “Robotics, AI-driven inventory management, and predictive maintenance are essential for improving throughput and reducing labor dependency. Leading players are already deploying advanced systems to optimize space utilization and energy efficiency.”

Moura notes that *climate volatility* is accelerating, placing unprecedented pressure on critical infrastructure and disrupting

power grids and transportation networks. “Cold storage facilities must invest in contingency planning, backup energy systems, and structural resilience to safeguard temperature integrity during crises.”

Reducing energy and food waste remains a critical focus across the cold chain, points out Adam Forste, Co-Chair of Lineage. “Energy efficiency is no longer just about cost management; it’s about resilience. Smarter refrigeration controls, AI-enabled energy management, and tools that dynamically respond to demand, weather, and utility conditions can significantly reduce energy use while also maintaining strict temperature integrity and strengthening uptime during peak loads, grid stress, and disruption events,” notes Forste.

Food waste reduction is equally tied to better data to help ensure that product is stored and moved where it’s needed most, reducing dwell time and spoilage risk, explains Forste. “When disruptions do occur, having systems and partnerships in place to responsibly redirect product to secondary markets or communities in need, rather than send it to a landfill, remains an important part of the solution.”

GLP-1 medications will continue reshaping demand patterns. Moura explains the therapies are reducing overall food consumption while increasing demand for high protein and nutrient-dense products – many of which require refrigerated storage. “At the same time, GLP 1 biologics themselves require strict cold chain handling, creating new

demand for pharmaceutical-grade warehousing,” says Moura.

## Global Perspectives

Latin America remains one of the most promising regions for the global temperature-controlled supply chain, accounting for 25% of global food exports and playing a vital role in ensuring global food security, notes Rafael Rocha, Senior Vice President, Emergent Cold LatAm. “In 2026, we see strong opportunities in the expansion of *logistics hubs* near ports and major consumption centers. These hubs increase efficiency, reduce food loss, and bring resilience to the supply chain, and the company is building modern facilities in these key areas across our network.”

*Network optimization and capacity expansion* remain critical, Moura points out. “The year has already begun with heightened trade tensions, Operators must anticipate shifts in import/export flows and position capacity closer to consumption hubs to mitigate volatility and capture growth in emerging markets.”

Nicholas-P. Pedneault, CEO of Congebec, expects an increased focus on *supply chain resiliency* this year. “I anticipate a pivot on Canada’s trade markets, and we support our clients as they expand their global footprint.”

“Stubbornly high *food inflation* has been a persistent issue since the pandemic, prompting consumers to shift toward more affordable proteins, and as a result, we can expect increased demand for chicken and pork when BBQ season returns in the spring,” says Greg Laurin, President of Conestoga Cold Storage. “If domestic producers are unable to meet this demand in the short term, import volumes of proteins from South America – and even beef and lamb from as far away as Australia – will likely continue to grow.”

Laurin says *retailers*, hesitant to pass additional costs on to already strained consumers, are putting mounting pressure on manufacturers to hold the line on price increases. “Further down the supply chain, this dynamic has made it increasingly difficult for cold storage providers to recover the significant cost escalations we have faced in labor, insurance, and building expenses over the last several years.”

Cold storage and food manufacturing facilities are major investments, and with uncertainty surrounding the upcoming USMCA (United States-Mexico-Canada Agreement) renewal in July, Laurin says he is already seeing projects on both sides of the border

delayed or cancelled by companies reluctant to commit to significant *capital expenditures* when questions remain about the future direction of trade policy and the potential implementation of new tariffs within North America.

“If leaders are able to successfully renegotiate the USMCA agreement, we could face a shortage of both manufacturing and warehouse capacity in the years ahead, driven by the cumulative effects of today’s project pauses and construction slowdowns,” notes Laurin.

While population levels are stabilizing or even declining in North America, *pet ownership* continues to grow significantly. Laurin explains that consumers are seeking higher protein, less processed foods not only for themselves but also for their pets. He points out that this shift presents a meaningful opportunity for cold storage operators to capture additional volume in the frozen pet food segment that is expected to expand into a \$10 billion market within the next decade.

## Value-Added Now Expected

Customers are increasingly looking to 3PL partners to help reduce friction, simplify complexities, and provide better visibility across their supply chains, according to Forste.

“One clear trend is multi-vendor consolidation, where shipments from multiple suppliers are combined into scheduled, shared truckloads to help reduce costs, improve delivery reliability, and meet strict delivery windows – effectively turning a historically variable logistics process into a more predictable, repeatable, and efficient operation,” Forste says.

Another growing expectation is data-driven insights. “More customers are asking logistics providers not just to move product, but to help analyze their end-to-end networks, looking at inventory, transportation, and networks to identify smarter, more streamlined ways to operate,” notes Forste. “Our data science and network analysis capabilities are one example of how advanced modeling and analytics are being used to support better decision-making across the cold chain, from forecasting and replenishment strategies to route optimization and facility selection.”

Forste points out that as supply chains grow more interconnected, customers value partners with facilities positioned near major ports, population centers, and production hubs. “We have also seen an increased

need for import and export capabilities, like customs-bonded warehousing and services that help product move more smoothly across borders,” says Forste. “When done right, this kind of integrated footprint supports greater reliability, flexibility, and continuity, and ultimately helps drive value for customers.”

Risk mitigation to counterbalance possible uncertainty is now a value-added service, Pedneault says. “To mitigate risk, we strive for robustness in our service offerings. Rail is an interesting solution we are exploring as it offers more stability, efficiency, and better cycle time to our customers.”

In addition, Pedneault says as the population continues to be impacted by the increasing cost of food, customers are asking him to do more with less to help fight inflation.

Rocha notes that in Latin America, the definition of value-added services is also evolving rapidly and centers on being a true partner in the customer’s logistics strategy.

“We’ve seen a clear shift in expectations: customers are asking for fully integrated solutions that combine storage, transportation, handling, documentation, and traceability in a single, seamless experience,” Rocha says. He adds that it is especially important in a region with complex regulatory environments, export procedures, and infrastructure gaps.

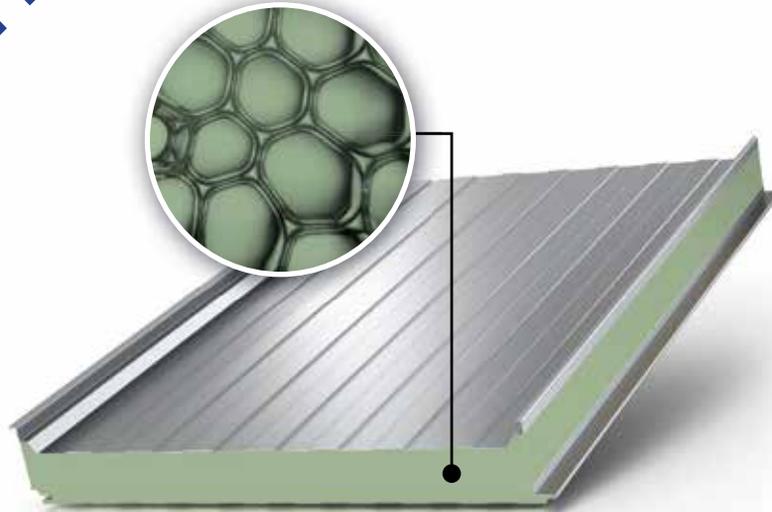
Clients are also seeking greater visibility and control, which Rocha accommodates by investing in systems integration and real-time data. In some cases, what used to be value-added — like blast freezing, cross-docking, or bonded warehousing — Rocha says is now simply expected.

He says at the same time, new demands are emerging: support for export flows, customs clearance, multi-temperature handling, and even collaborative planning to respond to shifts in demand. In response, Rocha notes the company has expanded its transportation network and integrated digital platforms to support cross-border operations.

“3PLs are no longer just operators,” explains Rocha. “We’re enablers of agility, efficiency, and regional growth. And that’s exactly where we believe our long-term investments in people, technology, and infrastructure make the difference.”

Sustainability and resilience are equally critical, notes Moura. “Customers expect providers to deliver green energy sourcing, carbon footprint tracking, and contingency planning for climate-related disruptions.

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Investments in backup power systems, flexible temperature zones, and pharma-grade storage for biologics such as GLP-1 medications are emerging as differentiators.”

In short, Moura says third-party logistics is evolving from a transactional role to a strategic partnership offering integrated, technology-driven, and sustainability-focused solutions that anticipate market volatility and changing consumer trends.

“This transformation is redefining what ‘value-add’ truly means in the cold chain,” says Moura.

### Shifting Last-Mile Delivery

“In Latin America, we’re seeing important operational shifts in last-mile delivery – but not necessarily driven by online grocery or e-commerce,” says Rocha. “The region’s food logistics landscape is still largely driven by wholesale, foodservice, retail distribution, and exports, which require a different type of last-mile solution: one that is reliable, temperature-controlled, and aligned with regulatory and urban infrastructure challenges.”

Rocha explains that what’s emerging is the need for more agile and localized distribution models – especially in dense urban areas and around major ports. He notes that this includes investments in multi-temperature transport, port transfer (T1 and T2) operations, and cross-dock platforms that bring products closer to the point of consumption or export.

“We are responding to this shift by embedding last-mile logistics into our network design, and through strategic partnerships with 3PL transporters, complemented by technology for routing, visibility, and service-level performance,” Rocha says. “Rather than micro-fulfillment, the focus in Latin America is on scalable, compliant, and efficient last-mile delivery for B2B operations – especially in high-growth markets where infrastructure is still catching up with demand. This is where we see the opportunity to create long-term value through operational excellence and regional integration.”

Over the past year, Moura has seen exponential growth in demand for rapid, reliable, and traceable delivery of perishable goods driven by consumer expectations for convenience and freshness. “Micro-fulfillment

centers, dark stores, and urban cold hubs are becoming essential to reduce delivery times and maintain temperature integrity. Investments in advanced route optimization, IoT-enabled monitoring, and electric or hybrid refrigerated fleets are critical to meet sustainability goals while ensuring service reliability.”

Additionally, the rise of subscription-based meal kits, fresh protein delivery, and pharmaceutical e-commerce demand specialized handling and strict compliance with temperature standards. “These factors are pushing providers to offer end-to-end solutions that combine warehousing, packaging, and last-mile execution under a single integrated platform,” Moura says.

Moura believes last-mile delivery is no longer a peripheral service – it is a strategic growth engine.

### Transformative Tech

The most exciting technologies are those that combine automation, data intelligence, and sustainability, Moura contends

“In 2026, we are prioritizing investments in IoT-enabled monitoring for real-time temperature control, advanced picking intelligence to optimize order preparation, and productivity-enhancing tools for warehouse operations,” says Moura. “AI is a real enabler, but our approach is pragmatic: implement solutions that deliver measurable value to customers and align with our operational realities in Latin America.”

Pedneault notes the company’s IT platform is a key asset. “We have a dedicated in-house development team that builds our own WMS and digital tools, which we share with independent partners for seamless collaboration and a unified global solution,” he says. “If a customer needs inventory in the northeastern United States, where we lack facilities, we can partner with a local warehouse using our systems to ensure a consistent customer experience and maintain the same EDI relationship. Rather than traditional M&A, Pedneault views collaboration as a more efficient way to build large-scale capabilities with minimal disruption.

Laurin is very excited about recent progress in the world of automatic guided vehicles (AGVs). He notes that while AGVs have existed in various forms for years, signifi-

cant advancements in sensors and related technologies – much of it originating from the automotive and robotics sectors – have accelerated their capabilities. “Developers are now integrating AI into machine programming, enabling AGVs to operate with far greater autonomy and to work more seamlessly alongside people in today’s highly active warehouse environments.”

According to Laurin, AI is being adopted at a measured and deliberate pace but he remains cautious about safeguarding customer and corporate data. “Our IT department, however, is implementing AI at a more accelerated rate, integrating powerful new tools across nearly all areas of programming, support, and strategy.”

Lineage is also focused on technologies that help reduce waste before it happens. “Data-driven platforms give customers better visibility into inventory and supply-chain activity, helping them make more informed decisions about production, storage, and movement,” Forste says. “That kind of insight can limit excess handling and dwell time, which ultimately reduces food and energy waste across the network while strengthening service levels and responsiveness.”

### Challenges to Overcome

Over the next five years, Laurin believes the industry will be tested by Amazon’s entry into the storage market to control last-mile delivery; the impact of GLP-1 drugs on food consumption; and whether aging facilities can be automated with AI and autonomous vehicles to extend their lifespan.

Topping Moura’s list of industry challenges are climate change and extreme weather events and the shift to e-commerce that demands new last-mile strategies, urban cold hubs, and micro-fulfillment centers to meet consumer expectations. In addition, Moura says industry challenges will define competitiveness such as decarbonizing operations, integrating renewable energy, and deploying AI for predictive analytics and warehouse optimization.

“Over the next few years, the cold chain industry – especially in Latin America – will need to address the challenge of scaling capacity while improving reliability, efficiency, and sustainability,” points out Rocha. “Demand for temperature-controlled logistics

is growing fast across the region, driven by food exports, population growth, and shifting consumption patterns. But much of the infrastructure is still fragmented, outdated, or concentrated in only a few urban areas.”

The industry’s challenge, Rocha believes, will be modernizing and expanding infrastructure in ways that keep pace with this growth while also addressing rising energy costs, climate volatility, customer expectations, and developing talent and operational excellence at scale.

“Regaining the trust of our customers that we are the experts in what we do will be our biggest challenge,” admits Pedneault. “Even though the cold chain expanded, it did so at the expense of service quality.”

Pedneault says the ‘Cold Rush’ attracted many opportunists to the industry, and many customers have expressed dissatisfaction with the service they are receiving in the cold logistics marketplace.

**Looking Forward and Working Together**

The temperature-controlled supply chain is being reshaped – entering a new era marked by rapid technological adoption, rising customer expectations, and intensifying pressures from climate volatility, trade uncertainty, and cost inflation.

Across regions, these leaders agree that long-term success will hinge on moving beyond transactional services toward inte-

grated, data-driven, and sustainability-focused partnerships that add measurable value across the supply chain. While challenges still loom large; the consensus is pretty clear: companies that invest strategically today will be positioned to lead, differentiate, and support the global food systems of tomorrow.

“Some customers are taking advantage of excess capacity to insource their cold chain needs. Operators need to work together to gain their trust back” says Pedneault. 🔄

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

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*Big Cold Kenya enjoys robust growth in the QSR sector.*

# ROBUST MOMENTUM IN EAST AFRICA

The cold chain may be on the cusp of a step change.

By Isobel Davidson

**A**lthough still constrained by fragmented infrastructure and high operational costs, the region's urban hubs are now experiencing a rapid, strategic expansion of the temperature-controlled logistics network.

In late 2024, GCCA Director for Africa Paul Matthew convened a series of engagements and facility tours in Kenya. He reports, “There is exciting and robust momentum in the expansion and development of East Africa’s cold chain. Significant investment is coming into the industry, and the results are very impressive: efficient new facilities, modern technologies, a strong range of services available to meet customers’ needs, and serious future plans.

“This surge in temperature-controlled logistics capabilities and capacity is set to reduce the region’s post-harvest losses, improve sustainable food security, increase export competitiveness, and support effective healthcare,” Matthew notes.

Dr. Newton Matope agrees. He is chief executive officer at temperature-controlled storage facility and logistics provider Cold Solutions and is GCCA Africa Council Chairman for 2026. He says, “The development of cold chain infrastructure in East Africa has evolved from isolated, donor-driven projects to strategic, market-led investments. The key economies of Kenya, Tanzania, Ethiopia, Uganda, and Rwanda are focused on creating integrated logistics ecosystems.

“Investment in refrigerated warehouses and storage facilities in Nairobi, Tatu City, Dar es Salaam, Kampala, Kigali, and Addis Ababa is driven by both domestic businesses and foreign investors,” Matope continues. “Governments are also playing a crucial enabling role through public-private partnerships. Kenya’s expansion of the Mombasa Port and the development of the Naivasha Inland Container Depot are prime examples.”

Over the past three years, private equity investment firm ARCH Emerging Markets Partners has launched three temperature-controlled logistics assets in the region through its Cold Chain Solutions East Africa Fund.

ARCH’s flagship site for Kenya and East Africa is a 15,000 pallet, LEED Gold certified facility in Nairobi that was constructed on a six-acre greenfield site within the Tatu City Special Economic Zone in Kiambu County. It provides temperature-controlled storage and distribution for key sectors such as agriculture, fast-moving consumer goods, pharmaceuticals, quick-service restaurants, and the protein market for local and regional

clients. This facility is complemented by a 3,000-pallet, temperature-controlled warehouse in Kampala, Uganda, and a horticulture packhouse in Kigali.

Construction is also underway for ARCH’s new 8,000 pallet temperature-controlled facilities in Kampala, Dar es Salaam, Mombasa, and Kigali, which are due to launch from late 2026 through 2027. ARCH Managing Director Frederick Kambo explains why the region’s cold chain is a core focus for investment.

“East African food and agriculture have a significant problem with 30% to 50% of food lost post-harvest,” says Kambo. “A main cause

is the lack of cold storage and logistics infrastructure in the region. We would like to make a meaningful contribution to addressing food loss and food security, and in doing so, we also anticipate commercial returns as a private sector investment firm.”

The commercial case for cold chain investment in East Africa has become increasingly attractive. According to Dr. Matope, the convergence of export ambitions and domestic consumption shifts is driving demand for cold chain services.

“East Africa is now a leading exporter of flowers, French beans, avocados, aquaculture, and specialty coffee,” says Dr. Matope.

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ARCH's facility in Tatu City, Kenya, sources 40% of its energy needs from off-grid renewable power production.



“The logistics to export this produce need to comply with stringent E.U. and U.K. supermarket standards on temperature control and traceability. At the same time, urbanization and a burgeoning middle class are shifting consumption patterns. The region’s growing hospitality and retail sectors are also contributing to the rising demand for cold storage and transportation, particularly for perishables like meat, seafood, dairy, and frozen goods.”

Peter Juma, Director of Operations at cold chain logistics company BigCold Kenya, notes robust growth in the region’s QSR sector attributed to the ease of opening businesses, a growing middle class, and demand for quality products from a population informed by globalization.

“The regions cold chain industry has been growing steadily to meet demands in food safety, capacity, and logistics,” says Juma. “In 2018, we only had one cold chain facility in both Kenya and Uganda. Currently, we have four operators in Kenya and two in Uganda. This growth has been primarily driven by international QSR brands that demand high-quality cold-chain services. We can expect this trend to grow in the coming years with

the various entrants currently setting up in the region.”

Dr. Matope agrees there is great potential for cold chain growth in the region as there is a gap in the market for integrated 3PL and 4PL providers that can offer end-to-end visibility and management, as well as “immense untapped potential in providing scalable, modular cold storage and pre-cooling solutions at the collection point, empowering smallholder farmers and reducing initial quality loss,” says Dr. Matope.

The striking opportunities are, however, tempered by significant challenges.

Regional 3PL cold chain pathfinders such as ARCH are educating the market. At the same time, infrastructure deficits, including road network limitations, remain a barrier. The cost of setting up cold chain facilities is high, and there is a shortage of skilled technicians for specialist temperature-controlled logistics operations and maintenance.

It’s encouraging that innovations and advanced technologies that will help the industry move beyond many of these challenges are being embedded in facilities and processes as the region’s cold chain network expands.

Use of solar technology is a prime example. ARCH’s state-of-the-art Tatu City facility sources up to 40% of its energy needs from off-grid renewable power production, mainly using solar photovoltaic energy. Solar technologies are being applied on a smaller, localized scale as well.

“With the current challenges of setting up operations and high post-harvest losses, the creation of smaller solar-powered cold chain centers has been a game changer,” says Juma. “It has brought cold chain services closer to the farmers.”

Cold chain facility design and operation in East Africa are adapting global technologies to forge the resilient, sustainable, and customizable cold chain model needed in the region.

“IoT-enabled sensors and data loggers are becoming standard for premium exports and pharmaceuticals, providing real-time monitoring and creating a digital audit trail,” says Dr. Matope. “Cold Chain-as-a-Service (CCaaS) models are enabling SMEs to tap into shared, scalable cold storage and transport networks. And while electric refrigerated trucks face range limitations, they are finding a strong niche in urban last-mile distribution.”

With the promise of increased intra-African trade through the African Continental Free Trade Area, and as shifting global trading patterns offer potential new opportunities, investors and operators in the region are clearly looking to the technologies, facilities, and services that will provide for the region's needs today and into the future.

GCCA is supporting cold chain growth in East Africa by facilitating knowledge sharing and networking, and by providing key insights

and guidance. GCCA is also engaging with governments and regional development agencies to promote policy environments in East Africa that encourage and enable cold chain investment and growth. Find out more at [www.gcca.org/regions/africa](http://www.gcca.org/regions/africa) 

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**ANNOUNCING**

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# THE BEST GATHER IN THE SOUTHWEST

*Cold chain leaders head to Scottsdale  
for the 2026 Global GCCA Convention.*

ne hundred twenty-five years of education, connection, and relationship building. For the first time since 2019, the GCCA Convention returns to the first half of the year with a content-driven program to be held April 27-29, 2026.



Hosted at the newly renovated Scottsdale Grand Hyatt Resort, Scottsdale, Arizona, the annual program convenes cold chain leaders from around the world.

The program is designed for temperature-controlled warehousing, transportation, and logistics professionals, as well as industry suppliers and others that provide tools, technology, and equipment that support the cold chain, along with value-added services and innovative products.

“The 2026 GCCA Convention will host speakers, sponsors, and attendees from around North America and the world, to discuss key opportunities and challenges for the global cold chain – topics include leadership development, market and economic challenges and opportunities, capital investments, emerging technologies, multimodal logistics, grid capacity, ongoing trade fluctuations, and more,” says Sara Stickler, President and CEO of GCCA. “Demand for temperature-controlled environments is increasing around the world, and our members are ready to supply best-in-class solutions. I’m excited to hear the customer perspective from our main stage keynotes and also new topics curated for this year’s focus sessions. The Convention is the ideal place to share ideas and collaborate, ensuring efficient and quality response to emerging and continuing challenges.”

### **Expert Keynotes on Leadership, Economy, and Business**

This year’s four Convention keynotes will focus on customer needs, building business enterprises, leadership and talent development, and the economic environment.

**Greg Creed** was Chief Executive Officer of Yum! Brands from January 2015 to December 2019 and served as a Director of the Board from November 2014 to May 2020. Creed retired after a successful 25-year career with the company. He has more than 40 years of global experience in marketing and operations at leading packaged-goods and restaurant brands.

Previously, Creed was head of Taco Bell, the Mexican-style quick service restaurant chain. He was appointed Chief Executive Officer of Taco Bell in early 2011 after serving as President and Chief Concept Officer and was responsible for driving the overall brand strategy and business performance in the United States and internationally.

He held various roles at Taco Bell, including Chief Marketing Officer, and spearheaded the “Think Outside the Bun” campaign and new product introductions that generated strong sales and profit growth for five consecutive years.

**Doug Ducey** is known as one of America’s most successful entrepreneurs

and governors. Ducey began his career with Procter & Gamble, and later served as CEO of Cold Stone Creamery. There, Ducey led the expansion of the ice cream franchise from one single store into a business with 1,400 locations in the United States and 10 other countries.

Elected Arizona’s 23rd Governor in 2014, and reelected by an even wider margin in 2018, Ducey successfully championed historic policy initiatives, enacting the lowest flat income tax rate in the nation, knocking down licensing requirements that stood as a barrier to work, and eliminating or improving over 3,365 regulations resulting in the equivalent of a \$183 million dollar tax cut.

Under Governor Ducey’s leadership, Arizona experienced unparalleled growth as the state’s economy boomed while the size of government shrunk. He welcomed record amounts of investment by leading various economic development initiatives, attracting businesses from all industries, and served as Chairman of the Republican Governors Association.

**Drew Matus** is Chief Market Strategist for MetLife Investment Management (MIM). In this capacity, Matus is responsible for formulating MIM’s global outlooks, which ultimately help to shape the company’s portfolio management and business decisions. His team

# ENERGY EXCELLENCE RECOGNITION PROGRAM (EERP)



Measure and improve your energy efficiency using qualitative and quantitative assessment tools

Managing energy usage is a high priority for temperature-controlled warehouse operators: to control costs—energy is the second highest operating cost behind labor in the cold chain industry—but also to meet industry demands for increased sustainability impact. The EERP is a tool for communicating your facility's progress in meeting sustainability objectives to your customers, allowing you to be a better partner in overall cold chain sustainability.

## HOW IT WORKS

Using qualitative and quantitative assessment tools, operators track facility performance over time and receive progress reports with recommended next steps and links to useful resources. Top performers will be recognized based on energy culture and magnitude of savings.

**Qualitative** | The EERP utilizes an Energy Management Assessment (EMA) tool to discover each facility's energy culture. The EMA uses a progressive question framework addressing twelve areas that measure commitment to energy conservation.

**Quantitative** | The quantitative assessment determines the percentage improvement in energy efficiency over time.



### Executive Summary

Congratulations on completing your Energy Management Assessment (EMA)! In this report, you can review your assessment results and recommended priority actions to help you improve your organization's Strategic Energy Management (SEM) practices.



*"As the world's largest operator of temperature-controlled warehouses, it is our duty to spearhead programs that promote energy efficiency while, at the same time, driving sustainability and cost-savings throughout the entire supply chain. We're proud of the achievements we've already made at our Americold facilities and we remain committed to the mission of energy excellence in the cold chain."*

**Ted Royals**

*Sr. Manager, Energy and Sustainability, Americold Logistics*



## MORE INFORMATION

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Contact: [energy@gccca.org](mailto:energy@gccca.org)



also conducts research on investment themes to advise and inform MIM's global team of investment professionals.

Prior to joining MetLife, Matus was the Deputy Chief U.S. Economist at UBS Securities LLC. Before banking, Matus worked in the market research group at Moore Capital Management, a hedge fund in New York, and also on the open market desk of the Federal Reserve Bank of New York, assisting in the implementation and analysis of monetary policy operations and conducting Treasury market surveillance on behalf of several regulatory agencies.

**Lindsay Shookus** is a seven-time Emmy-winning producer best known for her two-decade run shaping Saturday Night Live. As both producer and head of SNL's talent department, she booked the show's biggest hosts and musical guests, scouted rising stars, and helped launch the careers of Kristin Wiig, Kate McKinnon, and many more — earning a reputation as one of entertainment's sharpest eyes for talent.

In her keynote presentation, Shookus shares important takeaways for how she was able to navigate challenging circumstances, and how anyone can do the same. Her insights are designed to help audience members reframe their mindsets to help them find the opportunity in adversity, make quick decisions, and develop solutions that will move them from one step backwards to two steps forward. Teamwork, resilience, accountability, and adaptability are all key components for sharpening your skills as a

problem solver and emerging from the fire stronger, smarter, and better.

#### Cultivated Session Topics

Attendees will learn from peers and thought leaders on topics like food loss and waste, investments in capital upgrades, advancing multimodal logistics in North America, optimizing energy strategies, expanding grid capacity, navigating transportation shifts in the cold chain, and protecting your business in fluctuating markets.

"In recent years, we've been refining Convention breakout sessions to deliver the most impactful and relevant topics for our attendees," said James Rogers, Senior Vice President, Member and Program Services and Operations for GCCA. "The 2026 Convention program will home in on what matters most for warehouse and transportation professionals – driving operational efficiencies through investments in technology, modernizing facility infrastructure, making smart capital upgrade decisions, bolstering energy strategies, navigating global logistics challenges, and combating food waste. I'm excited about the practical insights these sessions will deliver to help GCCA stakeholders adapt, compete, and thrive in the cold chain market."

#### Key Technologies in the Cold Stage: Innovation Showcase and Stage

The Showcase offers Convention attendees an opportunity to evaluate new tools and technology – saving time and identifying the best solutions on the market. Directly

## Innovation Showcase Exhibitors\*

A&E Construction  
 Advance Storage Products  
 Agility Recovery  
 Albany Door Systems  
 APSM  
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 Bonar Engineering & Construction Company  
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 Motive industrial  
 Nucor Warehouse Systems  
 QuickFreeze  
 Rack Builders Inc.  
 Ramp Systems, Inc.  
 RefrigiWear  
 Royalty Roofing  
 Rytex High Performance Doors  
 Steel King Industries Inc.  
 Stellar  
 Tippmann Group  
 Vapor Armour  
 Viking Cold Solutions, Inc  
 Wagner Fire Safety Consulting  
 WDS Construction, Inc

\*As of 1/20/26.

connect with over 50 providers to learn about new equipment, technology trends, automation solutions, and other innovations that are moving the cold chain sector forward.

The thought leaders presenting on the Showcase Stage replace the previous Convention "Tech Talk" format. These tailored, focused presentations, highlighted on their own stage, will ensure attendees hear about high-level insights and use cases on emerging

technologies and solutions deployment for warehouse owners and operators, transportation professionals, and cold storage builders. The Showcase Stage presenters provide valuable inside perspectives on the industry's ongoing technical evolution.

**2026 Cold Chain Café**

GCCA's Cold Chain Cafés provide an environment that convenes attendees in intimate groups to discuss the critical issues facing their businesses and the supply chain industry. Café participants choose from a variety of topics, joining moderated tables for intensive 20-minute conversations with peers before switching to a new table and topic of interest. Past Café discussions have included supply chain disruptions, traceability, food security, electrification of transport, macroeconomic trends, and more.

**New Faces, Old Friends, and the Power of Relationship Building: Networking and Social Events**

GCCA's Scottsdale program offers multiple opportunities to connect, like breakfasts and coffee breaks on the showcase floor, group social events, and opportunities to give back to the community. Pickleball pro? Golf great? Valuable volunteer? Make sure to add these activities to your registration to round out your Convention experience.

Additionally, the Grand Hyatt resort will host multiple receptions and the annual themed party – pack your finest for the GCCA Desert Oasis.

**See You in Arizona**

As the industry continues to evolve, GCCA is poised to lead. By members and stakeholders advancing pro-business global policy decisions, supporting and promoting new technology innovations, advancing a skilled workforce, and monitoring economic uncertainties, the annual Convention connects us, educates us, and prepares us for change.

The GCCA Convention is the ideal opportunity to collaborate on future-focused solutions for the entire cold chain.

Find out more about this year's program and register now: [www.gcca.org/events](http://www.gcca.org/events) 📍



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# GLOBAL COLD CHAIN DEVELOPMENT

## SUMMARY OF GCCF ACTIVITIES

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

#### Cold Chain Development in Honduras, El Salvador, and Guatemala, 2023 – 2027

In 2025, GCCF provided virtual and in-person training, consultations, and advisory support in Honduras, El Salvador, and Guatemala. GCCF Technical Experts provided a series of virtual training on perishable goods handling and transportation. The trainings were later added to GCCA's Cold Chain eCampus. Twelve students from Guatemala, Honduras, and El Salvador attended GCCF's Cold Chain Institute and participated in a site visit at a member's facility. CSA member Dr. Elhadi Yahia delivered training and consultations to local operators handling loroco, bell pepper, okra, and avocado.

GCCA members also provided technical assistance on energy management and design best practices and served on a review committee for cold chain grants. In 2025 alone, nearly 200 local operators, logistics providers, and cargo handlers were trained in cold chain best practices through these activities.

#### 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 partnered with GCCA member Michaels Energy, the Supply Chain Management Research Center (SCMRC) of the University of Arkansas, and Feeding America to pilot an energy efficiency program with two food banks in Texas. The project's goal is to reduce energy consumption to generate cost savings. The project is funded as part of the Danone Institute North America's (DINA) Sustainable Food Systems Initiative Focus on Food in collaboration with the Foundation for Food and Agriculture Research.

In July, the team performed energy audits at Food Bank of the Golden Crescent and Food Bank of the Rio Grande Valley. The two banks were identified by Feeding America based



*GCCF Technical Expert Fernando Cojulun of EPV Italia met with engineers from cold storages in El Salvador to discuss efficiency measures.*

on their size and cold chain operations. The audit reports generated 28 recommendations, ranging from \$0 for operational practices to \$100,000 for thermal energy storage. In 2027, GCCF will work with each food bank to assist in implementing selected recommendations.

The premise for the energy project was suggested by GCCA members in 2022, during the initial kickoff of the Foundation's Food Waste Reduction Initiative, to build off the expertise developed by GCCA's Energy Excellence Recognition program. GCCF will apply lessons learned from the Texas pilots to further support additional food banks and food rescue organizations worldwide, especially those dedicated to efficient, intelligent energy management in their refrigerated warehouses.

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

In 2025, GCCF facilitated 10 mentorship relationships between international expert members and local operators in Senegal, Ivory Coast, Ghana, Morocco, and Mauritania. The mentorships are intended to provide one-on-one technical support to individual cold storage and logistics operators, warehouse designers, business development professionals, and customer service representatives in West Africa, with the aim of increasing cold chain technical skills for the market.

GCCF also delivered a series of in-person trainings and consultations in Ghana, Ivory Coast, and Senegal in 2025. The training covered business development for third-

# GLOBAL COLD CHAIN DEVELOPMENT

## SUMMARY OF GCCF ACTIVITIES

party cold storage and logistics providers, design-build best practices for cold storage, and warehouse operations. The in-person activities were supplemented by English and French digital resources on GCCA's Cold Chain eCampus. More than 100 individuals received technical cold chain support through this project in 2025.

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

GCCF launched the Food Waste Reduction Initiative in 2022, centered around three objectives:

1. Support food rescue groups by increasing their access to GCCA's resources and network
2. Alleviate the barriers that prevent GCCA members from donating food that would otherwise go to waste



*Multicongelados Storage in El Salvador.*



## **GCCA CONVENTION**

**APRIL 27-29, 2026 | SCOTTSDALE, AZ**

**#GCCACon2026**

The **GCCA Convention** is the most important event of the year for cold chain warehouse operators, owners, and executives. Join your professional peers to forge powerful connections, discover cutting-edge solutions at the industry's leading expo, and gain the strategic insights needed to drive profitability and operational excellence in your temperature-controlled facilities.

Register for Scottsdale at  
[www.gcca.org](http://www.gcca.org)

# GLOBAL COLD CHAIN DEVELOPMENT

## SUMMARY OF GCCF ACTIVITIES

3. Increase awareness within the membership of the problems caused by food loss and waste and potential solutions

In 2025, the number of food waste reduction members grew to more than 70. In addition, GCCF has developed virtual training for food rescue organizations and a Food Waste Reduction toolkit to support members with donation and community support, both of which will be promoted in 2026. The Energy Excellence program, piloted through the Powering Food Banks project, has also demonstrated the cost savings food banks can achieve by leveraging private-sector expertise to reduce energy consumption. ☞



Employees sorting fresh fruit at Gotera, a cold storage facility in El Salvador.



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



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Virginia Tech University,  
Fish Products Expert  
**COUNCIL CHAIRMAN**



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Cool-Climate Fruit & Produce Expert



**Dr. Barbara Rasco, BSE,  
Ph.D., JD**  
University of Wyoming, Food Safety  
& Food Safety Regulations Expert



**Dr. Patrick Brecht**  
PEB Commodities,  
Refrigerated Transportation Expert



**Dr. Debjit Roy**  
Indian Institute of Management,  
Logistics & Operations Expert



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**Dr. Faris Karim**  
Kansas State University, Ammonia  
Contamination & Food Toxicology Expert



**Dr. Elhadi Yahia**  
Universidad Autónoma de Querétaro,  
Mexico, Postharvest Technology,  
OTropical Fruit & Produce

**Have a burning cold chain question?**  
Submit an inquiry to the Council of Scientific Advisors at [www.gcca.org/inquiry](http://www.gcca.org/inquiry)

# COOL SOLUTIONS

SCIENTIFIC ANSWERS TO COLD CHAIN CHALLENGES

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

**Q:** How can we remove the ice buildup on our freezer floor from a small leak, mitigate the humidity and stop the moisture between unit and ceiling?

**A:** Remove ice by separating it from the floor with a scraper or hammer, breaking it up, and removing it from the freezer. Warming the ice is not recommended.

Humidity controls include:

**Infiltration:** Ensure there are no leaks in the building envelope and limit open door time.

**Moisture Reduction:** Remove air moisture on the dock. Run time of the dock evaporators is essential to reducing the moisture in the air that is exchanged with the freezer every time the doors open. Start by running dock evaporator fans constantly. This will add sensible heat to the dock, increasing the dock evaporator run time. Also, removing moisture on the dock vs. the freezer costs 30% less.

**Defrost Controls:** Review the evaporator's defrost settings. When there is too much hot gas or at too high a temperature, it will cause the ice to evaporate from the coil rather than melting down the drain. Defrost interlock

with other nearby evaporators so that fans can blow water off the coil instead of running down the drain. Turning off nearby fans during defrost can prevent this.

*This answer was provided by Bob Tippmann, Industry Expert to the Council of Scientific Advisors.*

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)

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# UPCOMING 2026 GCCA EVENTS

## JANUARY

- 21 January 2026 — Cold Chain Development in Latin America (Webinar)
- 29 January 2026 — The Global Year Ahead (GCCA Members Only Webinar)

## FEBRUARY

- 7–10 February 2026 — U.S. Cold Chain Institute East | Atlanta, Georgia, United States

## MARCH

- 1–4 March 2026 — U.S. Cold Chain Institute West | Tempe, Arizona, United States
- 10 March 2026 — Cold Chain Connection Medellín | Medellín, Colombia
- 12 March 2026 — Cold Chain Transportation Best Practices (Webinar)
- 18–20 March 2026 — GCCA Europe Conference | Düsseldorf, Germany
- 26 March 2026 — Leading Through Change (Webinar)

## APRIL

- 15 April 2026 — Brazil Regulatory Forum | Brasília, Brazil
- 27–29 April 2026 — GCCA Convention | Scottsdale, Arizona, United States

## MAY

- 13 May 2026 — Cold Chain Connection Guatemala | Guatemala City, Guatemala
- 21 May 2026 — Cold Chain Connection Singapore | Singapore
- 27–28 May 2026 — Brazil Cold Chain Congress | São Paulo, Brazil

## JULY

- 8–9 July 2026 — Cold Chain Connection Toronto | Toronto, Canada
- 20–22 July 2026 — Cold Chain Institute Latin America | Mexico City, Mexico
- 22 July 2026 — Cold Chain Connection Mexico City | Mexico City, Mexico

## AUGUST

- 18–20 August 2026 — Cold Chain Institute Brazil | São Paulo, Brazil
- 26–27 August 2026 — Cold Chain Connection Midwest | Kansas City, Missouri, United States

## SEPTEMBER

- 1–3 September 2026 — GCCA Africa Conference | Johannesburg, South Africa
- 7–9 September 2026 — Cold Chain Institute Europe | Rotterdam, Netherlands
- 9 September 2026 — Cold Chain Connection Rotterdam | Rotterdam, Netherlands

## OCTOBER

- 14–15 October 2026 — Cold Chain Connection Northeast | Philadelphia, Pennsylvania, United States
- 27–28 October 2026 — Cold Chain Connection Lima | Lima, Peru

## NOVEMBER

- 3–4 November 2026 — Cold Chain Connection Southeast | Atlanta, Georgia, United States

## CONVENTIONS, CONFERENCES & CONGRESSES

Major industry gatherings with broader programming and networking opportunities.

- **18–20 March 2026** — GCCA Europe Conference | Düsseldorf, Germany
- **27–29 April 2026** — GCCA Convention | Scottsdale, Arizona, United States
- **27–28 May 2026** — Brazil Cold Chain Congress | São Paulo, Brazil
- **1–3 September 2026** — GCCA Africa Conference | Johannesburg, South Africa

## COLD CHAIN CONNECTIONS

Regional, informal networking and education events — often alongside other industry activities.

- **10 March 2026** — Cold Chain Connection Medellín | Medellín, Colombia
- **15 April 2026** — Brazil Regulatory Forum | Brasília, Brazil
- **13 May 2026** — Cold Chain Connection Guatemala | Guatemala City, Guatemala
- **21 May 2026** — Cold Chain Connection Singapore | Singapore
- **8–9 July 2026** — Cold Chain Connection Toronto | Toronto, Canada
- **22 July 2026** — Cold Chain Connection Mexico City | Mexico City, Mexico
- **26–27 August 2026** — Cold Chain Connection Midwest | Kansas City, Missouri, United States
- **9 September 2026** — Cold Chain Connection Rotterdam | Rotterdam, Netherlands
- **14–15 October 2026** — Cold Chain Connection Northeast | Philadelphia, Pennsylvania, United States
- **27–28 October 2026** — Cold Chain Connection Lima | Lima, Peru
- **3–4 November 2026** — Cold Chain Connection Southeast | Atlanta, Georgia, United States

## GCCA WEBINAR SERIES

Online sessions focused on trends, technology, best practices, and strategic insights.

- **21 January 2026** — Cold Chain Development in Latin America
- **29 January 2026** — The Global Year Ahead (GCCA Members Only)
- **19 February 2026** — Understanding the New U.S. Food Traceability Requirements (GCCA Members Only)
- **12 March 2026** — Cold Chain Transportation Best Practices
- **25 March 2026** — Leading Through Change

## COLD CHAIN INSTITUTES

Multi-day training and professional development programs powered by the Global Cold Chain Foundation.

- **7–10 February 2026** — U.S. Cold Chain Institute East | Atlanta, Georgia, United States
- **1–4 March 2026** — U.S. Cold Chain Institute West | Tempe, Arizona, United States
- **20–22 July 2026** — Cold Chain Institute Latin America | Mexico City, Mexico
- **18–20 August 2026** — Cold Chain Institute Brazil | São Paulo, Brazil
- **7–9 September 2026** — Cold Chain Institute Europe | Rotterdam, Netherlands

# ASSOCIATION NEWS

## NEWS ABOUT GCCA CORE PARTNERS

### Cold Chain Index Q3 Now Available

GCCA's Cold Chain Index (CCI) is a customizable template that members can use to justify their positions to customers during negotiations. The CCI tracks the growth rates of costs associated with cold storage using predominantly official sources of economic data; and can be customized to the region, state, and metro area where a warehouse facility operates.

The CCI can be customized to the region and state where a warehouse facility operates and includes five classes of expenses: *labor*, *electric power*, *supplies*, *repairs*, and *rent*. Using the template, members of GCCA and their customers can better understand the index and customize cost shares to the experience of their business, and to account for variation across geographic regions. This latest release highlights recent findings for both the United States and Canada.

Q3 2025 U.S. Takeaways:

- Overall expenses for refrigerated warehouses rose by 2.77% in the third quarter of 2025, relative to the same period in 2024
- Electricity costs escalated further in the third quarter, rising by 5.18% on average nationwide
- Labor costs grew by 3.91% in Q3 2025 compared with the third quarter of 2024
- National occupancy cost growth for warehouses and distribution properties was 0.61% in the third quarter of 2025
- The national average cost of labor for the transportation and warehousing industry trended upward, but at a moderate pace
- Electric power expenses grew by 5.18% on average nationwide during Q3 2025 compared with Q3 2024



### Q3 2025 Canada Takeaways

- Overall expenses for refrigerated warehouses grew by 1.23% during the third quarter of 2025, relative to the same period in 2024
- Labor costs in Canada grew by 4.25% in Q3 2025 relative to the same quarter in 2024

- Electricity costs rose by 7.24% year over year in Q3 2025
- The cost of supplies is proxied by the Industrial Product Price index for packaging, which rose by 4% in Q3 2025 relative to Q3 2024

Members can access Q3 templates and full executive summaries at [www.gcca.org/resource/gcca-cold-chain-index](http://www.gcca.org/resource/gcca-cold-chain-index)



### GCCA Launches 2026 Webinar Series

GCCA's new Cold Chain Insights Webinar Series provides a comprehensive, high-level look at the issues, trends, and innovations shaping the global cold chain industry. Providing thought leadership and expertise on policy and advocacy, our Foundation work, and cold chain hot topics like infrastructure (equipment, tools & tech) and transportation/logistics, GCCA webinars keep professionals informed about emerging technology, operational best practices, and strategic insights. Attendees will gain actionable intelligence and takeaways to improve operations, efficiency, and navigate the evolving global landscape.

Learn more and register for our upcoming programs: <https://www.gcca.org/events/event-calendar/>



### 2026 GCCA Regional Advisory Councils

Congratulations to the 2026 Advisory Councils that will help advise on GCCA global priorities in the coming year.

#### GCCA Africa Advisory Council

- *Chairman:* Dr. Newton Matope, Vice Chairman, Cold Solutions Kenya
- *Vice Chair:* Patrick Fernandes, Afrigotel
- Owusu Akoto, Freezelink
- Paul Gibbons, Commercial Cold Store Holdings, (MANCO)
- Ivor Quelly, QK Coldstores
- Jurie Schoeman, Commercial Cold Holdings
- Ivan Sutic, Chilleweni Cold Storage

#### GCCA Brazil Advisory Council

- *Chairman:* Fábio Fonseca, Friozem
- Adilson Eduardo Assunção, Emergent Cold LatAm
- Fábio Galesi Starace Fonseca, Friozem Logística
- Francisco Moura, SuperFrio Logística Frigorificada
- Bruno Nahas, Refrio Armazéns Gerais
- Adriano Rocha, Arfrio Armazéns Gerais Frigoríficos
- Bruno Vargas, Iceport Câmara Frigorífica

#### GCCA Europe Advisory Council

- *Chairman:* Ben van Leeuwen, Frigolanda Group (Netherlands)
- *Vice Chairman:* Andrew Lawrence, Magnavale (United Kingdom)
- Rob Haesakkers, Thermotrafic (Netherlands)
- Jesper Hansen, Wagner (Germany)
- Paul Jukes, Americold (United Kingdom)
- Maciej Kisiel, Chlodnia Gdansk (Poland)
- Niels Lundgaard-Svenstrup, Lineage (Denmark)
- Jon Miles, NewCold (England)
- Joris Olbrechts, Jodifrost (Belgium)
- Roel Smets, GTS Group (Belgium)
- Jeroen Tempels, Americold (Netherlands)
- Tineke van de Voorde, Port of Antwerp Bruges (Belgium)
- Ron van Gestel, DP World (Belgium)
- Kris Verbruggen, Frigo Logistics (Poland)

#### GCCA Latin America Advisory Council

- *Chairman:* Rafael Rocha, Emergent Cold LatAm (Panama)
- *Vice Chairman:* Ewald Heinsen, E.T. Heinsen (Dominican Republic)
- Abel Fernández Burgos, Polar Port - Reparación Integral de Contenedores (México)
- Edgar Chahua, Ransa (Perú)
- Jean Falotico, IceStar (Chile)
- Ignacio García, Sancho-Frica Construcción (México)
- Pablo Hernández, Precisa Frozen (Chile)
- Jorge Huanqui, ASAP Consulting Group (Perú)
- Luis Jorge, Rannik (República Dominicana) 🌐

# NEW MEMBERS

## NEW MEMBER COMPANIES OF GCCA CORE PARTNERS

### GCCA ASSOCIATE MEMBERS

**Beldon Roofing Company**  
San Antonio, Texas, United States

**B-Built**  
Netherlands, Netherlands

**Cold Storage List**  
Raleigh, North Carolina, United States

**Contegra Construction**  
Edwardsville, Illinois, United States

**DLN Integrated Systems**  
Byron Center, Michigan, United States

**Frigo Stahl SA**  
Thessaloniki, Greece

**H&M Construction**  
Jackson, Tennessee, United States

**Heaton Design Build LLC**  
Fayetteville, Georgia, United States

**Industrias Refridcol S.A.S**  
Valle del Cauca, Colombia

**Kinetic Partners**  
New York City, New York, United States

**National Design Build Services**  
St. Louis, Missouri, United States

**North American Fire Protection**  
Palm Coast, Florida, United States

**Ricker Thermline**  
Martinez, California, United States

**Strategnos**  
Johannesburg, Gauteng, South Africa

**TEC Services**  
Columbia, Maryland, United States

**Zudek International Ltd**  
London, United Kingdom

### GCCA WAREHOUSE, GCCA TRANSPORTATION, AND GCCF MEMBERS

**Commonwealth Kokubu Logistics Pte Ltd**  
Singapore, Singapore

**eGourmet Solutions Inc**  
Kansas City, KS United States

## Marcus & Millichap

WILLIAMS INDUSTRIAL GROUP

### SPECIALISTS IN COLD STORAGE REAL ESTATE

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**New Consumption Patterns Becomes Fully Ingrained, Aiding Cold Storage Demand**

Historic delivery wave extends through 2025. Online grocery sales topped \$9.5 billion for the ninth 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 second e-commerce category by 2026.



CONTACT US FOR A COMPLEMENTARY MIDYEAR REPORT

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# MEMBER NEWS

## NEWS FROM MEMBERS OF GCCA CORE PARTNERS

**AMERICOLD** announced a new partnership with On the Run, one of Australia's most recognized convenience store brands, to provide cold storage and distribution services. In the Asia-Pacific region, Americold supports supply chains for more than 1,500 QSR locations. Building on this foundation, Americold is extending its expertise into the convenience segment through its partnership with On the Run.



**CONSTELLATION COLD LOGISTICS** entered into an agreement to acquire Spedition Wohlert and Wohlert Kühl Logistik in Germany. This marks Constellation's entry into the German market and adds 40,000 pallet positions of temperature-controlled space.



**CONSTELLATION COLD LOGISTICS** acquired the main cold store of JN-Spedition East located in Køge, Denmark. Through this partnership, Constellation further strengthens its position in the Danish market, adding 20,000 pallet positions on the east coast of Zealand.



**EMERGENT COLD LATAM** inaugurated a new cold storage facility in Cartagena, Colombia, expanding its infrastructure along the country's Caribbean coast. Located in the Parque Central Free Trade Zone, the warehouse offers over 9,000 pallet positions and 76,000 m<sup>3</sup> of temperature-controlled storage capacity. The purpose-built facility features automation, energy-efficiency measures, and advanced food-safety systems.



**LINEAGE** celebrated the latest expansion of its cold storage facility in Hobart, Indiana. The project added approximately 188,000 square feet of space and 58,000 pallet positions featuring next-generation automation technology to Lineage's existing Hobart site. This is the third expansion of the building since

2008, making it the company's largest North American facility serving multiple customers.



**NEWCOLD** is developing a \$275 million, 15-story cold storage facility in Hagerstown, Maryland, that will total about 400,000 square feet. NewCold's automated, high-bay warehouse will use robotic cranes and temperature-controlled storage systems to handle frozen foods with minimal human entry. The company projects operations could begin by early 2027.



**SUNSWAP**, a British manufacturer of battery and solar-powered transport refrigeration, announced it is entering the Latin American market through a distribution partnership with Chilean operator Trailerlogistics. Combining battery storage with integrated solar panels to deliver zero direct emissions across frozen, chilled, and multi-temperature applications, commercial deployments have validated reductions up to 81% compared to diesel equivalents.



**SWISSPORT** has launched its first dedicated perishables center at London Heathrow Airport, expanding its global cool chain network and responding to rising demand for fresh seafood, particularly Atlantic salmon. The purpose-built, 24/7 facility offers temperature-controlled handling, airside border inspection, and capacity for up to 30,000 tons of perishables annually.



**TI COLD** announced the completion of a new state-of-the-art cold storage facility for Agile Cold Storage, marking the third building Ti Cold has designed and constructed for the operator. The 132,865-square-foot facility delivers 20,000 pallet positions and a 65-foot clear height, with rooms capable of maintaining temperatures from 40°F down to -10°. 📍



Ambient  
75°F



Cooler  
34°F

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