COLDFACTS

Valuable insights into the global temperature-controlled supply chain

GLOBAL COLD CHAIN ALLIANCE®

VOLUME ONE, ISSUE TWO | 2026

Investors Are Bullish on Ports

COVER STORY 12

In Latin America and around the world, private capital is expanding and modernizing port infrastructure and services.

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CONNECTING A VITAL INDUSTRY

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About the cover: Polar Port, a temperature-controlled logistics operator located in Mexico's Port of Veracruz.
(Photo courtesy of Polar Port.)

GLOBAL COLD CHAIN ALLIANCE®

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WELCOME TO THE SPRING ISSUE OF *COLD FACTS* MAGAZINE. I AM EXCITED ABOUT THIS EDITION'S THEME, FOCUSING ON INVESTMENT – THE CAPITAL, POLICY, AND ADVOCACY WORK RESHAPING BOTH THE COLD CHAIN AND THE BROADER GLOBAL SUPPLY CHAIN. In 2019, a report on cold chain investing estimated that demand for cold storage space would rise by 100 million square feet over the next five years – roughly a 47% increase from the then-current level of 214 million square feet.

But the report also depicted cold-storage investment and construction as costly, slow, and more complex compared to dry warehousing. A closer look at the industry data and recent market activity GCCA tracks suggests a more nuanced, and in my opinion, much more optimistic picture of professionals committed to long-term engagement in the industry.

Investment costs might be high, but the long-term value proposition of the cold chain is what really matters. Framing cold storage construction costs as "higher per square foot" ignores Return on Investment and incorrectly oversimplifies "building on spec." Seven years ago, claims circulated that speculative construction was necessary to move quickly into the market. But those who moved without a plan, partners, or customers also quickly realized that the cold chain standard of excellence is difficult to achieve.

According to GCCA's Cold Chain Index data, labor, not capital construction, is the largest ongoing cost driver for refrigerated warehouse operators. And while high-efficiency refrigeration systems might carry upfront costs, they deliver long-term energy savings, making them a worthwhile investment for our members who prioritize sustainability. To be a successful part of our industry means continual investment over many years and at the highest standards – in building, in operations, and in skilled people.

The industry is growing despite higher capital costs. Our data show that, even with these higher capital costs, growth in the cold chain in 2024 outpaced that in the prior two years. This growth includes investments in expansion projects from both legacy operators and carefully prepared new market entrants. GCCA members currently own or operate 8.16 billion cubic feet of temperature-controlled capacity, with total capacity growing by more than 10% in 2025.

Capacity is expanding into major markets with confidence. In North America, GCCA's Top 25 members are operating a combined 5B cubic feet of cold storage capacity, up 629M cubic feet since 2024. As we prepare to release our 2026 Top 25 List, we anticipate this upward trajectory will continue – with members expected to report more cubic footage, more facilities, and deeper geographic reach than ever before. These are not the investments of an industry discouraged by construction timelines or temperature complexity, but an industry making long-term strategic investments.

We have an important voice in global trade. As we analyze global capacity growth needs, we must also consider changing trade trends. A year marked by uncertainty and disruption has slowed some investments. Consumer demand shifts, affordability concerns, changing diets, and changes in trade agreements all impact food supply chains. Ensuring that the cold chain is at the table in trade negotiations will secure supply chain resilience, increase import and export efficiency, and guide us in making the most impactful investments. This is why the GCCA is part of the Agricultural Coalition for USMCA, a group ensuring the renewal and improvement of this critical trilateral relationship.

Challenges in our industry and in the global economy are real, but what the data shows us is that we're not just keeping up with those challenges … we're getting ahead of them.

SARA STICKLER, CAE
PRESIDENT AND CEO
GLOBAL COLD CHAIN ALLIANCE

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.

GLOBAL COLD CHAIN ALLIANCE®

CONTACT US:

COLD FACTS magazine
Global Cold Chain Alliance
Attn: Lindsay Shelton-Gross
241 18th Street South
Suite 620
Arlington, Virginia 22202
United States

tel +1 703 373 4300
lsheltongross@gcca.org | www.gcca.org

COLD FACTS welcomes editorial ideas; contact Editor-In-Chief Alexandra Walsh at +1 301 523 3318 or **awalsh@associationvision.com**.

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

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We Know COLD

We Know Cold.

Cold isn't a market we entered.
It's the material we were formed from.

In 1948, in post-war Austria, Josef M. F. Brucha began working with cork insulation—long before "cold storage" was an industry with standards, playbooks, or shortcuts. At the time, the problem was simple and unforgiving: how do you preserve what matters when temperature failure isn't an option?

That question became the foundation of Brucha.

What followed wasn't rapid expansion or trend-chasing innovation. It was decades of refinement—engineering insulated panel systems for cold environments where precision isn't a luxury, but a requirement. Food, pharmaceuticals, logistics, process spaces—places where performance must hold, quietly and consistently, year after year.

Cold storage shaped our thinking early.
It taught us that joints matter.
That tolerances compound.
That installation is as critical as specification.
That trust is earned slowly—and lost quickly.

Those lessons are still woven into how we design, manufacture, and support our systems today.

From cork insulation to high-performance insulated metal panels, from European roots to a growing North American footprint, Brucha has remained focused on one idea: build systems that perform in the real world, in the hands of installers, under real operating conditions.

Cold is not a segment to us.
It's part of our fabric.

And after more than 75 years, we're still learning from it.

Superior Cold Performance

BruchaLock Joint

Insulated Doors

BRUCHA.US

BRUCHA®

Built FOR Installers.

CONNECTING WITH POLICY MAKERS TO ADVANCE INDUSTRY PRIORITIES

Why the GCCA Advocacy Fund matters more than ever.

By Shane Brennan

In today's unpredictable political and regulatory environment, complacency is not an option. For the temperature-controlled logistics industry, the decisions made in Washington D.C. and by state and local governments can positively reshape, refine, and advance cold chain business priorities. That is precisely why the GCCA Advocacy Fund exists and why its continued success depends on broader industry support.

The Advocacy Fund enables the collective voice of the industry to connect GCCA members and stakeholders directly with policymakers and influence pro-business legislation and regulatory decisions. It empowers companies to invest in high-impact, time-sensitive initiatives that shape the political, legislative, and regulatory landscape in favor of our market sector.

Why This Fund Is Necessary

Standard association dues fund essential "business-as-usual" government affairs benefits: monitoring policy, employing expert staff, and maintaining relationships on the Hill with those in the Administration and with decision makers. But today's environment demands more than steady vigilance and stakeholder engagement. It requires agility, firepower, and the ability to lean in quickly when threats — or opportunities — arise.

The Advocacy Fund provides that capability.

When emerging legislation threatens common-sense supply chain regulations, the Advocacy Fund allows GCCA to commission rapid research, retain legal expertise, and mount coordinated campaigns. When building coalitions or targeted public affairs efforts are required, the Advocacy Fund enables fly-ins, direct engagement, digital campaigns, and strategic communications to ensure our industry's voice is heard early — not after decisions are already made.

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COLD CHAIN WORK DEMANDS A HIGHER STANDARD

In subzero environments, quality isn't optional, it's critical. Our insulated PPE is engineered with premium materials, reinforced construction and proven performance to stand up to the cold chain's toughest demands.

From deep freezers to high-traffic docks, our gear delivers trusted warmth, durability and comfort that lasts longer, performs better and helps reduce downtime, replacements and risk, shift after shift.

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In short, the Advocacy Fund is the difference between reacting and influencing.

A Record of Delivering Results

Over the past several years, the Advocacy Fund has backed tangible, sector-defining wins:

- Building bipartisan support for the FRIDGE Act – legislation championing cold chain infrastructure in export markets – that is now positioned within the 2026 Farm Bill and moving toward enactment.
- Securing a 30-month delay to implement the Food Safety Modernization Act (FSMA) Section 204 traceability requirements, driving the need for consistent compliance standards across the food industry.
- Protecting cold storage operators' ability to choose modern, efficient refrigeration systems for their facilities under changes to the American Innovation and Manufacturing (AIM) Act.
- Winning regulatory concessions to allow cold storage facilities to operate as "i-house" food import inspection sites, beyond restrictive geographic limits.

These outcomes are not abstract policy wins – they translate directly into operational flexibility, capital investment certainty, and reduced regulatory friction for businesses across the cold chain.

High Stakes in 2026

This year is pivotal for the cold chain and GCCA members. Priorities include:

- Securing final passage of the FRIDGE Act
- Safeguarding and strengthening trade frameworks such as the U.S.-Mexico-Canada Trade Agreement (USMCA)
- Cutting red tape in export and import inspection processes
- Elevating the role of cold chain operators in fighting food waste.

Each of these issues carries real commercial implications, from cross-border meat exports to producing inspection regimes, and international market access. Without sustained advocacy, the risk is clear: increased compliance costs, duplicative inspections, trade friction, and policies designed without practical supply chain expertise.

The cold chain is critical infrastructure. Yet policymakers will only prioritize it if we continue to demonstrate unified, strategic engagement.

Members and Stakeholders Support

Supporting the GCCA Advocacy Fund is not a political gesture, it is a strategic investment.

Contributions directly enable:

- Rapid-response campaigns to stop harmful legislation before it gains traction
- Research and expert analysis to underpin credible policy proposals
- Coalition-building with aligned industries
- Public affairs campaigns that educate policymakers and the public about the essential role of temperature-controlled logistics

For business leaders, getting involved shows you're committed to a stable, pro-growth regulatory environment. It makes sure your company's voice is heard when it comes to briefings and engagement strategies. And it strengthens our industry's collective clout at a time when division only weakens our influence.

A Collective Responsibility

The GCCA Advocacy Fund has proven its value and delivered measurable results. But the Advocacy Fund's strength depends on participation.

Policy momentum does not pause. Legislative calendars do not wait, and midterm elections and regulatory reviews taking place in 2026 will shape the business environment for years to come.

Now is the moment for cold chain businesses and GCCA members – warehouse operators, transportation providers, and suppliers alike – to invest in protecting and advancing the policy environment that underpins your success.

When the cold chain industry speaks with one voice, and backs that voice with action, it is impactful. Thank you for helping to not just respond to change, but to proactively define the future of the temperature-controlled supply chain.

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

EMAIL: sbrennan@gcca.org

By Isobel Davidson

Polar Port, a temperature-controlled logistics operator located in Mexico's Port of Veracruz. (Photo courtesy of Polar Port.)

INVESTORS ARE BULLISH ON PORTS

In Latin America and around the world, private capital is expanding and modernizing port infrastructure and services.

With access to both the Atlantic and Pacific Oceans, efficient multimodal transport connections, and competitive shipping costs, Latin America is a critical link in the global food supply chain. Private capital is driving very significant expansion and modernization of port terminals, logistics platforms, and connected cold chain infrastructure.

This trend is bringing clear changes for the temperature-controlled supply chain. Bruno Vargas, Operations Manager at a cold storage facility located at Portonave, the first private container terminal located in Brazil, says, "Over the last decade, and especially in the past few years, we've seen significant private and public investment in port infrastructure across Latin America, and that is clearly impacting cold chain operations. These investments are modernizing terminals, expanding container capacity (including reefer capacity), reducing turnaround times, and improving hinterland connectivity."

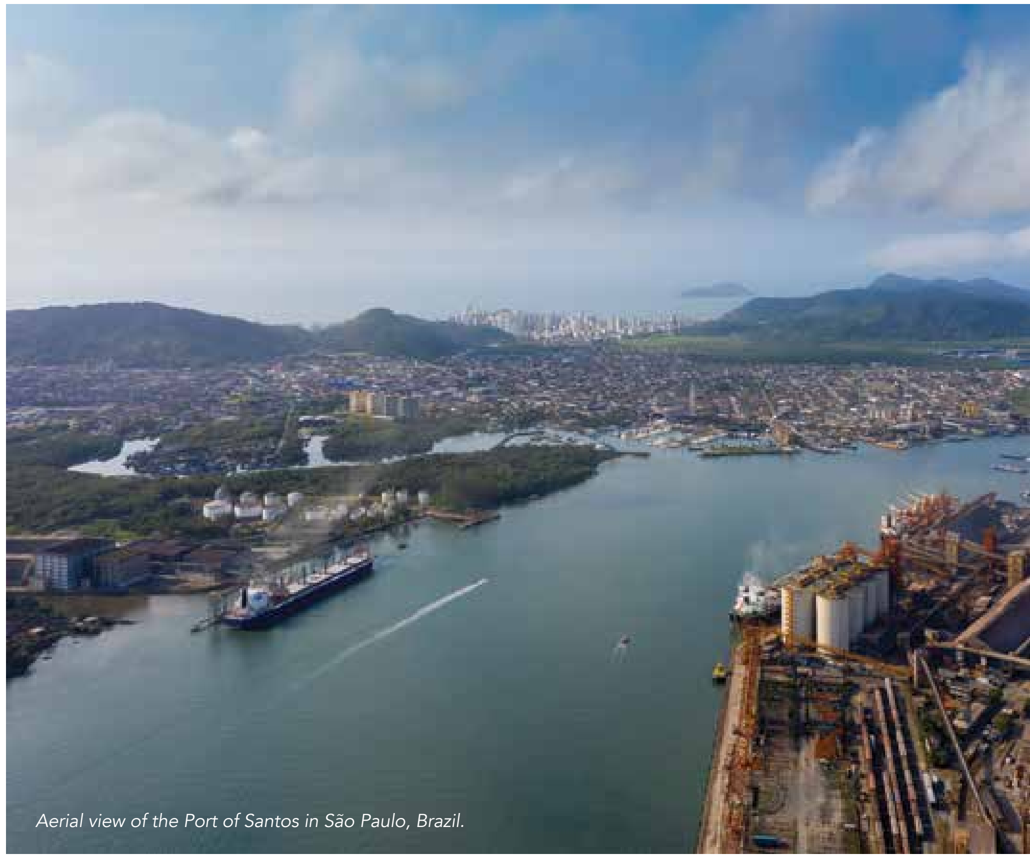
Vargas says in Brazil alone, there are strategic port infrastructure programs with billions of dollars allocated to modernization and logistics access improvements. Portonave is controlled by the Swiss group Terminal Investment Limited (TIL/MSC), and its cold storage facility is the only one in the country located directly within a container terminal. Portonave has significant private investment totaling approximately R$2 billion, to modernize its quay and acquire new equipment.

Abel Fernández Burgos, Reparación Integral de Contenedores and Polar Port, a temperature-controlled logistics operator located in Mexico's Port of Veracruz, agrees. "Infrastructure is essential for efficient operations, and last year there was saturation at several port terminals. As in any market, saturation tends to trigger investment, expansions, and new capacity."

As a result, users now have more options, even among ports located in the same region, Fernandez says. He offers good examples in the Gulf of Mexico are Altamira versus Veracruz, and in Central America, Santo Tomás de Castilla versus Puerto Cortés in Guatemala and Honduras. Investment in Brazil's ports is particularly high profile, and the Brazilian government has stated its goal of expanding private investment in ports. It intends to auction the Port of Santos' new mega-terminal Tecon 10 in April 2026, for a 25-year concession period. The investment is intended to increase the port's capacity by 50%.

In November 2025, DP World announced an investment of $275 million to expand cargo handling capacity, including infrastructure for refrigerated cargo, at Port of Santos.

Elsewhere in Brazil, a new $175 million private investment in the Rio Brasil Terminal at the Port of Rio de Janeiro was announced in 2025. It is expected to increase capacity by more than 70% by 2029.



Aerial view of the Port of Santos in São Paulo, Brazil.

This investment is reflected across the region. In 2025, APM Terminals announced a $550 million investment to expand Peru's Callao port in 2026-2027. And Tisur, concessionaire of Peru's Matarani Port Terminal and subsidiary of BlackRock-backed port operator Tramarsa, announced a $700 million investment to expand operational capacity and strengthen the competitiveness of the country's main southern port.

In Mexico, a major base for nearshoring, the Nuevo Manzanillo project will more than double the port's capacity by 2030, and will be funded by a mix of private and public investment. And last year, DP World pledged a $760 million investment aimed at enhancing the Dominican Republic's Port of Caucedo and its Free Trade Zone.

The profusion of expansion and modernization is unlocking new opportunities for temperature-controlled logistics businesses. As Latin America's exports of agricultural products and proteins continue to grow, the demand for cold storage and refrigerated transport is increasing.

"The biggest opportunity for cold chain operators in the region is the increased trade flow with alternative markets," says GCCA Senior Vice President of Global Markets Adam Thocher. "Major investment in multiple ports means that more Latin American produce can be exported to the United States and Asia and, to a lesser extent, Europe. Increasing the capacity and efficiency of ports means that the cold storage industry really has the opportunity to service this growing export market."

The cold chain is responding to this opportunity positively but with more caution than recent strategies in the United States and Europe, adds Thocher. "The risk profile in Latin American countries is higher, and businesses tend to go to where customers specifically need a cold storage solution."

Vargas notes he's seeing more private investment in temperature-controlled warehouses located close to port areas to reduce dwell time and improve cargo integrity. With trade flows in Latin America becoming more complex and more global, cold chain operators are adapting by expanding capacity and geographic coverage.

Busy industrial shipping terminal at Port of Rio de Janeiro, Brazil.

Vargas says, "Operators are investing heavily in technology and efficiency, including warehouse automation, digital temperature monitoring and traceability, and energy-efficient refrigeration systems. These investments are essential because operating costs, especially energy, remain one of the biggest challenges in the region."

Vargas says they are also seeing a closer integration between logistics providers, shipping lines, and exporters. "Many cold chain operators are evolving from pure storage providers into integrated logistics partners that manage transport, inventory, and export coordination."

Polar Port's response to the port-based demand increases of recent years includes expansion across borders and future-facing facility upgrades. "Since 2022, we have expanded our operations into Guatemala by establishing the first sanitary inspection facility of its kind at Santo Tomás Port. In Mexico, specifically in Veracruz, we have upgraded our port facilities to increase our operational capacity by nearly 40%," says Fernandez. "At the same time, we are developing additional infrastructure outside the port area (within approximately eight miles), which will allow us to further increase capacity and diversify the range of services we offer."

Looking to the future, the continued increase in demand from Asia, Europe, and North America for Latin American produce places cold chain logistics at the heart of the region's export economy.

Vargas highlights several other developing opportunities for temperature-controlled logistics operators facilitated by investment in ports. "New port infrastructure and logistics corridors are improving connectivity, nearshoring and supply chain diversification are increasing trade volumes across the Americas, and technological modernization is allowing operators to improve efficiency and traceability. Operators that invest in infrastructure, digitalization, and energy efficiency will have a strong competitive advantage."

Fernandez adds that he expects opportunity too in the connection between operations inside and outside the ports.

"As the industry gains more experience and market penetration improves, products will be less exposed to time disruptions. Commodities such as meat products will increasingly be delivered for a wider range of uses, including food service, processing, and ingredient supply chains," Fernandez says. "Many ports in Mexico and Central America are located near medium-sized cities that also serve as connections to other consumption centers. Demand for cold chain services around port areas should continue to grow, particularly for activities such as product separation, picking, consolidation, and distribution."

There are challenges to address, too. Many Latin American countries continue to experience infrastructure gaps and port bottlenecks, energy costs are high, and climate and weather changes are increasingly affecting agricultural production and logistics networks. Policy changes require flexibility and adaptability: for example, while Mexico experienced double-digit growth in beef imports from South America in 2025, new measures implemented by the Mexican government this year to regulate the market and support domestic producers are expected to bring a significant decline in that segment.

GCCA is working to support members operating in Latin America with the latest information and analysis, with expert advice and guidance, and by creating the professional connections that support new opportunities and collaborative solutions. GCCA is also working to address the challenge that operators face through lack of understanding among some of the wider supply chain about the value of third party logistics (3PL) providers.

"We are working to help develop greater understanding about 3PL for producers and processors, demonstrating that 3PL makes their processes more efficient and cost effective while minimizing port congestion and helping manage disruption and change," says Tocher.

Latin America is one of the world's largest exporters of perishable food, and the private investment that drives port infrastructure improvements and capacity increases is boosting the perishable food supply chain not just in Latin America, but for the region's trading partners around the globe.

Visit www.gcca.org/events to find out about the GCCA events coming soon in Latin America.

Private investment in Ports Around the Globe

The influx of capital into ports as global supply chains are recalibrating has clear potential to drive changes in regional trade dynamics, and beyond.

Thocher says, "Strategic port investments are well underway almost everywhere around the world. Land for ports is finite, and port ownership is a matter of national security."

The global picture of port ownership is mixed, explains Victor Shieh, Membership Outreach and Networks Director at the International Association of Ports and Harbors (IAPH). "In some regions like Latin America, there is a mix of national port administrations on one hand who put concessions out to tender, but also a large number of privately owned and run ports that also own the land. In other regions like in India, a recent call has been made to change the governance of ports from trusts to public port authorities, which does not mean private ownership, but will arguably allow for competitive tenders, which will mean greater incentive for investment."

With a strong focus on developing premier assets and returning value, private capital in ports often drives early investment in automation, training, expansion, and maintenance.

"Private ports have a clear mandate for permanent, long-term investment. But private ownership also means less choice for shipowners, and a public port with different terminals may offer more options," says Shieh. "In the case of public port authorities, in recent years we have seen longer concessions put out for tender, some exceeding 20 years, which are often demanded by candidates in order to commit to the necessary investments in port infrastructure, materials handling equipment and storage."

The lack of competition created by a small number of international conglomerates operating the world's ports brings risks too – commercial decisions or changes in relationships have the potential to upend global trading patterns and affect entire economies.

The flow of capital to ports is expanding and modernizing associated cold chain infrastructure. Thocher says, "People have become more aware of cold chains since the pandemic, and as ports are developed and improved we are seeing more specialized inspection points, more reefer points, more climate-neutralized environments, and more opportunities provided to cold chain operators inside of trade zones. Cold chain represents a small percentage of port throughput but there is high value placed on the produce inside the containers."

Temperature-controlled supply chain capacity is also being augmented by major liner shipowner-terminal operators such as MSC, Hapag Lloyd, Maersk, CMA-CGM and terminal operators turned end-to-end supply chain solutions providers such as DP World and PSA.

"They are investing in reefer containers, plugs and/or storage because for them, fresh produce is almost always high-yielding cargo," says Shieh. He adds, "They are far more interested in having direct relationships with cargo owners than with their forwarder base, which is why many of them are putting their money on the table when it comes to private investment in specialized cold storage, intelligent containers with IoT tracking options for shippers, and other innovative supply chain technologies."

Geopolitical turmoil is creating major disruption and uncertainty in the shipping industry, however investments in port infrastructure are long term by nature.

Shieh says, "Locations such as the Western Cape will always export high yielding fresh fruit and vegetable products from the Cape Town port or those close by; much as the Brazilians will always be exporting their poultry from the southeast coast of Latin or South America. That predictability over the long term plays an important role."

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

EMAIL: isobel@isobeldavidson.co.uk

WHY IS PRIVATE EQUITY SO HOT ON COLD?

A Q&A with Investor Relations Expert Evan Pondel.

By Alexandra Walsh

For most of its history, the cold storage industry was viewed as a non-institutional property type, but that view is rapidly changing. Private equity (PE) has transformed the cold storage sector from a niche property type into an institutional-grade asset class characterized by massive consolidation and high-tech modernization. As of 2026, the market is dominated by PE-backed giants that control the majority of North American capacity, though new entrants are emerging.

Institutional capital began to gravitate toward the sector beginning in the early 2010s, and that process has accelerated in recent years. Since 2015, cold storage transactions accounted for only 0.4% of total commercial real estate investment activity in dollar terms, according to MetLife Investment Management. Though a small percentage, 0.4% represents nearly $21 billion in investment activity during the period. The share of institutional investors taking part in these sales has increased, particularly over the last five to eight years. Market watchers expect this trend will help push capitalization rates down, and values up, in the cold storage sector.

Other industry trends that investors are watching include the strong demand for cold storage. Farming and food companies are expected to consolidate inventories into larger, more efficient, modern cold storage facilities to improve logistics and meet consumer preferences.

Investors view pharmaceuticals to be a key growth driver in the cold storage industry. An aging U.S. population, combined with new medicines that require refrigeration, means that the growth in demand from pharmaceuticals will be enduring.

Wall Street also expects that consumer acceptance and adoption of e-grocery delivery services will continue to increase over the long term as well, and grocery supply chains will move toward dedicated e-grocery delivery fulfillment centers, including cold storage facilities, in the pursuit of efficiencies.

To gain a subject expert's view of the present and future impact of private equity in the cold storage industry, *COLD FACTS* interviewed Evan Pondel, the founder of strategic communications, investor relations (IR), and digital branding firm Triunfo Partners.

Evan Pondel is the founder of Triunfo Partners, a strategic communications, investor relations (IR), and digital branding firm that advises senior management teams, boards of directors, governments, organizations, and high-profile individuals.

The firm specializes in programs that engage key stakeholders during critical moments, including M&A transactions, initial public offerings, quarterly earnings cycles, management changes, and crises.

Prior to Triunfo, Pondel served as president of PondelWilkinson, an investor relations and strategic public relations firm where Pondel led IR and PR programs.

CF: Given the unique characteristics of the cold chain, how does temperature-controlled storage compare to investing in other assets? Is the industry good for private equity investment, and what are the dynamics that make this sector attractive?

EP: I'd say temperature-controlled storage blends real estate stability with industrial operating complexity, offering inflation-linked pricing, high barriers to entry, and sticky, long-term customer relationships that make it more defensible than generic warehousing.

Private equity finds temperature-controlled storage attractive for these reasons, though the energy intensity, specialized labor, and capex (capital expenditure) cycles create operational drag that distinguishes it from passive real estate plays.

CF: There are differences between capital structures, return profiles, and operational complexities in legacy ("old") facilities, versus next-generation ("new") infrastructure. What are the pros and cons of investing private equity in a traditional vs. new facility, and under what market conditions does old vs. new generate the best return?

EP: The honest answer is it depends on where we are in the cycle. Old assets are great when capital is tight and replacement costs are elevated. You're buying the moat at a discount, and the cash flow is there day one.

CF: How have investments evolved over the past decade, particularly with post-pandemic supply chain disruptions, the rise of pharmaceutical and biologics cold demand, and the wave of consolidation?

EP: A decade ago, this was largely a family-owned, under-the-radar industry and then COVID happened and everyone suddenly realized cold chain was critical infrastructure. That, combined with the explosion in biologics and mRNA therapeutics, brought serious institutional capital to the table and kicked off a wave of consolidation that's still playing out today.

CF: What are the drivers that are leading the cold storage sector to experience high-value acquisitions?

EP: A few things are converging at once: e-commerce grocery, tighter food safety regulations, and the automation premium in modern facilities have all repriced what cold storage is worth. And because there simply aren't enough well-located, code-compliant assets out there, when something comes to market, buyers are paying for future optionality as much as today's income.

CF: How do you grow from family-owned regional operators into larger, more efficient, and geographically diverse networks?

EP: The playbook is pretty straightforward, conceptually. You need to find a solid regional operator, use it as your platform, and then bolt on adjacent geographies and services over time until you've built something no single-site operator can compete with. The integration work is the hard part.

CF: As infrastructure funds — with their lower cost of capital, longer hold periods, and stable cash flows — increasingly compete for cold storage assets alongside private equity, how do their long investment horizons align with refrigerated facilities?

EP: What's really interesting here is how cleanly the two models hand off to each other. PE comes in, adds value operationally, and then infrastructure funds, with their longer horizons and lower cost of capital, are natural buyers because cold storage looks a lot like a utility to them: predictable cash flows, inflation linkage, high replacement cost moat.

CF: How are investors delivering, without sacrificing operational efficiency or sustainability targets, and what are some other specific investment barriers to rapid expansion?

EP: Smart folks are pairing development with a real sustainability story, not just to check an ESG box, but because the operating cost savings over time actually justify the premium you pay upfront to build it right.

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

EMAIL: awalsh@associationvision.com

Market Consolidation & Major Players

The cold storage industry has seen aggressive "roll-up" strategies where private equity (PE) firms acquire numerous smaller competitors to build global platforms.

- **Lineage (Formerly Lineage Logistics)**: Originally PE-owned and grown from a single warehouse in 2008 to over 400 locations today. It recently pursued a massive IPO with valuations exceeding $30 billion.
- **Americold**: The second-largest player, controlling a combined 71% of North American rentable space with Lineage. In late 2025, it attracted interest from PE-backed firms like **Constellation Cold** (backed by EQT) and **CubeCold** (backed by I Squared) for its international operations.
- **Cold-Link Logistics**: In December 2025, **Slate Asset Management** and **Hamilton Lane** acquired a majority stake in this top-10 North American platform.

Emerging Trends & Risks

- **Automation & Tech**: PE firms are increasingly investing in "OpCo/PropCo" (operating company/property company) structures to capture value from both the real estate and high-margin services like blast freezing and AI-driven predictive maintenance.
- **Rise in Vacancy**: While historically tight (~3-4%), national cold storage vacancy has risen to roughly 5.3% as of 2025 due to a wave of new speculative construction.
- **Higher Entry Barriers**: Building cold storage can cost four times as much as traditional warehousing ($150-$200+ per sq. ft.), often requiring specialized lenders and deep-pocketed institutional partners.
- **Diversifying Capital**: What was once primarily a PE-funded industry now sees heavy involvement from infrastructure funds, sovereign wealth funds, and family offices seeking long-duration, stable yields.

COLD CHAIN MOMENTUM

Shaping the future at the 2026 GCCA Brazil Cold Chain Congress.

Brazil's cold chain sector is entering a transformational stage. Rapid growth in food production and exports has elevated the country's strategic importance, not only for domestic food security but also for global supply continuity. Warehouse owners and operators are also navigating an increasingly complex regulatory environment and facing demands to improve efficiency and deliver on their sustainability goals.

These topics are reshaping how Brazil's cold chain industry operates now, and how it plans to operate in the future.

This year's GCCA Brazil Cold Chain Congress, which will be held 27-28 May 2026, in São Paulo, has emerged as a critical program for industry alignment and best practices. The Congress serves as a focal point for decision-makers across Brazil's cold chain ecosystem — operators, logistics providers, technology partners, and policymakers.

General and Educational Sessions

The Congress brings together industry leaders and subject-matter experts, along with real-world case studies that explore the issues shaping the industry today.

As this year's program takes shape, one theme keeps rising to the top: the changing regulatory landscape. New and evolving policies are already shaping how companies operate day to day, while also affecting compliance costs and influencing longer-term investment decisions.

Breakout educational sessions at the Congress also provide practical, in-depth learning opportunities focused on operational excellence, innovation, regulatory compliance, and emerging technologies.

- Infrastructure and logistics constraints will feature heavily in this year's program. Gaps in transportation networks and cold storage capacity present ongoing hurdles, so addressing these bottlenecks is critical for reducing waste, improving efficiency, and maintaining competitiveness in global markets.

- The country's cold chain industry is making progress on sustainability and technology. GCCA members are exploring energy efficiency, alternative refrigerants, and more sustainable facility design. These efforts tie to both cost management and customer expectations. From facility automation to AI-integration, the cold chain is advancing its data-informed, responsive operations.

Cold Chain Café

The Cold Chain Café is a dynamic roundtable component of the Congress designed to foster peer-to-peer exchange and interactive discussions. Themes may include:

- Energy efficiency and sustainability strategies
- Regulatory and compliance challenges
- Workforce and operational efficiency
- Technology adoption and automation
- Risk management and food safety

Making Connections

Beyond formal discussions, the Congress provides an important opportunity to network and connect. The program includes valuable exchanges between peers, suppliers, and regulators.

Brazil is a key player in feeding a growing world, and a successful path forward depends on sustained collaboration, informed decision-making, and an appetite for long-term investments. GCCA Brazil is a critical partner in the successful future of the cold chain.

To learn more and register for this year's Brazil Congress, visit www.gcca.org/events/gcca-brazilian-cold-chain-congress

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

Dr. Elhadi Yahia, Postharvest Technology Expert on GCCF's Council of Scientific Advisors, prepared four reports covering on-site training and consultations delivered to operators in the three target countries. GCCF is gearing up for additional capacity-building activities for the remainder of 2026.

Powering Food Banks Project, 2025 – 2027

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

GCCF and partners are piloting an energy efficiency program with two food banks in Texas. The project's goal is to reduce energy consumption to generate cost savings. After conducting energy audits and generating a total of 28 recommendations, the project team is working with each food bank to implement select recommendations.

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

In 2025, 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 that can be achieved by food banks when utilizing private sector expertise to reduce energy consumption.

Dr. Elhadi Yahia with farmers in Chimaltenango, Guatemala.

Dr. Elhadi Yahia with an avocado farmer in San Andrés, Itzapa, Chimaltenango, Guatemala.

GCCA Joins Food Industry FSMA 204 Collaboration

In early March, GCCA announced it joined the Food Industry FSMA 204 Collaboration, an alliance designed to drive industry-wide awareness of the U.S. Food and Drug Administration's (FDA) Food Traceability Rule, which implements Section 204(d) of the U.S. FDA Food Safety Modernization Act (FSMA).

The goal of the collaboration is to share resources to help industry take action in preparing for FSMA Rule 204. The rule mandates comprehensive tracking and tracing of certain high-risk foods listed on the FDA's Food Traceability List (FTL) to improve outbreak response and deeper supply chain visibility.

Learn more about the collaboration and the 10 member organizations at https://info.ift.org/global-food-traceability-center-fsma-collab

GCCA Brazil Committee Discusses Regulatory Landscape, Storage Capacity

The GCCA Brazil Regulatory & Food Safety Committee met in late February, bringing together representatives from leading cold storage operators to discuss regulatory developments and emerging challenges affecting the sector.

Participants exchanged perspectives on the current international landscape, including potential logistics impacts related to geopolitical developments in the Middle East.

The committee also discussed operational aspects related to regulatory data reporting to Brazil's Ministry of Agriculture (MAPA), highlighting opportunities to improve system integration and streamline reporting processes between production facilities, cold storage warehouses, and government platforms. Additionally, the group reviewed two public consultations recently issued by MAPA regarding self-control programs for pork and poultry.

GCCA Cold Chain Index – Q4 2025

The 2025 4th Quarter updates of the GCCA Cold Chain Index for the United States and Canada is now available to GCCA members. Labor costs rose in the United States by 3.72%, a slight deceleration from the previous quarter. In British Columbia, labor costs grew more than 9% from earlier in the year. Energy and utilities across both Canada and the United States saw spikes specifically in electric power (6.62% and 7% respectively).

The tools and template for the CCI can be accessed at www.gcca.org/resource/gcca-cold-chain-index

GCCA Top 25 List 2026

Each year, the GCCA publishes a list of the largest temperature-controlled warehousing and logistics providers in the world – the Global Top 25 List. Accompanying the Global Top 25 are lists of the largest operators in North America, Latin American/Caribbean, and Europe.

The lists are determined by the capacity of temperature-controlled space operated by GCCA Warehouse Members. This year's GCCA Top 25 List will be presented live at the 2026 GCCA Convention in Scottsdale, Arizona. Learn more and access current and past lists at www.gcca.org/resource/top-25-lists

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GCCA Middle East Conflict Updates and Situation Reports

As conflict continues in the Middle East, the GCCA is providing supply chain professionals timestamped updates on operational, economic, and cold chain impacts, including potential short-term bottlenecks and longer-term consequences for temperature-sensitive goods. To see our posts throughout March and April, visit www.gcca.org/about/advocacy/tariffs-information-and-resource-center

• • •

29th GCCA Europe Conference Held in Dusseldorf

The 2026 GCCA Europe Conference was hosted in Dusseldorf, Germany, March 18-20. Delegates heard from multiple keynote presenters and panelists on topics like the German cold chain market, capital access and the economy, food sector development, European border modernization, future markets, AI and technology, low-carbon infrastructure, smart supply chain, cold chain development in emerging regions, consumer research, and e-grocery technology. The event also hosted several networking opportunities and a facility tour of e-retailer Pic-Nic's automated fulfillment center.

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CEBA and GCCA Update

As of March 2026, GCCA and the Controlled Environment Building Association (CEBA) have formally separated into independent business entities. This marks the next step in GCCA's organizational evolution, strategically positioning the organization to focus even more intently on delivering increased value to our members. For more information, please visit www.gcca.org

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.

- 22 April 2026 — One Year After "Liberation Day"
- 6 May 2026 — Understanding the New U.S. Food Traceability Requirements
- 13 May 2026 — The New Age of Cargo Theft
- 10 June 2026 — What's Left of the European Green Deal?
- 24 June, 2026 — Cybersecurity and AI Trends in Cold Chain

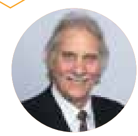
COLD CHAIN INSTITUTES

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

GLOBAL COLD CHAIN FOUNDATION
Council of **Scientific Advisors**

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

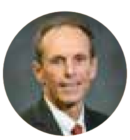


Dr. Michael Jahncke
Virginia Tech University,
Fish Products Expert
COUNCIL CHAIRMAN

Dr. Jeffrey Brecht
University of Florida,
Cool-Climate Fruit & Produce Expert

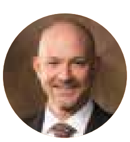
Dr. Patrick Brecht
PEB Commodities,
Refrigerated Transportation Expert

Dr. Stephanie Clark
New Mexico State University,
Dairy Products Expert



Dr. Paul Dawson
Clemson University,
Poultry Products Expert

Dr. Donald Fenton
Kansas State University,
Refrigeration Engineering Expert



Dr. Brian Fugate
University of Arkansas,
Supply Chain Management Expert

Dr. Janeth Gabaldon
Emerging Supply Chain Technologies
Expert, University of Arkansas

Dr. Cody Gifford
University of Wyoming,
Meat Products Expert

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

Dr. Eduardo Molina
Virginia Tech,
Sustainable Packaging Expert

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

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

Dr. Victoria Salin
Texas A&M University,
Agriculture Economics Expert

Dr. Subramaniam Sathivel
Louisiana State University,
Frozen Food Quality Expert

Dr. Donald Schaffner
Rutgers, The State University
of New Jersey, Microbiology Expert

Dr. Shengyue Shan
Food Science & Technology Expert,
The Ohio State University

Dr. S. Paul Singh
Michigan State University,
Packaging & Labeling Expert

Bob Tippmann
Industry & Freezing Expert,
QuickFreeze

Dr. Elhadi Yahia
Universidad Autónoma de Querétaro,
Mexico, Postharvest Technology,
0Tropical Fruit & Produce

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

COOL SOLUTIONS

SCIENTIFIC ANSWERS TO COLD CHAIN CHALLENGES

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

Q: Can frozen French fries be stored next to frozen fish without emitting odors?

A: Make sure that the French fries and fish are completely frozen to 0°F (-18°C) before they are placed in the freezer, and ensure that the packaging is intact and appropriate for these products to prevent cross contamination. These products should also not be intermingled in the freezer, so keep them on separate racks with space between them.

Check out the Food Freezing & Storage Calculator, a GCCA member resource, for more assistance calculating time-to-freeze and cost-to-freeze these commodities.

This answer was provided by Dr. Michael Jahncke, Chairman of the Council of Scientific Advisors and Fish Products Expert.

Submit your burning cold chain questions to the Council of Scientific Advisors at www.gcca.org/inquiry or at inquiry@gcca.org

NEW MEMBERS

NEW MEMBER COMPANIES OF GCCA CORE PARTNERS

GCCA WAREHOUSE

Continental Cold Inc.
Bellevue, Washington, United States

Kanejo Logística Ltda.
Rio de Janeiro, Brazil

Western Gateway Storage Company
Ogden, Utah, United States

GCCA ASSOCIATE

AR Racking Inc.
Charlotte, North Carolina, United States

Coldsense Technologies GmbH
Hamburg, Germany

Coryell Roofing and Construction Inc
Oklahoma City, Oklahoma, United States

ESL Power Systems
Corona, California, United States

ICF
Reston, Virginia, United States

Ideal Warehouse Innovations, Inc.
Woodbridge, Ontario, Canada

Infrisa Mexico SAPI De CV
Moneterrey, Nuevo Leon, Mexico

Kadean Construction
St. Louis, Missouri, United States

Made4net, LLC
Teaneck, New Jersey, United States

Narcomey Construction
Prairieville, Louisiana, United States

Pope Technologies
Las Vegas, Nevada, United States

Recticel NV/SA
Wevelgem, Belgium

Rochon Building Corporation
Toronto, Ontario, Canada

Spacemaker Systems Inc.
Ococee, Florida, United States

Weiland Doors
Norfolk, Nebraska, United States

Willog Co., Ltd.
Seoul, Republic of Korea

GCCA TRANSPORTATION

Nagle Companies
Walbridge, Ohio, United States

GLOBAL COLD CHAIN FOUNDATION - FOOD MAXIMIZATION MEMBERSHIP

Banque Alimentaire Luxembourg
Luxembourg

Community Food Bank of Southern Arizona
Tucson, Arizona, United States

Corporación Red de Alimentos Chile
Santiago, Chile

Feeding Hong Kong
Hong Kong

Food Bank of the Golden Crescent
Victoria, Texas, United States

FPBA - Federacja Polskich Banków Żywności
Warsaw, Poland

FULFILL
Neptune Township, New Jersey, United States

Greater Chicago Food Depository
Chicago, Illinois, United States

Island Harvest Food Bank
Melville, New York, United States

Lagos Food Bank Initiative
Lagos, Nigeria

Ohio Association of Foodbanks
Columbus, Ohio, United States

Red de Alimentos Chile
Santiago, Chile

Retaaza
Atlanta, Georgia, United States

Scholars of Sustenance Thailand
Pom Prap Sattru Phai, Bangkok, Thailand

Second Harvest of Coastal Georgia
Savannah, Georgia, United States

The Society of Saint Andrew, Inc. – Indiana
Indianapolis, Indiana, United States

United Against Poverty
Vero Beach, Florida, United States

Zambian Food Bank
Mwinilunga, Zambia

CARRIER TRANSICOLD has named Carrier Transicold Northwest of Auburn, Washington, its 2025 Dealer of the Year for the United States and Canada, and Grupo Refritrans Centroamérica as its 2025 Dealer of the Year for Latin America. The awards recognize top performance across all aspects of dealer operations, including sales, service, market penetration, customer satisfaction, business investment, and growth.

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DHL SUPPLY CHAIN has signed a deal with real estate development firm RLCold to develop more than five million square feet of temperature-controlled facilities across North America. Under the memorandum of understanding, DHL Supply Chain said it will combine its operational and customer strengths with RLCold's design, project management, and construction capabilities to accelerate the delivery of turnkey, food-grade, cold storage solutions. According to the partners, the project is a response to shifts in demographics and the rise of online grocery and food delivery services, which are driving demand for strategically located, multi-node cold storage networks with high-capacity storage and automated handling that improve accuracy, protect freshness, and reduce obsolescence.

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KARIS COLD and **DEVELOPMENT SOLUTIONS, INC. (DSI)** announced the opening of their new cold storage facility in Chicago's McKinley Park neighborhood. Built as new construction, the 99,530-square-foot building can hold more than 15,500 pallets of food in two freezer spaces allowing tall pallet stacks thanks to 50 feet of clearance height. A cold dock supports load in and out from 13 semi-trailer stalls, and the property offers semi-truck and car parking, a truck court and many infrastructure elements to support operations and safety, including a massive water tank and pump house in case of fire.

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LINEAGE, INC. announced the completion of its Louisville-Winstead cold storage facility expansion in Louisville, Kentucky. The expansion, which broke ground in mid-2025, adds over 84,000 square feet of temperature-controlled warehouse space to the existing Louisville-Winstead facility. This includes approximately 10,400 pallet positions across two convertible freezer and cooler rooms. The Louisville-Winstead facility offers a range of temperature-controlled warehousing and integrated services, including USDA and FDA inspection services, railcar siding, and cross-docking.

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MATTINGLY COLD STORAGE announced its partnership with ChillCo Logistics, a newly formed cold chain platform backed by long-term infrastructure investor Igneo Infrastructure Partners. Built to partner with owner-operators seeking growth and succession solutions, ChillCo preserves partner brands, teams, and customer relationships. Mattingly Cold Storage operates a multi-temperature facility with over 30,000 pallet positions. Andrew Hess, Rusty Deaton, and Angie Schmidt will continue leading the business day-to-day while joining the ChillCo executive team.

• • •

VERTICAL COLD STORAGE announced its Indianapolis facility received organic certification from Where Food Comes From Organic, Inc. By securing organic certification, the facility enables customers to consolidate SKUs from multiple origins into a single location, improving efficiency and simplifying the supply chain.

AD INDEX

Ambient 75°F

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