Cold Chain Strategic Initiatives

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GLOBAL COLD CHAIN ALLIANCE®

STRATEGIC PLAN, 2016–2018

SUPPLY CHAIN PROFITABILITY

Energy Excellence Recognition Program

- Energy Champion/Team
- Energy Waste Walks
- Site-Specific Energy KPI Goals
- Energy Efficiency Action Plans
- Energy Monitoring Activities

COMPLETE YOUR ENERGY MANAGEMENT ASSESSMENT

The Energy Management Assessment (EMA) Tool offers a strategic and confidential analysis of your organization's current energy management business practices and specific areas of opportunity. The EMA Assessment and other SEM Hub resources can then help you develop or improve your Strategic Energy Management (SEM) practices for your organization.

TAKING THIS ASSESSMENT WILL HELP YOU:

- Review your current energy practices
- Identify priority actions for improvement
- Implement an energy management program
- Compare your practices against your peers

Review the quick start guide → | **Take a sample assessment →**

Session Dashboard

Find and edit current or past session reports from your session dashboard.

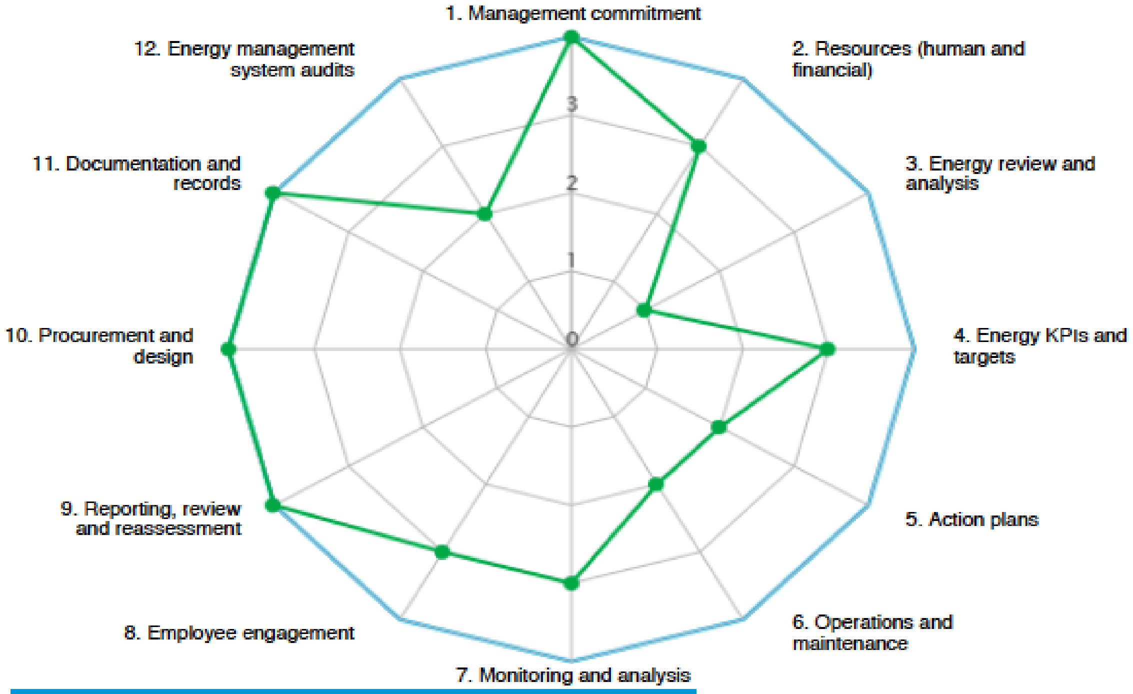
Go to Dashboard

RECOMMENDATIONS FOR YOUR BUSINESS

The following recommendations are provided based on the results of your self-assessment. The recommendations are prioritized based on your responses provided in the self-assessment, your level of development in each of the 12 components and the assessment prioritization factors for each component.

	By When	By Whom
Energy review and analysis Conduct a review of your energy using equipment and energy bills to identify savings opportunities. More info: https://semhub.com/resources/browse?query=audit		
Action plans Prepare an energy improvement plan(s) for the current year for reducing energy use and organizational activities. Incorporate clear timeframes and responsibilities for each project and activity. More info: https://semhub.com/resources/browse?query=Energy+project		
Operations and maintenance Review and revise your standard operating procedures to include specific actions to reduce energy waste to ensure persistence of energy savings. More info: https://semhub.com/resources/browse?query=operations+maintenance		

YOUR SELF-ASSESSMENT RESULTS



Component	Description
1. Management commitment	Executive involvement in promoting and deploying energy management
2. Resources (human and financial)	Resources required for with energy management, including as budgets, energy leaders, energy teams
3. Energy review and analysis	Regular assessment of energy consuming activities
4. Energy KPIs and targets	Strategically relevant metrics of energy consumption and waste
5. Action plans	Specific plans related to energy management
6. Operations and maintenance	Ongoing attention to energy during regular business operations
7. Monitoring and analysis	Monitoring of energy consumption at the appropriate level and the continuing analysis of data
8. Employee engagement	Employees involvement in energy consumption and savings
9. Reporting, review and reassessment	Information flow and periodic adjustments in response to changes
10. Procurement and design	Including energy in purchasing and design of equipment and supplies
11. Documentation and records	Documentation of operational processes and the management system
12. Energy management system audits	Periodic assessment of the entire management system for energy

Congratulations!!!

Best in Class. Outstanding!!!

You have rated your business at the Best in Class level (6) for the following components:

Management commitment
Documentation and records

6 Refrigeration System

Refrigeration System Type	
Refrigeration System Set Points	
Blast Freezers	
Conventional Freezers	
Refrigerated/Chilled	

- Ammonia Single Stage Screw
- Ammonia Two Stage
- Low Charge Ammonia
- CO2 Refrigerant
- Freon Air Cooled
- Freon Water Cooled
- Other / Unknown

7 Door Automation

Door Automation by Space	
Blast Freezers	
Conventional Freezers	
Refrigerated/Chilled	

8 Facility Lighting

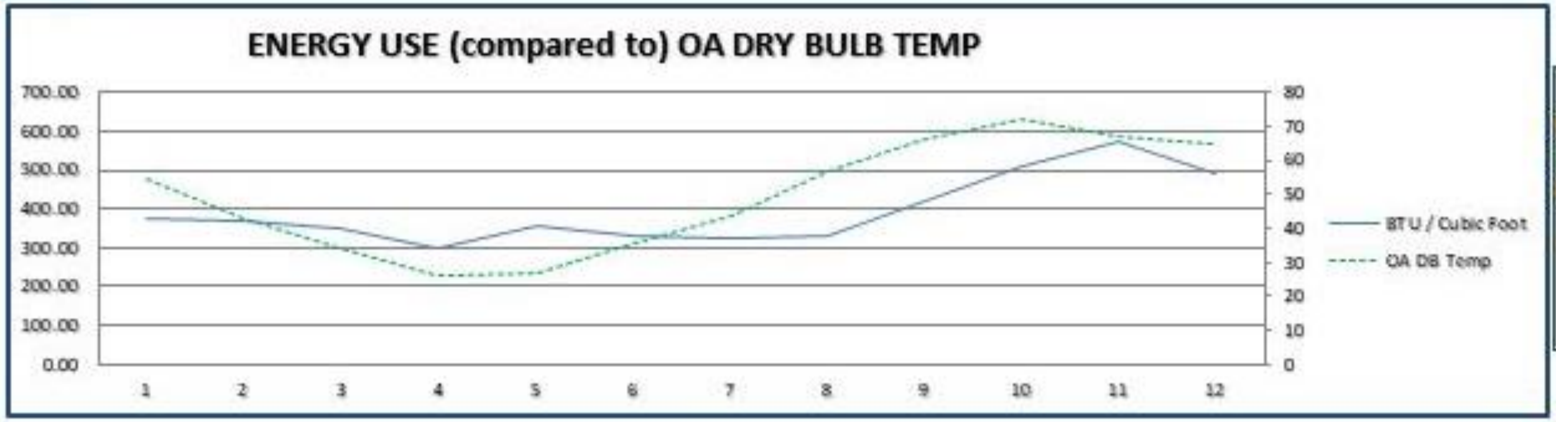
Facility Lighting Type by Space	
Blast Freezers	
Conventional Freezers	
Refrigerated/Chilled	
Non-Conditioned Storage (Ambient)	
Office/Support	

- LED
- T5
- T5HO
- T8
- T12
- Mercury Vapor
- Metal Halide
- High Pressure Sodium
- Other

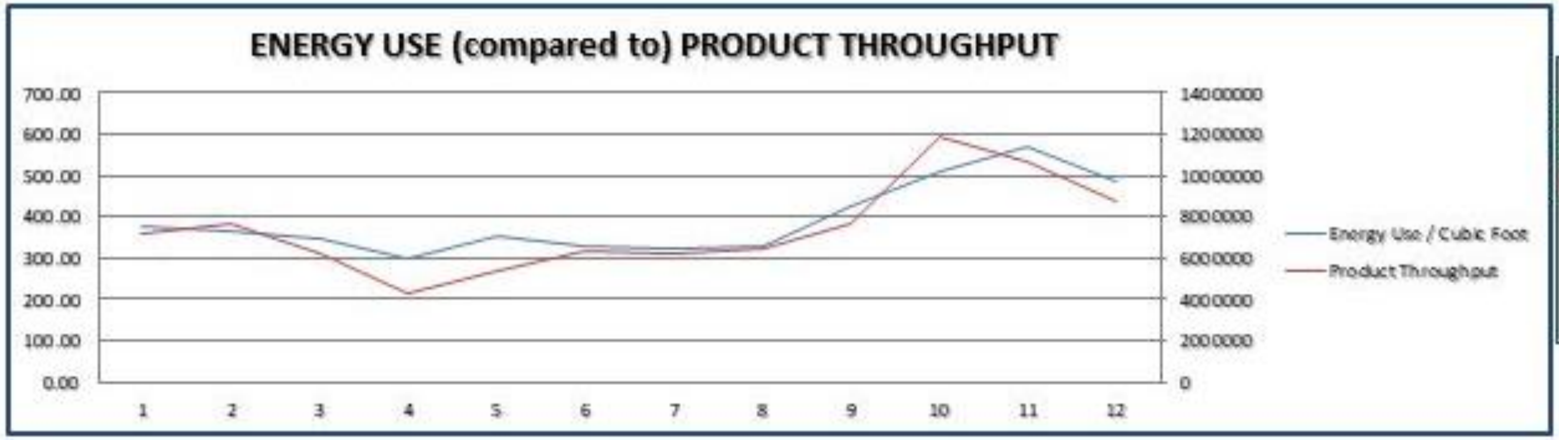
9 Building Envelope R-values

Building Wall R-value	
Building Roof R-value	

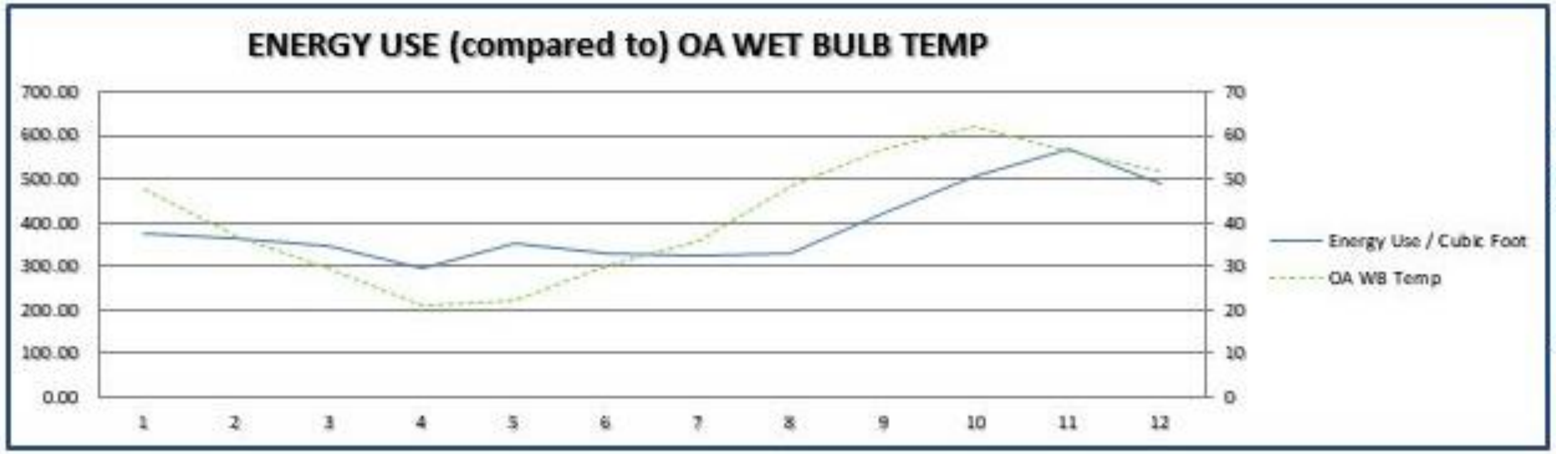
Corelation Graphics - Comparing Energy Use to Dry Bulb, Wet Bulb and Throughput



Corelation Factors Year 1,2,3
0.795
0.804
0.767
Green indicates weather may directly effect energy use; building envelope and insulation may warrant further review.



Corelation Factors Year 1,2,3
0.913
0.847
0.596
Green indicates product throughput greatly effects energy usage and may warrant review of doors and door controls.

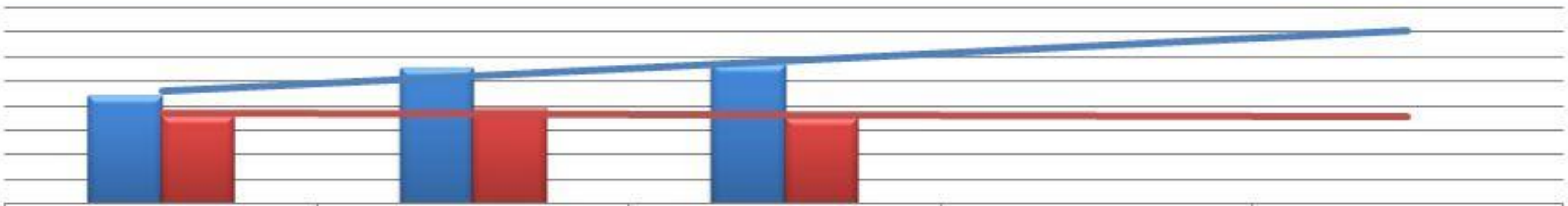


Corelation Factors Year 1,2,3
0.774
0.782
0.836
If green, and greater than dry bulb corelation in previous column then refrigeration system may warrant review.

Denovo
ENERGY ASSESSMENT TOOL

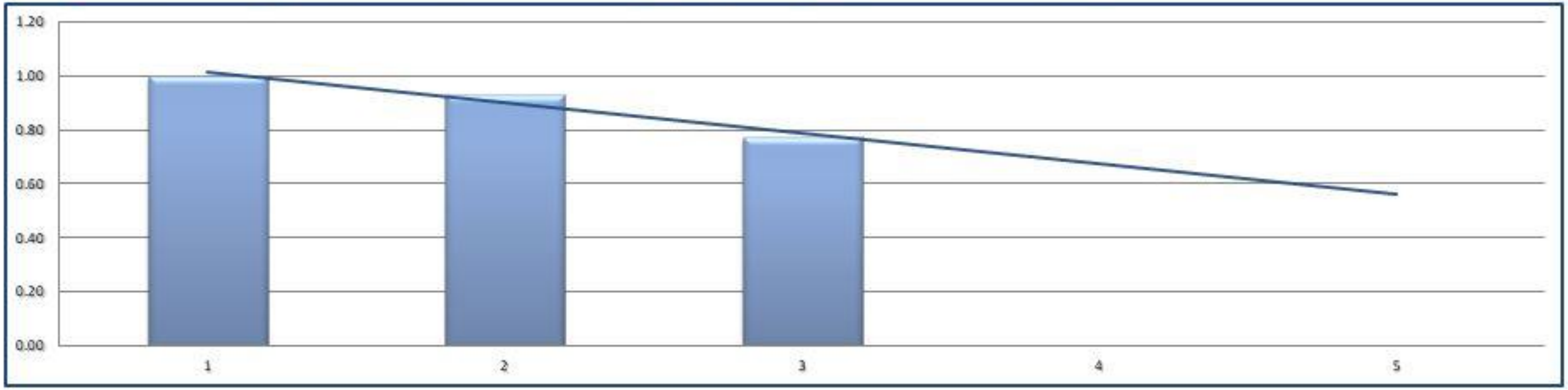
GLOBAL COLD CHAIN ALLIANCE®

Total Annual Energy Use and Product Throughput (snapshot of annual facility data)



	1	2	3	4	5
Product	8873599	11110122	11318437		
Energy	7,190,913	7,869,600	7,039,288		

Annual Energy Use Per Product Throughput (Energy / Pounds Product)



Quarterly Reports - Comparison of Current Quarter to Average of First Year

Quarter	Product Throughput	Total Energy Consumed	Energy Per Throughput	Average Energy per Throughput Improvement
Q1 Y1				6%
Q2 Y1				-19%
Q3 Y1				-1%
Q4 Y1				3%
Q1 Y2				11%
Q2 Y2				3%
Q3 Y2				-27%
Q4 Y2				24%
Q1 Y3				18%
Q2 Y3				31%
Q3 Y3				15%
Q4 Y3				14%

Gold Level Qualification (Energy Savings vs Throughput)

Facility Savings - Energy Per Throughput - 10% Reduction Target	
Year 1 to Year 2	△ 7%
Year 1 to Year 3	● 23%
Year 1 to Year 4	(Data Not Provided)
Year 1 to Year 5	(Data Not Provided)
◆	(indicates 0% savings)
△	(indicates 0-9% savings)
●	(indicates 10%+ savings)

WWW.GCCA.ORG/ENERGYEXCELLENCE

Now accepting applications!

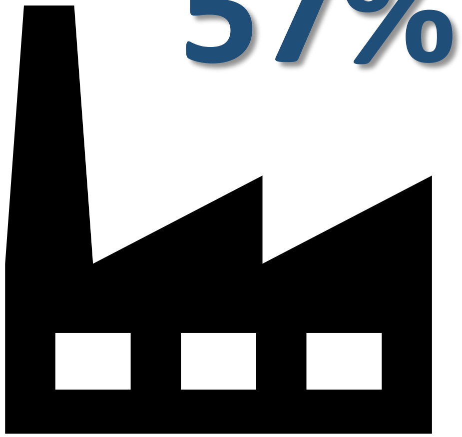
GROW THE INDUSTRY


COLD CHAIN CUSTOMER RESEARCH REPORT
GLOBAL COLD CHAIN ALLIANCE®
Results and findings of GCCA's research into food companies' perceptions of the cold chain, and how cold chain providers can improve their services and relationships with these partners.
About the Research
GCCA SURVEY BY THE NUMBERS
202
COMPLETED RESPONSES
14
COUNTRIES REPRESENTED
United States 69%
South Africa 13%
Canada 5%
Satisfied with their Primary
Overall Satisfaction with the Primary
Overall:
30% Extremely Satisfied
43.57% Somewhat Satisfied
7.86% Neither Satisfied nor Dissatisfied
13.57% Somewhat Dissatisfied
5% Extremely Dissatisfied
"Small players may not have the resources... but the smaller ones, sometimes you're just talking to the owner, so you got the ears of the right person."
—Processor
Indicators: Reporting Needs a Conversation
[Figure 11] KPIs, Ranked
Shipping Accuracy 151
Warehouse Cost per Unit 138
On-Time Delivery/ On Time Shipment 127
Inventory/Cycle Count Accuracy 117
Out-bound Turn Times 75
In-bound Turn Times 72
Warehouse Shrinkage (adjustments) 65
Case Pick Percentage 56
"I think the industry could use some standardization, frankly, in terms of their reporting back to their clients or retailers. So, with some consistency there, I think that to me, represents a big step that can be made."
—Retailer

Whole Foods Market
1-800-flowers.com
Sprouts Farmers Market
Gordon Food Service
Kroger
Grocery Outlet bargain market
Smart & Final
Wegmans
Kwik Trip
Walgreens
ALDI

Plumrose
Butterball
Land O Lakes
bel
The Laughing Cow
Dannon
Coca-Cola
Smithfield
Grimmway Farms
Saputo
Mondelēz International
Kellogg's
ConAgra Foods
Johnsonville
The HoneyBaked Ham Company
Perdue
Organic Valley
Williams Country Sausage
Made in Tennessee since 1958
Maple Leaf
Titan Farms
Quality First
Tillamook
Ocean Spray
Firestone Walker Brewing Company
Dole
Sargento

Respondent Company Function

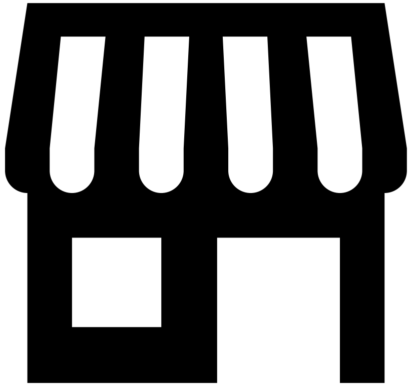


57%

Food Manufacturers/Processors

29%

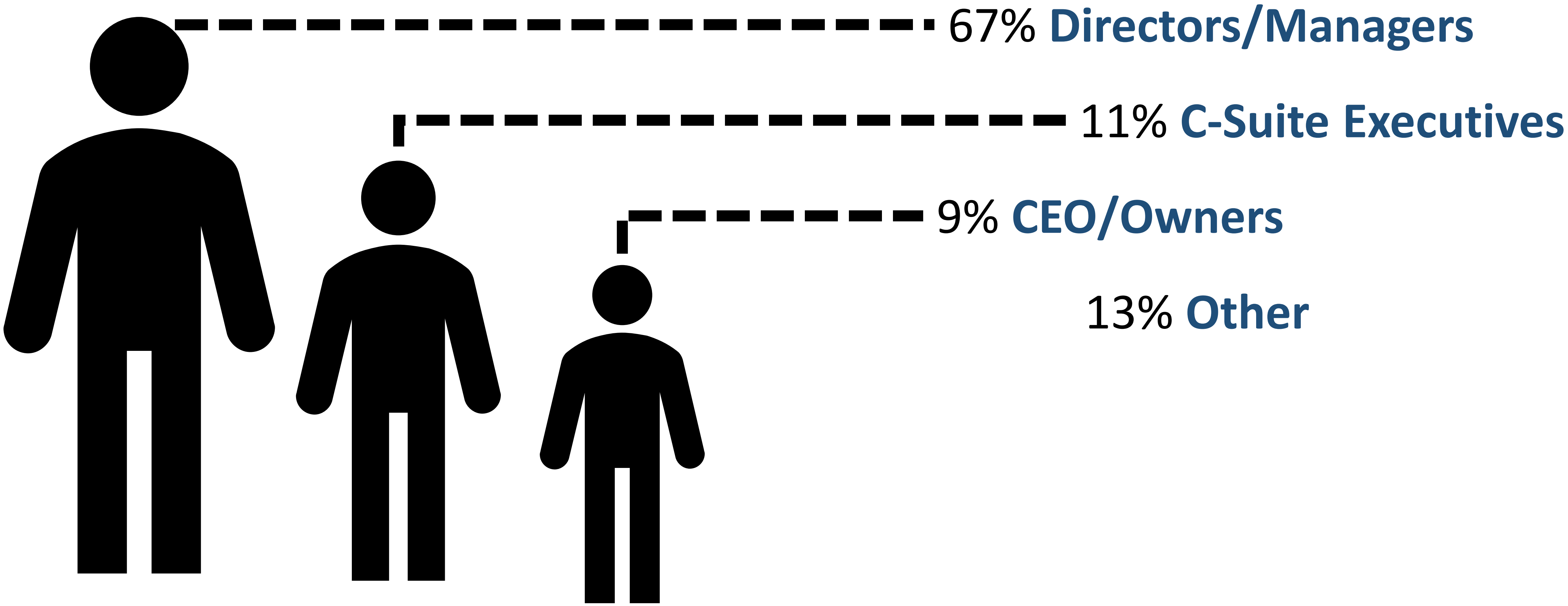
Refrigerated/Frozen Distribution



14%

Agriculture production, Retail, HRI

Respondent Position



Respondent Company Revenue

$100,000,000 or Greater	100,000,000 – 50,000,000	$50,000,000 - $10,000,000	Less than $10,000,000
$	$	$	$
55%		**20%**	

Customer Headquarters

69%

13%

5%

Needs & Wants in a Cold Chain Provider

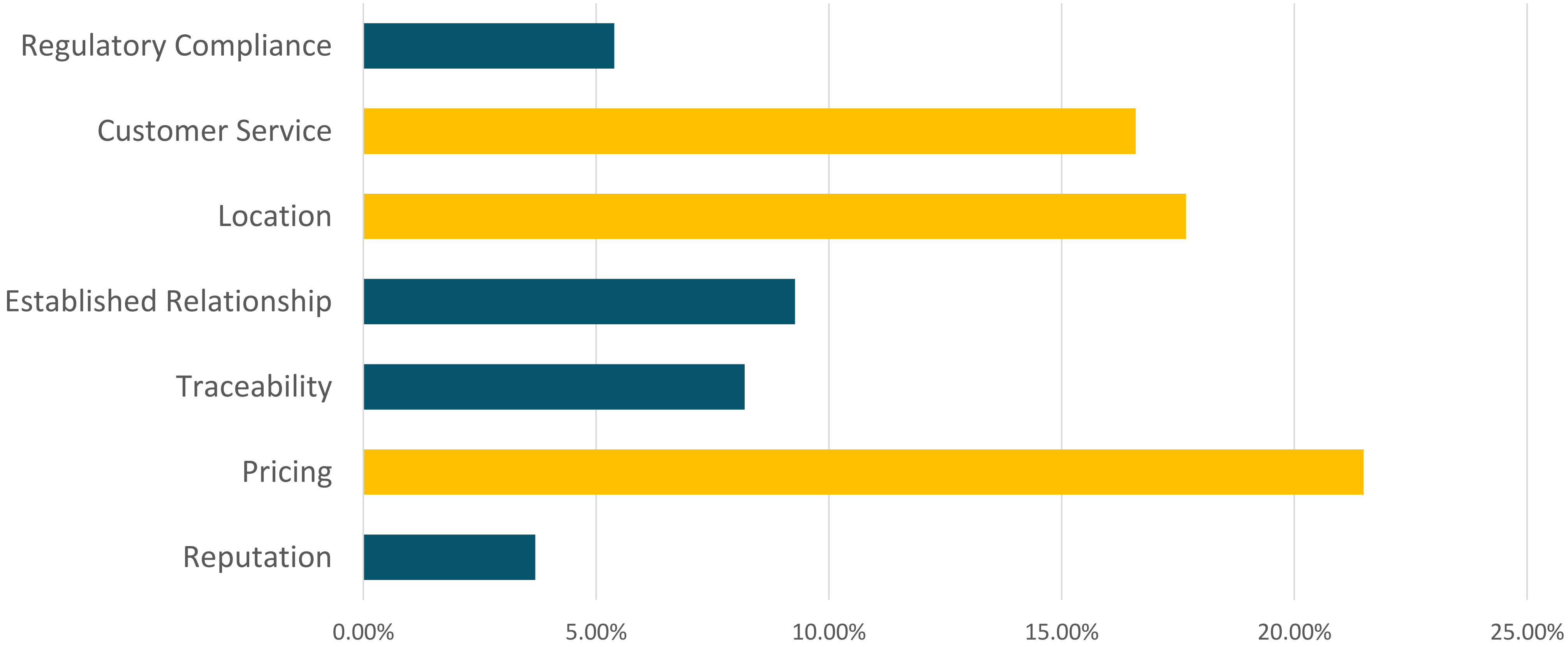
KPIs Ranked

1. **Shipping Accuracy**
2. **Warehouse Cost per Unit**
3. **On-Time Delivery/On-Time Shipment**
4. Inventory/Cycle Count Accuracy
5. Out-bound Turn Times
6. In-bound Turn Times
7. Recent Warehouse Audit Score (AID, BRC, SQF, etc.)
8. Warehouse Shrinkage (adjustments)
9. Case Pick Percentage

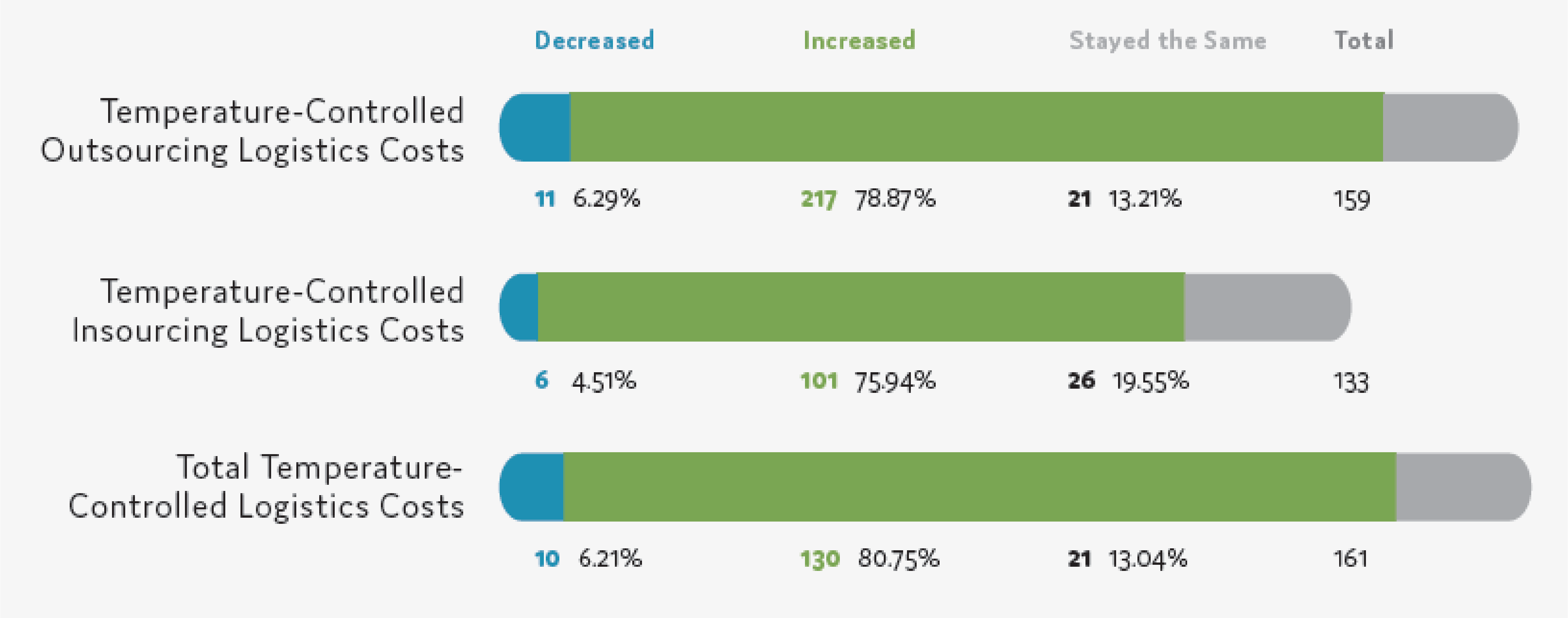
“*I think the industry could use some standardization, frankly, in terms of their reporting back to their clients or retailers. So, With some consistency there, I think that to me, represents a big step that can be made.*”

- 2017 Retailer Focus Group

Factors in selecting a 3PL partner



Temperature-Controlled Logistics Costs in the Last 24 Months

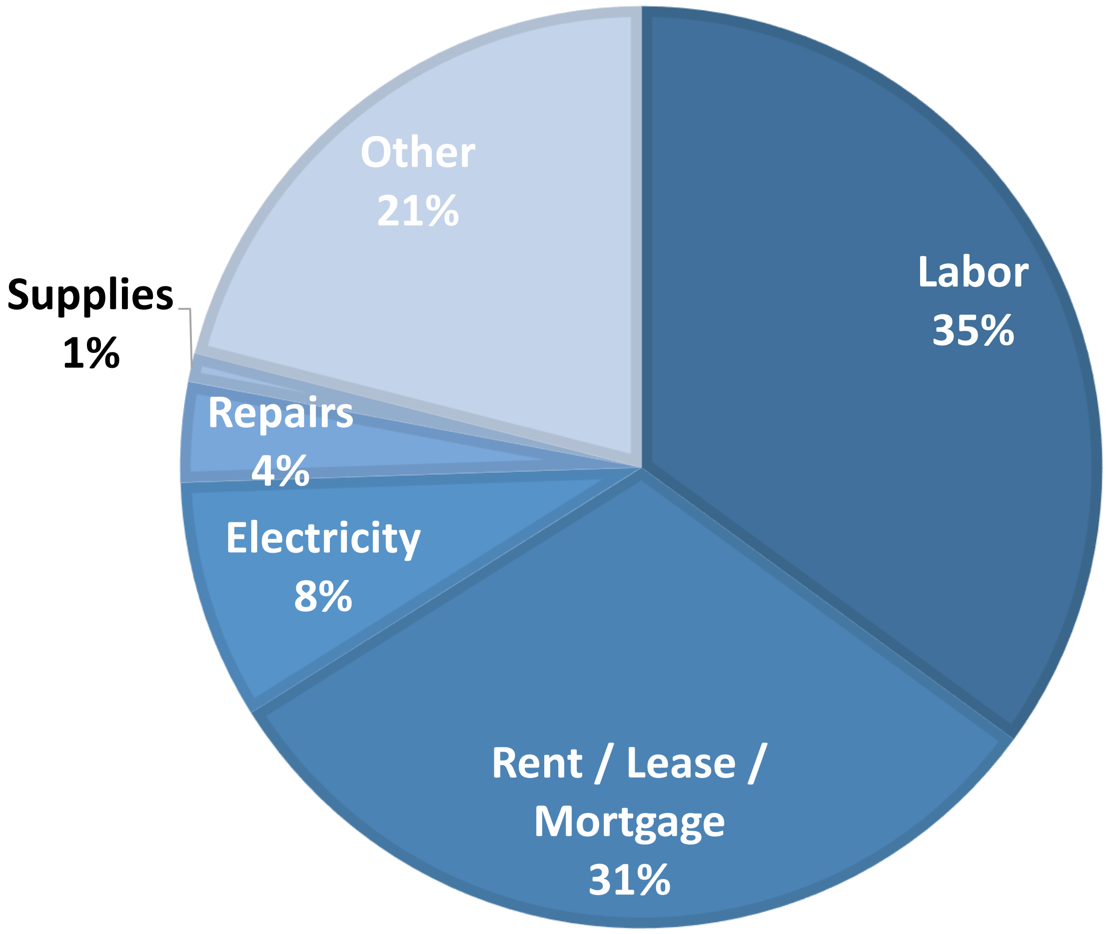


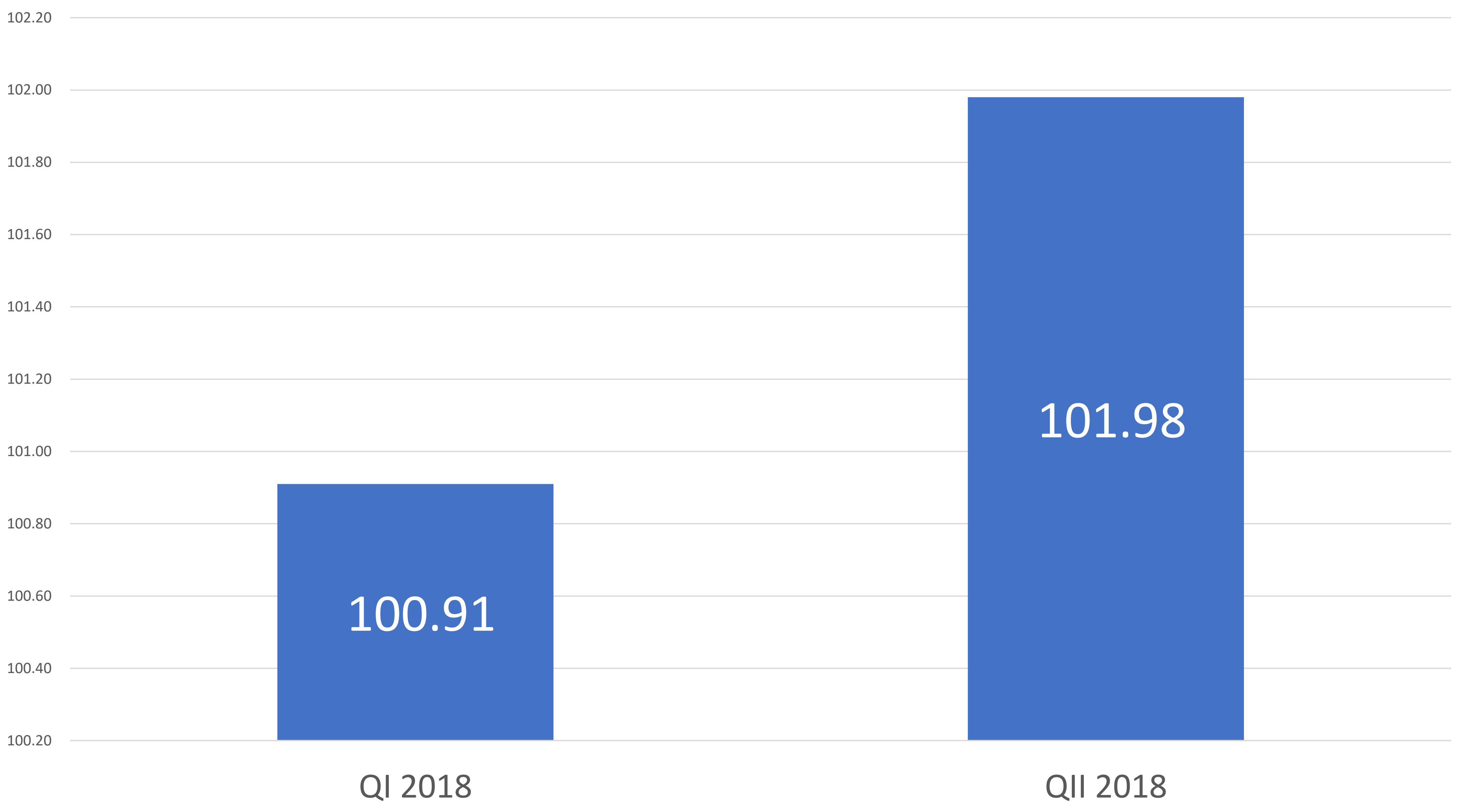
Warehouse Cost Per Unit Discrepancies

Companies with an ***annual revenue greater than $100,000,000*** saw 'Warehouse Cost Per Unit' drop to #4 compared to #1 in overall reporting.

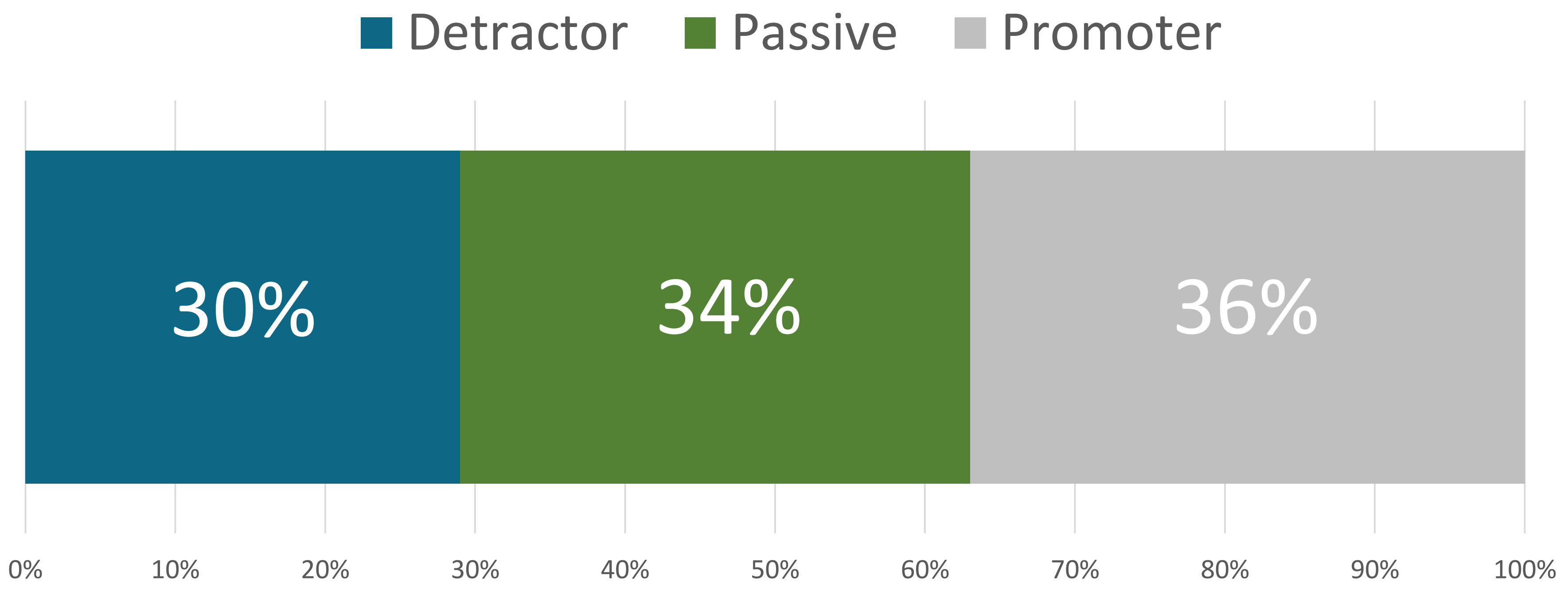
When looking at company type or function, those in ***refrigerated or frozen distribution*** saw "Warehouse Cost Per Unit" drop to last place (#9).

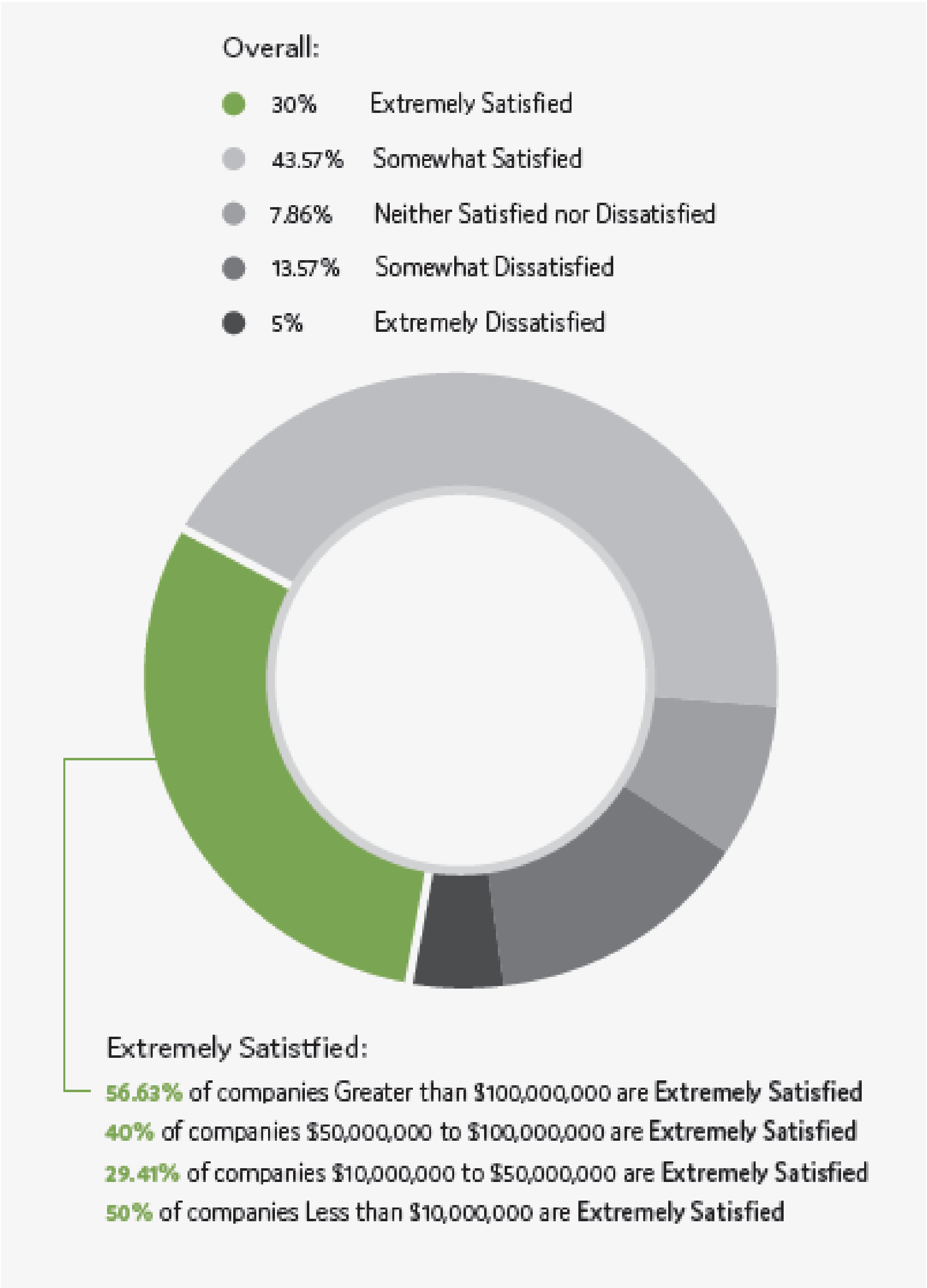
Cost Shares are derived from most recent GCCA Productivity & Benchmarking program




102.20
102.00
101.80
101.60
101.40
101.20
101.00
100.80
100.60
100.40
100.20
100.91
101.98
QI 2018
QII 2018

How likely are customers to promote the use of temperature-controlled 3PL services?



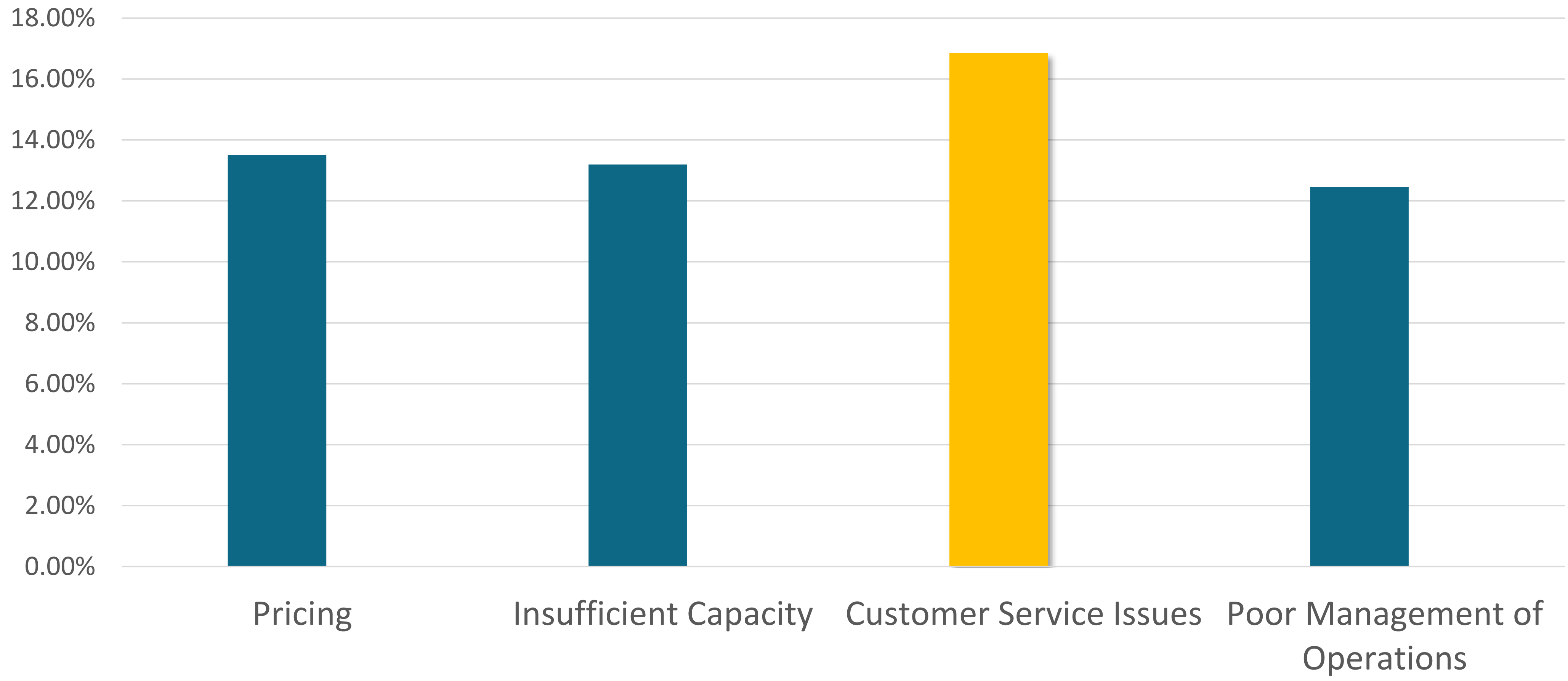


"Overall satisfaction with your primary cold chain provider."

Net Promoter Score

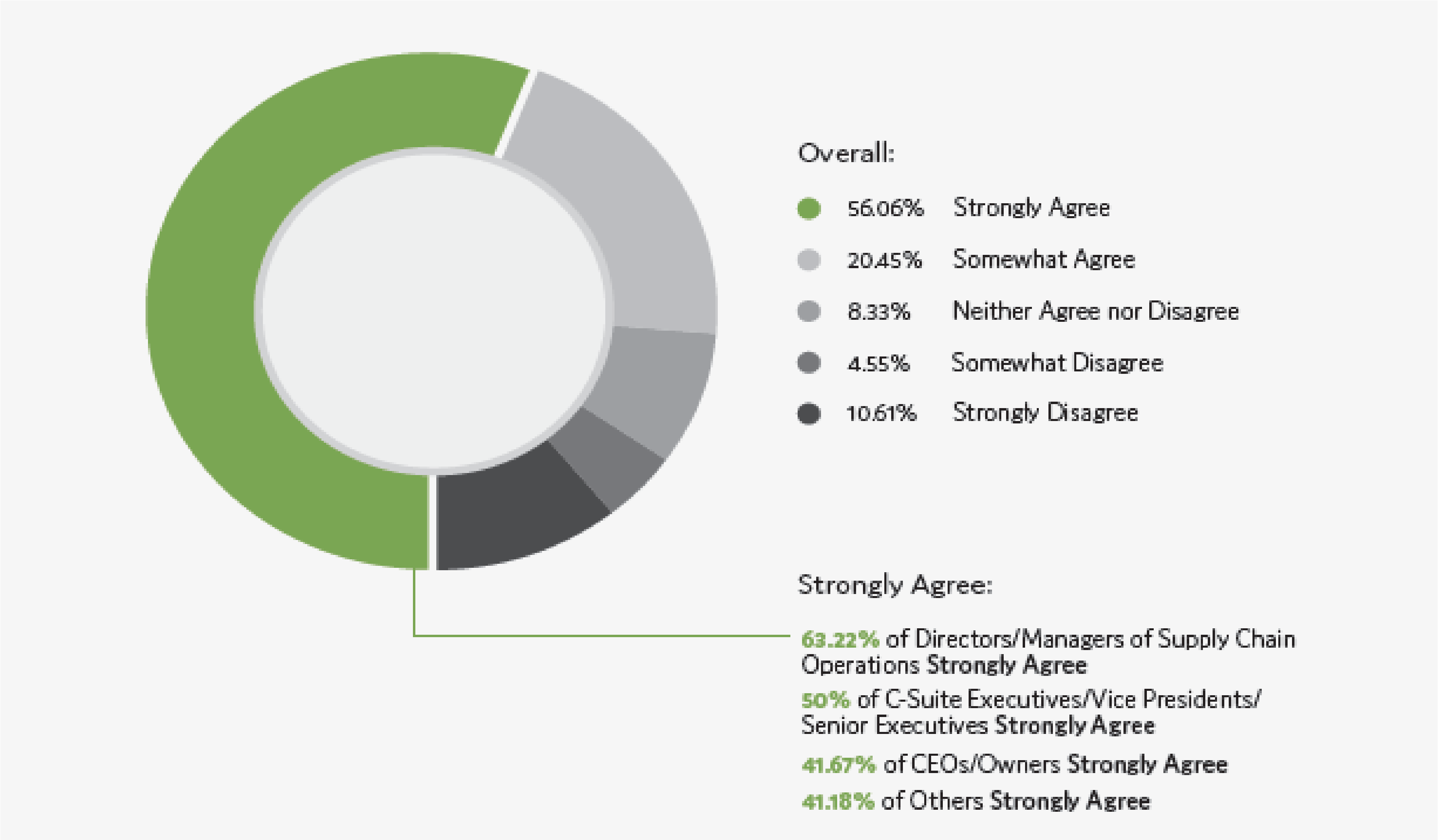
In the NPS range of -100 to 100+, anything above 0 is considered "good", while anything above 50+ is "excellent."

Most common reasons for ceasing work with a 3PL



Business trends in the next 5 years

My cold chain provider plays an important role in my company's food safety.



Cold chain 3PL providers are experts in temperature and supply chain management. They partner with fresh/frozen food companies and retailers to provide distribution, warehousing and value-added services that enable these companies to:

Protect and enhance the brand

Thank You!

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