



JANUARY 29-30 • TAMPA FL

SHIFTING TRADE

Title: Market Snapshot – Cold Chain
Presented By: Howard Posner, NAGA Logistics





Industry Milestones - 2019

- THE LONG-PROMISED FUTURE HAS ARRIVED . . .
- KINDA . . . SORTA . . .





Industry Milestone - 2019

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BLOCKCHAIN AND BITCOIN

- Promising to providing secure traceability from farm to table.
- Promising secure transactions globally.



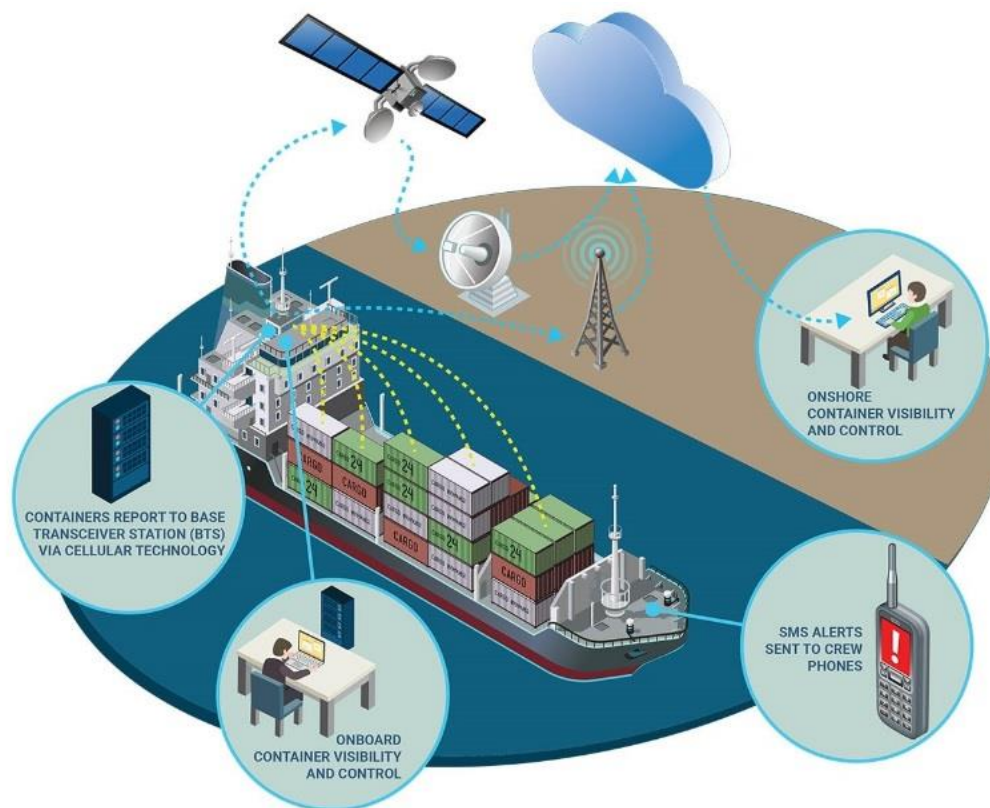


Industry Milestones - 2019

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REMOTE MONITORING

- Carriers are rolling out real-time temperature monitoring
- What's the value of this information to shippers and carriers?



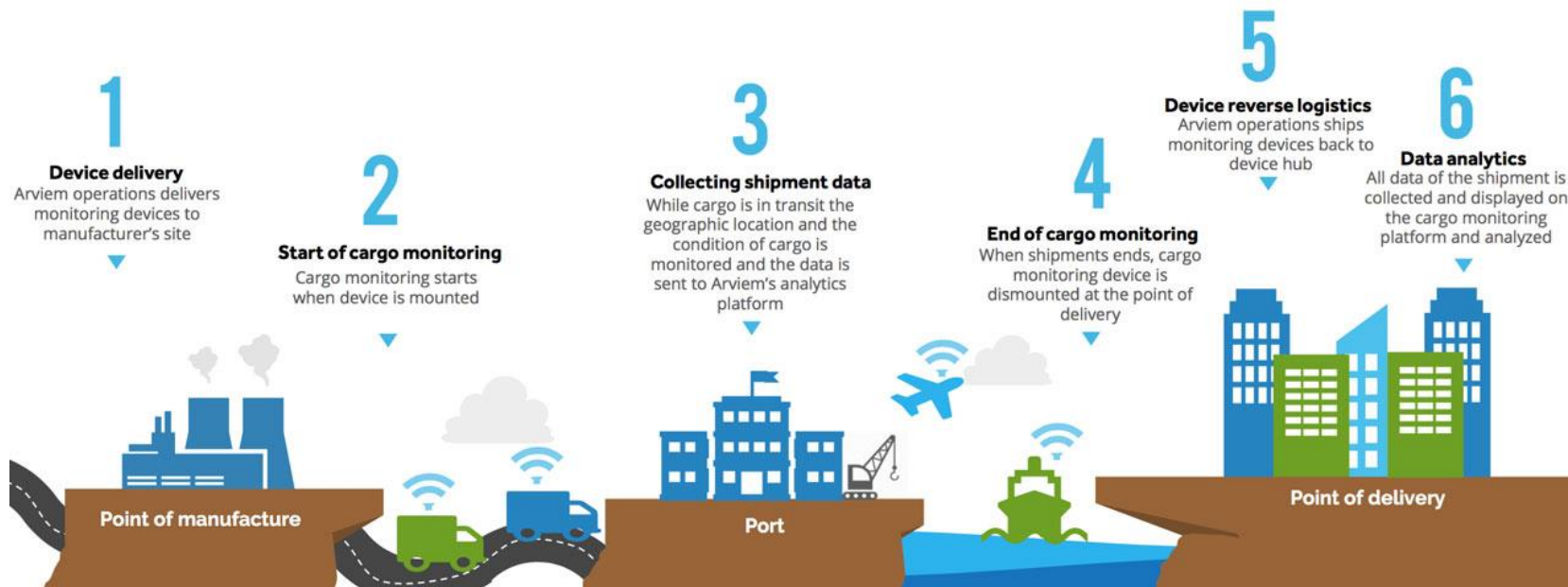


Industry Milestones - 2019

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CARRIER AUTOMATION

- Instant rate quotes and booking process
- Complete digital interface on track and trace
- Push to providing door/door solutions including customs clearance
- Moving further away from real interaction with customers





Industry Milestones - 2019

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Milk, beef representatives urge seafood industry to join fight against plant-based incursion

By Cliff White
January 24, 2020

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National Milk Producers Federation President and CEO Jim Mulhern offers a simple piece of advice to the seafood industry regarding the wave of new plant-based analogs making their way into the market with an aggressive marketing message that their products are superior to seafood: Fight back.

Speaking on a panel titled, "Fishless Fish: The impact of plant-based and cell-cultured products on traditional seafood and other proteins," Mulhern said the dairy industry "played nice" with what he called the "imitation milk" sector for too long.

"Four to five years ago ... we decided not to play so nice and ... deploy a new strategy, rais[ing] visibility of the issue with consumers, go to Capitol Hill to get legislators to pay attention and really put a spotlight on this issue," Mulhern said. "I'm very pleased to see in the last five years it has now grown into much broader issue. It's an issue for all of us producing natural foods in the protein category, and I'm optimistic about the prospects of action, and just raising the visibility of discussion, even among consumers ... People want to know what's in the food they're eating."

TRACK YOUR SHELLFISH

"We know instantly who provided the product and who took delivery."

Ian MacGregor
The Lobster Place

 **Seasoftware**

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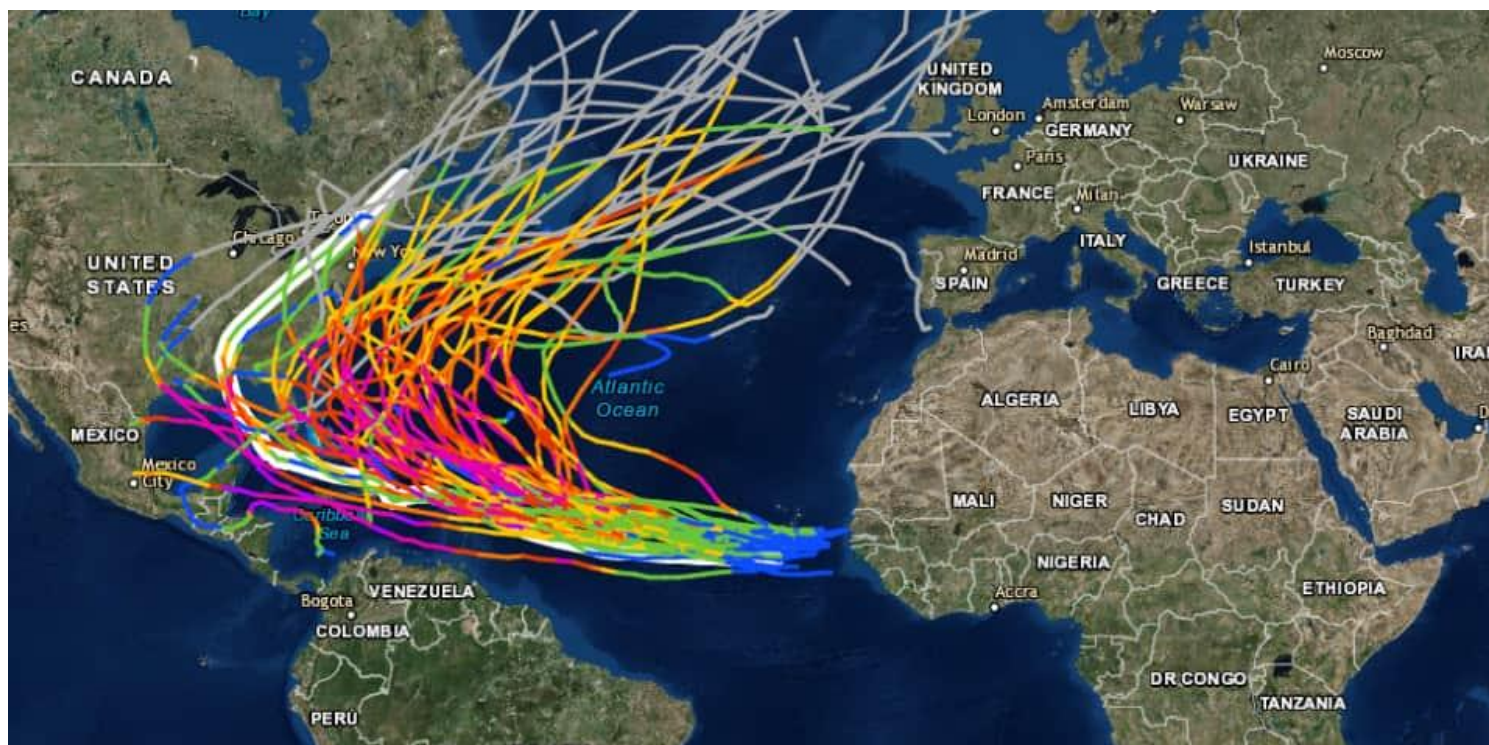


Industry Challenges - 2020

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CLIMATE CHANGE

- Too cold, too hot, too wet, too dry . . .
- Global Production of Citrus has dropped in 2019-20





Industry Challenges - 2020

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TRADE WARS / POLITICAL INSTABILITY





Industry Challenges - 2020

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TRADE WARS / POLITICAL INSTABILITY





Industry Challenges - 2020

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THE UNEXPECTED

- The spread of disease can quickly wreak havoc on global markets.
- How quickly can governments and markets adjust?



SINGAPORE MALAYSIA AUSTRALIA

navirus
(Jan. 27)



Improvised table for cutting meat Live frogs for sale Fish and frog remains Frog being slaughtered for client Nylon industrial gloves Unwashed buckets Dirty scale

Vendor prepares a frog for sale in a Wuhan street market



Industry Opportunities – 2020

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CLIMATE CHANGE

- Disaster can often beget opportunity
- Changes in weather patterns long and short-term

ASIA PACIFIC

The New York Times

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An onion market in Lasalgaon, near Nashik, India. Atul Loke for The New York Times

By Jeffrey Gettleman, Julfikar Ali Manik and Suhasini Raj

Oct. 1, 2019





Industry Opportunities - 2020

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TRADE WARS


clementines-from-castellon-lose-us-market/

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Spanish clementines from Castellon lose US market

The tariffs that US President Donald Trump has imposed on European agro-food products have caused the Spanish province of Castellon to stop exporting clementines to the United States this year.

The last two exporters that were shipping citrus fruits to the US market, Bagú and Nulexport, have decided to take a step back because, according to sources familiar with the process, "the current conditions make exporting to the US unfeasible." The refrigeration terminal of the port of Castellón, already affected by the continuous drop in exports recorded in recent campaigns, has also been hit by this, as customs fees have become an insurmountable obstacle.

13 people will not work during these months

Even though Canada could absorb the volume of clementines from Castellón that was intended for the US. In the US, this country does not have a cold treatment protocol to prevent the arrival of Mediterranean pests, as these cannot survive there. This entails that exporters won't use the Noatum refrigeration terminal in PortCastelló in order to cut costs.

For this reason, the 13 people that Fricasa (under Noatum) usually hired for the campaign won't be needed. The company's survival is not guaranteed with just the ships arriving from Argentina during the off-season (this year, there have been five), so now its work is focused on the search for new products with which to create activity.

Exports once reached 80,000 tons

With the end of shipments to the United States, as well as the difficulty of recovering them in the future due to the growth of California's clementine production, it is the end of an era in which the US market served as a symbol of the quality and reputation of Castellón's fruit. Not surprisingly, with the turn of the century, the export of clementines from the Grau docks to Philadelphia reached 80,000 tons.

But the pressure from the American citrus lobby, initially reflected in the fruit fly crisis, after the alleged discovery of live larvae of *Ceratitis capitata* in Castellón clementines, motivated the closure of this market for almost a year. When the reopening was achieved, thanks to the signing of a cold treatment protocol for Spanish fruit, US producers

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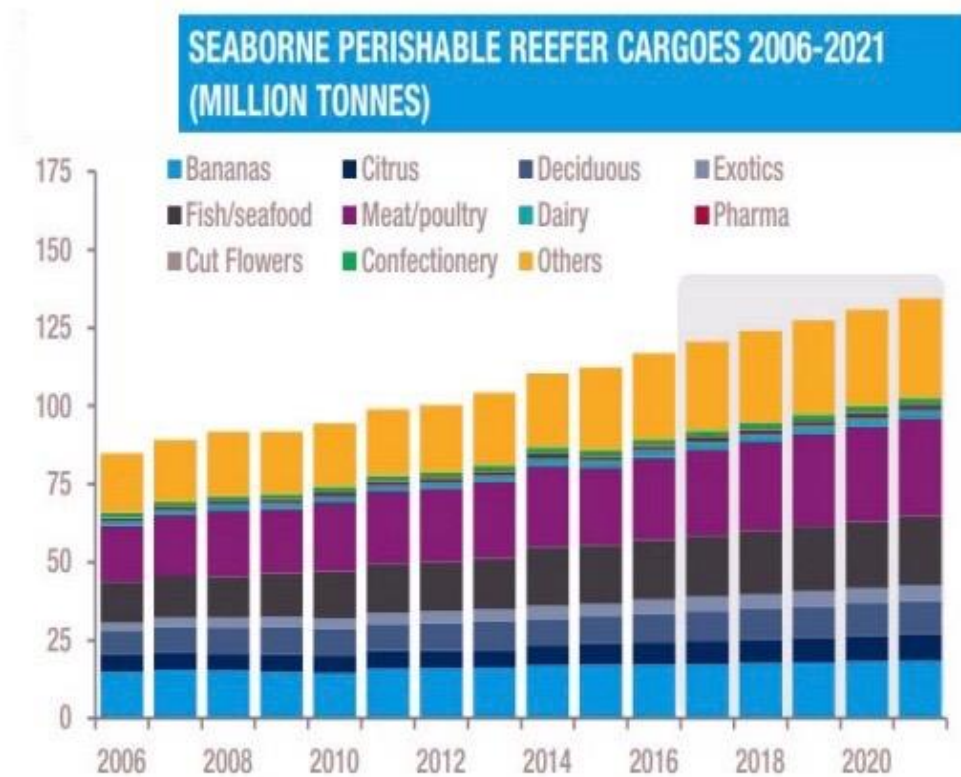
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Industry Opportunities - 2020

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TO PARAPHRASE JAMES CARVILLE, “IT’S THE MARKET, STUPID.”



Source: Drewry Maritime Research, Sextant Consultancy