

Shifting Trade Routes for Refrigerated Cargoes Workshop

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C.H. ROBINSON

» C.H. Robinson Core Service Lines



Truckload

Powerful truckload network—everything from transactional to dedicated fleet—for the most capacity options for your shipments



LTL/Consolidation

One call for virtually any kind of LTL freight—temperature controlled, cross-border, expedited, and even flatbed



Intermodal

Comprehensive, route neutral, North American solutions from a Top 5 IMC with direct programs on all Class 1 Railroads



Air

Convenient domestic and global air freight services for your most time-sensitive freight



Ocean

Rated the number one NVOCC on the Trans-Pacific Eastbound (Asia to U.S.) and the leading LCL carrier on the Trans-Pacific



Customs

Fourth largest Customs House Brokerage in North America—Trusted Advisor® experts dedicated to delivering best practices in global forwarding and trade policy



Sourcing

Fifth largest produce company in North America with proprietary and national brands, and a wide range of services—P.O. management to fulfillment



Management Services

Integration of a single global technology platform, supply chain expertise, and consulting services

Global TMS technology + Managed Services, offered through TMC, a division of C.H. Robinson

» C.H. Robinson Sourcing - deep expertise in product categories



» Market Trends in Refrigerated Cargo



- Consumers and Food Retailers demand a fairly constant supply of fresh fruit varieties
- One stop shopping is increasingly vital to the consumer
- Increase in income levels are driving demand for fresh fruits
- Food Industry has expanded it's global sourcing by taking advantage of global seasonal produce variations
- Efficiency and reliability of temperature control technology facilitates global sourcing

» Market Trends in Refrigerated Cargo, cont.

- Logistical flexibility; Global visibility to shipment critical data; and customized solutions are necessary
- Reliable capacity when faced with seasonal surge in production and demand
- Tight delivery windows
- Comprehensive logistical planning and processes to maintain the integrity of the shipment to the “last mile”
- Continuous process improvement of the Cold Chain



» Global Reefer Industry



- Global reefer volume growth projected at 4.5% year
- Perishable growth of 3.3% for the last 10 years
 - Trade of exotic fruit category has grown by an average of 9.1%
- Reefer fleet exceeds 2 million TEUs
 - Growth estimated at 6%
 - Units cost 5-6 times the amount of dry container
- Conventional reefer vessels continue to decline
 - 77 scrapped during 2010-2011 (Drewry)
 - 74 scrapped in 2012

» Global Reefer Industry



- Carriers are demanding better return of their reefer fleets
 - Driven by need to reduce financial losses
 - Projected shortfall in reefer capacity by 2015-2016
- Carriers are focused to closely match vessel plugs to bookings
- Opportunity for Global Logistics providers to become proficient at managing Cold Chain Logistics
- Air conversion influenced by cost reductions and leaner inventories

» Export & Import Challenges

- Integration of work processes
- Infrastructure necessary to maintain cold chain integrity
- Equipment and space allocation
- Timely documentation
- Planning made more complex by global supply and demand of perishable products
- Visibility to critical shipment events



» C.H. Robinson Cold Chain Reliability



- **Growers.** Local and regional growers reduce food miles for fresher produce.
- **Sourcing.** Competitive pricing, global procurement options, quality products, and unmatched customer service.
- **Refrigerated Transportation.** Elastic capacity and transportation expertise for all your perishables.
- **Direct-to-Store Delivery.** Dependable supply chain power to efficiently stock fresh items.
- **Service Centers.** From consolidation to quality inspections, you get a flexible suite of solutions.
- **Consumer Brands and Programs.** Increase store-traffic with national and proprietary brands.

Global Network and Services



● C.H. Robinson office

NORTH AMERICA
3 COUNTRIES | **7850** EMPLOYEES

Truckload
 LTL
 Intermodal
 Air
 Ocean
 Customs
 Managed TMS®
 Sourcing
 Consulting
 Project Logistics
 Warehousing

SOUTH AMERICA
4 COUNTRIES | **140** EMPLOYEES

Truckload
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 Customs
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 Warehousing
 Project Logistics

EUROPE
14 COUNTRIES | **940** EMPLOYEES

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 Air
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 Warehousing

ASIA
10 COUNTRIES | **1560** EMPLOYEES

Truckload
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SUPPLY CHAIN IS YOUR COMPETITIVE ADVANTAGE

» *Accelerate Your Advantage*®

- Outpace your competition
- Achieve better outcomes
- Satisfy your customers

Thank You



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