

Hot shots & hot spots:

Opportunities, challenges and trends in the cold chain

On how the leading companies make the difference
....and how to become one of them.



VebaBox
Cool Solutions

Contents

	Foreword	3
	Management Summary	4
1.	The Research Methodology	5
2.	Strategy and Challenges	9
3.	Trends & Developments	14
4.	Compete or Collaborate?	20
5.	Quality, Proof and Incidents	23
6.	The Effectiveness Score in the Cold Chain	26
7.	Learning from the leaders	29
8.	Collaborating for a More Effective Cold Chain	34

Foreword

Demand for the transportation of temperature-sensitive products is expected to triple within the next five years. More and more products are transported under controlled climate conditions and this market continues to grow. New solutions will be needed just to keep up with the demand. At the same time, there is more international regulation on product safety than ever before. All of this means that the cold chain is in a state of transition. Is the temperature-controlled supply chain ready for these changes? What are the challenges in the market, and what investments will be needed to meet them? Also, what makes a leader in this market, and what can we learn from them?

These are the questions that led VebaBox to initiate a market survey, the results of which we want to share with you in this report. As a disruptor in the traditional cold chain, our goal is optimal efficiency, guaranteed quality and flexibility. This research helps us to better understand the market. It shows where manufacturers, warehouses and transporters expect to be able to reap the most rewards.

One thing is certain: the organizations in the cold chain will need to collaborate more. Now that manufacturers are judged by both regulatory agencies and the consumer, we need to show that the handling of products is safe and stable from beginning to end. That accountability, and the need for proof and transparency, applies to every organization in the chain. The differences in how ambitious each organization is in this area are quite significant. We'll see in this report what it is that the leaders do differently and the lessons the rest can take from that to become leaders themselves.

The purpose of this research for VebaBox is to help strengthen the collaboration between the different links in the chain. We want to strive together for optimum effectiveness. Together we can create more quality, certainty and efficiency in this increasingly demanding market. We look forward to discussing the insights from our research with you personally.



Roland van de Ven
Managing director

Management Summary

The results of the research reveal a cold chain that is changing drastically, and that most of the sector could benefit from working more effectively. The greatest challenges for decision-makers are cost reduction, customer satisfaction, a tight job market and regulatory compliance issues.

Effectiveness in the sector is lagging when it comes to a sense of urgency to change. The ability to adapt appears to be insufficient to meet these challenges. A large part of that failure is due to a lack of strategy and investment.

The above becomes apparent when we look at how organizations scored on the effectiveness model that is at the heart of the research. On aspects such as leadership, purchasing, process, governance, collaboration, capabilities, monitoring, sustainability and electrification, the scores were between 5.1 and 6.4 on a scale from 1 to 10. It means there is a lot of room for improvement!

Approximately 1/3rd of the market appears to be both aware and

capable when it comes to optimizing effectiveness. This group is highly driven by efficiency and cost reduction. To make that happen, they focus on progress: they plan, invest and seek out new technologies. And it pays off. The group of companies in the lead also report much higher customer satisfaction, effectiveness and agility, fewer cold chain breaks and more focus on sustainability.

Of course, these leaders aren't magicians. From the research, we were able to uncover the five ingredients of their success:

1. Situational awareness
2. A clear strategy
3. Budget for investment
4. Focus on technology
5. Purposeful collaboration

It is a simple recipe for optimizing effectiveness. Under our motto of 'Finding and applying simple solutions together,' VebaBox uses this recipe to help producers, retailers and all other partners in the chain with crucial changes and effectiveness.

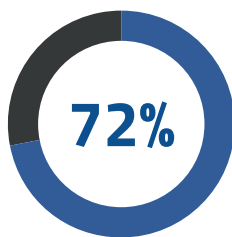
1.

The Research Methodology

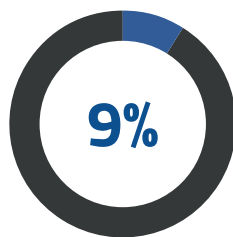
The research survey 'Cold Chain Change, a benchmark for decision-makers in the cold chain' is an initiative from VebaBox and was performed late 2018. The more than 50 respondents from the cold chain sector were asked about such topics as their business challenges, strategies and investment policies.

Benchmarking

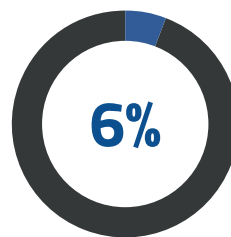
Following a careful selection process, the respondents were contacted by telephone to request their participation in a detailed online questionnaire. After completing the survey, each participant received direct insights comparing their answers to those of the other participants, a method known as direct benchmarking. The survey is currently available for anyone who would like to benchmark themselves against other organizations in the chain.



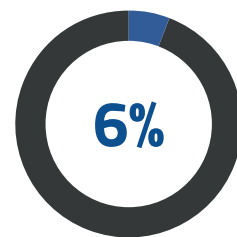
producer /
manufacturer



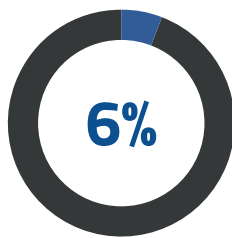
logistics
provider



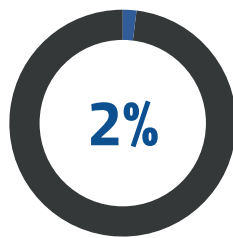
merchandiser /
trader



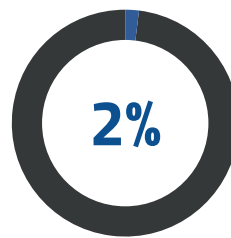
retailer



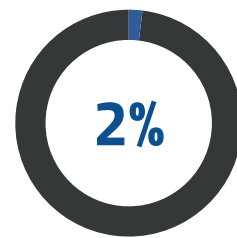
other: producer
and retailer



other:
producer /
manufacturer /
merchandiser /
supplier



distributor



supplier

The survey respondents

The companies that have participated so far in the research represent all phases of the chain. Distributors, retailers, merchandizers and warehousing, logistical services and manufacturers all contributed. The largest group represented is manufacturers and producers. The additional accountability is heaviest for them, and they are the most interested in finding solutions and innovations.

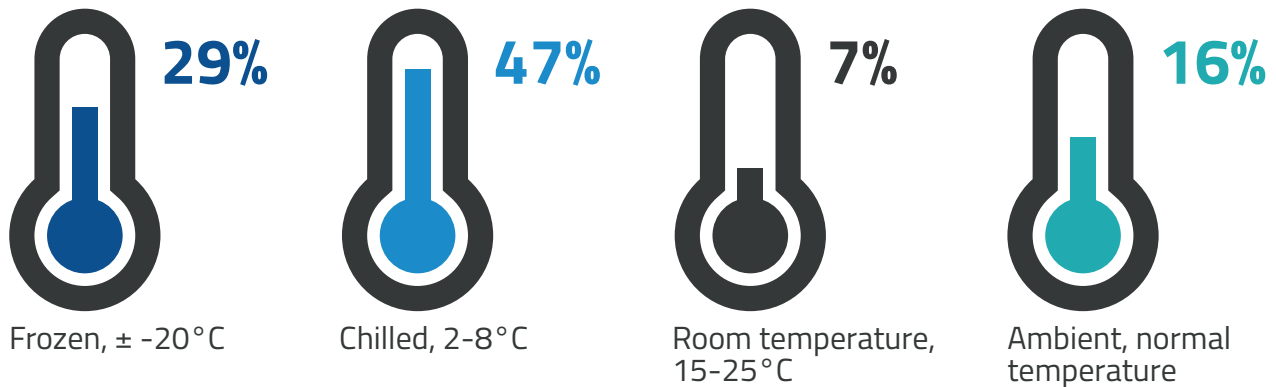
Influencers and decision-makers

Respondents have (final) responsibility in the areas of distribution, quality or operations and are most often at the (co-)decision level with respect to defining the cold chain. From this, we can conclude that decisions about the cold chain are made at a high level. Because of the complexity, it is often also a responsibility shared across multiple positions in the organization. Does that also make it a strategic business topic? This question is the subject of the next chapter.

What is your position?

director of distribution & logistics	23%
quality manager	17%
COO / operations VP / operational manager	13%
supply chain director	11%
fleet manager / transportation manager	8%
owner	6%
production manager	6%
director	4%
procurement director	4%
director (global) supply planning	2%

What is the level of revenue through the cold chain versus the normal supply chain?



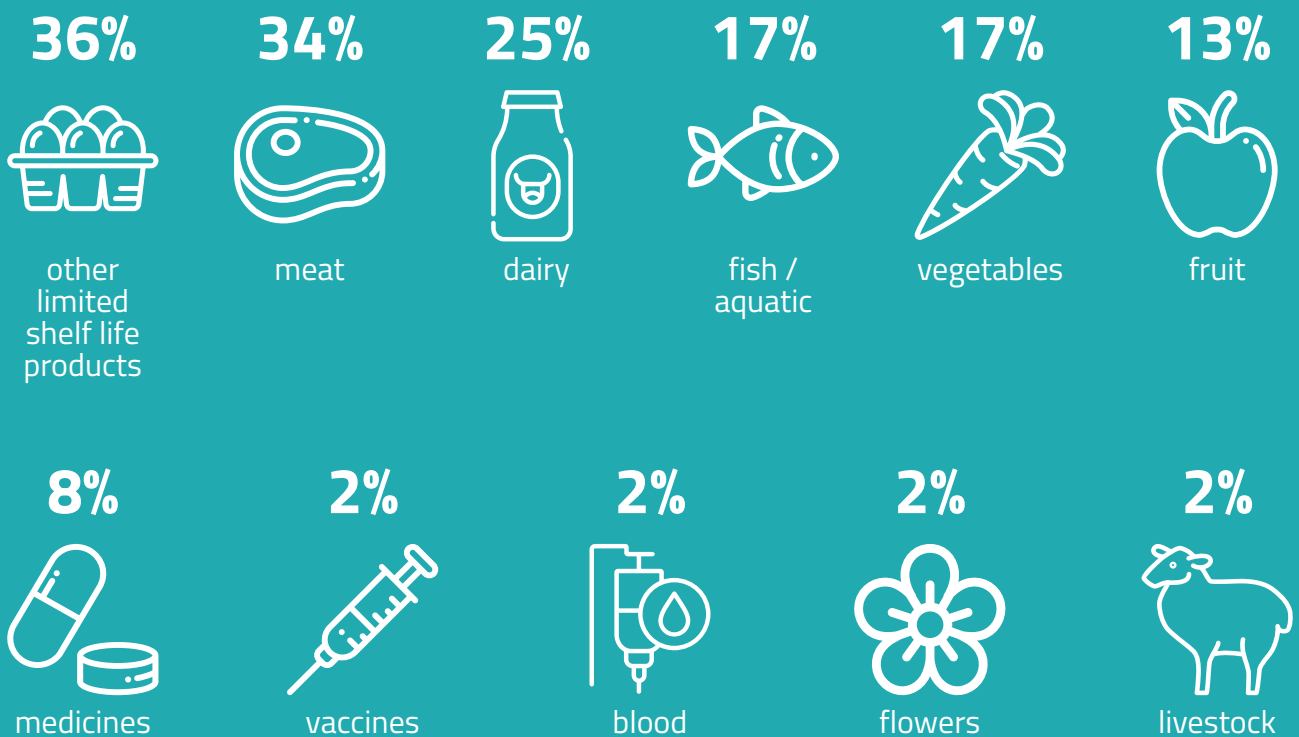
The products in the cold chain

The research respondents, mainly manufacturers in the food sector, generate most of their revenues in the cold chain from 47% chilled (between 2 and 8°C) and 29% frozen (-20°C). This is expected to remain relatively stable in the next two years. The market shows little change in coming years, no more than a small shift of about 3% from ambient to frozen and room temperature.

Companies have an average of 2.9 cold chains with one or more products. The emphasis is on refrigerated and frozen.

Products in the cold chain always have a limited shelf-life. Some respondents did not specify the type of product (36%), but most did. Meats, dairy and aquatic are all in the cold chain top 3, followed closely by vegetables and fruit. Specialties in the cold chain include blood, flowers, vaccines and live animals.

For which of these products have you set up a cold chain?



Some companies have only one cold chain established, while others have several. The average is 2.9 cold chains per company. A chain contains an average of 1.57 products / product categories. The further down the chain (closer to the consumer), the more varied the products that are included in the cold chain. Flowers, vegetables, fruit, meats and dairy are often combined within the same chain, in varying combinations. We see this mainly in retail organizations.

2.

Strategy and Challenges

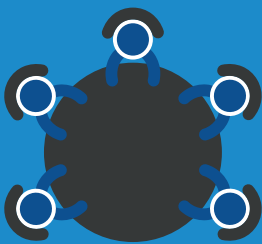
The decision-makers in the cold chain shared their biggest business challenges. There are many, and the sector has some noticeable gaps. For instance, decision-makers must balance between costs on the one hand and delivering excellent customer service and complying with regulatory requirements on the other. They also struggle with adaptability: how do you manage the supply chain when the portfolio is changing? Other significant challenges are customer satisfaction and a tight job market.

What are your biggest challenges in the cold chain?

balancing cost with delivering excellent customer service	49%
customer satisfaction	45%
managing the supply chain as the product portfolio changes	34%
balancing costs with regulatory compliance	30%
changing regulatory requirements	28%
attracting, training and retaining the best personnel	28%
digital transformation of the supply chain	23%
innovating the supply chain to stay competitive	17%
integrating partners into the process	15%
employee satisfaction	15%
managing the supply chain following a merger	11%
business innovation	11%
cultural shift	6%

Balancing between cost, customer satisfaction and regulatory requirements

A lack of strategy

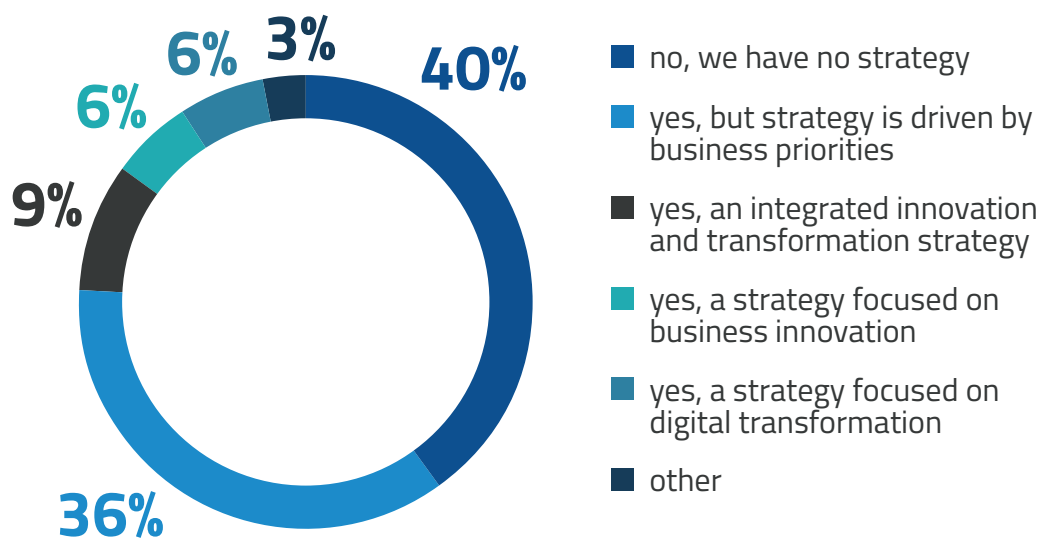


Even though there are plenty of challenges in the sector, it is remarkable how seldom organizations have a clear strategy. Nearly 75% of respondents have no strategic plan in place, or have one that is driven mainly by business opportunity. Planning for the future, seeking out strategic partners or trends-driven innovation are almost unheard of. Only those companies that have recently been involved in a merger have a more strategic focus, as do companies with more varied portfolios. The need for strategic innovation is more apparent for those companies.

The question when there is a lack of strategic vision is: how do we move forward and how do we find solutions for the growing number of challenges in the chain?

The challenges are numerous, but only 25% have a strategic plan in place

Does your organization have a detailed strategy and plan of action in place to further optimize the cold chain?



Investment: interested yes, action no

Of course there is some forward movement. We see a considerable interest in investments to improve customer satisfaction, as well as quality and safety. Investing to achieve cost reductions is another attractive consideration for decision-makers. Even sustainability investments (less waste and reduced CO₂ emissions, for example) receive a good amount of attention. The investment plans have a logical correlation to the strategic challenges. Clearly, decision-makers understand that you can solve problems with targeted investments in money, knowledge and capacity.

Where do you see the greatest advantages of investing in an optimal cold chain?

increasing customer satisfaction	43%
higher quality and more safety	42%
less waste / loss	30%
achieving cost advantages	30%
lower CO ₂ emissions	26%
we can serve more customers	21%
increasing revenues	19%
we can transport more goods	15%
offering a wider assortment	15%
lower cost per kilometer	13%
no benefit	11%
higher employee satisfaction	9%
up-selling and cross-selling to existing customers	9%
international expansion	9%
productivity improvements	8%
lower cost of transfers	8%
better prepared for climate change	8%
highly improved trend insights	8%
maximum evidence	6%

But do the companies also act to implement those ambitions? This is a legitimate question since only 21% of companies have allocated funds to this year's budget for the optimization of systems, manpower and/or resources. Only one-fifth of the companies, therefore, are acting on the stated challenges. Are there too many challenges, or is there not enough focus? Or are the challenges not big enough?

The willingness to act does happen to be greater at those companies that have a strategic plan: 31% have freed up budget for investments. Having a plan tends to lead to targeted action.

1/5th of companies invest specifically to be able to meet these challenges



3.

Trends & developments

When companies were asked about changes in the next 2 to 3 years, there were quite a few that are expected to have a significant influence on the cold chain. Regulations (53%), logistics expense (53%), consumer demands (43%) and liability (32%) are the most important aspects to consider.

Decision-makers also expect sustainability, electrification and new delivery methods to play a role in their company in the coming years.

Recent developments in last-mile deliveries are driving more interest in electrification, new delivery methods and reusable passive cooling solutions.

In the discussion of trends, there a few things that stand out:

- New entrants pay more attention to alternative delivery methods.
- Companies focused on electrification are also concerned with urban accessibility, growing consumer demands *and* the increasing numbers of last-mile deliveries.
- Those who have more last-mile deliveries and choices for delivery options, tend to be more interested in reusable passive or active cooled packaging solutions.

Which industry trends will have the most impact for the future of temperature-controlled transport and warehousing in your company over the next 2 to 3 years?

53%

regulations,
more regulatory
demands

53%

logistics
expense will
increase

43%

increase in
consumer
demands

32%

manufacturers
liability will
increase

21%

growth in
sustainable
cooling methods

21%

growth in
electric
transport
options

21%

development
of large urban
areas

21%

more data
monitoring for
optimization

19%

changes
in delivery
methods

17%

more last-mile
deliveries

8%

changes to
temperature
profile

6%

new entrants
with innovative
supply chains

6%

industrywide
standardization
of ambient
temperature

4%

don't know /
no opinion

2%

more solutions
for reusable
passive cooling

Last-mile solutions and active cooling modules

At VebaBox, trends are an important driver of innovation. Managing Director Roland van de Ven explains: 'We actively scan the changes in the cold chain and then develop modules that fit with our clients' processes and hardware. Our mission is to optimize the cold chain using smart innovations that work within an existing environment.'

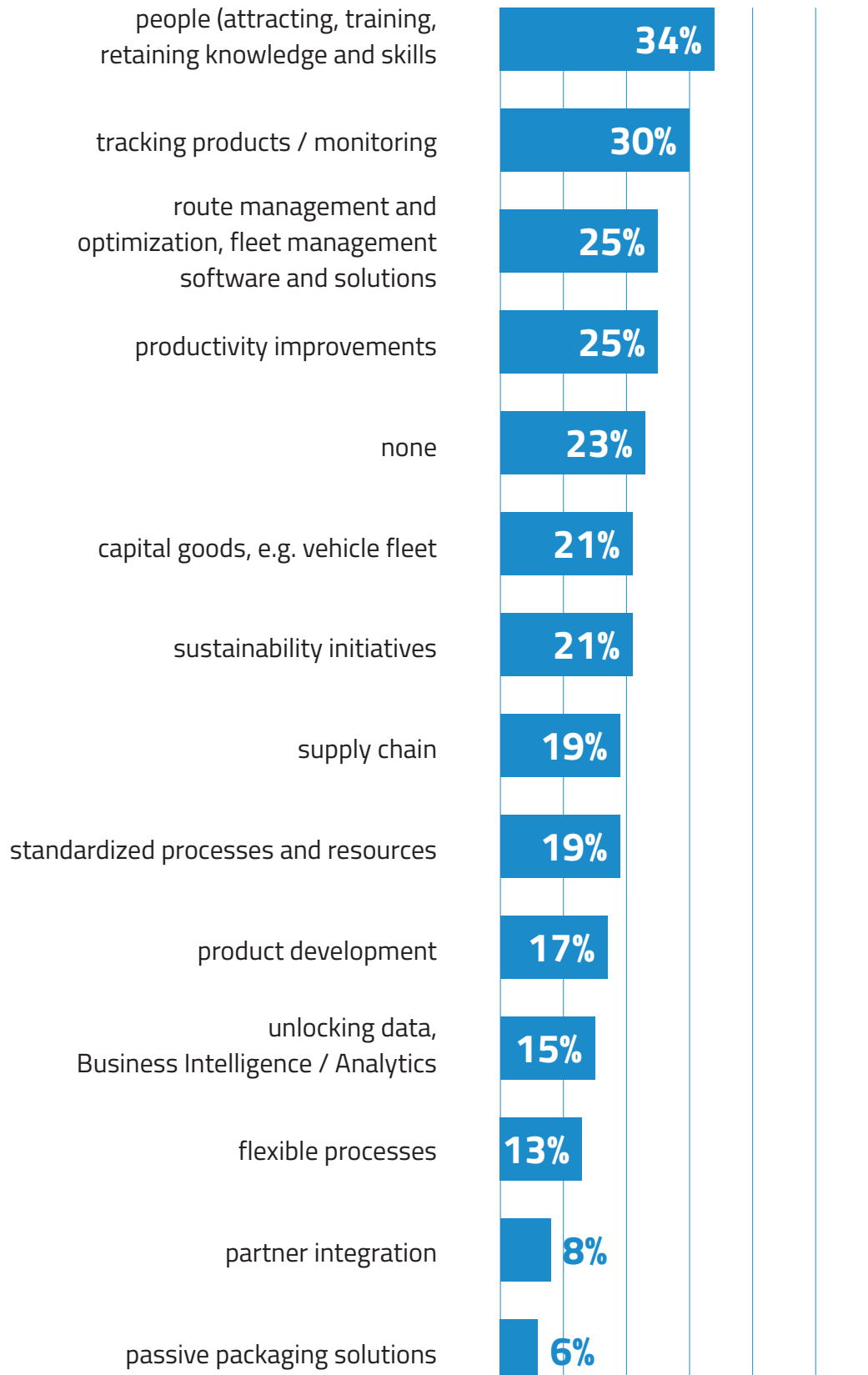
Our LogiBox, for example, is an answer to the crucial last-mile developments. This passive cooler box with integrated cooling elements makes it possible to keep products at the correct temperature for up to 72 hours, both in transport and at the delivery location. It's a relevant solution for pharma and food, but of course, also increasingly interesting for retailers in the logistics process.'

Van de Ven also shared his views on the respondents' investment activities: 'What I notice most are the investments in aspects such as monitoring, productivity improvement and vehicle fleets. If you combine these types of investments, I think you can achieve a multiplier effect. These are also the kinds of innovations we are working on at VebaBox: smart products that can be integrated into existing processes and vehicles.'

'Our VebaBox, for instance, is an active cooling container that turns any commercial vehicle into a cooling solution. It can cool and heat from 2°C/26°F to 25°C/77°F and freeze from -22°C/0°F to 5°C/40°F, even on location and when the motor isn't running. It is adjustable to any size car and transferable to the next vehicle. It doesn't get easier than that.'

VebaBox intends to use this research for more innovations. Van de Ven: 'This survey revealed the trends that are game-changers and where the cold chain can be optimized. We'll use these insights to create more solutions together with our clients.'

In which of these areas are investments in the cold chain planned within the next 5 years?



Investing in manpower



Manpower is needed to address the changes expected: people bring the knowledge and capacity to effect change. For that reason, companies are expecting to invest more in attracting, training and retaining people and expertise in the next 5 years. That means attention to employee satisfaction is important. Change can't happen without the right people in place.

Investing in people and technology go hand-in-hand

Taking advantage of technology

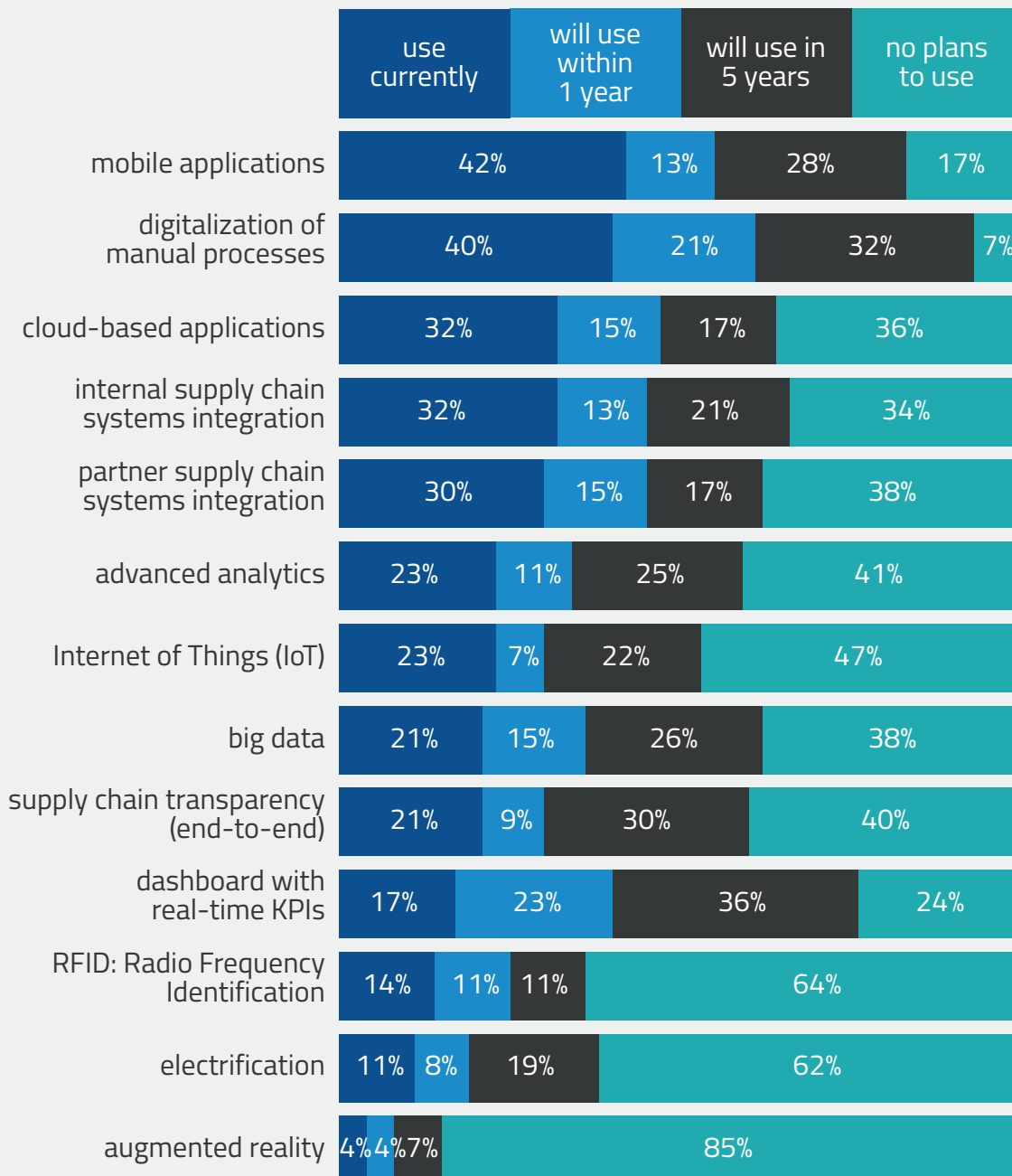
If a company has enough qualified people, a focus on technology is the next logical step. The sector will undeniably meld even further together with technology in the coming years. Digitalization, apps, cloud and system integration were named in the responses as important aspects of the technology trend. The decision-makers are focusing their attention on improving their process and effectiveness.

In the short term (within the next year), companies are betting on dashboarding, big data and supply chain partnering. The focus for the medium term (5 years) will be on end-to-end supply chain transparency and on business intelligence and predictive analysis.

There is one thing that could upend these plans, however, and that is whether a competitor gets there first. The competition tends to be an obvious trigger for the decision of whether to continue implementing new technology. When companies are more advanced than the competition, they will continue to go even further in applying technology. Leaders invest more often in advanced analytics, cloud-based applications and augmented reality. Technological advancement also appears to take place more often at the end of the chain, closer to the consumer. Those companies tend to be more interested in augmented reality, electrification and mobile applications, for example.

Leaders invest more often in advanced analytics, cloud-based applications and augmented reality

Which tools / technology do you currently use or plan to use in your supply chain?



4.

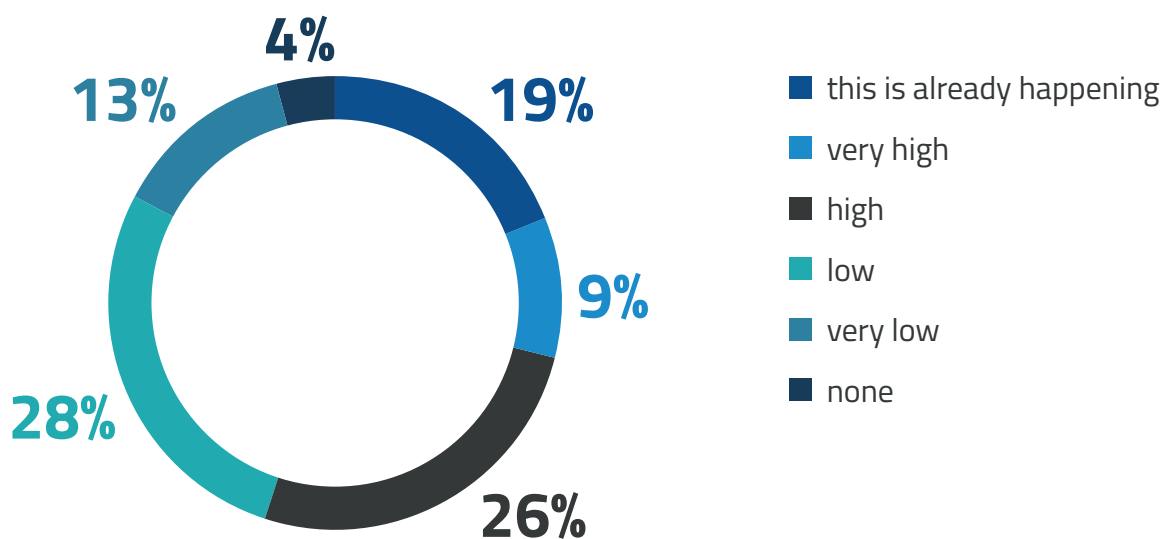
Compete or Collaborate?

The cold chain is not terribly competitive compared to other sectors. Just under 55% see other suppliers serving the same target market better with the same product. The other half doesn't (yet) have problems with competition.

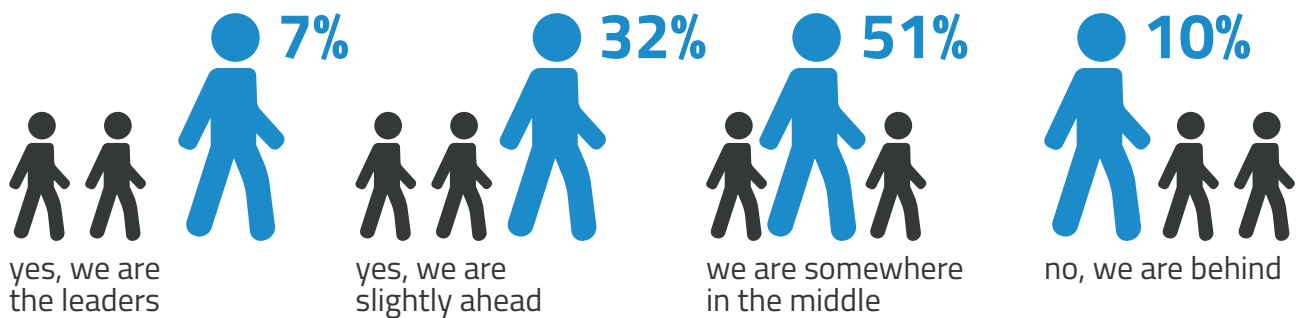
The further down a company is in the chain (closer to the consumer), the more the level of competition increases. Competition tends to be most intense in the market for vegetables.

The more competition is felt, the more organizations plan to invest. External pressure leads to the swiftest changes. Interestingly, the pressure of competition tends to increase investment the most in the area of sustainability. Companies believe that sustainability can give them a competitive edge.

How high would you estimate the chance that other suppliers will serve your target market with the same product but better delivered?



Do you believe that your company is further in the optimization of the cold chain than other suppliers?



Not pushing for optimization

The limited levels of competition also appear in answers to the question of whether the organization is further in the optimization of the cold chain than other suppliers. 39% claim to have a (slight) lead over the competition, but the majority (51%) position themselves comfortably in the midzone. One-tenth even admit to being behind their competitors. This limited competitive capacity is in line with the modest strategic environment. That raises the question of whether the necessity is not yet sufficiently recognized.

Competition leads to optimization and sustainability

The importance of collaboration

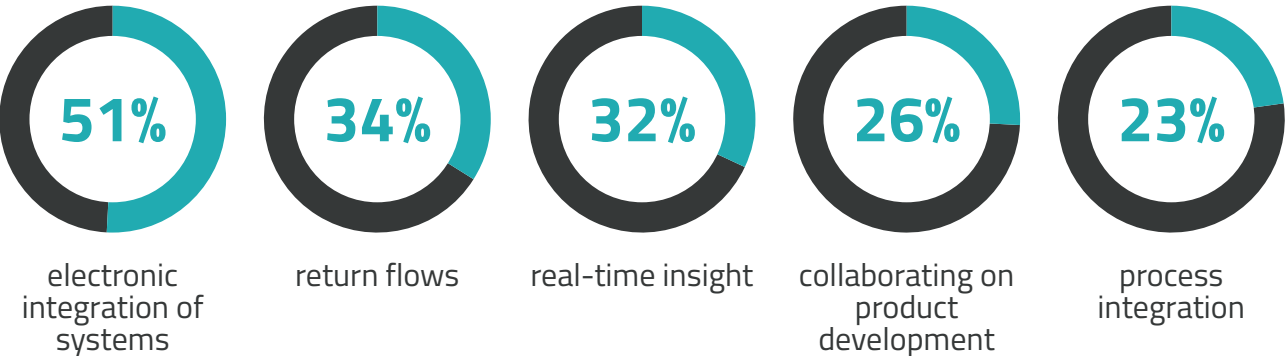
Collaboration in the chain is increasingly important because producers and manufacturers are increasingly being held specifically accountable for quality right up to the final point in the chain. Every link in the chain must also contribute to the avoidance of a cold chain break, monitoring and proving the quality aspects, and the exchange of information.

Many organizations are already collaborating. In practical terms, most collaboration takes place in the areas of warehousing, transport and third-party logistics.

When it comes to collaboration for optimization and integration in the chain, the focus tends to be on electronic integration (51%), stemming the return flows (34%), and obtaining real-time insights (32%). Collaboration on product development or process integration is not yet as common, even though they are precisely the activities that seem crucial to avoiding cold chain breaks.

Leaders collaborate more

Which aspects do you include in your collaborative efforts with suppliers, clients and third parties?



5.

Quality, Proof and Incidents

Responsibility and accountability are increasing, and not in the least part because of regulatory requirements and growing customer expectations. Transparency, sensor technology and data exchange place the focus on the burden of proof. Knowing whether the product is being kept under the correct conditions at any given moment is becoming increasingly important. How advanced is quality control in the cold chain?

How long does the cold chain process fall under your responsibility?



32%

> 168 hours



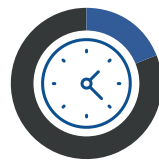
11%

96 - 168
hours



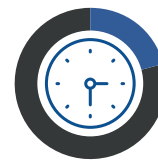
4%

72 - 96
hours



19%

24 - 72
hours



21%

4 - 24
hours



13%

< 4 hours

Accountability

The average cold chain is quite long, with parties having responsibility for approximately 94 hours. In 32% of cases, it is even longer than 168 hours. That is a long time to be held accountable for the quality of a product.

Monitoring does take place, but not much is known about incidents and their costs

Monitoring



Accountability and monitoring go hand-in-hand, especially in the modern era of data and sensors. Monitoring in the chain takes place on an average of 2.8 aspects. The temperature during transport is by far the most common (83%), with the temperature at the time of transfer not far behind (66%). Other aspects measured often include the process duration, smell and color and the chain breaks (broken seals).

Which aspects of the cold chain process do you measure?

83%



ambient temperature during transport

66%



temperature at point of transfer

45%



temperature of individual products

30%



process duration

23%



smell

19%



color changes

8%



cold chain break

4%



nothing

Quality assurance

Quality management relies mostly on very specific handling agreements between parties (75%). Packaging and temperature control are also considered crucial (62%). These are not particularly innovative concepts. New ways of avoiding cold chain break do not appear to be on the radar for most.



Leaders have fewer problems with incidents

Incidents and costs

Is quality management good enough to avoid incidents? Not always, since you cannot make an omelet without breaking some eggs, and this is also true for the cold chain. The rate of incidents, however, tends to be highly variable. For 38%, the number of incidents is unknown (despite monitoring). The rest report an incident rate of once a year (49%), once a month (33%) or once a week (18%). The average is approximately 14 incidents per year. The exact cost of an incident is seldom clear. Answers vary from less than 1,000 to more than 25,000 euros each year. That can mean considerable losses. Higher incident costs occur mainly in the frozen chain.

The companies that are ahead of the competition also have fewer problems with incidents. Also, specific handling agreements seem to work well, as those companies also report having fewer incidents.

6.

The Effectiveness Score in the Cold Chain

The research results revealed a gap between the considerable changes taking place in the cold chain and the levels of strategy and willingness to act at the companies. This varies significantly from company to company, of course.

We created a model to show effectiveness in the sector and of the individual respondents. This effectiveness is expressed as the importance that companies place on change versus how high they scored, or in other words: the level at which they are capable of actually effecting change.

Effectiveness model

The model is made up of the following elements:

- Leadership: creating an innovative culture and a focus on optimization
- Purchasing: the level at which purchasing is able to achieve strategic goals as opposed to simply focusing on price
- Process: the efficiency, effectiveness and flexibility of the process
- Governance: applying procedures for compliance with regulatory requirements
- Collaboration: the level of cooperation (both internal and external) in, for example, integrating systems
- Capabilities: utilizing the right future-proof technology, materials, equipment and knowledge
- Monitoring: real-time data collection and using it for forecasting and optimization
- Sustainability and electrification: designing storage, transport and processes for a minimal impact on the environment

Importance

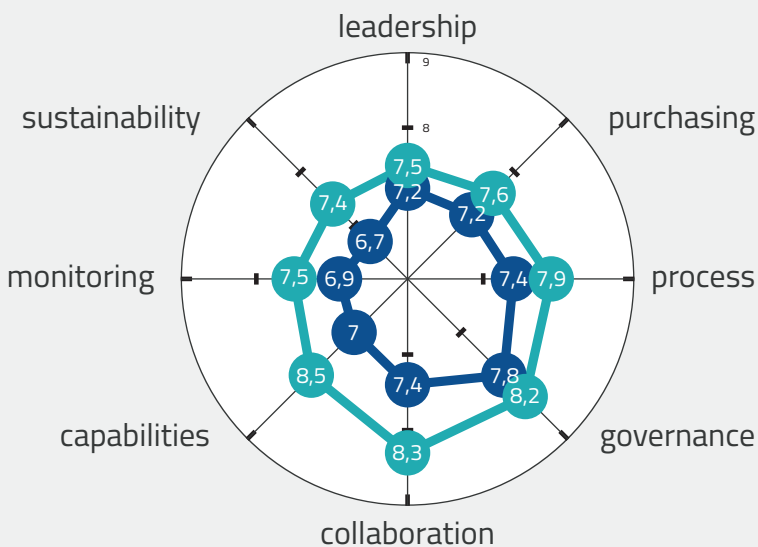
When asked about the importance of each aspect for an optimum position in the cold chain, it is interesting that particularly governance (8.2) and collaboration (8.3) are considered extremely important (even though we have already seen that collaboration does not yet happen in all areas). Other important elements are an optimized process (7.9) and having the right capabilities (8.5).

Sustainability and monitoring score lower than expected based on the trends mentioned earlier.

How each company rates itself on each of these aspects is important: are they good at it, or do they give themselves a lower grade than expected given how important they consider that element to be?

Cold chain lags in the areas of sustainability and monitoring

The importance of each dimension compared to the score



Importance score

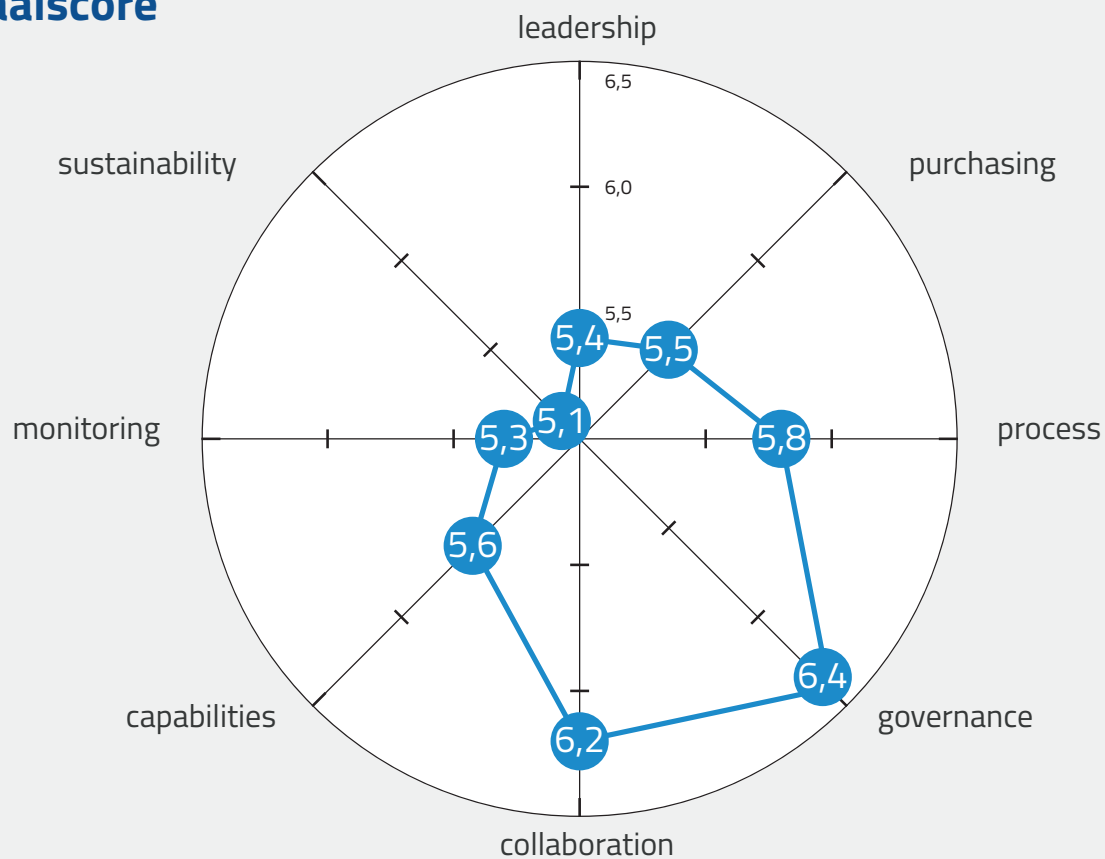
Disappointing scores

The sector is relatively satisfied on average: all aspects receive a passing grade. There are exceptions, of course, since 25% of the companies give themselves multiple failing grades at an individual level. So, there is work to be done.

Governance, collaboration and process aspects all scored well above average.

As for capabilities, monitoring and sustainability, there is enough room for improvement. Not only do companies give themselves low scores in these areas (less than a 7 out of 10), but the gap between importance and the actual score is also quite wide (approximately 10% difference between importance and score). Whether this can be improved in the short term remains to be seen. Without a strategy or investment plan, the chances are not high.

Totaalscore



Inadequate effect

The total score on effectiveness in the cold chain (importance x score) is relatively poor. With grades ranging between 5.1 and 6.4 out of 10, we can safely say that the sector is not yet working hard enough for optimum effectiveness. The lack of a strategy and the limited willingness to invest are a large part of that.

7.

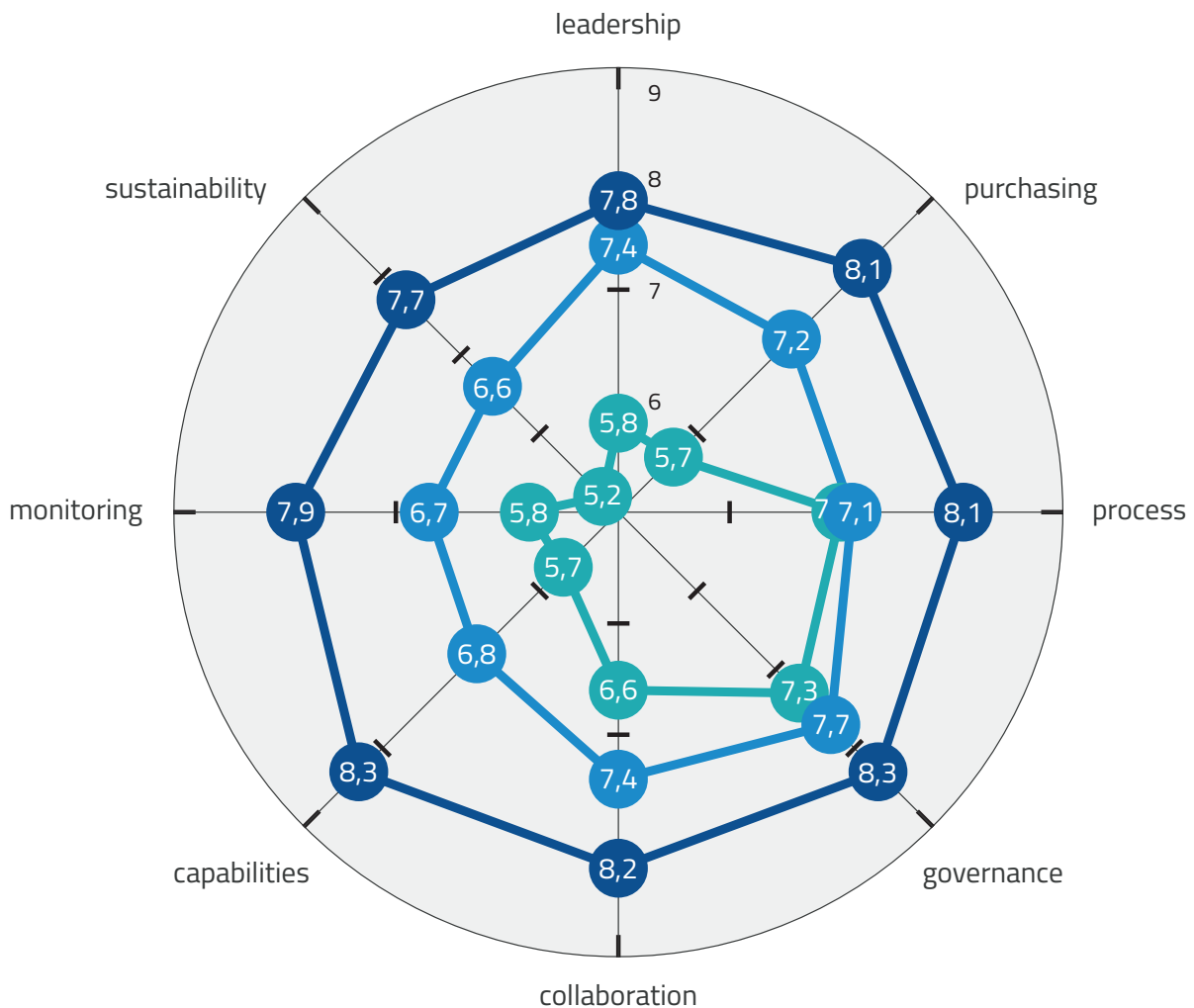
Learning from the Leaders

For the research, we examined how individual companies scored on the different aspects of the effectiveness model. When we combined these with the specific characteristics of each organization, we found they can be divided into three groups:

- **Aware & capable (34%)**, scoring high on both importance and how they apply it,
- **Aware & incapable (47%)**, who understand the importance but have not (yet) taken adequate action, and
- **Unaware & incapable (17%,)**, who not only do not see the importance, but also are not doing the right things.

The graph shows how each group scores on the various aspects of the effectiveness model.

Scores on the effectiveness model



A third of the market is both aware and capable, and in a position to act on the goals they consider to be important. It is interesting that this group is highly driven by efficiency and cost reduction. To achieve that, they plan, invest and seek out new technologies. And that seems to deliver them more than just the desired reductions in costs.

The leaders make their own luck

The leaders (aware & capable) report a significantly higher level of customer satisfaction. Their customers give them a 7.8 out of 10, while the other groups receive a 7.3 and a 7.2, respectively. And don't forget: customer satisfaction was the biggest challenge for every organization in the cold chain.

The leaders experience even more advantages from their proactive approach. They reported:

- a higher effectiveness
- fewer cold chain breaks
- a better optimized process
- a higher agility
- more focus on sustainability

Leaders score higher with customers and are better organized

The main driver for the leaders is cost reduction. It is their attention to investment and innovation that helps them better balance costs. They are not only actively working on lowering costs, but their customers are also happier, which means they are able to charge a higher price for their services. The leaders also have fewer issues with regulatory requirements, since they tend to already have their processes well organized.

And yet, the leaders are not completely carefree. Even they still have their challenges. One of these is the ability to innovate continuously. Another thing that keeps them up at night more than the rest is customer and employee satisfaction and digitalization. They also feel a need to be more alert to new entrants in their market.

Results leaders versus the rest

	lead group	rest group
balancing costs with delivering excellent customer service	46%	56%
customer satisfaction	40%	56%
managing the supply chain as the product portfolio changes	31%	39%
changing regulatory requirements	26%	33%
attracting, training and retaining the best people	26%	33%
innovating the supply chain to stay competitive	11%	28%
employee satisfaction	9%	28%
digital transformation of the supply chain	20%	28%
balancing costs with regulatory compliance	34%	22%
business innovation	6%	22%
integrating partners in the process	14%	17%
managing the supply chain following a merger or expansion	11%	11%
cultural change	6%	6%

Do's and don'ts from the leaders

What can we learn from the leaders? They are driven by efficiency and cost reduction. To achieve that, they work with a clear strategy and tend more often to have a strategic plan in place. They also invest more than the rest. Their investments are most often in more flexible processes (144% more than the rest), route optimization and productivity enhancement (+129%) and unlocking data and business intelligence (+100%). Leaders look to technology for solutions: they are ahead of the rest when it comes to cloud computing and process digitalization. And it pays off.

The lessons we can learn from them are hopeful. The leaders are not magicians, but it is clear that companies that are more aware of their environment, make strategic plans and then act on those plans, are the ones doing things right.

Greater success from just five simple ingredients

1.

Scan the environment regularly for innovations, competitors and opportunities

2.

Develop a strategic plan

3.

Allocate investment budget

4.

Focus on technology

5.

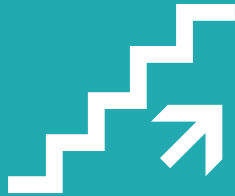
Seek out collaboration with third parties wherever possible

The effect this recipe has is powerful: fewer incidents, more satisfied customers, more effectiveness and better immunity to new market entrants.

Characteristics of the leaders



understand the benefits and importance of investing; have a sense of urgency



have a detailed strategy and plan of action for cold chain process optimization



have freed up (extra) budget for optimizing the cold chain (systems, people, resources)



plan to innovate in more areas over the next 5 years



collaborate more, monitor & measure more and ensure quality (process control)

Results



fewer incidents



more customer satisfaction



leading the market; ahead of competition (innovator)



higher maturity ranking



score higher on the 8 aspects of the Cold Chain Effectiveness Model



immunity to competition and new market entrants

8

Collaborating for a More Effective Cold Chain

The decision-makers in the cold chain are mostly in agreement about their focus, their challenges and the future developments. From the honest answers given by the respondents, we get a peek into where opportunities can be found:

- More collaboration
- More strategy
- Targeted investments
- Focus on technology
- More innovation, also in product development and integration

The leaders show us that 'working proactively on change' can be an advantage. Who doesn't want more satisfied customers and a better competitive edge? Also, change is not optional: the changes in the market, customer expectations, regulations and technology all force us to create a more effective cold chain. We will only be able to ensure quality when there are fewer cold chain breaks, more efficient data exchanges and new tools.

**Find and apply
simple solutions together**

Our challenge at VebaBox is to help producers, retailers and all other partners in the cold chain with change and effectiveness. We help specific markets such as food, health, labs and pharma to deliver optimum quality and avoid cold chain breaks. We do this not just with our modular solutions for all sorts of temperature-sensitive products, but also by using our expertise in logistics and our creative approach to understanding supply chains. We believe in working together to optimize processes and develop new products. It is this working together toward a clear vision that allows us to create more efficient and sustainable solutions.

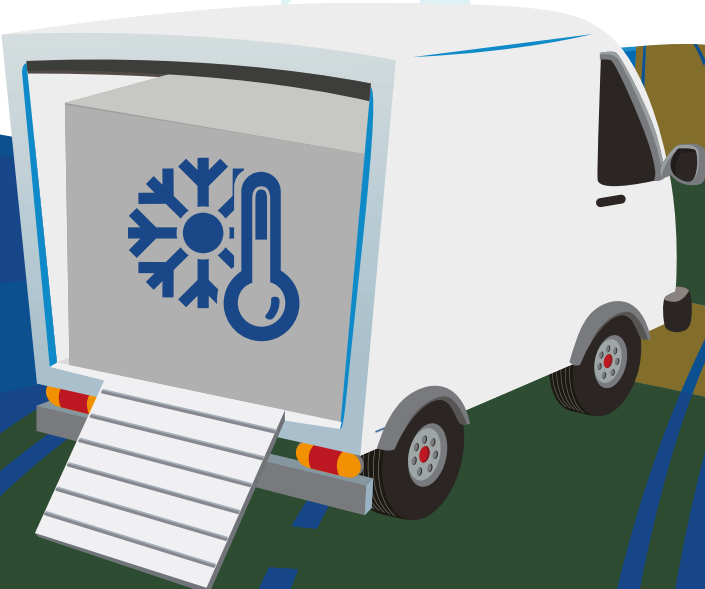
This research report and the insights it contains are our initial investment in working together. Will you accept the challenge of making your cold chain more effective?

Want to find out more?

At www.vebabox.com/en/news/ we share even more insights about trends, innovations and process optimization. Want to discuss your cold chain challenges with our experts? Mail us at info@vebabox.com or call +31 (0)413 269 300.



How do your challenges, investments and view on change compare to those of other competitors in the market?



This benchmark research was done together with prospex.

