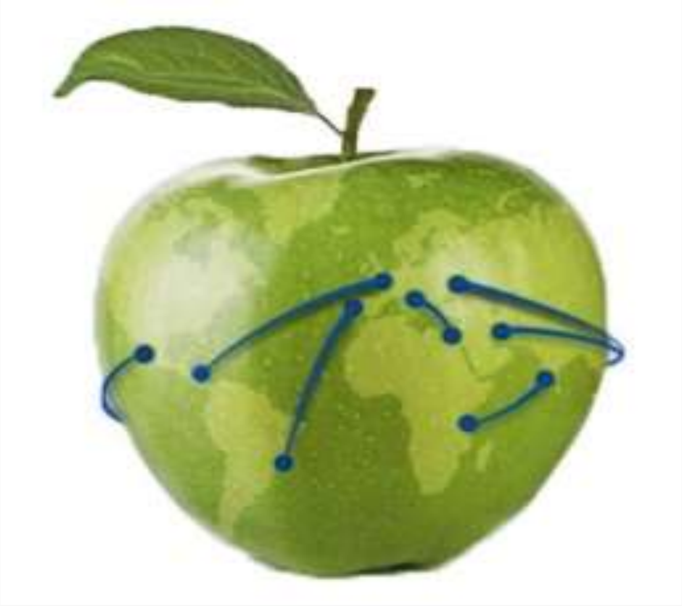
The world's only global, neutral & dedicated reefer logistics suppliers

@easyfreshglobal



EASY FRESH

Our Mission is to supply integrated logistics solutions for perishable cargo globally

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Worldwide Network : We serve our customers everywhere in the world and with strong local know-how.

Dedicated : We are dedicated to the logistics of perishables.

Multimodal transportation : We offer all realistic transport modes and its combinations to our customers, under temperature controlled environment.

We are committed to provide expertise and quality, insuring the best conditions for transport and handling of perishables (fresh and frozen) across all major global routes and countries.

We provide our customers with world class perishable handling expertise. We are growing our network and strategic partners to meet the growing consumer demands for fresh and healthy commodities year round.

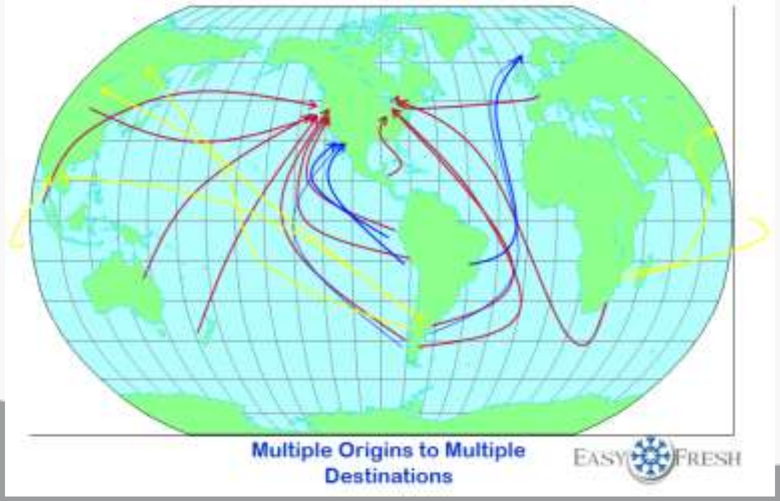
From farm to final destination ; we offer our customers door/door, door/port, port/door, using any viable transport mode (port/port is not a goal). In our transport packages we offer a variety of services

Visit www.easyfresh-logistics.com

Twitter; Follow us @easyfreshglobal

LOGISTIC SOLUTIONS FOR PERISHABLES

INCREASED COMPLEXITY



We operate coldstores as hubs & a key part of the cold chain

European Refrigerated Distribution Centers

Our coldstores ; our gates !

European Refrigerated Distribution Centers are fundamental, as they allow a single location to stock and efficiently distribute a vast number of fresh and frozen products in a specific geographical range. Easyfresh owns, manages, operates with own staff or subcontracts a number of bonded coldstores, full or partly, throughout the world. Given our strong position in Europe our different coldstores, well **connected to ports** and container terminals, allow to link a number of **inland services** to the ocean freight.

- **Koper (Slovenia)**
- **Breda (Netherlands)**
- Hamburg (Germany)
- Fos (France)
- Ravenna (Italy)
- Piraeus (Greece)
- Klaipeda (Lithuania)
- Algeciras (Spain)
- Dublin (Ireland)
- Gdansk (Poland)

Through our various coldstores we can offer a number of services to our customers, as part of the **cold chain**, adding same to the seafreight :

List of services

Trucking / FTL & LTL	Bar Coding	Re-icing / wet & dry ice	Special packaging
Consolidation	Customs Clearance	Computerized inventory	Re-packing
Deconsolidation	Cargo insurance	Palletizing	Re-weighing
Quality Inspection	Freezer storage	Shrink wrapping	Labeling
Cool storage	Pre-cooling	Phytosanitary Inspection/Clearance	Veterinary Inspection/Clearance
Container Transport	Seafreight Coordination		

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45Reefer units – Equivalent to Reefer trucks

Reefer shipping. Outlook

1) Liner Shipping Carriers Consolidation & Concentration: Lesser frequency. Core liner routes not always matching reefer cargo needs. Dry cargo (more volumes) is the generally the priority for liners.

1) Bigger ships : The global average call size at terminals is growing. Increasing pressure on terminal operators (Alphaliner)

2) Limited availability of reefer equipment in some routes/seasons

3) Few "fresh" or "fruit friendly" ports : Deadlines at terminals, plug availability, documentary bottle-necks , other …

4) Drewry predicts by 2018 only 18 % of the reefer cargo will be shipped by reeferships. 82% by container carriers

#time4change

The global reefer logistics industry

Time for an inevitable change

by Rafael Llerena, *CEO at Easyfresh*

The price of doing the same old thing is sometimes far higher than the price of a new habit. In fact, the world doesn't like changes, yet they are the only things that bring progress and development. Our business sector – reefer logistics – has already initiated a path towards change. Slowly but surely, customers dealing with perishables are switching their thinking, and are now driven by some retailers and a few other players.

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ARE 3PLS *STEALING* A MARCH ON THE CARRIERS BY FLEXING THEIR NETWORK CAPABILITIES TO SERVE PERISHABLE SHIPPERS ?

"The family is a harbour in a heartless world"

<<< The "house of the cold chain"

"Teenager growing up" >>>

Customer needs >>>

"The world is on the edge of a blade.Without balance, it will fall"

Negotiations and "balance of power " between reefer logistics suppliers and carriers : Scenarios

Hiding in an own world

Elephants walk with elephants

Running behind

"Never think that lack of variability is stability"

"VUCA" : VOLATILE, UNCERTAIN, COMPLEX & AMBIGUOUS

FACTORS CREATING UNSTABLE SCENARIOS :

- **POLITICAL**
- **ECONOMICAL**
- **SOCIAL and PSYCHOLOGICAL**

"VUCA" FACTORS ABOUT :

- **COMMODITIES**
- **SHIPPING LINES**

POLITICAL factors :

- Iran & Cuba deals : Trade activation
- Middle East thunderstorm : Syria & continuous problems
- Hot spots : North Korea, Venezuela, Afghanistan,…
- Ukraine – Russia dispute / Russia EU food ban
- African effervescence & broad-based political instability
- Refugee crisis >> Schengen / EU questionable
- "BREXIT"

"International politics, like all politics, is a struggle for power"

ECONOMICAL factors :

- "Currency wars" and rates of exchange variability. Yuan, Brazilian rial, etc.

- M&A (mergers & adquisitions), Globality – "buying market shares", vs improving long-term productivity

- Financial markets instability

- Capital flows to emerging market economies

- Trade agreements : TTIP/Transatlantic, TTP/Transpacific, … (Cancelled/not cancelled)

- Central Banks (Fed, ECB,…) announcing and applying (or not) interest rate changes

"A global economy is characterized not only by the free movement of goods and services but, more important, by the free movement of ideas and of capital."

SOCIAL & PSYCHOLOGICAL factors :

- **News cascade & press influence**
- **Social Media Panic / Alarms (true & not true)**
- **"Filtering" and selecting innovations: Real opportunities vs danger of being "too innovative" or "too creative".**
- **Implementation of innovations at its right speed.**

"It is not far that you get a ringtone in your mobile that alerts you of a heart attack. Question : In advance or during it ?"

COMMODITIES; Food Supply chains are multidimensional !

•Agricultural produce:Traditional concern; price volatility.Weather, water scarcity, etc.
Severe price gaps between origin and consumer prices.
Distribution controlled by retailers largely , wordwide (Product X – sourced 365 days)
EU Changes on "Common Agricultural Policy"; trend > less subsidies.

•Seafood : Difficulties in fishing. Lesser catches in certain areas.
Shift to Asia vs local sourcing
Aquaculture as a broader source of seafood.
Increased number of fishers and fish farmers (doubled in the last 25 years)

•New Products, new origins, new markets (meat, poultry, seafood, fruit + vegs, …)

•Future Food demand:FAO by 2030 Global Food Production has to raise 70%
given expected population

•At the same time a number of unresolved issues (Food Waste) or with a strong educational/cultural component :"Trendy" organics / "Ugly Food" concept / food security/ e-grocery/ urban agriculture/local sourcing/…

"No Logistics, no food "

LINER SHIPPING and Michael Ende's "Never ending story" :

- **Overcapacity: By 2020 the global capacity will reach 45 million vs 35 Millon TEU trade.**

- **Preassure on freight rates & "sudden" GRIs**

- **With the "blessing" of the US/EU/China etc authorities : "Oligopolistic" concentration of carriers , sharing services, concentrating in certain hubs/ports, able to cope with the "bigger volume per call", leading to congestions and of course requiring huge investments.**

Another question;not for today;is it beneficial for the global trade to allow this concentration in 8-10 hands?

- **Same problems & trends than in the past 20 years(Y), but multiplied by X. X > Y !**

- **Carriers' "FILL-THE SLOT PHILOSOPHY", vs 3PLs "CUSTOMER IS THE KING".Lines prioritize volumes and subsequently DRY cargo, subrogating reefer to dry.As a general rule,with some exceptions, a line will always call at a port granting a volume vs a call at a "reefer friendly port" with less volume.**

"Turn around, look at what you see … "

"We cannot solve problems with the same thinking we used when we created them"

How can we address this COMPLEXITY ?

COOPETITIVITY = COOPERATIVITY + COMPETITIVITY

ALLIANCES WITH SPECIALISED LOGISTICS SUPPLIERS !
Carrier & 3PLs or Ports & 3PLs or Terminals + Rail & 3PLs,..
with

- **Medium and long term duration**
- **Clear goal definition**
- **Practical functions assignment**
- **Sharing of information and resources**
- **Multiprojects**
- **Transparent**

"You can't depend on your eyes,when your imagination is out of focus"

Koper : The success story of a "real" reefer port : focus & alliances !!

- A) Operations : 24/7 , 365 days p.a. (Customs, port ops, phytosanitary,...)
- B) Alliance : Port, carriers & 3PLS work together

"Sometimes we stare so long at a door that is closing, that we see too late the one that is open"

Easyfresh European model to be emulated in other areas (Central Asia, Gulf, IPC, ...)

"Omnia vivunt, onia inter se conexa" : Eveything is alive; everything is interconnected

We are ready for the "COOPETITIVE INTELLIGENCE" !

"Avatar" : James Cameron recommends deeper and better interaction

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GLOBAL REEFER LOGISTICS SOLUTIONS