



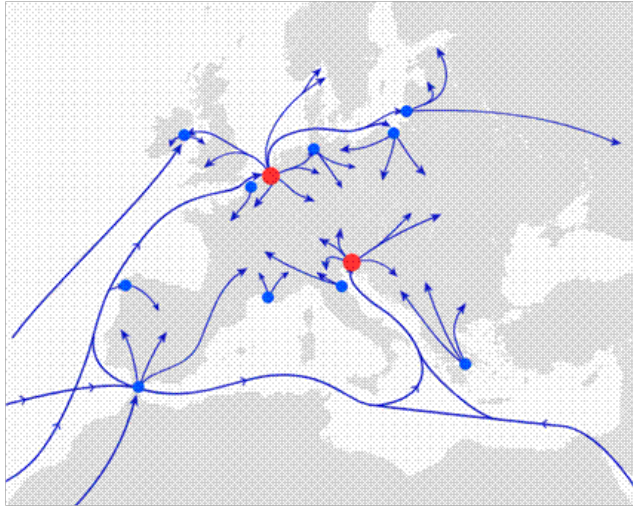
International transport and the Global Potato Value Chain

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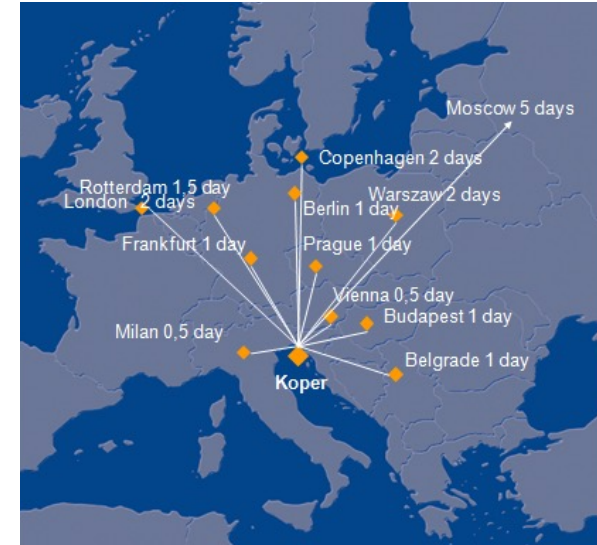
LOGISTIC SOLUTIONS FOR PERISHABLES



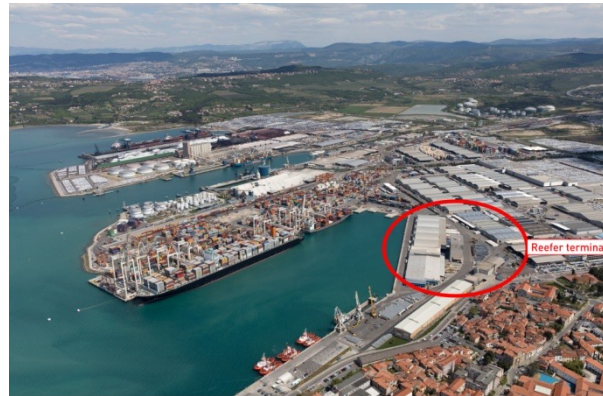
Worldwide Network: We serve our customers everywhere in the world and with strong local know-how.

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.

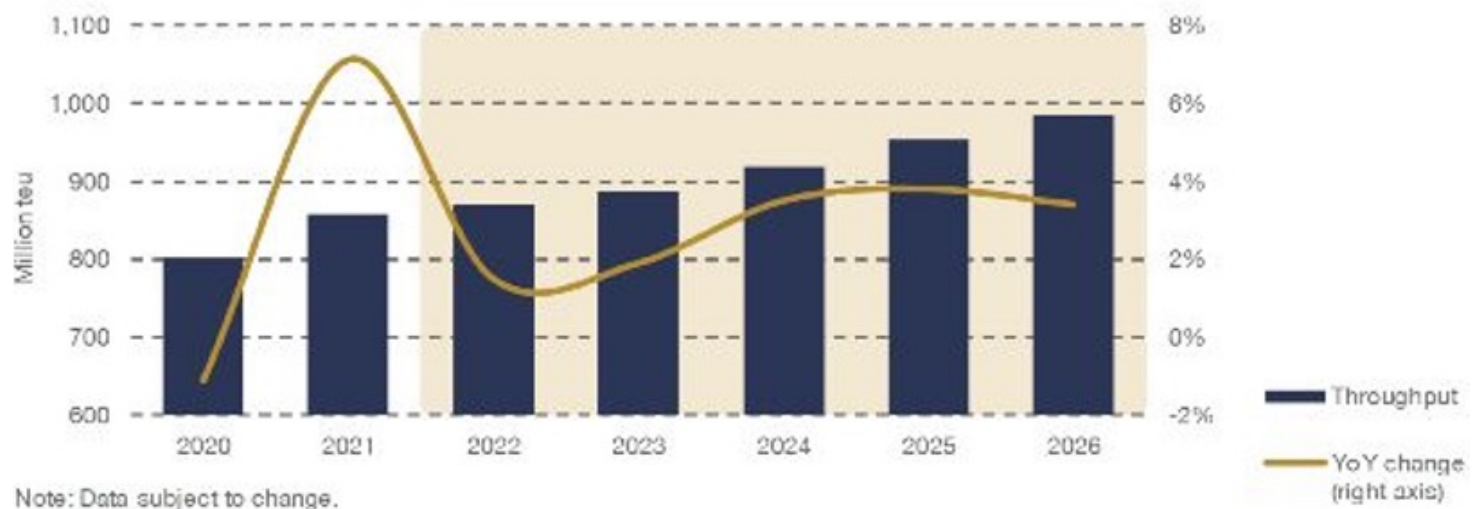


We cover 220 countries & territories



GLOBAL LOGISTIC SOLUTIONS FOR PERISHABLES

Global Container Shipping Demand Outlook

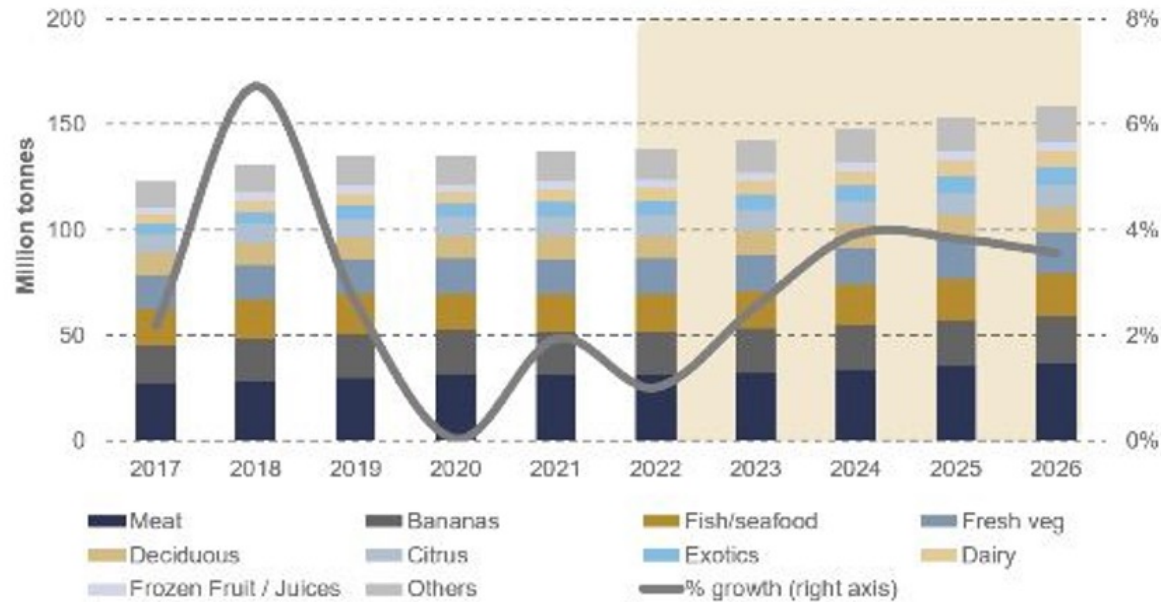


People will prioritize the basic. Foodstuff is a basic.



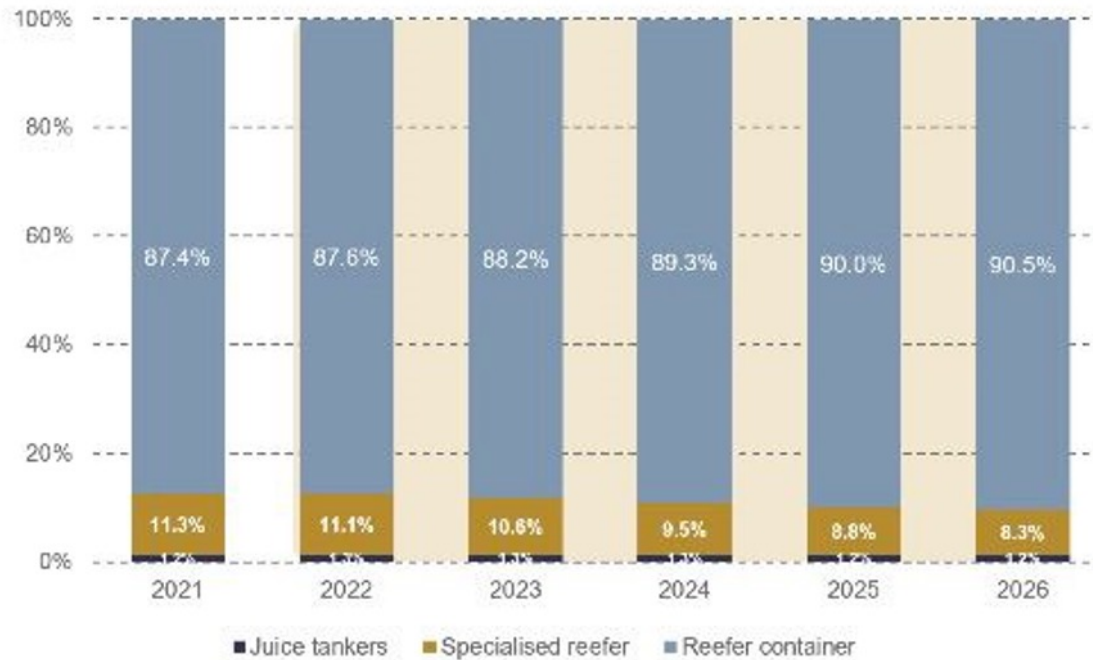
Seaborne reefer trade to expand CAGR 3% to 2026

Seaborne reefer trade, million tonnes



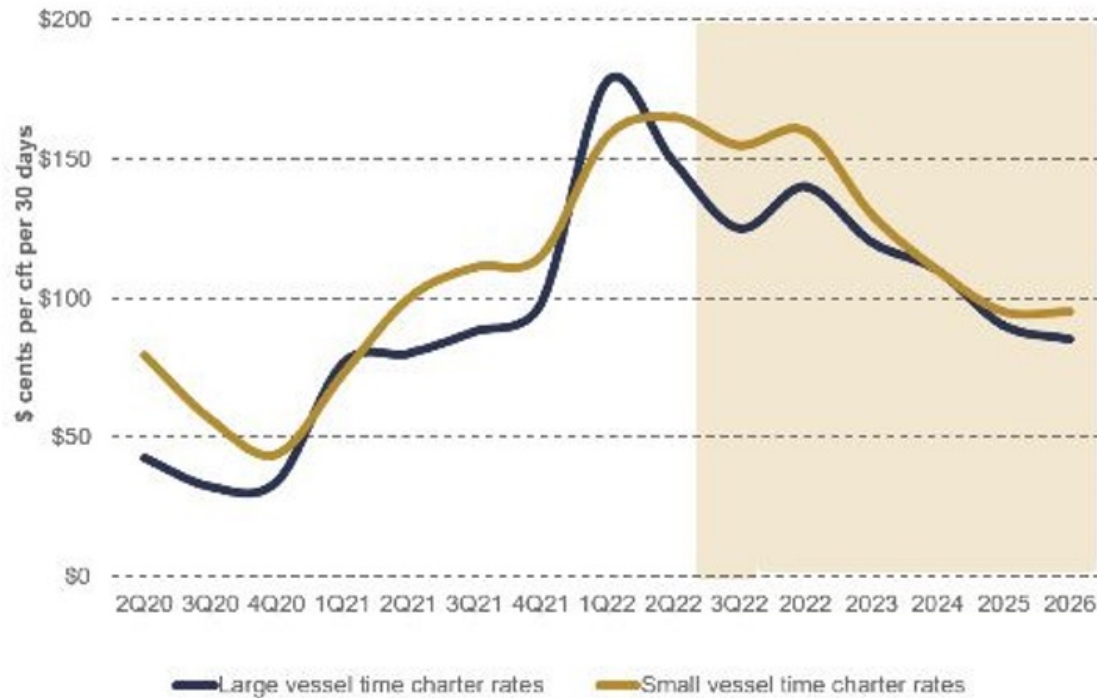
Worldwide perishable cargo modal split forecast

Containers to account for 90% of all reefer cargo by 2025



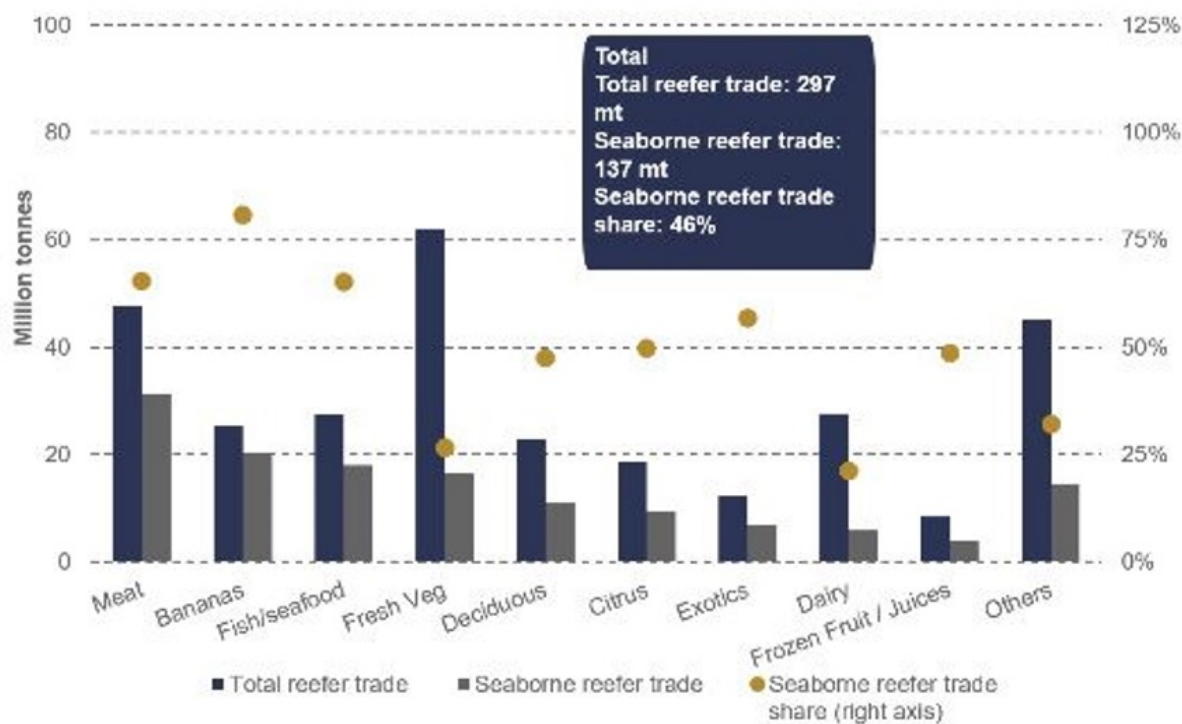
Specialised reefer rates peaked, short term positive

Quarterly spot time charter rates for small and large specialised reefers



Seaborne trade by commodity group

Worldwide seaborne reefer trade compared to seaborne reefer trade



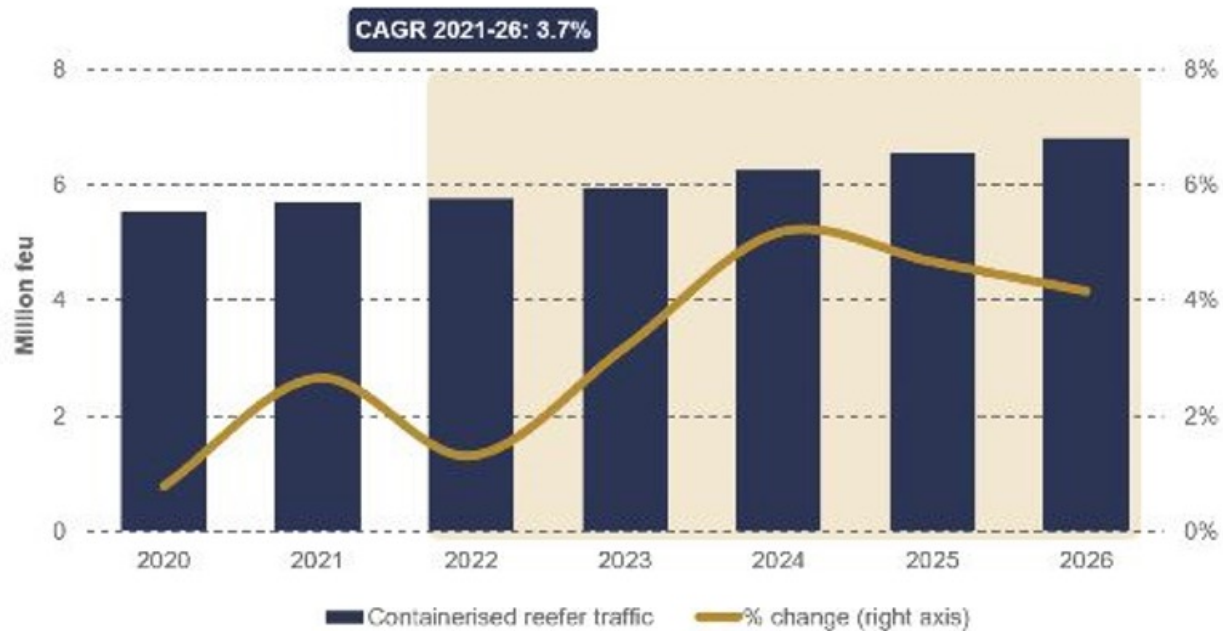
Conclusions

- **Seaborne reefer trade recovered in 2021 but has slowed into 2022**
- **A year in which equipment growth at a standstill and older equipment gets removed from the fleet**
- **Container imbalance remains a constant but repositioning easier as alternative cost lower**
- **Reefer Container freight rates have peaked**



Container reefer volume to expand 3.7% CAGR

Containers are the mainstream supply chain option

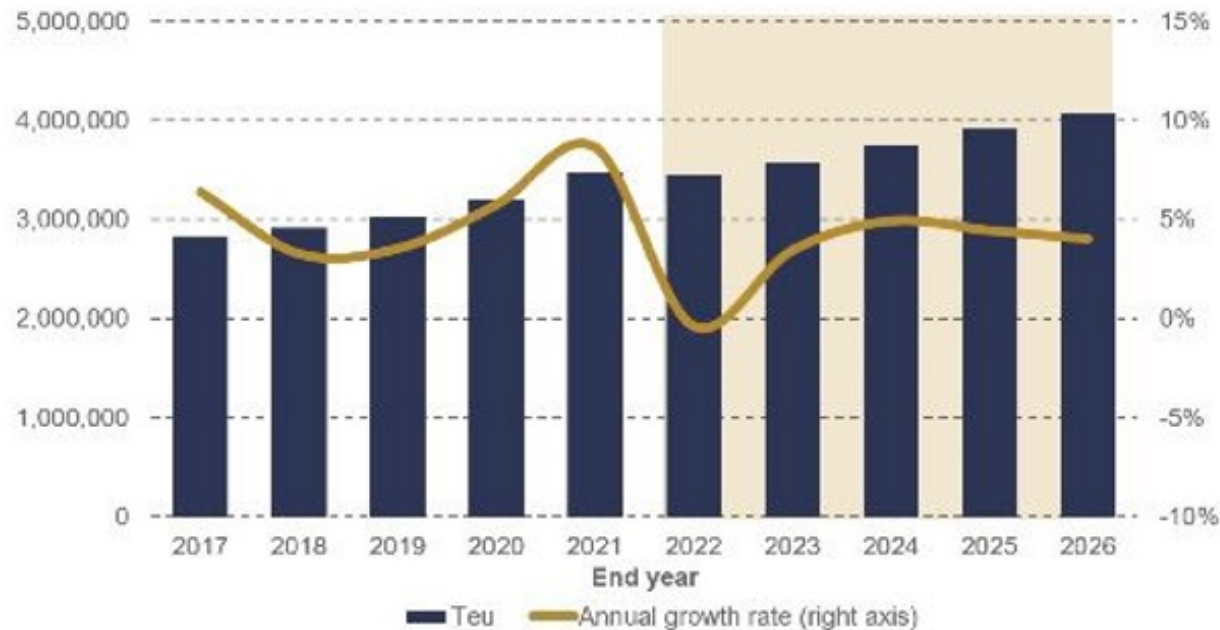


Reefer container imbalances



No growth in overall reefer container equipment fleet in 2022

Development of world maritime refrigerated container fleet





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