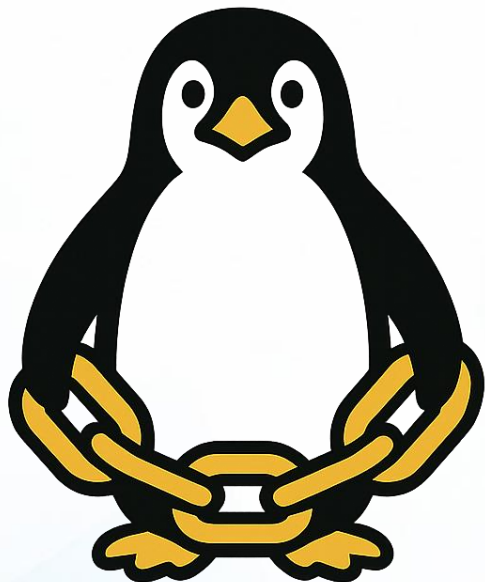




COLD CHAIN COLLECTIVE



Tara Larson
*Customer Account
Manager*
Nestle



Owen Stehm
*Trade Promotion
Optimization Analyst*
Rosina Food Products



Alek Ramoska
Vice President of Sales
Island Way



Daniel Sedgwick
*Director, National
Sales*
The Coca-Cola
Company



Stephanie Smith
*National Account
Manager*
Kroger & Whole Foods
Market
Tru Fru



Yuki Palermo
*Sr. Manager Trade &
Insights*
InnovAsian Cuisine



Cost Leakage: Shared Problem & Nobody Wins

THE BIG QUESTION

How can **retailers and suppliers** collaboratively reduce friction and **cost leakage** in frozen and refrigerated operations?

THE GUARDRAILS

Solutions must not shift penalties or redistribute financial burden. They must improve process clarity, compliance, and operational effectiveness.



\$268B

TOTAL FROZEN & REFRIGERATED INDUSTRY

ESTIMATED ANNUAL OPPORTUNITY

\$3.2B

in annual deductions, fees & chargebacks across
U.S. Frozen & Refrigerated categories

\$1.1B

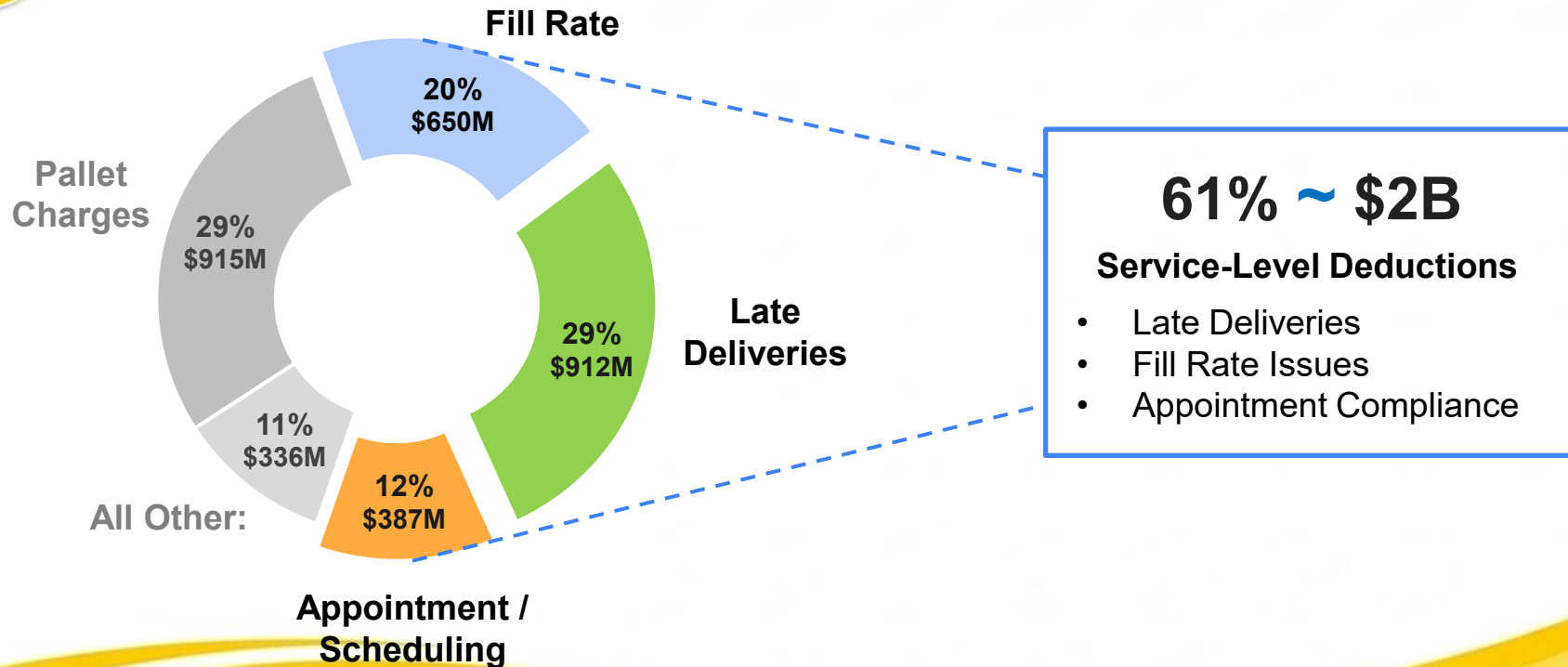
FROZEN

\$2.1B

REFRIGERATED



Service-Level Fees Drive 61% of Chargebacks





Service Failures Across Four Stages Drive Chargebacks



Reducing failures at any stage lowers chargebacks, improves profitability, and strengthens supplier/retailer collaboration



From Compliance to Continuous Improvement

1 Scorecard & Joint Business Planning



CPGs cite goal misalignment as a top barrier to effective planning:

73%

2 Advance Ship Notice Implementation



Potential reduction in preventable deductions:

30%

3 Industry Wide AI System



Reduction in on-time delivery fines report by a CPG leveraging AI:

50%

The Progression:
Visibility → Accountability → Prevention



Opportunity:

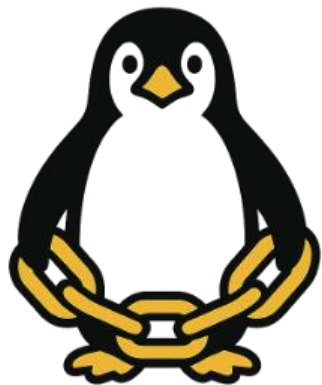
Small steps make a big difference, and our solutions have benefits for both the retailer and the supplier.



\$2B → 10% improvement = \$200M savings



Thank you!



**COLD CHAIN
COLLECTIVE**

Scan the QR Code for more
information:

