

BALMER LAWRIE

A PIONEER IN ORGANISED COLD CHAIN SECTOR

"Balmer Lawrie LOGICOLD is one of the few organised players in the Cold Chain Logistics business offering its own fleet of Temperature Controlled Vehicles (TCV) that are capable of handling cargo within temperature range of -18 to +25 Degree Celsius and ensure timely last mile delivery. All the TCVs are GPS enabled for real time tracking and also has real time temperature monitoring system."



Current scenario of cold chain market in India

The Cold Chain industry is presently considered as the Sunrise segment of India. The Indian Cold Chain logistics market is a fragmented market, which consists of a large number of local players to cater to the growing demand. The market is being driven by the growth in organised food retail and rise in the production and consumption of perishable food products. To efficiently manage the supply chains, most of the organised retail players are setting up large cold chain infrastructure. Further, increasing preference for processed food products and the growing shift towards the cultivation of fruits and vegetables over grain crops is significantly contributing to the industry growth. The favourable Government

policies coupled with the Government's initiative of setting up several mega food parks is providing a further boost to the industry. The growing demand for effective Cold Chain facilities from the health care sector in order to preserve heat sensitive products like vaccines, biopharmaceuticals, and clinical trial materials, among others, is propelling the industry growth.

The current Indian Cold Chain market size in volume is 33 Mn Tonnes and the cold chain market size is valued at 291 Bn INR. The industry is further expected to grow at a CAGR of 14.72% over the forecast period of 2022-2027 to attain a value of ₹3637.4 billion by 2027.

Size of cold storage facilities

Balmer Lawrie is one of the pioneers in the logistics industry and amongst the

leaders in the organised sector providing end-to-end Logistics services backed by pan India best-in-class infrastructure including Container Freight Stations, Cold Chain Units and owned fleet of Temperature Controlled Vehicles spread across the country. Balmer Lawrie has been providing total cold chain solutions through its brand 'LOGICOLD'.

Balmer Lawrie has four Cold Chain Units with a total capacity of 16,000 pallets.

Balmer Lawrie in association with Visakhapatnam Port Trust, through the JV Company Visakhapatnam Port Logistics Park Ltd. (VPLPL) has set up a state-of-the-art Multi Modal Logistics Hub spread over an area of 53.2 acres at Visakhapatnam. This facility has a Cold Chain Unit with total capacity of 3780 pallets.

Presence of cold storage facilities across India and their hinterland coverage

Balmer Lawrie has four state-of-the-art Cold Chain Units at Medchal (Hyderabad), Rai (Haryana) Patalganga (Navi Mumbai) and Chhatabar (Bhubaneswar), all adhering to international standards. Its JV company VPLPL has a Cold Chain Unit at Visakhapatnam.

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Commodities handled

All the Cold Store facilities are designed to handle multi commodity storage with the temperature range between -18 to +25 Degree Celsius.

Major Sectors we cater to:

- QSRs – Quick Service Restaurants
- e-Groceries & Online Food Delivery
- Dairy & Milk products
- Pharmaceuticals
- Fruits & Vegetables
- Marine & Meat Products
- Exim Cargo
- Confectioneries

Major Segments

- Frozen (Below -18 Degree Celcius)
- Dairy, Marine, Processed Food, Frozen Vegetables and Meat varieties
- Chill (0 to 10 Degree Celcius)
- Dairy, Vegetables, Fruits, Pulp and Pharmaceuticals
- Mild Chill (10 to 20 Degree Celcius)
- Sub tropical fruits, Dairy, Chocolates and Seeds
- Normal (Greater than 20 Degree Celcius)
- Dehydrated foods, RTE, Oil and extracts.

“The Cold Chain Units provide multi chamber, multi temperature palletized storage facility with automated location tracking and can handle 1000+ containers of cargo across categories. The Cold Chain Units are BRC and FDA accredited and are MPEDA & FSSAI certified. It has the expertise in handling all products between the range of -25°C to +25°C.”



ADIKA RATNA SEKHAR
CHAIRMAN & MD, BALMER LAWRIE & CO LTD

Balmer Lawrie’s Cold Chain Unit at Hyderabad is the logistics and distribution partner of Covid-19 vaccines (Covaxin & Sputnik) besides other popular vaccines.

Technology use and automation

Technology plays a vital role and is a differentiator in the entire cold chain logistics supply chain and Balmer Lawrie has implemented tech-intensive initiatives to increase efficiency, and ensure safe handling of products and crucial last mile delivery seamlessly.

All the state-of-the-art Cold Chain Units at Balmer Lawrie work on Warehouse Management System (WMS) software for managing day-to-day warehouse activities effectively. We have centralized SCADA system for automated operation of the refrigeration plant which helps us to monitor real time storage temperature. All the Cold Chain Units are equipped with Reach Truck for loading and unloading of the products and Dock Leveller and Dock shelter. Each of the warehouse has ammonia gas leak detection system with alarm, automated doors and emergency alarms and 24x7 CCTV surveillance.

Key highlights/USP of cold storage facilities

Balmer Lawrie is one of the most trusted Cold Chain Logistics companies in India offering one-stop-shop solution under brand "LOGICOLD" to the temperature controlled supply chain requirements of the nation. It is an integrated service provider offering, storage, distribution and value added services. The four state-of-the-art Cold Chain Units, all adhering to international standards are strategically located providing cold chain solutions to all the four regions across the country. The Cold Chain Units provide multi chamber, multi temperature palletized storage facility with automated location tracking and can handle 1000+ containers of cargo across categories.

Balmer Lawrie LOGICOLD has the expertise in handling all products between the range of -25°C to +25°C. With the ‘customer first’ approach,

Facilities	Navi Mumbai	Hyderabad	Haryana	Bhubaneswar
Total Plot	2.00 acres	1.41 acres	2.20 acres	1.5 acres
Total Capacity	3840 pallets	3402 pallets	3800 pallets	2000 pallets + 3000 MT



we serve leading brands, catering to almost all industry verticals be it QSR chains, confectionary, food processing, pharmaceuticals, meat and poultry, or fruits and vegetables. We believe in going that extra mile to ensure that the products are delivered on time and in prime condition.

Balmer Lawrie has its own fleet of Temperature Controlled Vehicles (TCVs), which are GPS enabled and have 24x7 temperature monitoring system. Balmer Lawrie LOGOCOLD has already created its brand presence during the pandemic by storage and distribution of Covid-19 vaccines (Covaxin & Sputnik) from the Hyderabad unit.

Various value-added services like grading, sorting, packaging, dry storage, inventory management, bulk packing and repacking, client workstations providing complete food processing setup, blast freezer (Patalganga) are also provided. All the warehouses are compliant to all HSE and statutory requirements. The Cold Chain Units are BRC and FDA accredited and are MPEDA & FSSAI certified. A team of professionals including trained and skilled personnel work round the clock to provide superior services to all customers.

Balmer Lawrie LOGICOLD won various accolades and awards. It was conferred with the 'Best Customer Service in Cold Chain Industry' award by World Logistics & Supply Chain Congress in 2023. It won NCCD, CII awards for Best Cold Chain Facility in small category 2021, FSC awards for best Cold chain Project- 2017, 2018 and has constantly ranked among top cold storages as per yearly audit by major QSR.

What are the opportunities and challenges cold chain operators face in India?

The Cold Chain industry is observing a paradigm shift from unorganised cold storage to organised end-to-end cold storage solutions. There is considerable gap between the demand and existing capacity of organised Cold Chain service providers in the market for the storage and distribution of various high valued products. This gap presents a significant opportunity for stakeholders associated with the industry. Increase in the number of segment of products opens multiple opportunities to the Company in segments like Quick Service Restaurants (QSR), Pharmaceutical, etc. Increased demand in the real time temperature monitoring of products in the entire supply chain is opening multiple doors for temperature controlled vehicles as well. Since the organised Cold Chain segment is highly capex intensive, the capacity utilisation along with right pricing model and leveraging new age technology play an important role in ensuring the profitability of the business. With organised players gradually entering this market segment, a high price war for ensuring capacity utilisation resulting in reduction of average selling price may pose as a threat to this industry. However, service excellence, maintaining high quality standards, value added service offerings, seamless distribution of products and use of green technologies shall overrule the price war and help in customer retention.

Despite the growing size and criticality of the logistics and supply

chain industry in India, it is marred by an unbalanced logistics modal mix, high indirect costs, poor infrastructure, fragmented networks and lack of technology adoption. However, the COVID-19 pandemic and its ripple effects brought in expedited upheaval seen in the form of technology adopted and execution of operations. Modern technology such as automation, robotics, artificial intelligence, big data analytics, and the Internet of Things are being rapidly adopted by Cold Chain industry which is helping them to complete their deliveries with higher accuracy and shorter times.

The Cold Chain warehouses are highly volatile due to the seasonality which in certain cases lead to reduction in the utilisation of the infrastructure throughout the year. Scarcity of trained manpower is also a concern for Cold Chain industry. Large players are also focussing on a sustainable supply chain with by using solar, electric and other renewable energy solutions. 