

top 25 operators

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The Top 25 temperature-controlled logistics providers

Produced by Cold Chain News in association with **THERMO KING**

THE COLD CHAIN NEWS LISTING OF THE TOP 25 TEMPERATURE-CONTROLLED OPERATORS IN BRITAIN AND IRELAND

A vibrant industry grows

Britain's top five temperature-controlled transport, distribution, and logistics providers report increased turnover in what has unanimously been agreed an incredibly tough trading environment for all sectors of the transport industry

Despite the general economic gloom the larger companies have continued to use their financial resources to invest in plant, equipment, vehicles and depot/warehouse expansion. Companies investing in this way include Yearsley, Grocontinental, NFT, Turners and RDS.

While this is a positive development, most other companies in the top 25 listing overall report stagnant, or even a decline, in turnover. The trend towards expanding from chilled and frozen to ambient transport and warehousing has continued from last year with Chiltern Cold Storage and Fowler Welch just two of the companies beefing up the ambient side of their businesses.

Acquisitions were few and far between last year with most temperature-controlled operators focusing on organic growth. However, Turners, which appears in our listing for the first time, snapped up Browns Distribution last year and SDM European Transport bought a groupage exporter in the UK.

Most companies have stressed that the current financial year is likely to be equally tough, with continued pressure on margins and rates. Some of the initiatives to cut costs and improve profit include reducing empty running, the use of fuel escalators and offering more added-value services.

Suppliers, as well as operators, expect challenging times ahead for the industry. Karin De Bondt, regional director for Thermo King for the UK and Ireland, believes the road transport industry is likely to face similar challenges in 2013 as those faced during the last two years.

"In today's conservative economic climate and with the forthcoming Euro 6 legislation, operators are looking for solutions that offer improved fuel efficiency, lower noise and improved ease of use for drivers. In addition, we expect the pharmaceutical segment to drive market growth," says De Bondt.

Other players...

Excluded from this listing are those companies, such as ACS&T and Norbert Dentressangle, where we have been unable to separate out their temperature-controlled activities for comparative purposes.

Norbert Dentressangle is especially strong in frozen goods warehousing and distribution in the UK and has 4 million square metres of frozen warehouse capacity in Europe. It also handles chilled and ambient products.

ACS&T has 12 temperature-controlled warehouses for frozen, chilled or ambient raw materials and finished products for final distribution. It is a subsidiary of Camellia, a £250m turnover company that operates in 15 countries. Much of Camellia's revenue is generated from UK operations that include food storage and distribution, engineering, agriculture and banking.

Eddie Stobart did not appear in last year's table and has since pulled out of its short shelf-life chilled distribution operations. Stobart's multiple-user chilled operations, the part acquired with the purchase of Innovate Logistics in 2008, represented around 2.5 to 3% of the turnover of Eddie Stobart's transport and distribution business.



About our sponsor

Thermo King: 75 Years of Trusted Expertise, Innovation, Partnership and Performance

Since patenting the first successful mechanical refrigeration unit in 1939 (see page 12), Thermo King has helped to shape the global industry of transport refrigeration. Thermo King is committed to provide transport temperature control solutions that meet customer needs in terms of reliability, improved fuel efficiency, reduced noise emission and ease of use for drivers.

Thermo King also offers service maintenance programs as well as a range of accessories and temperature monitoring and tracking equipment. Our global network of certified dealer service technicians is unmatched in the industry, superior in their responsiveness and whose knowledge and depth of experience support our customers wherever they go.

Thermo King is a business unit of Ingersoll Rand, a global provider of products, services, and integrated solutions that advance the quality of life by creating and sustaining safe, comfortable and efficient environments. For more on Thermo King visit: europe.thermoking.com

UK Top 25 Temperature-Controlled Transport and Logistics Providers

Rank	Company	Depot	2012 (m)	2011 (€m)	2010 (€m)	Tractors	Trailers	Rigids	Vans	Ambient (m2)	Chilled (m2)	Frozen (m2)	Total
1	Gist	37		500.00	460.00	1500	1800	150	90				225,000
2	Turners (Soham)	32		235.00	210.00	1130	1670	21	12	10,000*	10,000*	60,000*	80,000*
3	Culina Logistics	13		210.00	206.00	355	680	20	10	140,000	75,500		215,000
4	Fowler Welch	12	155.0	138.35	119.92	360	847			46,188	30,844	0	77,032
5	NFT Distribution	7	152.5	140.90	127.70	390	490						74,322
6	Yearsley Group	13	143.6	122.00	126.90	297	300	40	15	17,500	2,000	127,500	147,000
7	Langdon Industries	9	74.2	67.55	59.39	181	264	90	4				20,275
8	Reed Boardall	1		32.76	30.21	160	240						112,000*
9	Grocontinental	1		28.40	25.70	65	120			7,277	25,467	40,020	72,784
10	Peter Green Chilled (Mann Group)	2		20.00	20.00	85	95	5	5	1,500	6,000	2,500	10,000
11	Moores Refrigeration Controlled Transport	5		19.57	17.99								
12	Virginia International Logistics	2		16.00	16.00	60	200			1,858	929	464	3,251
13	McCulla (Ireland)	2		14.30	13.50	65	125	2	3	2,000	2,000	12,500	16,500
14	Ocean Trailers	1		13.30	14.20	31	31						
15	David Price Food Services	6		13.00	13.00	43	54	11			955	5,037	7003
16	Cold Move	2		12.00	11.00	15	30			50,000	50,000	250,000	350,000
17	Matthews International Transport	4		11.00	10.00	100	120						
18	Pulleyn Transport	1		10.00	10.00	33	35	11	1	10,000	21,000	15,000	46,000
19	Armoric Freight International	1		8.67	9.66								18,000*
20	Castlecool	3		7.42	6.82								
21	Chiltern Cold Storage Group	1		6.97	6.17	30	35	8	10	5,146	2,280	9,386	16,812
22	S D M European Transport	3		5.90	5.40	20	22		2				4400*
23	Refrigerated Delivery Services	1		5.20	3.80	6	6	20	17	100	200	50	350
24	Clan International Transport Services	1		3.45	3.31	20	20		1				
25	HS Logistics	1		1.80	1.60	8	3	12	2				

Notes:
 * pallets
 • The listing includes only those logistics companies where temperature-controlled transport and distribution services make up an identifiable and substantial portion of turnover. Companies excluded from the list because we are unable to separate out their temperature-controlled activity or lack of data are: ACS&T Logistics, B W Refrigerated Couriers, Davies International Transport, Direct Deliveries Transport, Edward Gilder & Co, Gregory Distribution, J B Wheaton & Sons, Lowe (Paddock Wood), Wincanton, DHL, PCL Transport, Robert Summers Transport, Solstor UK, McBurney Transport, Oakland International, and Samworth Brothers.

What the top bosses say

1 Gist

www.gistworld.com
 "Our focus in 2012 was to further strengthen our temperature-controlled operations network throughout the UK and Europe. Our network covers the entire UK and Europe and combined with our expertise in international logistics, offers global end-to-end temperature-controlled and time-sensitive logistics capability."
Martin Gwynn, chief executive

2 Turners

www.turners-distribution.com
 "Turners Refrigerated Division acquired Browns Distribution last year expanding its customer base in Lincolnshire. Browns operates 100 vehicles and has a temperature-controlled warehouse and packhouse. We are optimistic about the future although we anticipate tough economic conditions for the foreseeable future."
Paul Day, managing director

3. Culina

www.culina-logistics.co.uk
 "It is our absolute intention to maintain our industry leading service levels and continue to provide the benchmark for food and drink logistics across the UK and Ireland by adding value in a highly competitive logistics sector."
Thomas van Mourik, chief executive

4 Fowler Welch

www.fowlerwelch.co.uk
 "Our business has remained strong through listening, responding and delivering to our customers at all times, and through the flexibility and adaptability of our team across the network. We have had many new contracts with existing and new customers and have a strong pipeline for the year ahead."
Nick Hay, managing director, Fowler Welch

5 NFT Distribution

www.nft.co.uk
 "Despite the challenging economy, NFT has grown by 8% per annum over the last five years. Our flagship Daventry depot is operating at optimum capacity and we invested £2m in our new Middleton depot (opened Oct 2011), significantly growing NFT's presence in the North West."
Dale Fiddy, sales and marketing director

6 Yearsley Group

www.yearsley.co.uk
 "The logistics division has won several new contracts and work has started on the head office 'Super Hub' consolidation centre at Heywood which is due for completion in May 2013. The purchase of Hams Hall in the Midlands expanded our cold store network to 13 and provided the ultimate destination for clients."
Harry Yearsley, managing director

7 Langdon Industries

www.langdons.co.uk
 "I am pleased to report steady growth in turnover and net profits over recent years and this is partly explained by our on-going commitment to deliver a consistent high quality service to our 2,000+ customers. As a result of this we have seen gains in our market share."
Arran Osman, managing director

8 Reed Boardall

www.reedboardall.co.uk
 Reed Boardall operates from a single site in North Yorkshire with a fleet of 160 tractors and 240 refrigerated trailers, all under four years old.

9 Grocontinental

www.grocontinental.co.uk
 "Pre-tax profit increased to £2.7m from £2.1m in 2010/2011. While we were challenged by rising costs and competitive pricing, close management and the improved utilisation of buildings and vehicles made the real difference during the last financial year."
Linda Grocott, joint managing director

10 Peter Green Chilled (Mann Group)

Peter Green provides UK and international logistics handling chilled, frozen and ambient foods with an 80-vehicle fleet.

11 Moores Refrigeration Controlled Transport

www.mrct.co.uk
 Moores Refrigeration Controlled Transport has delivered chilled food products since 1969. It has four sites in the UK delivering to wholesale markets, food service suppliers and retailers.

12 Virginia International Logistics

www.virginialogistics.ie
 "2011/12 proved a challenging period. However, despite these challenges, our business remained constant and we continue to focus on providing our many customers with competitive prices and quality services to ensure reliability and integrity in their supply chain."
Ray Cole, managing director

13 McCulla (Ireland)

www.mcculla.co.uk
 McCulla provides frozen, chilled and ambient storage, blast freezing, tempering, order picking and distribution.

14 Ocean Trailers

www.oceantrailers.co.uk
 "The past year has been tough for all transport companies, but new business and reduced empty running has enabled us to remain both competitive and profitable. Looking ahead to 2013/2014 we will continue with this strategy and look to improve our already high service levels."
Mike McLuskey, managing director

15 David Price Food Services

www.davidpricefoods.co.uk
 "David Price Food Services has continued to develop its national network albeit through difficult trading conditions in which we are continuing to drive down costs and increase sales. In 2013/2014 we are hopeful that we can further develop all of our strategically placed depots to further improve added-value services for the customer."
David Price, managing director

16 Cold Move

www.coldmove.net
 Cold Move provides temperature-controlled storage and UK distribution with warehouses in Shropshire and Warrington. It offers blast freezing, tempering, case picking and rework solutions and is BRC accredited.

17 Matthews International Transport

www.matthewstransport.co.uk
 Matthews International Transport provides temperature-controlled transport in the UK and Europe.

18 Pulleyn Transport

www.pulleyn.co.uk
 "The company continued to expand into the cold chain market during 2011/12 extending its client base. The company prides itself on providing a top level service to its customers, mainly in the pharmaceutical and foodstuff sectors."

19 Armoric Freight International

www.armoric.co.uk
 Armoric Freight International, set up by Marc Payne in 1975, provides full-load, temperature-controlled transport services in Europe (France, The Netherlands, Belgium, Germany, Spain, Italy and Portugal) running 26 trailers.

20 Castlecool

www.castlecool.ie
 "The company is looking at a number of potential growth developments in other geographical areas at present. Castlecool have been awarded the Gold Standard by Deloitte for the fourth year in succession, for being one of the Best Managed Companies in Ireland."
Paul Shortt, chief executive

21 Chiltern Cold Storage Group

www.chilterncoldstorage.co.uk
 "Building a new ambient warehouse, assembling a state-of-the-art fleet of refrigerated vehicles and installing automated voice picking are just some of the progress we have made. Our commitment to detail, accuracy and reliability will remain our key focus of attention."
Paul Jackson, managing director

22 S D M European Transport

www.sdmeuropean.com
 "We were in a fortunate position in 2012 to acquire a well-known groupage exporter in the UK. This has given us strength and flexibility for the business moving forward as well as a large increase in sales, so some good challenges ahead for SDM."

23 Refrigerated Delivery Services

www.rdstransport.co.uk
 "With substantial investment throughout 2012 in a modern fleet of vehicles and state of the art computer systems, we are looking forward to further growth in the coming year in a tough marketplace."
Richard Herbets, managing director

24 Clan International Transport Services

www.clan-international.com
 "Although volumes for the food and pharma sector have held up reasonably well during this period of recession, 2011/12 was another challenging year balancing and containing ever rising costs against transport rates that have remained at best static for some time."
John Clark, managing director

25 H S Logistics

www.hslogisticsltd.co.uk
 "The company is committed to running a modern fleet of vehicles with the best drivers at the wheel. A happy team and committed to excellence is what we strive for so the customer receives the best."
Patricia Hilton, managing director