



Storing
vital products
with care

Deer Park – Houston, United States

Deer Park - Major U.S. Chemicals Hub

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Forward-looking statement



This presentation contains 'forward-looking statements', based on currently available plans and forecasts. By their nature, forward-looking statements involve risks and uncertainties because they relate to events and depend on circumstances that may or may not occur in the future, and Vopak cannot guarantee the accuracy and completeness of forward-looking statements.

These risks and uncertainties include, but are not limited to, factors affecting the realization of ambitions and financial expectations, developments regarding the potential capital raising, exceptional income and expense items, operational developments and trading conditions, economic, political and foreign exchange developments and changes to IFRS reporting rules.

Vopak's outlook does not represent a forecast or any expectation of future results or financial performance.

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Key Messages

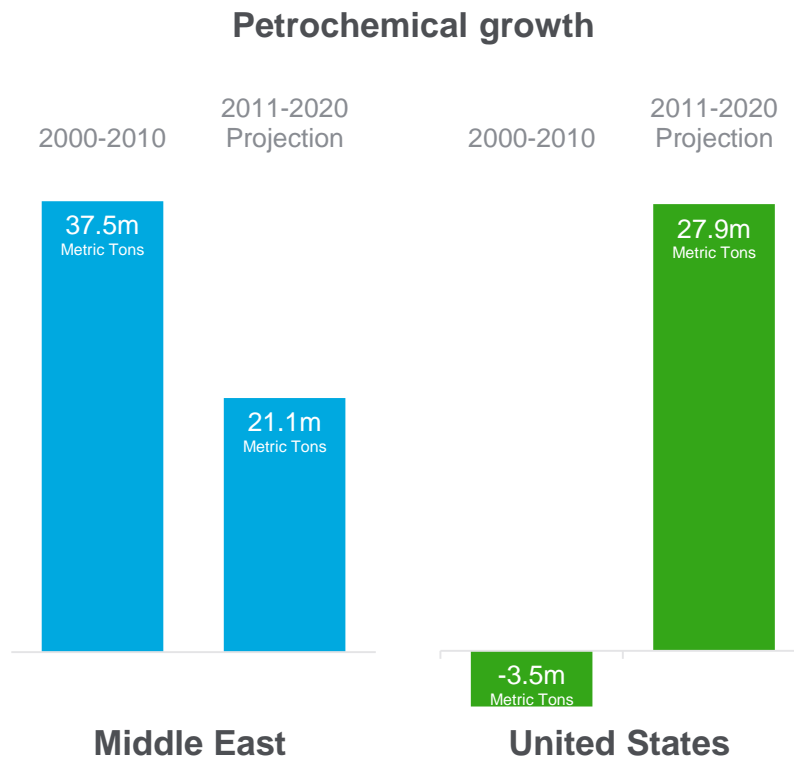


- Vopak terminal Deer Park is perfectly located in the Port of Houston to serve the growing US chemicals market
- Outstanding front line execution coupled with a major focus on safety continues to push Vopak's competitive position
- Expansion investments have been made and additional opportunities are being developed to continue our growth and profitability

Global petrochemical growth to Gulf Coast



- US Gulf Coast - the locus of global petrochemical growth
- Natural gas feedstock has shifted from the Middle East to the US Gulf Coast
- US ethane supply is growing rapidly, production is projected to increase 60% by 2021
- Between 2018-2023 at least 14 million tons of additional petrochemical capacity is expected to come online, mostly in the US Gulf Coast

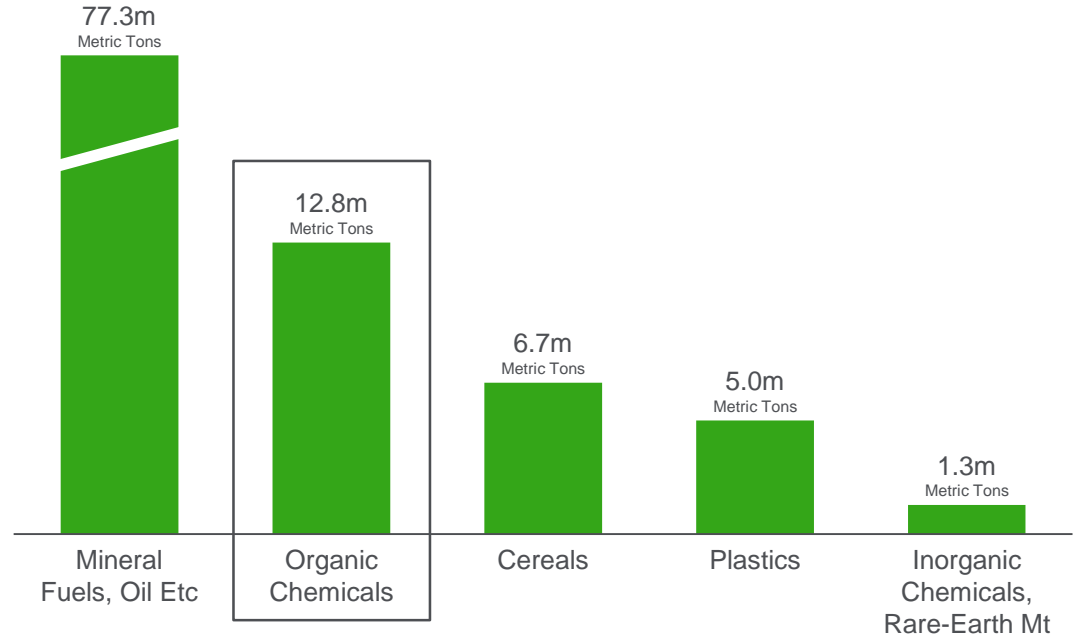


Growing export market



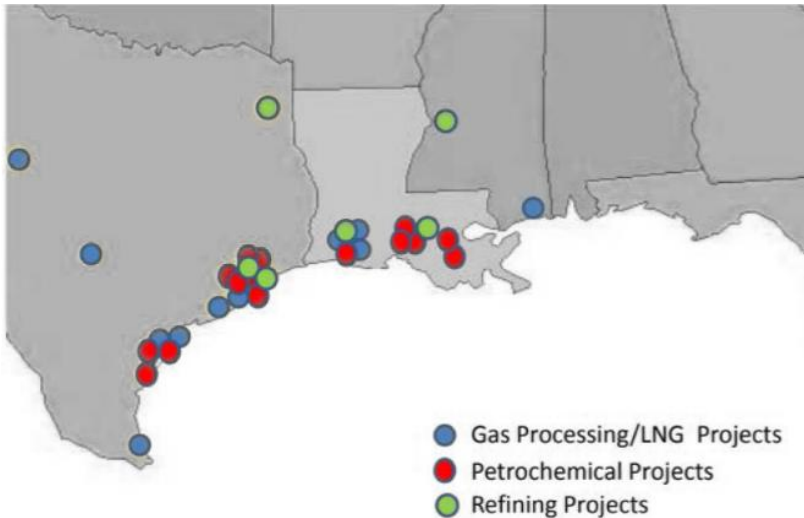
Houston leading commodities exports (2017)

- Almost **13 million metric tons** of liquid chemicals are exported from the Port of Houston every year and this is an ongoing, permanent shift upwards
- 2013-2023 additional output from over **300 projects** and **\$200 billion** in capital investment will generate more than **\$100 billion** per year in new chemical industry shipments

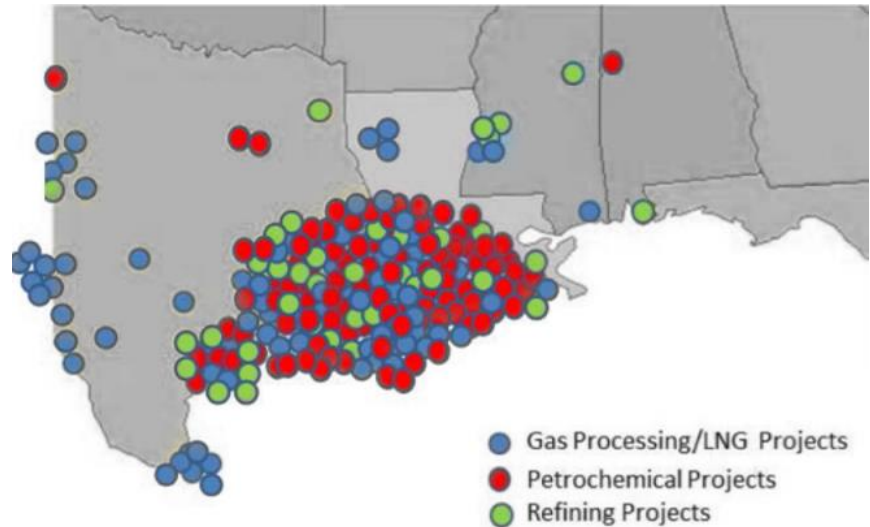


USGC project announcements

2012



Current





Houston metropolitan area comprises one of the largest petrochemical manufacturing areas in the world, primarily due to excellent access provided by the Port of Houston

Deer Park's Prime Location



Port of Houston

United States' largest petrochemical complex



1st

ranked US port
for international
commerce and
6th in the world

1st

ranked US port
in foreign
waterborne
tonnage
(247 million tons)

\$265 billion
annual economic
impact in Texas
(\$620 billion nationwide)

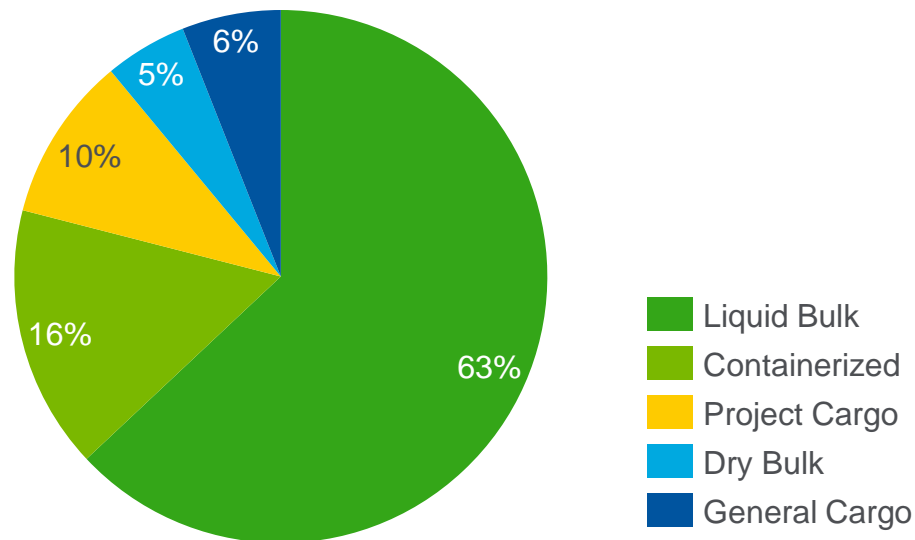
Port of Houston primarily liquid bulk



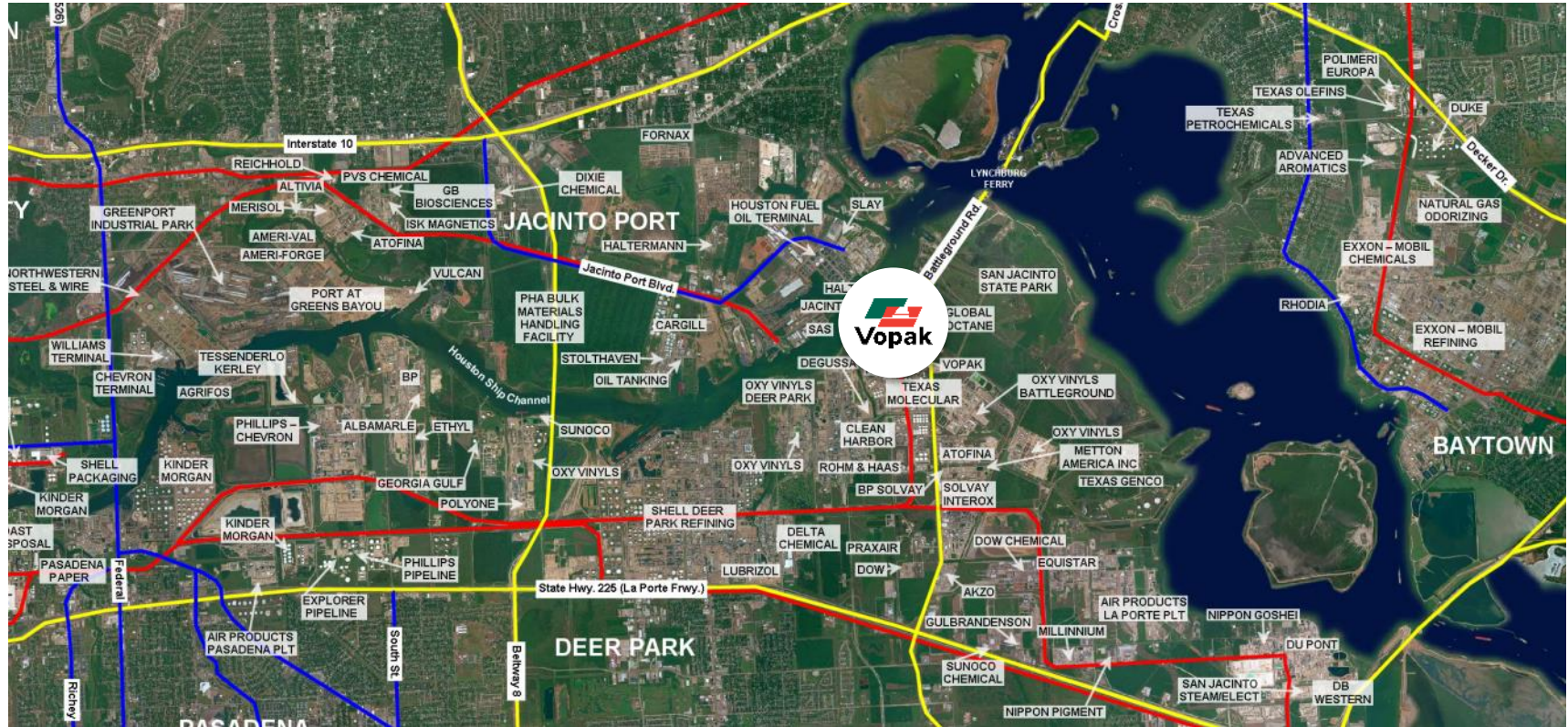
Greater Houston Port Complex

Cargo Sectors 2017

- More than 8,200 ships and 215,000 barges visit the Port of Houston annually
- Approximately 100 steamship lines provide service between Houston and more than 1,000 global ports



Major Players in the Area





Storing vital products with care
since 1976

Vopak Terminal Deer Park

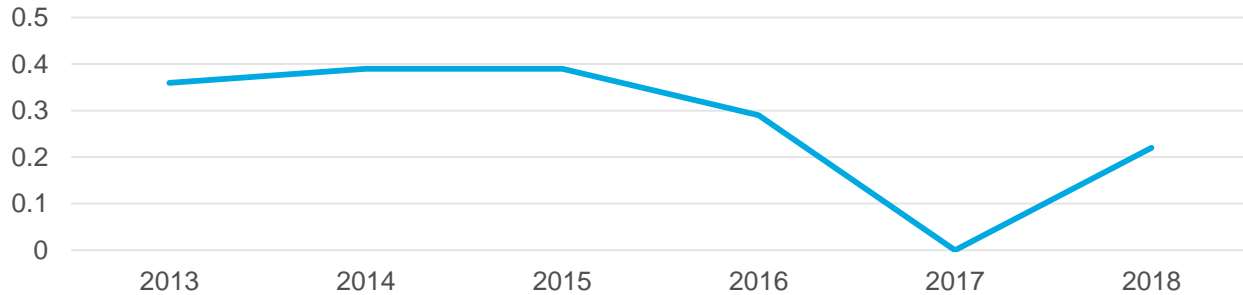


Terminal Deer Park safety statistics



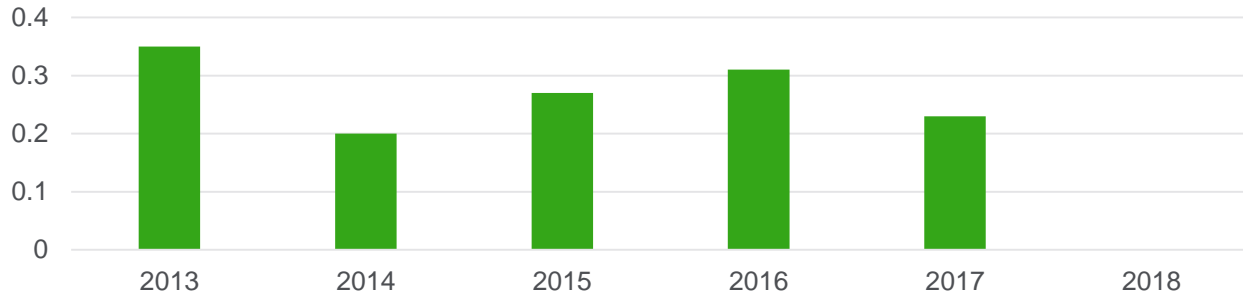
Total injury rate

Total injuries per 200,000 hours worked by own employees and contractors



Total process Event Rate

Tier 1 and Tier 2 incidents per 200,000 hours worked by own employees and contractors



Vopak Terminal Deer Park

The Deer Park side in numbers



22
Loading Bays



1.1
Million cbm



242
Tanks



550
Rail Spots



8
Barge Docks



5
Ship Docks

Deer Park annual activity



Pipelines

13 lines
5 customers

Ships

720

Barges

1,225

Railcars

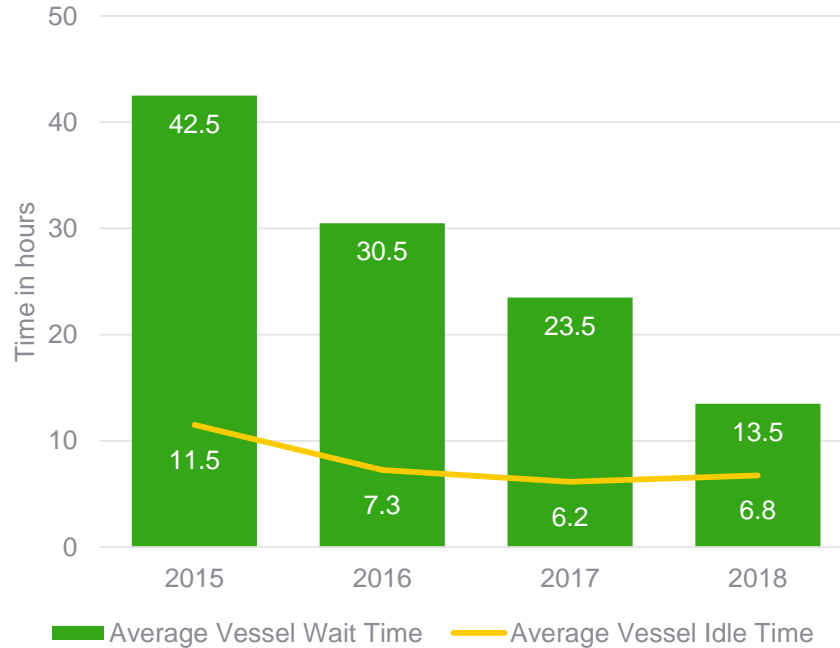
11,525

Trucks

25,900

Continuously improving performance

Reducing turnaround times strengthen our competitive position



Current Expansion

138,000 cbm expansion to be finished in Q4 2018



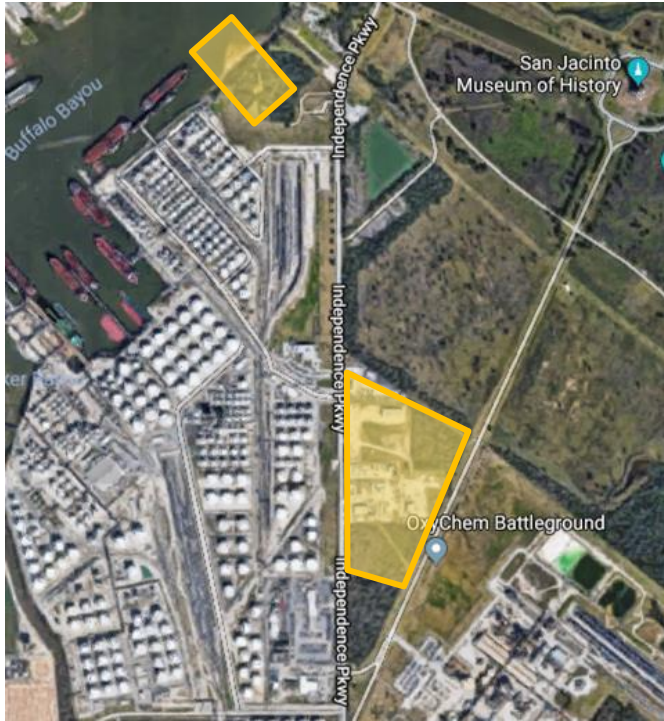
Capacity:
138,000 cbm

Tanks
10 x 13,800 cbm tanks



Deer Park East Land

Land available for extra expansion projects Deer Park



Land available for additional storage capacity,
1 ship dock and 1 barge dock

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Questions & Answers

