

Analyst's Presentation CEMEA

Antwerp July 10, 2008

***Professionals in
liquid bulk logistics***



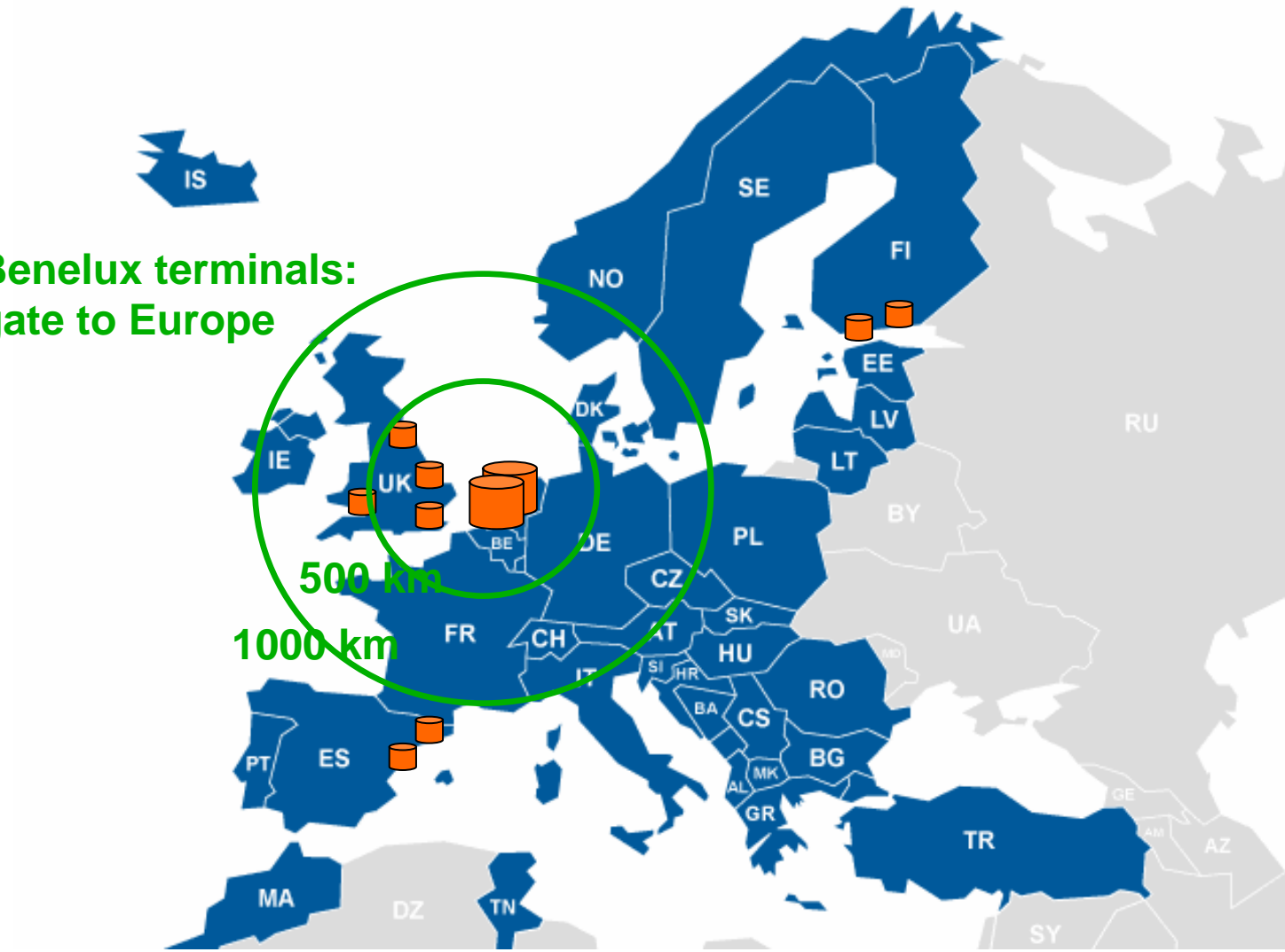
Introduction



Vopak Terminals CEMEA

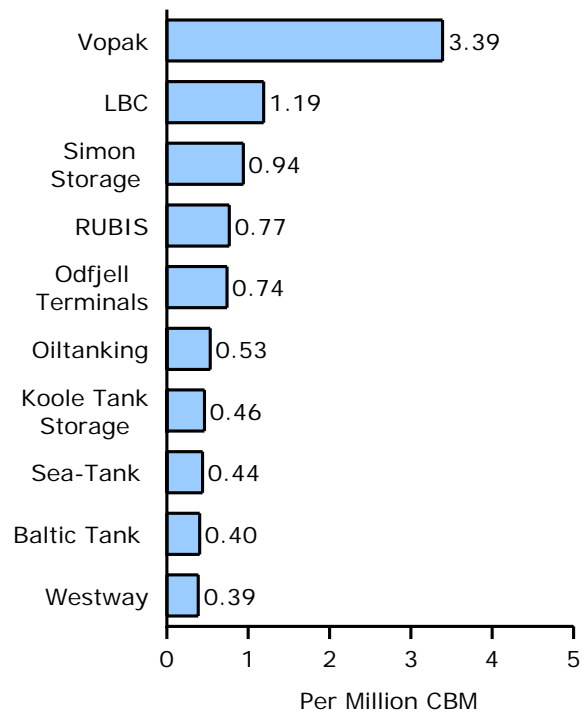
**Benelux terminals:
gate to Europe**

500 km
1000 km



Vopak's market share in Europe

Top 10 Independent storage providers for Chemical products



Vopak in Antwerp Chemical cluster

BASF



TOTAL

INEOS

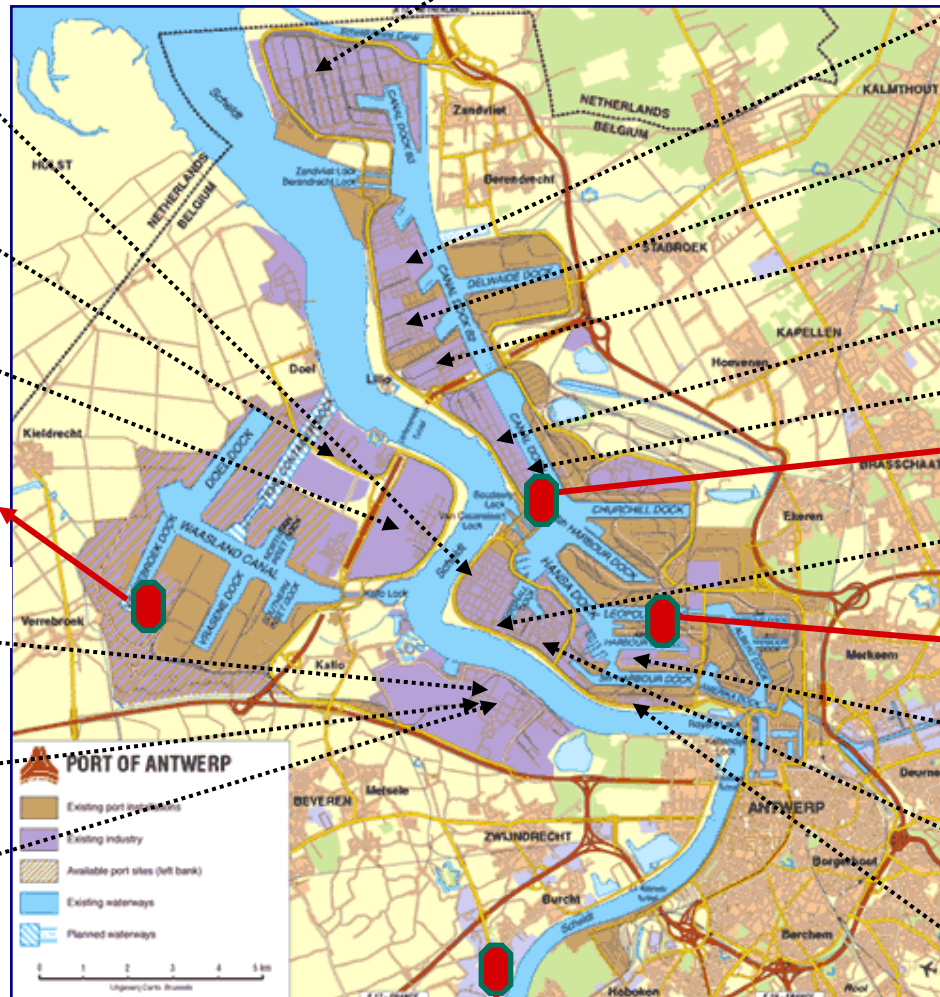


Bayer

VOPAK
LEFT BANK

ExxonMobil

bp



VOPAK HEMIKSEM



MONSANTO
imagine[®]

degussa.



Bayer

LANXESS

VOPAK ACS



BOREALIS

VOPAK EUROTANK



ExxonMobil

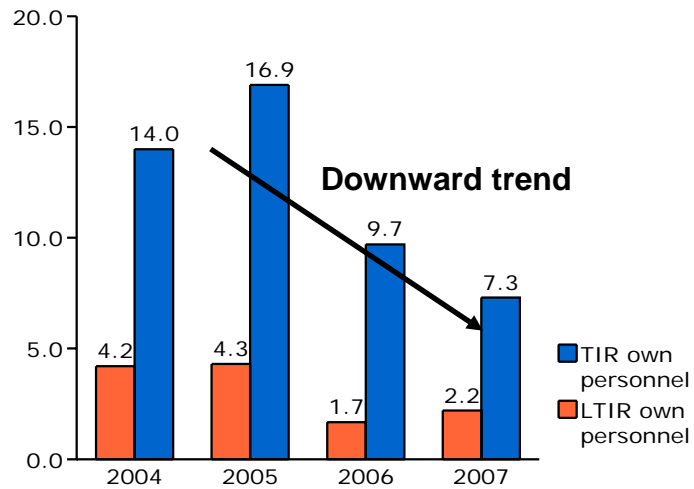


Trends



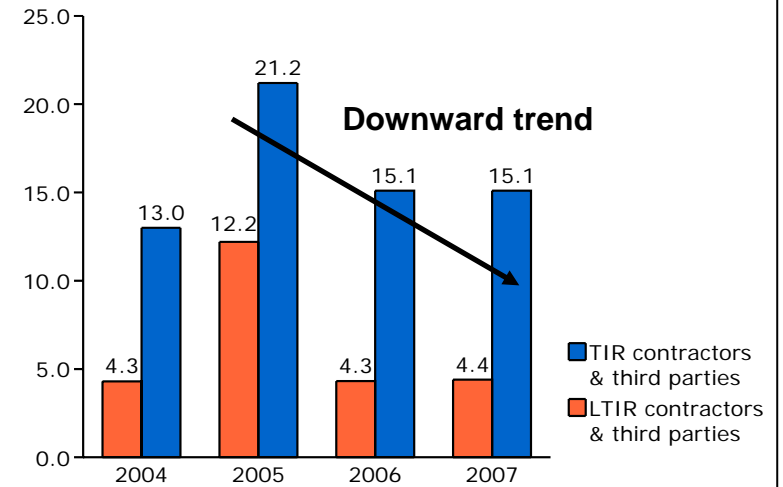
Operational Excellence

Vopak CEMEA LTIR
Own personnel

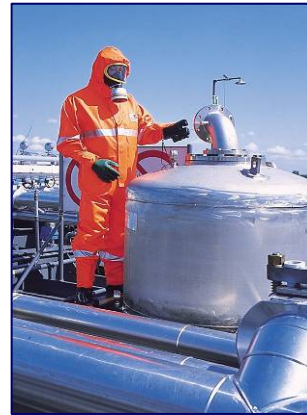


Lost Time Injury Rate (LTIR) and Total Injury Rate (TIR) in days per million hours worked

Vopak CEMEA LTIR
Contractors & third parties



Lost Time Injury Rate (LTIR) and Total Injury Rate (TIR) in days per million hours worked



Key facts & figures Vopak CEMEA

No. of Terminals

18

No. of Countries

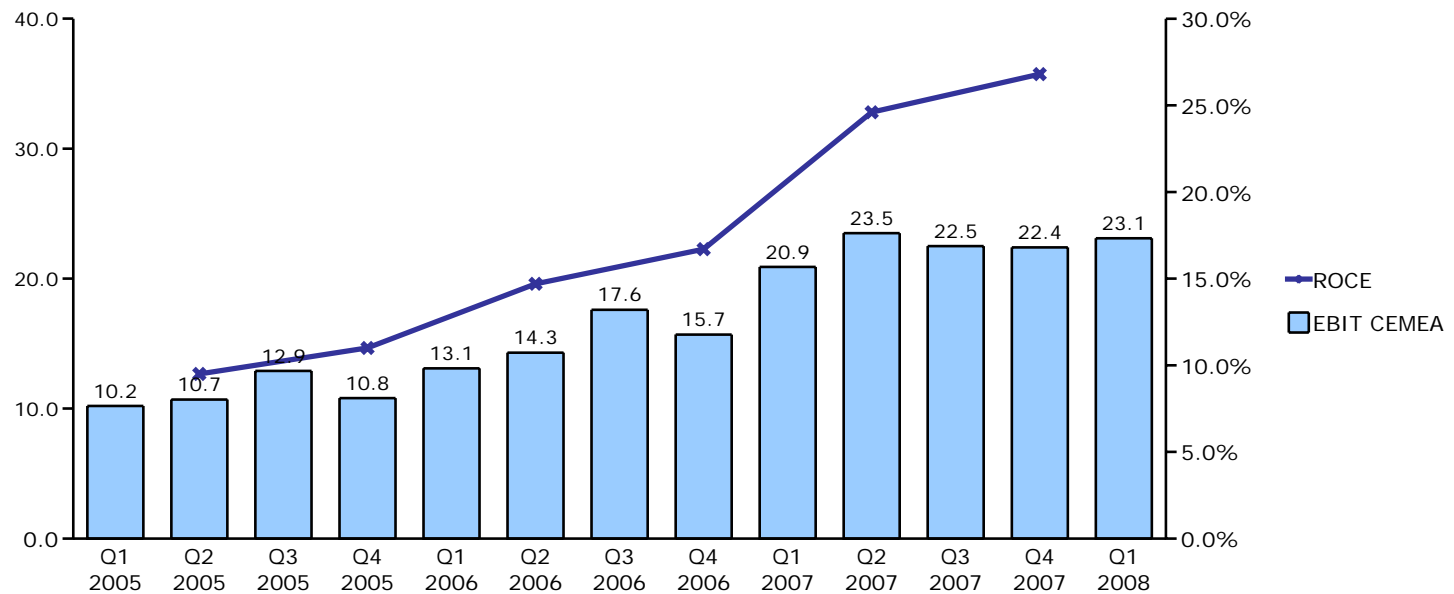
6

Total CBM

4.149.143

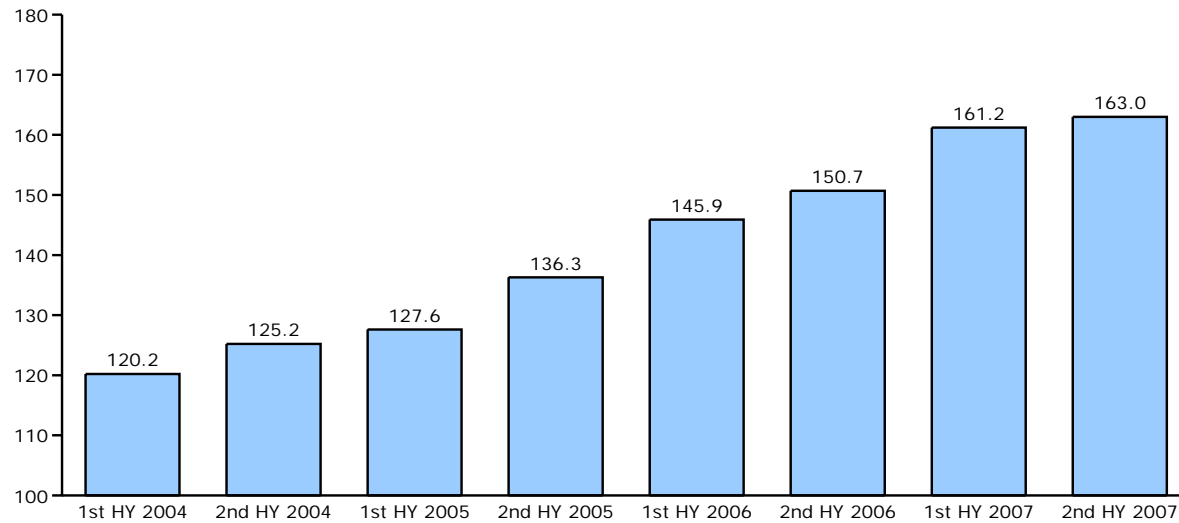
EBIT Vopak CEMEA

EBIT CEMEA (in €M)



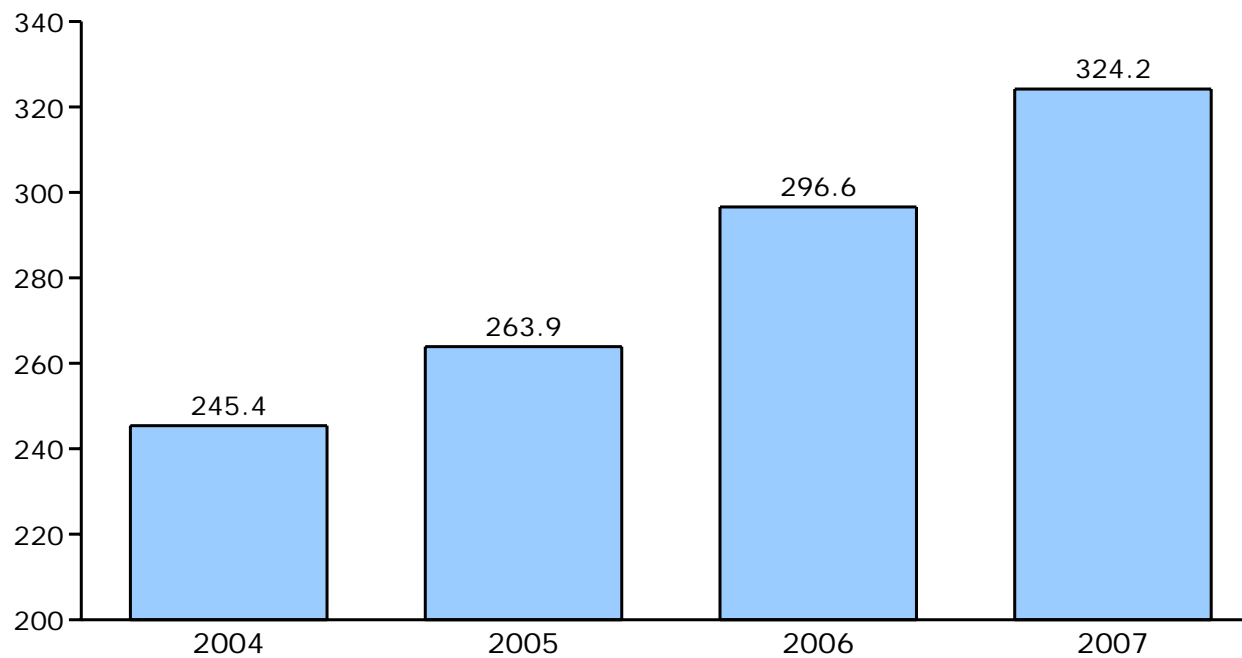
Net sales per HY CEMEA

Net Sales (in €M)



Net sales CEMEA

Revenue development 2004 -> 2007 in € mln



Growth Leadership



Rationalization of the Business



Standic



**Vopak Terminal
Hemiksem**



**Vopak
Barging
Europe**



Expansion projects CEMEA

Additional capacity: 40.000 cbm
Tanks: 16
Products: Chemicals
Completion date: Sept. 2009

Vopak Terminal Linkeroever

Belgium



Capacity: 100.000 cbm
Tanks: 60
Access: Vessel, Barge, Rail, Truck
Draught: 12,5 m
Berth: 1 for vessels, 2 for barges
Products: Chemicals, Oleochemicals
Services: Blending, Heating, Lab on Site,
Dedicated systems, Weighing, Nitrogen
Blanketing, Stainless steel product lines
Ownership: Vopak 100 %



Expansion projects CEMEA

Additional capacity: 12.770 cbm
Tanks: 7
Products: Chemicals
Completion date: Sept. 2007

Vopak Terminal ACS

Belgium



Capacity:	194.000 cbm
Tanks:	126
Access:	Vessel, Barge, Rail, Truck
Draught:	12,8 m
Berth:	5 for vessels, 5 for barges
Products:	Chemicals, Liquid Sulphur
Services:	Blending, Heating, Chilling, Lab on Site, Dedicated systems, Weighing, Nitrogen Blanketing, Drumming
Ownership:	Vopak 100 %



Expansion projects CEMEA

Additional capacity: 149.000 cbm
Tanks: 8
Products: Ethanol
Completion date: April 2009

Vopak Terminal Botlek (Zuid)



The Netherlands



Capacity:	695.195 cbm
Tanks:	204
Access:	Vessel, Barge, Rail, Truck, Pipeline
Draught:	12,5 m
Berth:	6 for vessels, 3 for barges
Products:	Chemicals
Services:	Blending, Heating, Chilling, Dedicated systems, Weighing, Nitrogen Blanketing, Block trains, Pipelines to local industry, Customs services
Ownership:	Vopak 100 %

The Netherlands

Expansion projects CEMEA

Additional capacity: 60.000 cbm
Tanks: 18
Products: Vegoil and
Biodiesel
Completion date: Q2 2009



Vopak Terminal Vlaardingen

Capacity: 428.200 cbm
Tanks: 420
Access: Vessel, Barge, Rail, Truck
Draught: 13 m
Berth: 3 for vessels, 11 for barges
Products: Vegetable oils, Oleochemicals, Biodiesel (B100/B99), Molasses
Services: Blending, Heating, lab on Site, Dedicated systems, Weighing, Nitrogen Blanketing, Drumming, Kosher & Halal storage
Ownership: Vopak 100 %





Expansion projects CEMEA

Additional capacity: 14.000 cbm
Tanks: 5
Products: Chemicals
Completion date: 2009

Terquimsa Tarragona



Spain

Capacity:	416.000 cbm
Tanks:	123
Access:	Vessel, Rail, Truck, Pipeline
Draught:	11 m
Berth:	3 for vessels
Products:	Petroleum Products, Chemicals, Vegetable oils, Oleochemicals, Liquefied Gas, Lubricating oils, Fertilizers
Services:	Blending, Heating, Chilling, Weighing, Nitrogen Blanketing, Drumming
Ownership:	Vopak 50 %

United Kingdom

Expansion projects CEMEA

Additional capacity: 40.000 cbm
Tanks: 8
Products: Biodiesel
Completion date: Oct. 2008



Vopak Terminal Teesside

Capacity:	246.600 cbm
Tanks:	160
Access:	Vessel, Truck, Pipeline
Draught:	10 m
Berth:	3 for vessels
Products:	Petroleum Products, Chemicals, Vegetable oils, Liquefied Gas, Bitumen
Services:	Blending, Heating, Dedicated systems, Weighing, Nitrogen Blanketing,
Drumming	
Ownership:	Vopak 100 %



United Kingdom

Expansion projects CEMEA

Additional capacity: 45.000 cbm
Tanks: 7
Products: Transport
fuels and
components
Completion date: 2008



Vopak Terminal London

Capacity: 392.899 cbm
Tanks: 125
Access: Vessel, Barge, Truck
Draught: 10,4 m
Berth: 3 for vessels
Products: Petroleum Products, Chemicals,
Liquefied Gas
Services: Blending, Heating, Lab on Site, Dedicated
systems, Weighing, Nitrogen Blanketing,
Additivation, Marking and Dyeing
Ownership: Vopak 100 %



Customer Leadership



Customer leadership

- Understand market developments of our customers
- Customer satisfaction survey
- KAM



Cost Leadership



Cost leadership

- Process Optimization
 - Automation
 - Efficiency Improvements
- Energy Savings Projects
- Reduce and prevent costs of spills and claims

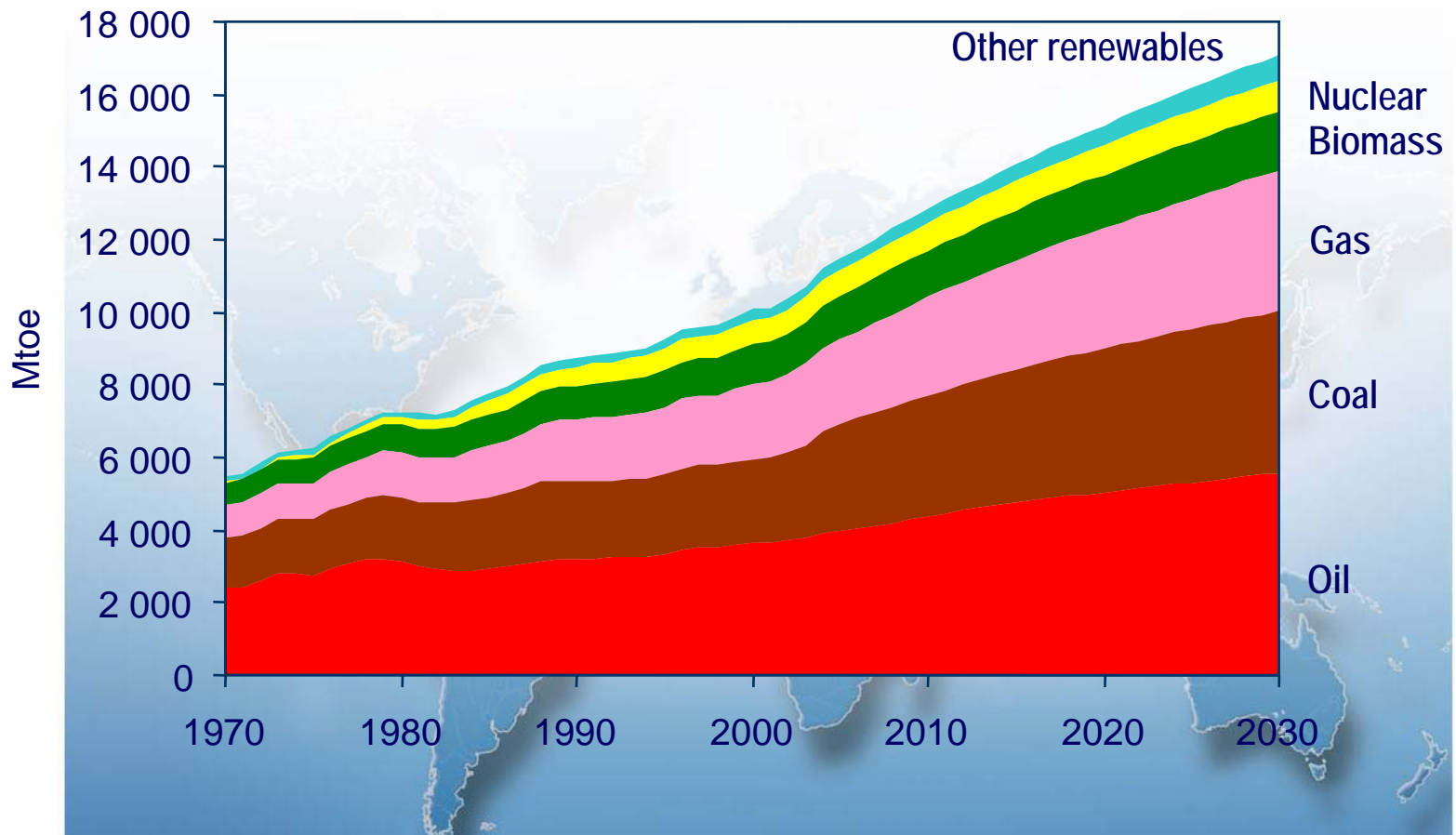


Biofuels



Why biofuels?

World primary energy demand



1. Increasing concern over energy supply and reduction of energy dependence

Source: IEA WEO 2006

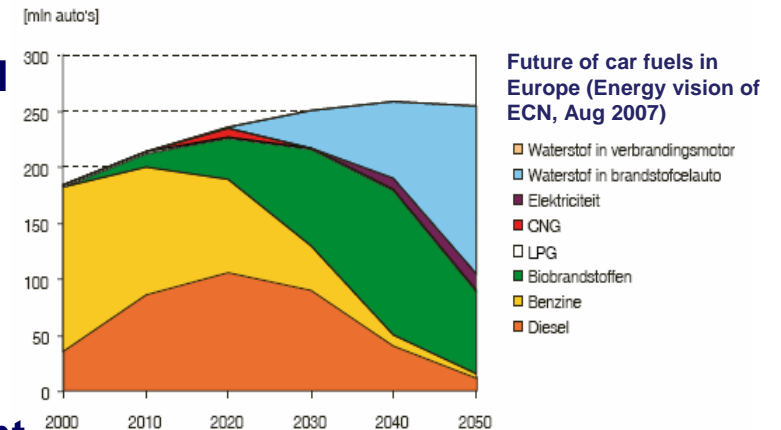
Why biofuels?

2. Increasing demand for transport fuel

For the next decades biofuels are seen as the only viable alternative for fossil fuels

3. Increasing concern over environment (GHG effect on Global warming)

4. New prospects for agricultural sector





THANK YOU

