

WELCOME



globalportsTM

TRANSESTONIA 2013
Kõrge lisandväärtusega naftasaaduste transiidimudel
Arnout Lugtmeijer
Vopak E.O.S. CEO



Vopak E.O.S. Shareholders 50/50



Royal Vopak is the **global market-leader** in independent storage and handling of liquid oil products, chemicals, vegetable oils and liquefied gases



Royal Vopak. Logistic hub terminals are well positioned to facilitate oil products trade

- over 80 terminals
- over 29 mn cbm
- over 30 countries



A leading container port operator in Russia, representing **27% of container throughput** in Russia. Assets located in key gateways of Baltic Basin and Far East Basin



Global joint-venture of N Trans and APM Terminals





Vopak E.O.S.: part of Royal Vopak network 84 Terminals in 31 countries, shared vision and standards



And a number of terminals under construction.



Vopak E.O.S. is the industry's front runner, currently the largest independent oil terminal operator in the Baltics

1993 - E.O.S.

2006 - Trendgate

2008 - (est. in 1992) Pakterminal

2008 - E.R.S.

2010 - Stivterminal

Total storage capacity 1,026,000 cbm

78 storage tanks

Berths - 7

Created over years - Unmatched complexity of four terminalling facilities and RW operator





Vopak E.O.S. is a unique complex service provider

Export HUB for Russia and FSU oil products global marketing

Solid Railway infrastructure

RW depo / own locomotives

Four tank farms to maneuver

Unmatched unloading capacities

Advanced Port infrastructure





Baltics is the preferred direction for Russian / FSU oil products exports to worldwide destinations

Region Drivers

Geographical proximity to the major
Russian / FSU refineries

Access to the distant key markets by large
tankers ARA / Asia / Middle East

Developed infrastructure
Port & RW

New projects development
▪ Ust Luga

**Baltic region continues to play a
significant role in Russian oil products
transportation.**

Region Challenges

Restructuring of the market
Shift to the distant markets

Ice condition in the Ports to the North
Winter railway congestion

Residual fuel gets heavier

Increase in long term storage capacities
demand

What is required...

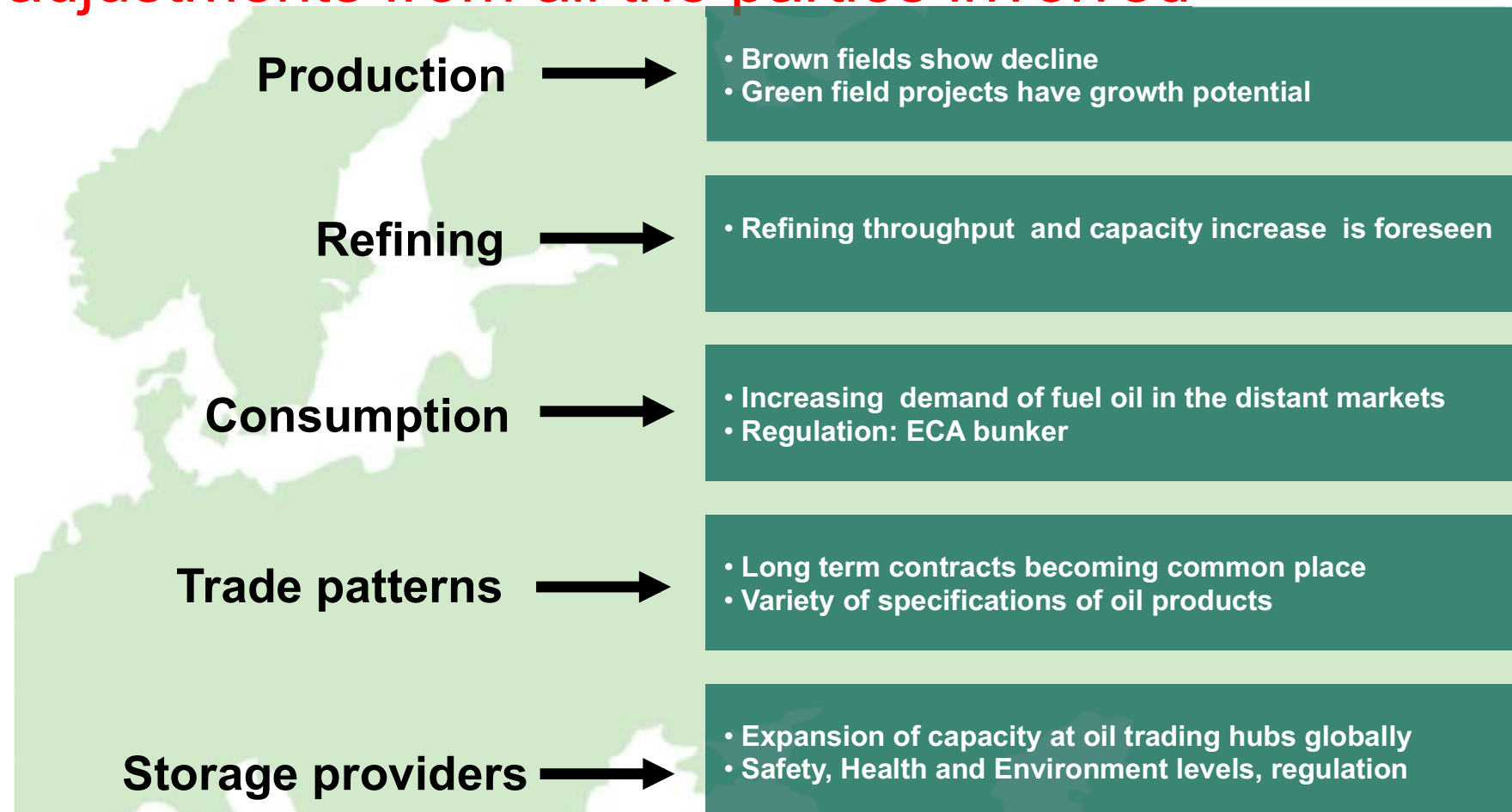


Competitive landscape: Vopak E.O.S. is the largest independent terminalling services provider





Continuously fluctuating market requires rapid adjustments from all the parties involved





Vopak E.O.S. continuously develops

Key elements to maintain competitive position

Timely investments in development

Research & Development

Market trends anticipation

Safety Health Environment

Innovation and improvement

Uniqueness: reliability of integrated services to create favorable environment





Integrity of the value chain determines company's present and prospects

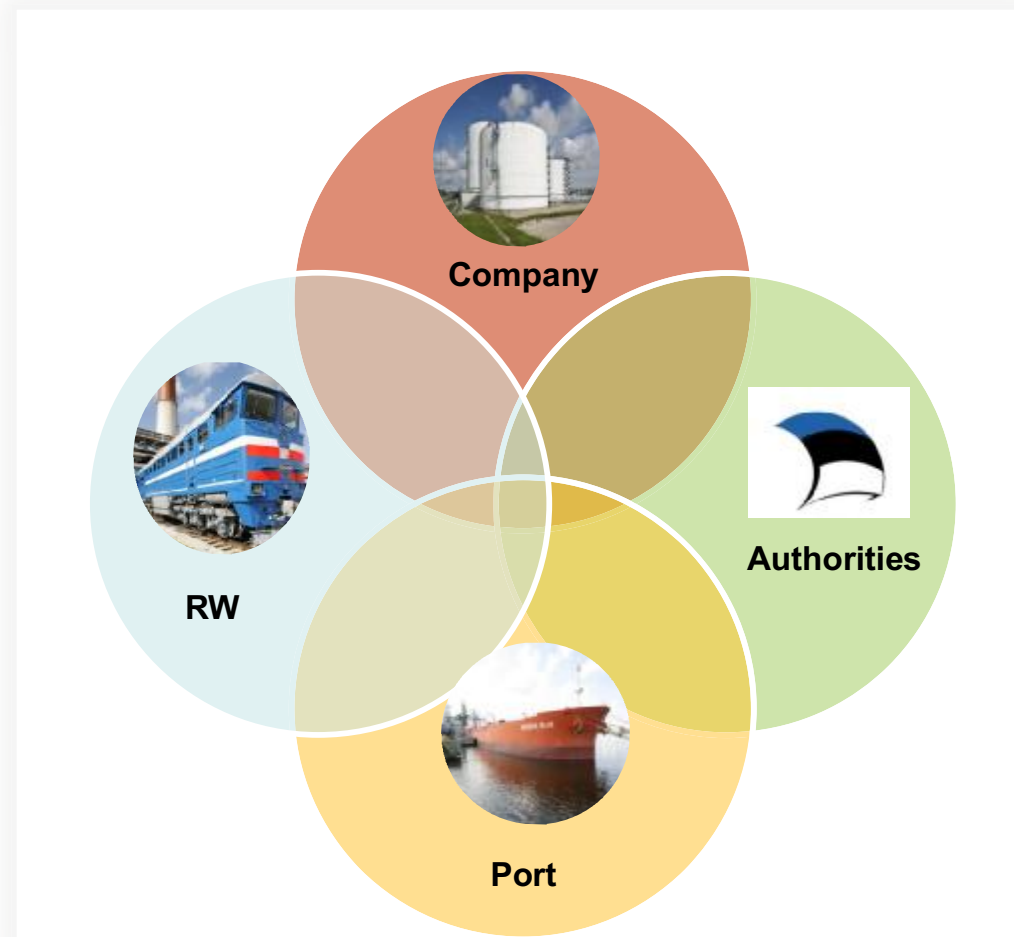
Development is in each value chains' link contribution

Company's abilities to develop continuously, to invest, to meet customer requirements, anticipating market changes

Partners cooperation and search for the most flexible and beneficial solution

Environment that creates a framework and allows to carry out projects timely

Development of the company as an outcome of the competence, capacities, joint forces and cooperation





Sustainability is the basis for long-term relationships

The core of every decision

Excellent people



Have the best people and create an agile and solution driven culture

Safety and Health



Provide a healthy and safe workplace for our employees and contractors

Environmental care



Be energy and water efficient and reduce emissions and waste

Responsible partner



Be a responsible partner for our stakeholders



Vopak E.O.S. Safety Health and Environment



- Company standards beyond legislation requirements
 - VRU systems
 - RTC safety fence
 - Sound insulation systems
- Substation investments in SHE projects
- Rigid control system of all the operations
- Air quality monitoring 24 hours
- Safety trainings
- Full law appliance and cooperation with authorities and responsible bodies

Thank You for Your attention!



www.vopakeos.com

