

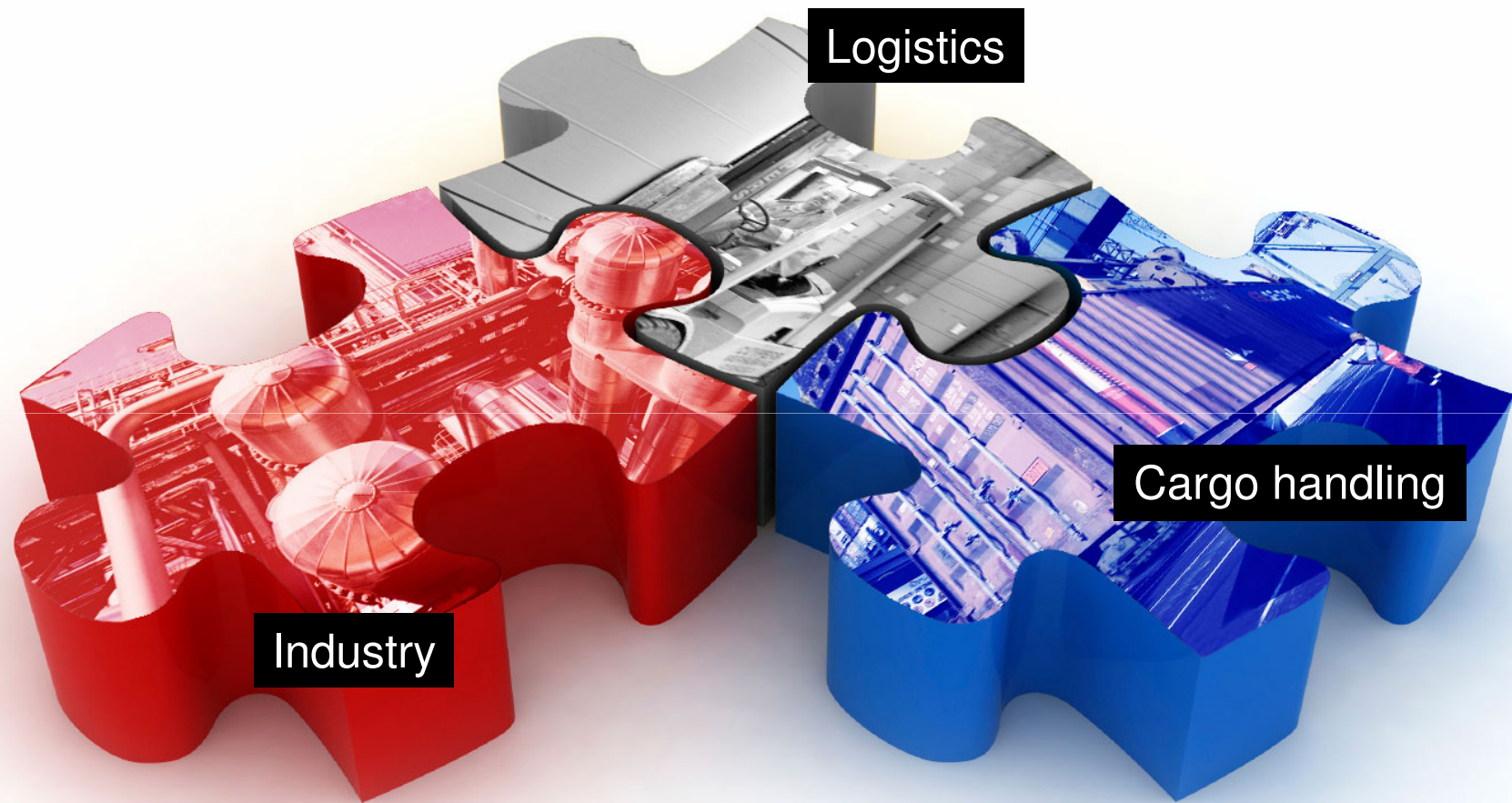
Chemical logistics: Infrastructure as keys to success

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8th Congress of the ECRN
October 7th, 2010



Multifunctional

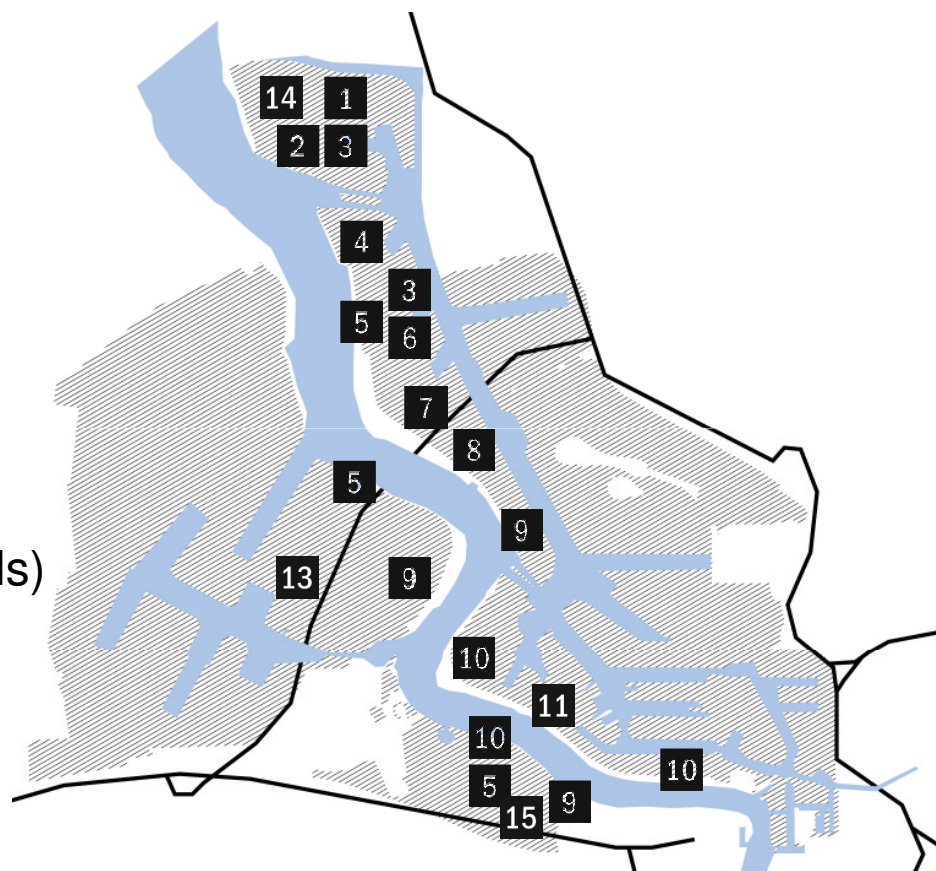


**Port of
Antwerp**

Industry:

Largest integrated chemical cluster in Europe

- 1 BASF
- 2 Air Liquide
- 3 Solvay
- 4 BRC (part of Petroplus)
- 5 Ineos
- 6 Monsanto
- 7 Evonik Degussa Antwerp
- 8 Bayer
- 9 Lanxess
- 10 Total (Refinery + Petrochemicals)
- 11 ExxonMobil (Refinery + Petrochemicals)
- 12 Fina Antwerp Olefins (JV Total and Exxon Mobil)
- 13 Borealis
- 14 Dow
- 15 Praxair

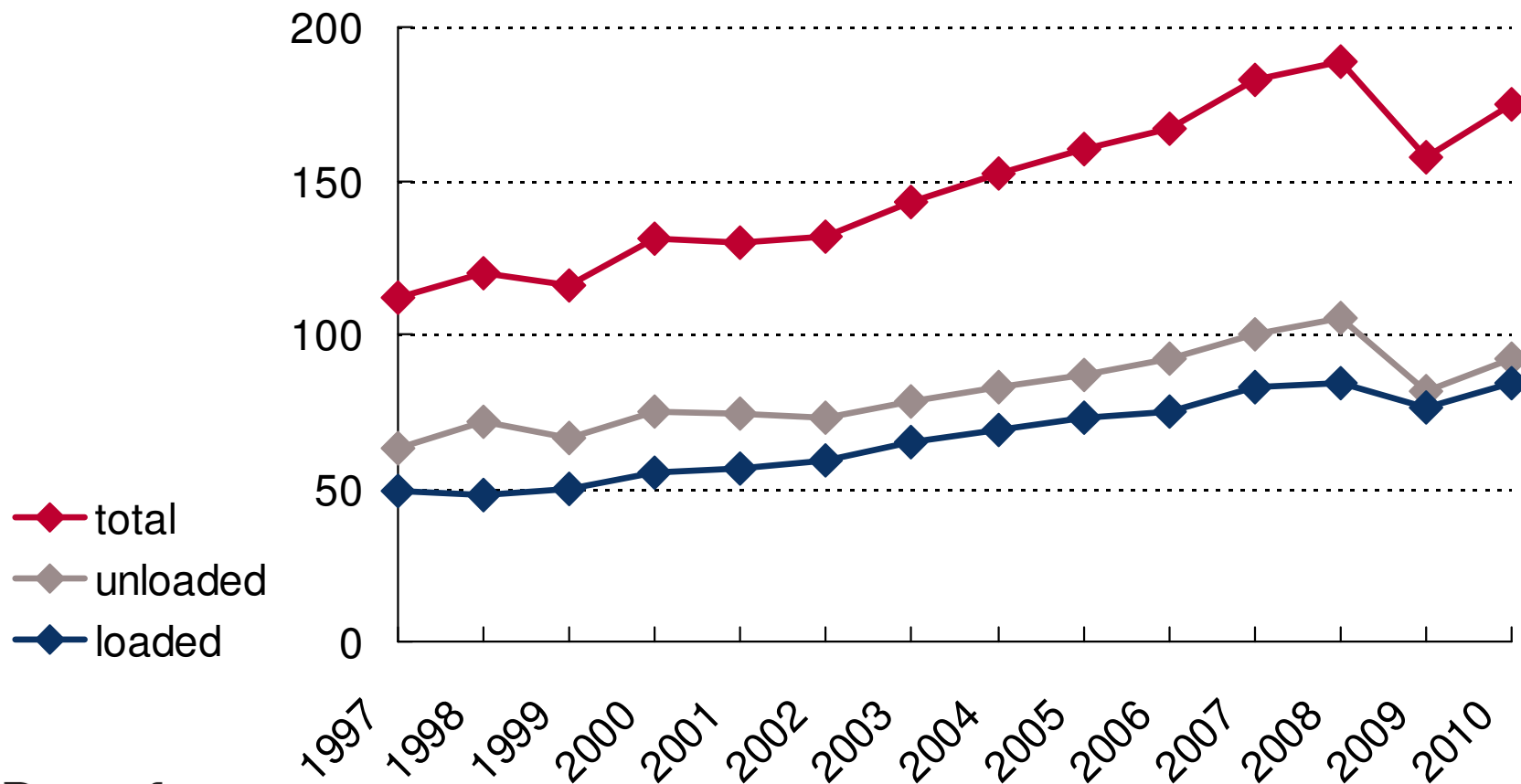


Cargo handling: Evolution

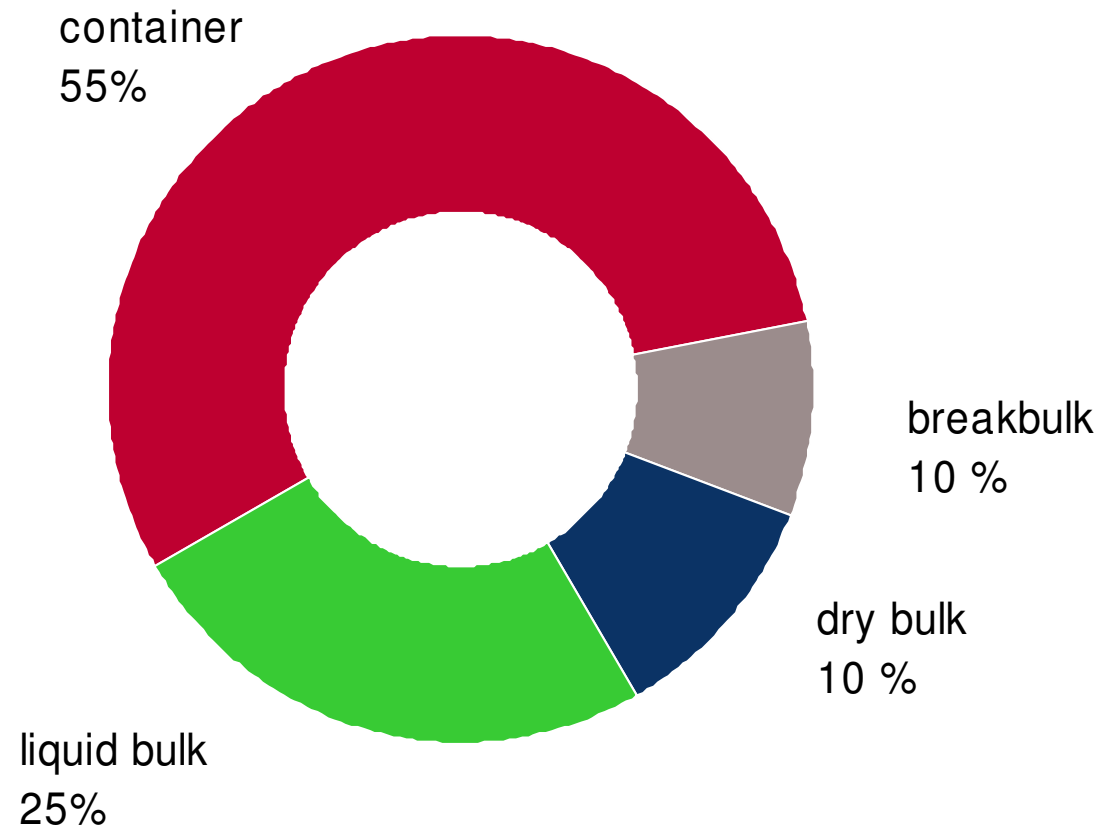
189 million tonnes in 2008

158 million tonnes in 2009

175 million tonnes in 2010*



Cargo handling: Maritime cargo transport 2009



Logistics: Antwerp is a leading logistics distribution hub

**5.4 million m² covered storage
space**

**Added value and tailor made
activities**

**700 European distribution centers
within 100 km from Antwerp**



Importance of the industry in the port of Antwerp

Direct added value:

4.3 billion euro

⌞ more than 40% of the port

Direct employment:

almost 25.000 employees

⌞ almost 40% of the port



The Antwerp Integrated Model

Integration on a product level

- 1 Cracker integration Total – ExxonMobil
- 2 IPPO BASF Dow Solvay Air Liquide

Integration on an energy and utilities level

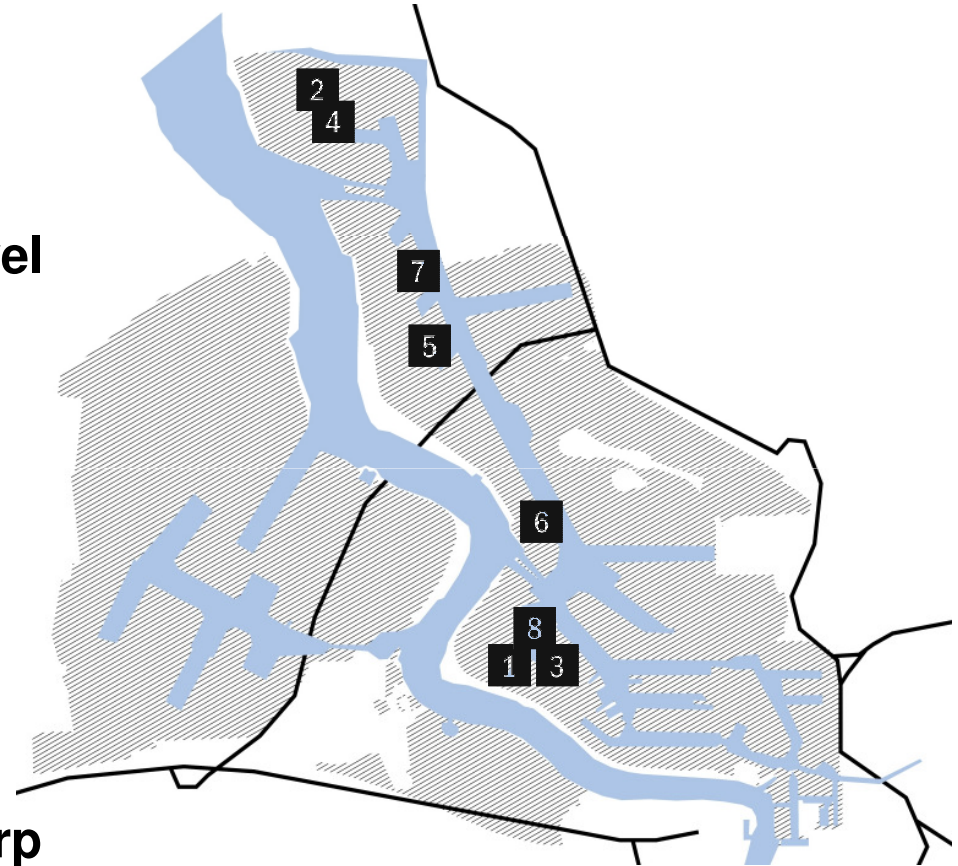
- 3 Cogen ExxonMobil
- 4 Verbund site BASF

Integration on a logistics level

- 5 Oiltanking Stolthaven Antwerp
- 6 BC-Cepsa

Integration across the borders of Antwerp

- 7 Sabic
- 8 RAPL



A seaport is more than a transit hub

- A seaport is partner in the total logistic chain
- Competition with other ports is about logistics and transport networks
- Customer wants a total supply chain solution



How does infrastructure play a roll?

Foreland

Within the port:

docks, locks, berths,
(pipelines), etc

Outside of the port

River Scheldt, VTS,
(pipelines), etc

Hinterland

Within the port:

Rail, road, barge, pipelines

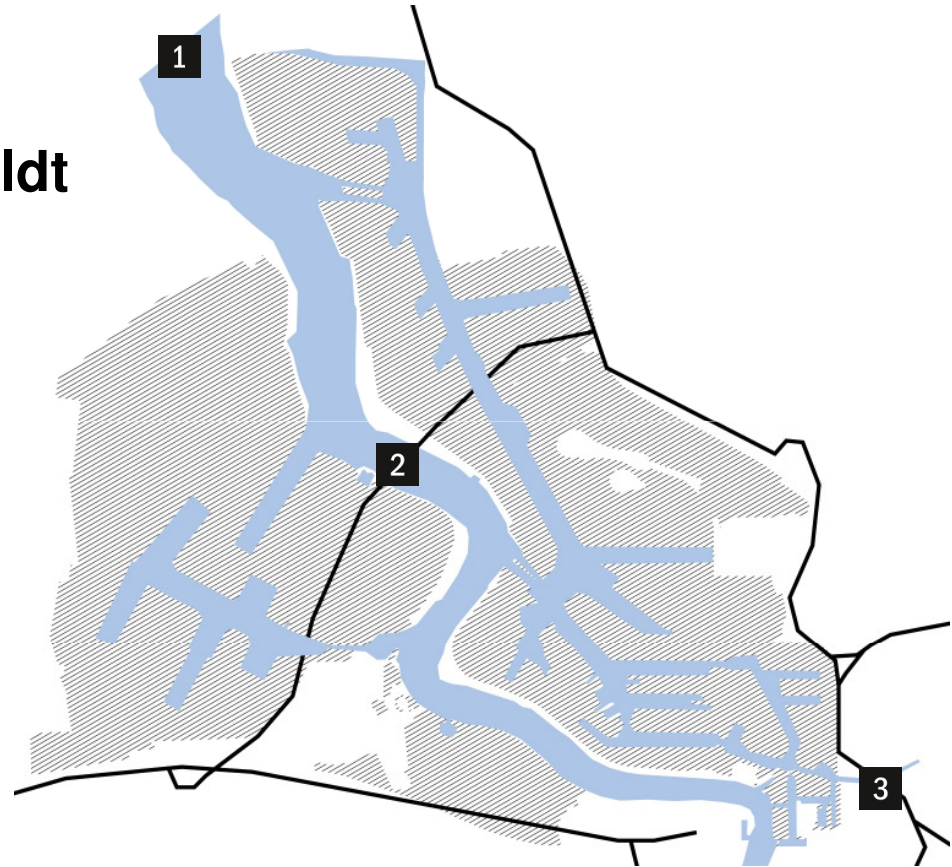
Outside of the port:

Rail, road, barge, pipelines
(also cross borders)

Land

Current investments in infrastructure

- 1 Deepening of the river Scheldt**
- 2 Rail infrastructure**
- 3 Barge transport**



Antwerp Port Authority invests 1.6 billion between 2011 and 2025

• Port expansion

- Verrebroek dock
- The Saeftinghe Development Area
- PAI

• Port facilities

- Second lock on the left bank
- Dock renovation and investment
- Maintenance of roads and bridges
- Cleaning up of the dock bottoms
- Oosterweel project

• Equipment

- Dredging equipment
- Tugboats
- Barges
- cranes

• New buildings

- Offices
- Workshops

Conclusion

- Infrastructure has and continues to play a key role in the further development of the Antwerp Port and Industrial Cluster.
- Optimal connectivity for **ALL** transport modes is crucial for the future competitiveness of the **ALL** users of the port.
- Special attention to continental long distance transport is necessary.

Thank you



Port of
Antwerp