



# Valuepark Terneuzen

the place to invest in growth

A SUPPLEMENT TO ASIAN CHEMICAL NEWS, CHEMICAL MARKET REPORTER AND EUROPEAN CHEMICAL NEWS | OCTOBER 2005

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# Become globally competitive at Valuepark Terneuzen

Valuepark Terneuzen in the south west of the Netherlands is the ideal location for chemical production and distribution; it is the perfect base for entry or expansion into today's European market. Centrally located on the estuary of the Western Scheldt, between the main ports of Rotterdam and Antwerp, Terneuzen offers the chemical producer and distributor cost effective facilities and direct access via road, rail, inland waterway and deep sea port, to the world's most crucial markets and sources of supply.

Valuepark Terneuzen, the base for chemical operations in Europe.

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**Central**

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**Facilities**

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**Production**

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**Distribution**

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**Infrastructure**





## Introduction

Hans van der Hart introduces Valuepark Terneuzen and explains the features the facility offers to the chemical industry

## Valued partners

Companies at Valuepark Terneuzen can enjoy the benefits of being close to Dow Benelux and other chemicals and logistics partners

## A helping hand

Moving to Valuepark Terneuzen will allow access to the excellent infrastructure established by Dow and Zeeland Seaports

## Coming together at Terneuzen

An in-depth look at the relationship between Vos Logistics and Dow Benelux and the building of a bulk/silo terminal at Valuepark Terneuzen

## Building for future growth

Oiltanking is building a state-of-the-art terminal at Valuepark Terneuzen with capacity for use by third-party customers

## Service, with added value

Katoen Natie was among the first companies to enjoy the Valuepark Terneuzen facilities and continues to benefit today

# Welcome to the hub of Europe

Valuepark Terneuzen is ideally placed to become a major European hub for the chemical industry and offers tremendous partnership potential says Hans van der Hart

SITED BETWEEN Rotterdam and Antwerp on the Western Schelde River, Valuepark Terneuzen is a joint venture between local port authority Zeeland Seaports and Dow Benelux BV. With 140 hectares of land available for further investment, companies settling at Valuepark will benefit from both the proximity to Dow Benelux BV's extensive petrochemicals facility as well as the expertise of Zeeland Seaports concerning park infrastructure and regional economic development.

Zeeland Seaports is responsible for managing and developing the ports of Terneuzen and Vlissingen, a total area of 4500 hectares. Together, the two ports have an annual seaborne cargo turnover of around 30m tonne, with a further 25.5m tonne shipped in by barges. The two ports are specialised in the petrochemical and industrial sector, as well as in the logistical handling and distribution of a wide variety of cargoes such as dry and liquid bulks, metals, cars, forest products and fresh produce.

Terneuzen and Vlissingen are home to

many leading multinationals, including Dow Benelux BV, Cerestar, Yara Sluiskil, Outokumpu Stainless, Total, Vopak, Petroplus, Pechiney, Thermphos and Arkema. Valuepark

**"We would now like to take the opportunity to extend this invitation to others in the chemicals sector to come and join us here as partners in Terneuzen"**

itself has already attracted several prominent logistics players, including Oiltanking, Bertschi, Vos Logistics and Katoen Natie. We would now like to take the opportunity to extend this invitation to others in the chemicals sector to come and join us here as partners in Terneuzen and see what benefits may be on offer for your company.



This supplement is sponsored by Valuepark Terneuzen



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# Valued partners

Companies at Valuepark Terneuzen will benefit by integrating their activities in partnership with other chemicals and logistics players and by close proximity to Dow Benelux's world-scale manufacturing facilities

LOCATED BETWEEN the major ports of Rotterdam and Antwerp, on the banks of the Western Schelde estuary and directly adjacent to one of Europe's biggest petrochemicals manufacturing complexes, Valuepark Terneuzen is a 140ha chemicals and services site operating as a 50/50 joint venture between Dow Benelux and local port authority Zeeland Seaports. Created with the vision of developing a multi-occupational site, including companies not only servicing Dow but also other third-party operations at the site, the Valuepark is divided into a 110ha chemicals manufacturing site and a 30ha logistics park, offering producers and distributors the dual advantages of cost-effective facilities as well as direct access - via road, rail, inland waterway and deep sea port - to major regional as well as global markets.

With the basic infrastructure now complete and three logistics firms already established on the site - along with a fourth due to begin operations there at the beginning of next year - Dow and Zeeland Seaports are currently in discussions with 'at least three companies' seriously considering investing in the site, says Ed de Graaf, Dow's director for infrastructure development at Terneuzen.

## JOINT VENTURE

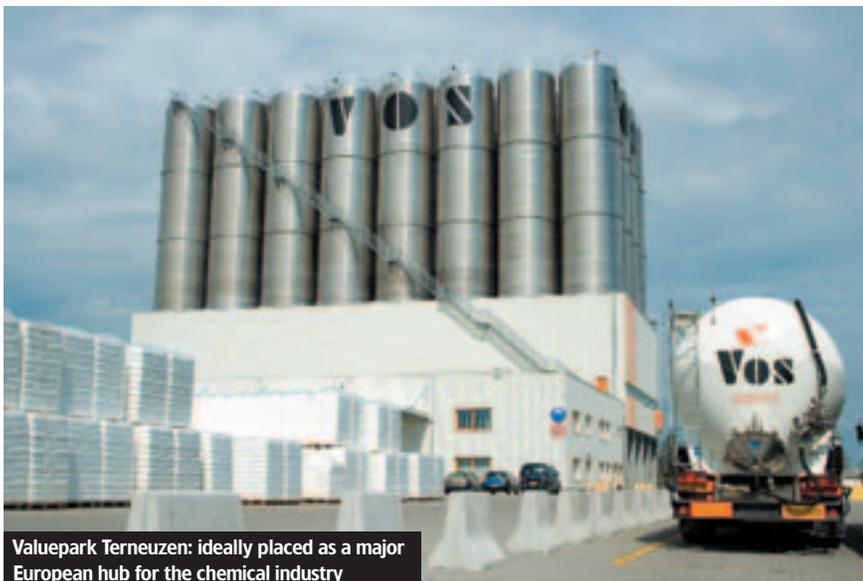
'We are looking for companies that provide synergies to Dow and its products, for example companies using one of our products or the same raw materials we handle. The beauty of the joint venture is that we can provide the infrastructure and attract serious customers. In Terneuzen we can offer a place

where you only have to invest in technology and for all the rest you have options.'

Dow's manufacturing facility at Terneuzen is its largest outside of the US and encompasses a 1.7m tonne/year cracker complex including 26 plants producing a range of chemicals and materials from hydrocarbons such as styrene monomer, benzene and ethyl benzene, to styrenics, plastics and polyurethane. 'Our vision for the Valuepark,' de Graaf elaborates, 'is not only to outsource activities but also to expand the chain - by attracting companies that transform our chemicals and plastics into products.'

To date, Dow Benelux and Zeeland Seaports have jointly invested between €70m and €80m in developing the park infrastructure. As well as ready access to their preferred materials, de Graaf says, companies renting space at the park benefit by having 'Valuepark as their partner responsible for managing and putting in place the relevant infrastructure.'

In addition, firms operating at the site would have the chance to develop market- or technology opportunities jointly with Dow, de Graaf continues. Joint R&D activities could boost innovations both compa-



**Valuepark Terneuzen: ideally placed as a major European hub for the chemical industry**

nies could benefit from. For instance, plastic converters or fabricators on site will be in a unique position to test out new polymers they might have helped to design and/or provide feedback during the development cycle to optimise the polymer performance properties. On top, one could think of utilising R&D services provided by Dow, like analytical services.

### LOGISTICS PROVISION

In terms of logistics provision, de Graaf adds that 'a full package' of services is now available at the park. Last summer saw the completion of 'phase one' of a new world-scale tank storage terminal being built by Oiltanking, together with the construction of a new jetty and 11 connecting pipelines by the Valuepark feeding into the Dow complex. While much of the initial 156 000m<sup>3</sup> terminal capacity is currently contracted to Dow, Oiltanking's managing director Huib Jansen is keen to stress 'this is not a Dow terminal' and, depending on customer requirements, he says, plans are already drawn up to increase capacity to 350 000m<sup>3</sup>. By next spring, companies sited at the park will also have access to a new rail terminal, currently being installed by Switzerland-based chemicals distribution specialist Bertschi. Sited alongside Dow's petrochemical complex, the terminal will comprise two 300m long tracks designed to connect Valuepark with the entire European rail network.

Two more logistics firms with operations already well established on site are Vos

Logistics and Katoen Natie. Both mainly service Dow in handling, packaging and distributing dry plastics products, while Vos further provides a road haulage service for transporting goods on behalf of either firm. Katoen Natie additionally operates a barge

**“The beauty of the joint venture is that we can provide the infrastructure and attract the serious customers. In Terneuzen we can offer a place where you only have to invest in technology and for all the rest you have options”**

and shortsea container terminal at the park, handling goods from chemicals to household wares; this has seen capacity growing from 5000 teu to almost 50 000 teu in the five years since this has been operational. Plans for further expansion are currently under discussion, says vice-president Fabian Leroy. Both Vos and Katoen Natie would be receptive to further business opportunities presented at the park and say they would be willing to invest if the right opportunity comes along. 'Compared with going to Mar-



seille, Basle or Rotterdam etc, you would get far more focused attention and service, and facilitate your investment much better than going to one of the, let us say, more major centres,' Leroy says.

With 110ha of land on offer, de Graaf estimates that the Valuepark presently has space to accommodate 'at least 15-20' plants. 'Companies settling down here will become partners with us. They will share the benefits of an excellent location, good transport connections and proximity to the Dow industry. Dow's relationship with the authorities means we will help companies obtain not just permits but also a licence to operate.'

### ENVIRONMENTAL ADVANTAGES

Creation of the Valuepark has brought significant environmental as well as logistical advantages. Before the park's establishment, raw materials such as naphtha and benzene used by Dow were also stored in Rotterdam, Antwerp or Ghent and then shipped in barges to Terneuzen. The creation of new on site storage terminals, together with the opening up of pipelines connected to plants on the Dow site has reduced the numbers of road shipments by 30 000 trips, in turn lowering overall CO<sub>2</sub> emissions by over 800 tonne/year. Ultimately, de Graaf sums up 'The whole development of the Valuepark is part of the implementation of what sustainable development is or can be.' ■

» For more information visit [www.dowterneuzen.com](http://www.dowterneuzen.com)



# A helping hand

THE PORTS of Zeeland are said to be the pillars of the region's economy. Encompassing 4500ha of land along the left and right banks of the Western Schelde estuary, the ports of Terneuzen and Vlissingen are home to some 170 companies, directly employing over 15 000 people, and leading to the creation of a further 15 000 jobs indirectly related to the ports.

After Rotterdam and Amsterdam, they are the third largest port in the Netherlands, with roughly one in every four jobs in the surrounding province of Zeeland being

Local port authority Zeeland Seaports is easing the path for companies settling in the Valuepark

port-related, says Hans van der Hart, managing director of the port authority Zeeland Seaports.

'The ports of Terneuzen and Vlissingen are attractive because of the fact that there is much more flexibility compared with the bigger main ports and the Zeeland sea ports are much less congested,' van der Hart con-

tinues. 'Furthermore, in our ports there are still more possibilities for development than in the more congested seaports. Companies should invest here because it is a good and solid environment and the mentality of the workforce is excellent.'

Formed as a result of the merger of the ports of Vlissingen and Terneuzen in 1998,

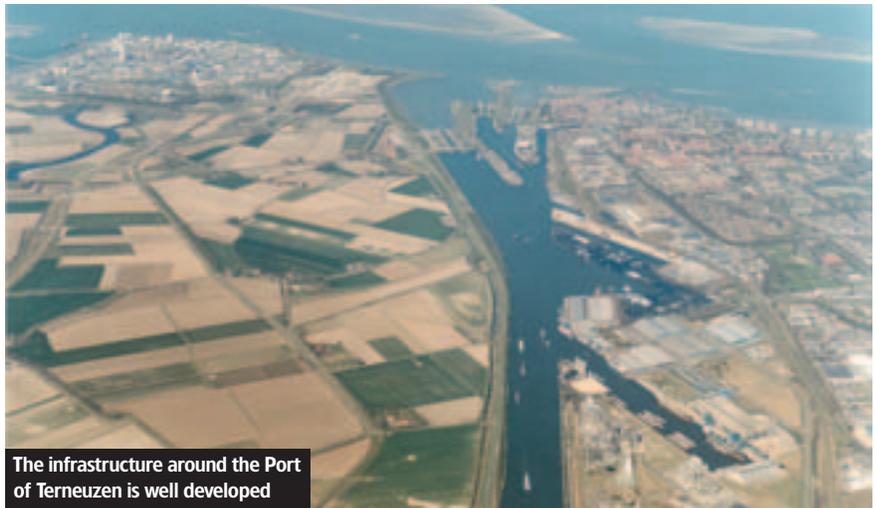
Zeeland Seaports is an independent, not-for-profit, organisation with responsibilities across the neighbouring municipalities of Borsele, Terneuzen and Vlissingen. Together with the province of Zeeland, these municipalities are shareholders in the Zeeland Seaports joint agreement. 'The task of Zeeland Seaports - being a public company - is to manage the ports of Terneuzen and Vlissingen by developing infrastructure in such a way that port-related companies are attracted. In this way, employment is created,' explains van der Hart.

## JOINT VENTURE

Sited on the banks of the Western Schelde estuary, Valuepark Terneuzen is a 140ha logistics and chemicals production park directly adjacent to the world-scale petrochemicals operations of Dow Benelux. As a joint venture between Dow and Zeeland Seaports, 'We would like Valuepark to develop as a fully integrated chemical site where parties can benefit from the logistic services that are available as well as from the multi-modal infrastructure,' says van der Hart.

Zeeland Seaports' role in the joint venture is to develop the necessary site infrastructure, as well as to work with Dow to market the site to potential investors. On-site facilities include a cogeneration plant operated by AES and local utilities company Delta, water supply from Evides, municipal waste-water removal facilities and industrial oxygen and nitrogen supplied by Air Liquide and Air Products. There is also a shared firewater system installed this year at a cost of €4m-5m and capable of servicing the whole Valuepark. In addition, van der Hart continues, 'We offer a land lease contract to new companies and help them with the procedures to get the necessary permits. The timespan to issue the available plots of land is about 10-15 years.' About 85ha of land remains available for companies interested in exploiting synergies with the activities of Dow Benelux.

Companies sited on the park will have on hand a full range of logistics services. This summer saw the opening of a new 156 000m<sup>3</sup> chemicals tank terminal at the site by storage group Oiltanking. Capacity is already available for third party operators and Oiltanking has plans for further expansions to 350 000m<sup>3</sup> depending on demand. From next year, the park will also have access to a new rail terminal currently being installed by Switzerland based chemicals distribution specialist Bertschi. Sited alongside Dow's petrochemical complex, the terminal will connect Valuepark with all of the major



The infrastructure around the Port of Terneuzen is well developed

European railway networks.

Meanwhile, Zeeland Seaports has further invested in a short-sea and barge container terminal at the site, which it operates together with Antwerp-headquartered logis-

**"We would like Valuepark to develop as a fully integrated chemical site where parties can benefit from the logistic services that are available as well as from the multi-modal infrastructure"**

tics firm Katoen Natie. Finally, Katoen Natie and Vos Logistics also have logistics facilities on site, mainly for servicing Dow in handling, packaging and distributing dry plastics products though both are open to new business opportunities.

## GOOD CONNECTIONS

Van der Hart is confident about the site's potential. 'Given the fact that the site can be reached by deepsea vessels, inland barges and the fact that there is a good railway connection as well as a good road connection, the site is attractive to investors which means that the development of the site will help the local economy and the employment.'

Zeeland Seaports has local industry to thank for the growing importance of the ports. In 2004, as in the previous year, Zeeland Sea-

ports set another record for transhipment. Together, the ports of Terneuzen and Vlissingen recorded a combined transhipment of sea-borne cargo of 30m tonne, 6.5% more than in 2003. Seaborne cargo in the port of Terneuzen grew most significantly - up 13% - to a total of 14.5m tonne, compared with 15.5m tonne at Vlissingen, while Zeeland Seaports closed the financial year with a profit of €6.4m, half a million more than in 2003.

Increased export activities of the basic industry around the port is the main reason for this growth, says van der Hart. Dow Benelux's contribution was particularly important. Transshipments of oil and petrochemical products increased by 908 000 tonne. Other growth areas included ores and metal residues (up 322 000 tonne), fertilisers (up 351 000 tonne), solid fuels (up 109 000 tonne) food products (up 20 000 tonne) and miscellaneous goods, including cars (up 485 000 tonne).

But van der Hart is keen to stress that growth is more than increase in transshipments. What is more important, he says, is what value we can add to all of the tonnage that is passing through our ports. Firms like Katoen Natie are a good example, he points out, because in the old days cargoes were merely transferred to Antwerp to be taken to lorry by road.

Companies interested in investing in the region will need to act quickly. Land in the Benelux is becoming scarce and the future growth of ports will be limited by the fact the ports have about reached their physical boundaries, van der Hart says. ■

» For more information visit  
[www.zeeland-seaports.com](http://www.zeeland-seaports.com)

# Five reasons for choosing Dow as a neighbour



*Dow Benelux B.V. in Terneuzen is an integrated part of The Dow Chemical Company, a market leader worldwide in the realm of plastics and chemicals. With an annual turnover of 40 billion dollars, the company supplies customers in 175 countries as well as a wide range of markets. The site in Terneuzen is the largest production site outside of the United States. The production volume comprises 8 million tons. This year Dow Benelux B.V. is celebrating its fortieth anniversary and is still energetically continuing its development. Growth with partners – at the Valuepark – is one of the spearheads for the future.*



## > Excellent logistic infrastructure

Terneuzen is the ideal gateway for Europe. The central location on the Schelde River, between the ports of Rotterdam and Antwerp, offers excellent hinterland connections. The businesses at the Valuepark have cost-effective transport options as well as an optimal connection to the European transport axes for railway, inland shipping and road transport. In addition, there is a deep-sea harbour adjacent to the industrial park.

## > Reliable supporting services

Businesses that establish themselves at the Valuepark can make use of the extensive network of reliable contractors and suppliers that Dow has built up in the course of forty years. These companies meet the highest safety and environmental standards and work continuously in consultation with Dow on further improvement.

## > Steady license to operate

Already for four decades, Dow has been investing in a good, stable relationship with the local authorities. This has resulted in an open dialog and a solid basis of trust, which accelerates the development of the Valuepark. Through community programs and other actions, Dow has also built up a good relationship with the residents in the region.

## > R&D facilities within reach

New firms operating at the site could jointly develop market- or technology opportunities with Dow. Joint R&D activities could boost innovation both companies could benefit from. For instance, plastic converters or fabricators on site will be in a unique position to test out new polymers they might have designed and get feedback during the development cycle to optimize the polymer performance properties. On top, one could think of utilizing R&D services provided by Dow, like analytical services.

## > Raw materials integration

Dow is one of the largest producers of cracker products and aromatics, such as ethylene, propylene, styrene, as well as plastics and polyurethanes. For businesses that use these intermediates or derivatives in their production process, a location at the Valuepark can be particularly interesting. The supply of products is easy, safe (without the need for transportation of hazardous goods) and is possible at minimum cost.



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# Coming together at Terneuzen

FOR VOS Logistics, the Valuepark site at Terneuzen in the Netherlands plays a significant part in its overall business. At the Terneuzen site, Dow is the most important client for Vos Logistics. Dow Chemical has its largest manufacturing facility outside the US at Terneuzen.

Vos' relationship with Dow Benelux goes back more than 30 years when it was contracted exclusively for transportation. Then, when Dow Chemical decided to outsource more of its logistics work, Vos Logistics also took over responsibilities for storage and packaging. Jan Schuurmans, member of the executive board at Vos Logistics explains, 'We wanted to connect our client's logistics to our own service facilities. Through this connection we are able to play an important role in controlling the total supply chain. There is a syner-

Vos Logistics' commitment to Valuepark is reflected in the firm's investment in a state-of-the-art bulk/silo terminal to service customer Dow Benelux

**"It is all coming together in Terneuzen. We have integrated both our experiences and the best techniques. This is absolutely state-of-the-art"**

gistic effect because of our ability to match perfectly the different parts of the process.'

## IMPORTANT MILESTONE

He notes that the start of the bulk/silo terminal in Terneuzen marked 'an important milestone in the level of our services to the petrochemical industry. This terminal can be seen as one of the most modern and innovative terminals in Europe when it comes to technical engineering,' Schuurmans states.

Vos believes that the Terneuzen termi-

nal is a 'dynamic showpiece for its logistics capabilities,' not just because the latest techniques were applied but also because it was able to put all its previous experience in customer-specific projects into practice. Schuurmans comments: 'It is all coming together in Terneuzen. We have integrated both our experiences and the best techniques. This is absolutely state-of-the-art.'

Together, Vos and Dow Benelux provided significant technical input to the project and the partners say that they have both found synergies from having an integrated logistics services business in one organisation. Indeed, Vos says that it is because of this new logistic concept that it has become an important player in Europe.

### LARGEST PROVIDERS

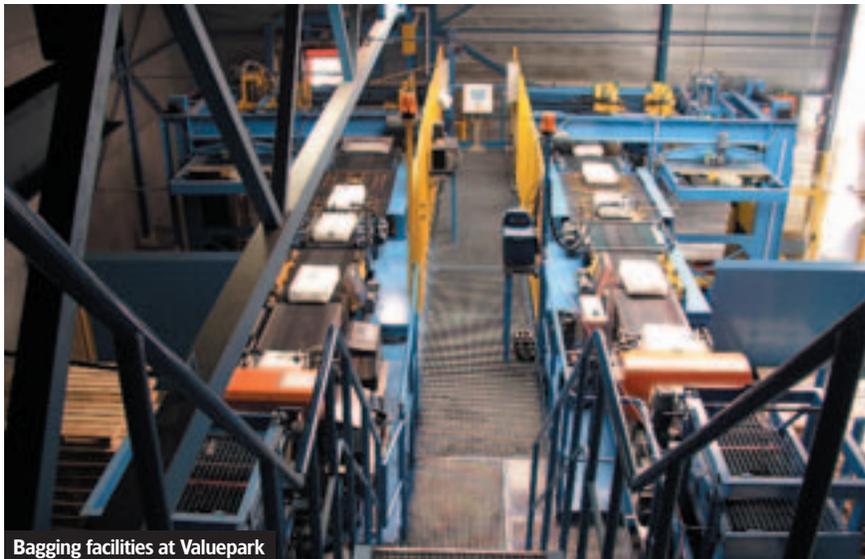
Vos Logistics is one of Europe's largest logistic service providers with an annual turnover of €800m. Vos Logistics has a fleet of more than 3000 trucks and 10 000 loading units. Furthermore, Vos has 500 000m<sup>2</sup> warehouse capacity and about 250 000m<sup>3</sup> silo storage capacity at its disposal.

Vos Logistics moved to Valuepark in February 2003. Thanks to a positive and successful cooperation with the local authorities in Terneuzen and Zeeland Seaports, Vos was able to start its operations within four months. Vos says that Terneuzen is becoming an increasingly important logistical area.

The company has invested around €20m at Valuepark which is located about 3km from the centre of Terneuzen. On 6ha of land it has a total storage space of 50 000m<sup>2</sup> and has built 32 silos with a capacity of 650m<sup>3</sup> each. Two fully automatic bagging and palletising lines have been installed with a total capacity of over 100 tonne/hour.

Vos' main activity at the Valuepark site is the storage, packaging and transport of plastics, primarily polyethylene (PE), pellets for Dow Benelux, and it handles over 250 000 tonne of PE annually. Product is transferred by dedicated bulk equipment from Dow Benelux's site to Vos Logistics nearby. Vos says it has the advantage of being able to pre-load at peak times, as it has both trucks and warehousing facilities. In Terneuzen Vos Logistics handles on average 80 shipments daily.

The terminal has access to all transport modes and intermodal facilities. Choices can be made between water, rail and road transport and also between bulk trucks, bulk containers, bag-in-the-box or packaged systems, whether palletised or not.



Bagging facilities at Valuepark

It has also developed a local transport infrastructure at Terneuzen and has a number of trucks based at the site to handle direct deliveries for Dow from short haul and local destinations.

Schuurmans notes that by using their terminal management system *Loplan*, together with Dow's advanced warehouse management system, Vos is able to monitor and plan all product flows in order to optimise on-site processes.

### REAL-TIME STOCK CONTROL

*Loplan* includes real-time stock control and integrates all terminal movements, at the same time communicating with the bulk loading system.



Unloading bulk trucks into silos

In the case of any stock movement, relevant data such as floor locations or pallet numbers will be directly passed to the system. Schuurmans says that these solutions prove once again Vos' ability to be top of the class.

Jaap Bos, Dow Benelux's former manager for infrastructure development at Terneuzen, agrees. 'As a customer, I believe that Vos has fantastic computer management systems and is extremely good at handling information and logistics flow.' He added: 'Not only does Vos have the hardware, trucks and facilities but also the software and tracking systems needed to support this.'

Vos' fleet of vehicles is equipped with satellite communication and on-board computers. Vos says that the combination of satellite communication and its unique *Lovos* information system, which was developed in-house, gives customers real-time information and allows them to track the progress of their loads 24 hours a day.

### TOTAL SOLUTIONS

One of Vos Logistics' aims is to offer customers total supply chain solutions and the Terneuzen site is one example where it works alongside customers. In its mission statement, Vos states it is, among other things, focused on service and customer-specific solutions that are cost effective and profit generating. It seems that for Dow Benelux at Terneuzen they are succeeding in doing just that. ■

» For more information visit  
[www.voslogistics.com](http://www.voslogistics.com)



# Building for future growth

Oiltanking's new independent state-of-the-art terminal at Terneuzen complements the group's existing facilities in Antwerp and Ghent and offers more versatile and flexible services throughout the River Schelde area

ON 1 AUGUST 2005, Oiltanking Terneuzen BV commissioned its new terminal at Valuepark Terneuzen in the Netherlands. It is Oiltanking's third chemical operation in the Schelde area, complementing its existing facilities in Antwerp and Ghent. This investment of €70m was made to satisfy the demands of the growing chemicals business in the ARA

(Antwerp/Rotterdam/Amsterdam) region and provides a state-of-the-art independent terminal in this important industrial area.

## INTEGRATION

'The new terminal is already an integrated part of Oiltanking's chemical activities in the ARA area,' says Luc Jorissen, commer-

cial manager of the Oiltanking terminals Antwerp, Ghent and Terneuzen. The construction of the terminal was initiated by a long term storage agreement signed in 2002 between Oiltanking and Dow Benelux. Although Dow is the main customer, Jorissen is keen to stress it is not a Dow terminal. 'There is sufficient capacity for other customers.' Situated directly adjacent to the Dow Benelux production site and within easy reach of the new Westerschelde tunnel, the terminal's location is extremely convenient, Jorissen says: 'very close to the sea, with excellent road and rail connections, congestion-free, and between the major ports of Antwerp and Rotterdam. These are excellent features for customers seeking to distribute products from here.'

### COMPLETION

The Oiltanking Terneuzen facility will be completed on a 15.5ha site of which the first phase used 9.8ha of the available land. It will provide deep-sea access to vessels up to 60 000 deadweight tons (dwt) with drafts up to 12.8m. The first phase of the terminal comprises 24 tanks with a combined capacity of 156 000m<sup>3</sup>, of which 120 000m<sup>3</sup> is being used for the storage of a range of hydrocarbons including naphtha, benzene and other aromatics, while the remaining 36 000m<sup>3</sup> handles a wide range of chemicals.

Plans are drawn up for a potential doubling of capacity, increasing the total capacity to around 335 000m<sup>3</sup>, with tank sizes ranging from 500m<sup>3</sup> to 20 000m<sup>3</sup>. 'We are very confident that we will achieve our goal and are looking at several possibilities,' says Huib Jansen, managing director of the Oiltanking terminals Antwerp, Ghent and Terneuzen. 'We are already in discussion with several chemical producers who have interest in investing at Mosselbanken and are willing to outsource their logistics.'

### THIRD PARTY CUSTOMERS

The terminal has been designed with third party customers in mind: ten tanks with a total storage capacity of 52 000m<sup>3</sup> serve this market. This capacity is divided between two 20 000m<sup>3</sup> tanks for hydrocarbons and eight 1500m<sup>3</sup> tanks for speciality chemicals (including two stainless steel tanks and two pressurised tanks). 'What makes this terminal unique,' says Jansen, 'is the amount of investment in environmental hardware. This is a zero emission terminal where all vapours created are recycled, and as little waste as possible is produced. The terminal

## STATE-OF-THE-ART DESIGN



Oiltanking's 'cup tank' design combines environmentally-friendly storage with space saving at the site. The tanks are constructed with a surrounding steel wall - providing a 'tank within a tank' - which serves as a containment area in case of leakage. The design replaces traditional bund walls and occupies less ground area for a given storage volume. Also the floating roof reduces emissions associated with tank breathing and the secondary wall provides improved protection against heat radiation if an adjacent tank were to catch fire. As there is no tank pit, there is a reduction in the amount of potentially contaminated rainwater.

is being fully equipped with environmentally friendly 'double hulled' cup tanks, designed to increase safety and lower emissions.'

**"What makes this terminal unique is the amount of investment in environmental hardware. This is a zero emissions terminal where all vapours created are recycled, and as little waste as possible is produced"**

### JETTY CAPACITIES

	Draft	Length	Max vessel
Berth 1	12.8m	236m	60 000 dwt
Berth 2	4.5m	110m	5000 dwt
Berth 3**	11.8m	200m	40 000 dwt
Berth 4**	7.9m	140m	5000 dwt

\*\*Berths 3 and 4 will be built in the final phase

All tanks are equipped with dedicated connections to both the jetties and loading racks for tank trucks and rail cars. The first phase of the terminal offers one combined loading bay with four loading positions for railcars and trucks. The final phase will include two additional loading bays. Two of four new jetties have also been commissioned, with the first vessel arriving ahead of schedule on 21 May, 2005. An extensive pipeline network has been installed to connect the terminal to Dow's production facilities. In total, 11 individual pipelines are now in place below the Braakman harbour in two bundles, 20m apart.

### PRIVATELY-OWNED COMPANY

The new state-of-the-art terminal at Terneuzen underlines Oiltanking's position as the second-largest commercial operator of tank terminals for petroleum products, liquid chemicals and gases worldwide. As part of the privately-owned company Marquard & Bahls AG, Oiltanking handles over 100m tonne of liquid bulk goods annually.

» For more information visit  
[www.oiltanking.com](http://www.oiltanking.com)



# Service, with added value

KATOEN NATIE has been plying its trade in the Benelux countries since 1855, originally in the business of storing cotton, wool, rice and other shipped goods, and later diversifying into storage, transport and distribution of steels and machinery. Today it is one of the largest and best-known logistics firms in the region, Katoen Natie is now a truly global player, with 85 platforms in 22 countries in Europe, the Far East, North and South America, says vice president Fabian Leroy – yet until the late 1980s the company's activities were based exclusively in Antwerp. 'The plan since then has been to focus on a limited number of clients – specifically in the plastics and automotive industries. These industries are very strong in the Benelux region, which is the biggest car manufacturer in Europe even though there are no national car companies in Belgium and Hol-

A specialist in the provision of high added value logistics services, Katoen Natie was one of the first companies to begin operations at Valuepark Terneuzen

land. The other plan was to grow by moving closer to the customer.'

## SPRAWLING COMPLEX

The site of Dow Benelux's sprawling world-scale petrochemicals complex, Terneuzen is today an important location for Katoen Natie. While not as well known as some of the region's other main ports, Leroy says, 'Terneuzen has the advantage of having a whole logistics body available only a very short distance away from the major ports of Antwerp and Rotterdam, and it doesn't

have any congestion or bottlenecks as at these other centres. Also, the workforce in this area is very high quality – there is a high work ethic not seen in more industrialised areas – and we never had any difficulty attracting people to work here.'

Katoen Natie began talks with Dow over the construction of a new container terminal in the region in the mid-1990s. A joint venture between the two companies – Katoen Natie owns 85% and Dow the remaining 15% – the terminal was 'developed from scratch' together with local port author-

ity Zeeland Seaports and has been operational since 1999. ‘The majority of the product in the containers belongs to Dow but there is also a shipping line, Samskip, which could take anything - TVs, furniture etc,’ Leroy says. Already approaching the limits of capacity, the terminal has seen transshipments grow from 5500 teu to 46 700 teu in the ensuing six years, while recent plans for further expansion ‘could see this become the largest container terminal in the region.’ Not including the investment by Zeeland Seaports, total spending to date on the terminal is roughly €5m, Leroy estimates.

Katoen Natie’s other, €25m, investment in Terneuzen is a 10ha silo terminal for handling, packaging and distributing Dow’s dry plastics products. Sited at the Valuepark, Terneuzen, the terminal now employs 110 staff and has been operational since 2002, when Katoen Natie became the first company to move activities to the 30ha logistics park. This terminal is Katoen Natie’s largest plastics handling terminal in Europe after Antwerp. Although no further investment is planned at present, Leroy says, ‘Katoen Natie would be willing to invest should the right opportunity come along.’ The company is now in talks with two, unnamed, companies interested in the possibility of investing in the park, he says.

## INVESTMENTS

In general, most of Katoen Natie’s current investments are in land and buildings. ‘We don’t consider ourselves a transportation company,’ Leroy says, ‘Instead we are investing in engineering activities – ie building and developing terminals. This focus on terminals is part of ongoing discussions within the group and with clients.’ Part of the group’s success, he believes, is down to the fact that Katoen Natie is privately owned. ‘Added to the operations we deliver, there is also our willingness to invest. We see the project at Terneuzen as having long term potential, which would have been difficult to bring to shareholders, but because we are a private company this is something our owners accept.’

As a group, Katoen Natie’s activities are mostly focused on high added value logistics services. ‘As manager of a service company,’ Leroy acknowledges, ‘I can say that we would not exist without industry. At the same time, we have been growing considerably because a lot of tasks previously performed by industry are now taken over by us.’ In the mid-1980s, Katoen Natie was the first logistics firm to invent and introduce silo batteries into its warehouses, Leroy



**Katoen Natie Zeeland Container Terminal; and below, the Logipark in Terneuzen**



claims – a development that allowed it to carry out packaging activities for its clients, previously considered part of industry production. ‘At that time we didn’t think it was that special but afterwards we realised it should have been patented. Now nearly

## “Added to the operations we deliver, there is also our willingness to invest”

every logistics firm has these silo batteries.’

Other high value-added services include special facilities for the storage of sensitive and explosive products under dry and inert conditions under nitrogen, respectively, as well as mobile de-dusting equipment for removing fine dust particles from delicate plastics films. Katoen Natie operates one of these de-dusters at its Terneuzen site, Leroy says, so that ‘whatever product is in the silo we can de-dust it afterwards.’ Yet another Katoen Natie innovation, meanwhile, is a

novel method for filling seaborne containers, allowing the firm to load more than 1.5 tonne extra per container simply using gravity. ‘This is a lot of money for Dow,’ Leroy says, explaining that the traditional methods of filling containers by blowing product into a plastic bag within the container results in a slope of material above which is empty space.

Along with these more conventional logistics services, Leroy says, Katoen Natie also has contracts ‘where we deliver land, engineering people, whatever services are needed and the client delivers the specialised equipment for the process. So there is a shared investment and we operate the plant for the client. In that sense the client limits his investment and also the complexity of the project.’

## FLEXIBILITY

In Brazil, for example, Katoen Natie is currently investing in a €5m compounding unit for one of its clients which will be sited between Rio de Janeiro and Sao Paulo, while closer to home the company is overseeing a \$15m project on behalf of a US chemical producer in Europe. This type of flexibility could also be extended at Valuepark, Leroy adds. ‘So there is the possibility a company would have huge plants in Asia and the US, and a finishing plant – say, adding additives – here in Terneuzen. Terneuzen would be the perfect location to deliver and give this high level of service.’

» For more information visit  
[www.katoennatie.com/](http://www.katoennatie.com/)



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