



# Insights Global - Consultancy

Competitive Intelligence



INSIGHTS GLOBAL



Market research company

*Create better functioning energy markets by enabling intelligent decisions*

- Provide insights to support our clients
- Scientific approach: data driven combined with on-the-ground intelligence
- Sophisticated & creative solutions

*Well-known products:*

- Rhine/ARA barge freight rates
- ARA oil product stocks
- TankTerminals.com
- Rhine Flow Service
- Consultancy Services
- Oil Academy

*TankTerminals.com*



# It is critical to know your competitive environment.

Management is responsible for long-term competitiveness.

## Responsibilities management

- Needs to know the competitive pressure in the market, the company's competitiveness and the main characteristics of the competitive environment.
- Needs to align business plan to competitive environment with regard to pricing, promotion and services and/or infrastructure.
- Decides on investments (e.g. infrastructure).
- Needs to ensure long-term competitiveness, positioning and potential and/or attractive customers.



# Uncertainty about your own competitiveness

New challenges and uncertainties due to changing competitive environment

## Challenges and uncertainties

- Own competitiveness in the market relative to its competitors
- Current and future competitive pressure
- New entrants and substitute products

Lack of knowledge of:

- The main characteristics, the logistical performance and the strengths and weaknesses of its competitors
- Threats and opportunities for your competitive environment
- Market share with regard to the products the terminal is storing and to what extent the market is dominated by suppliers, clients and/or competitors
- What products are stored and by whom because to assess potential clients and their loyalty to current suppliers
- Own logistical performance versus the logistical performance of your competitors



# Insights Global offers Competitive Intelligence Assessment

## What we offer

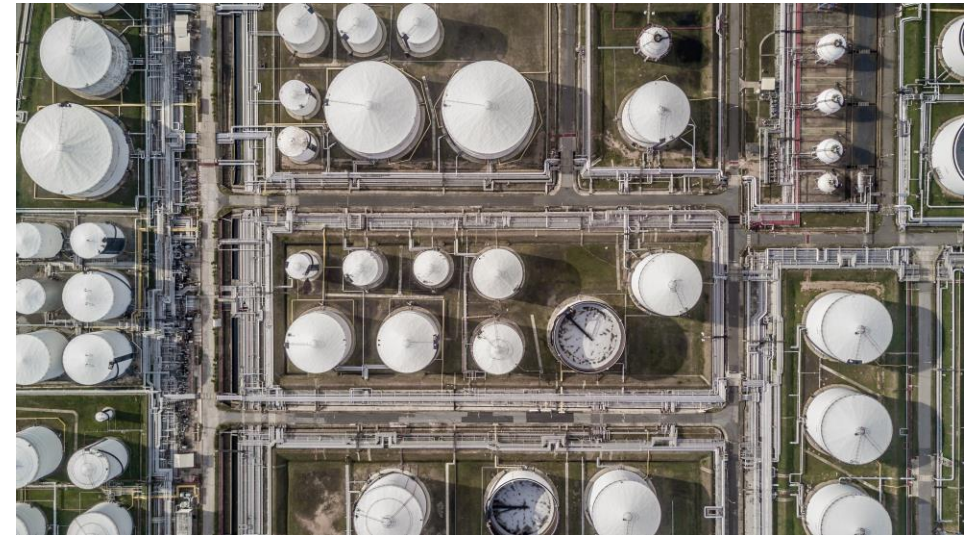
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The main characteristics of the Competitive Intelligence Assessment are:

- Benchmark on main characteristics with main competitors
- Logistical performance benchmark with its competitors
- SWOT analysis for the terminal and its competitors

Overview of:

- Market share for the relevant market segments and for main customers and competitors
- Which products are stored where and by whom
- Potential new entrants and substitute products and their impact on market dynamics
- Tank terminal / product plant capacities and future expansions



# Having a clear understanding of your competitive environment is crucial.

## What we offer

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### What we will do

- Give clarity about new entrants and substitute products
- Via a benchmarking analysis comparing main characteristics, logistical performance and other important factors we will give clarity about the competitiveness of your own company relative to competitors
- Determine opportunities and threats for own company and its competitors
- Prepare a SWOT for own terminal and for its competitors to determine how you and your competitors are positioned in relation to opportunities and threats
- Prepare overview of tank terminal capacity development and planned expansions to see if market is under or oversupplied
- Prepare overview of market shares for the relevant products and companies (sell/buy side) to better understand the extent of market concentration
- Prepare overview of which products are stored where and by whom to assess the potential clients and what are their stickiness to their current suppliers



# Concrete deliverables will help to better understand your competitive environment.

## What we deliver

### Deliverables

- Benchmark on main characteristics with main competitors
- Logistical performance benchmark with its competitors
- SWOT analysis for the terminal and its competitors

### Overview of:

- Market share for the relevant market segments for main customers and competitors
- Which products are stored where and by whom
- Potential new entrants and substitute products and their impact on the market dynamics
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Assessment will help to better positioning your company.

What you will experience

### Pay-off

You will have a better understanding of:

- Own strengths and weaknesses and those of your competitors.
- Competitive position in the current market environment.
- How to improve the terminal's competitiveness.
- How to enable better positioning of your company leading to more long-term profitability.





# Insights Global Team



# Patrick Kulsen – MD & Senior Consultant

Patrick brings his management skills, market knowledge and commercial DD experience to the team. He is also owner of TankTerminals.com which provides unrivaled access to relevant data and information on the terminal industry.

## Relevant experience:

- Involved in multiple Commercial DD's for tank terminal assets
- Frequent speaker at conferences on tank terminal market developments
- Specialist in quantitative modeling and forecasting of oil products supply, demand and trade flows
- Deep understanding of oil trading business and how this translates to requirements for terminals

## Education:

- Quantitative Finance (MSc.)
- Systems Engineering (MSc.)
- Mechanical Engineering (B.)



# Rene Loozen— Consultancy Director

Rene brings his analytical skills, market knowledge and extensive experience in the oil and chemical value chain to the team.

## Relevant experience:

- Leader of many strategic market insight projects in terminal and chemical industry
- Frequent speaker at conferences on tank terminal market developments
- Specialist in modeling and forecasting of chemical products supply, demand and trade flows
- Deep understanding of chemical business and how this translates into requirements for terminals

## Education:

- Business Economics (MSc.)



# Steven Bitter – Market Intelligence Analyst

Steven is a young highly educated expert in data analysis and programming

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## Relevant experience:

- Amongst others, econometrics, statistics, data science and commodity market belong to his field of expertise
- Competent in modeling and forecasting of oil products supply, demand and trade flows.
- Author of many oil market reports
- Has been involved in several consultancy projects

## Education:

- Econometrics and Management Science (MSc.)
- Econometrics and Operations Research (BSc.)



# Lars van Wageningen – Operations Manager

Lars is the key contact for understandings of Insights Global's different knowledge fields.

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## Relevant experience:

- Involved in various teams of previous commercial DD projects
- Analyst and editor of Insights Global reports on commodity markets, freights and tank terminal dynamics
- He is in charge of the different daily and weekly quantitative and qualitative reports Insights Global offers regarding the supply chains in the ARA and Rhine region and responsible for the Tankterminals.com platform.

## Education:

- Master in Business Administration (MSc.)





# Insights Global References



# References

Insights Global has been involved in several projects and has a good reputation in the market.

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*“Patrick and the entire team have provided valuable support to Zenith Energy from market research to M&A support and advisory since inception. Insights Global does a great job of truly understanding exactly what we want and need on each project, from off the shelf S&D figures to very market specific intel and he always delivers a great product.”*

Brian Feyereisen, Managing Director, Zenith Energy LP.

*“Patrick Kulsen and his team of professionals assist us with their profound knowledge of the industry and they help deliver insights for our aggressive investments projects”*

Walter Wattenberg, Group CEO LBC Tank Terminals Group

*“Insights Global has helped us with several projects, delivering excellent market research which has helped us to make the right business decisions. Recently, Insights Global prepared an excellent Market Outlook & Company Position Report, which contributed to a successful refinancing of our terminal in Amsterdam and which supported an investment in a new rail handling system as well as dedicated ethanol storage. In our view, Insights Global is very well equipped to deliver bankable market and commercial due diligence reports. They know the local markets very well, have terminal experience, work professionally and meet expectations.”*

Peter Vucins, Director at Global Petro Storage Group

*“Insights Global has been engaged by ESB to provide Oil Storage market valuation reports and market advice. Leveraging off their up-to-date market knowledge, their network and their experience, they have provided a very professional service that has always met our expectations.”*

Paul P. Cullen, Commercial Projects Manager, ESB Generation & Trading

*“For our terminal expansion in Rotterdam, Insights Global has advised and accompanied our commercial team very well in developing our Commercial Plan. The cooperation has led to a focus on the right, appropriate market segments with regard to our new tank capacity, which will be commissioned during Q3/4 in 2021.”* Erik Kleine, General Manager Europe, LBC Terminals