



Insights Global - Consultancy

Market Size and Outlook Analysis





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 on which product markets to focus on.

Management is responsible for the long-term strategy

Responsibilities management

- Wants to know which product markets it needs to focus on.
- Needs to make a business plan, develop/update long-term strategy and anticipate future developments.
- Decides on investments (e.g. infrastructure).
- Manages product and customer portfolio to ensure continuity.
- Engages with future winners.



Uncertainty about the future state of the market and developments

New challenges and uncertainties due to changing supply and demand volumes

Challenges and uncertainties

- Uncertainty about the future state of the market and developments
- Uncertainty about key drivers in supply & demand developments
- Uncertainty about future supply & demand developments
- Uncertainty about impact of S&D developments on future imbalances and trade flows
- Uncertainty about the impact of changing imbalances and trade flows on terminals
- Uncertainty about the impact of the Energy Transition
- Uncertainty about possible refinery and cracker closures
- Fear of investing in the “wrong” infrastructure
- Fear of engaging with future losers from product and customer perspective
- Uncertainty about potential opportunities and threats

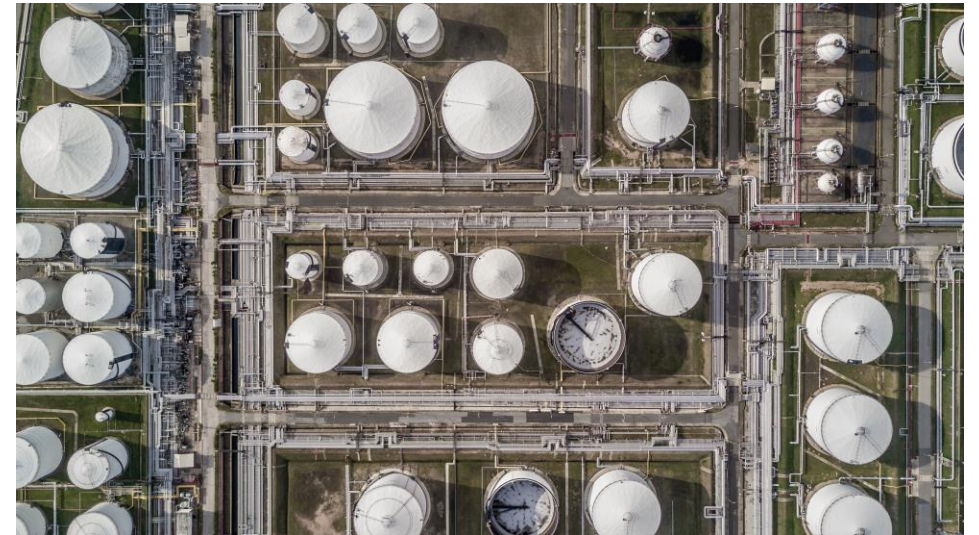


Insights Global offers a Market Size and Outlook Analysis.

What we offer

Main characteristics of the Market Size and Outlook Analysis are:

- It helps select which products to focus on.
- It gives an overview of the key drivers for supply & demand.
- It shows both historical and future supply & demand volumes.
- It shows the impact of changing supply & demand volumes on the imbalances and trade volumes.
- It shows the impact of changing imbalances and trade volumes on terminals or product owner's business.



Determining the impact of the changing market is crucial.

What we will do

What we will do

- Give clarity about the future state of the market and developments
- Determine the key drivers of product markets from both a supply and demand perspective and potential impact on infrastructure
- Include historical data and use own forecasting tool to determine the future supply and demand volumes
- Determine the impact of changing supply & demand volumes on the imbalances and trade flows
- Summarize Energy Transition developments and its impact on terminals
- Make a list of potential future winners and losers
- Production plant assessment to determine the likely candidates for closure



Concrete deliverables will help you better understand future product markets.

What we deliver

Deliverables

Overview of:

- The key drivers of the selected product markets
- Historical and future supply & demand volumes of the selected product markets
- Main Energy Transition developments and their potential impact on terminals
- Potential future winners and losers from product and company perspective
- Potential impact on infrastructure
- Changing imbalances and trade flow and their impact on terminals or product owner's business
- Outcome of production plant's assessment



Study will help you make better strategic decisions

What you will experience

Pay-off

Our analysis:

- Creates a better understanding of the threats and opportunities from a product perspective.
- Provides more in-depth knowledge of the changing supply & demand volumes and the impact on trade flows and terminals.
- Helps you be better prepared for making the right strategic decisions.
- Lets you feel more comfortable about the future direction of your terminals.





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 into 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

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.

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.

“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