



HPH

Port of Stockholm
Strengthening the position of Hutchison Port
Holdings in the Scan Baltic region

17 December 2008 – Stockholm

J. Westerhoud

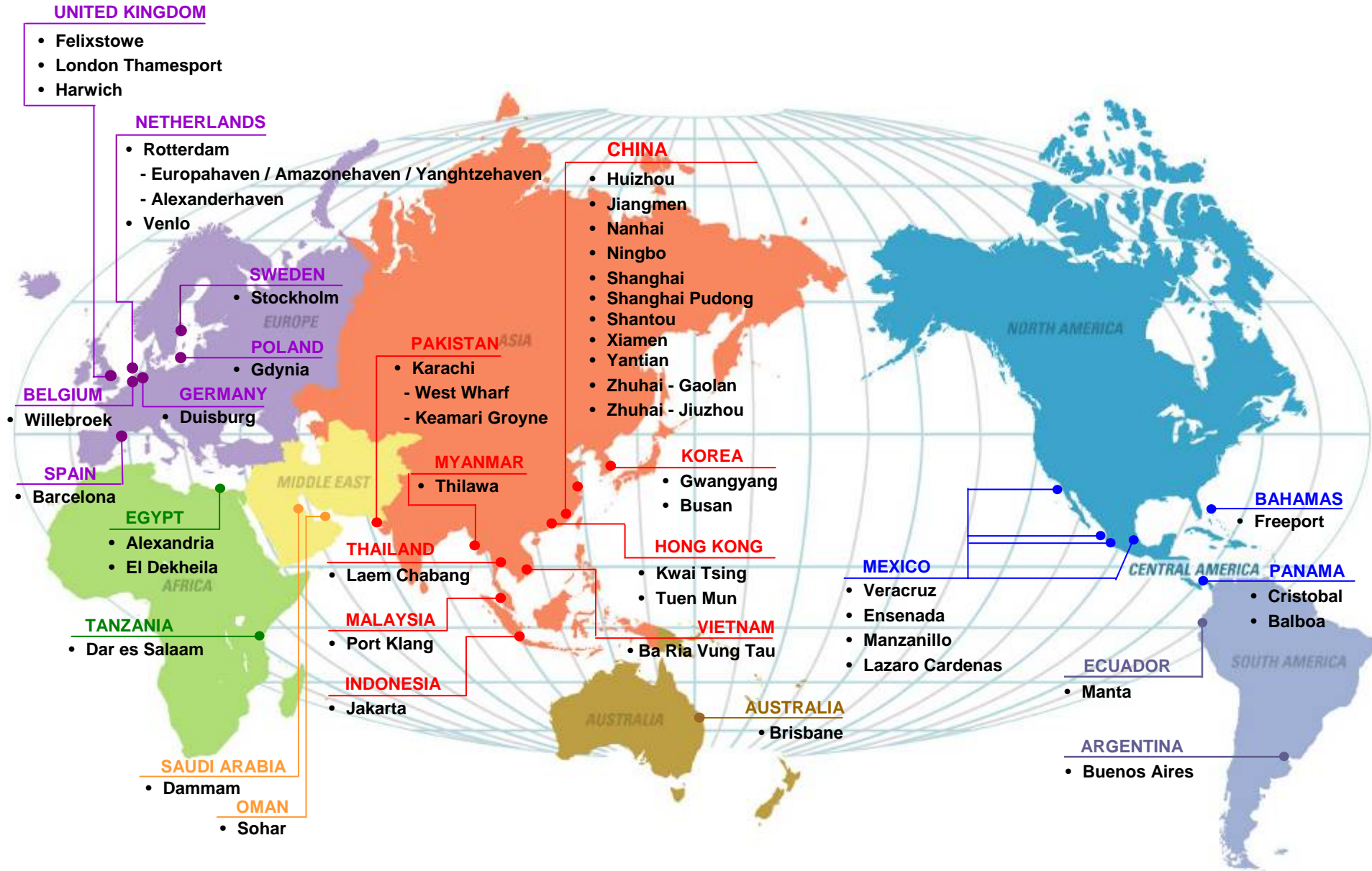
Managing Director Northern Europe Division

Agreement Ports of Stockholm and HPH

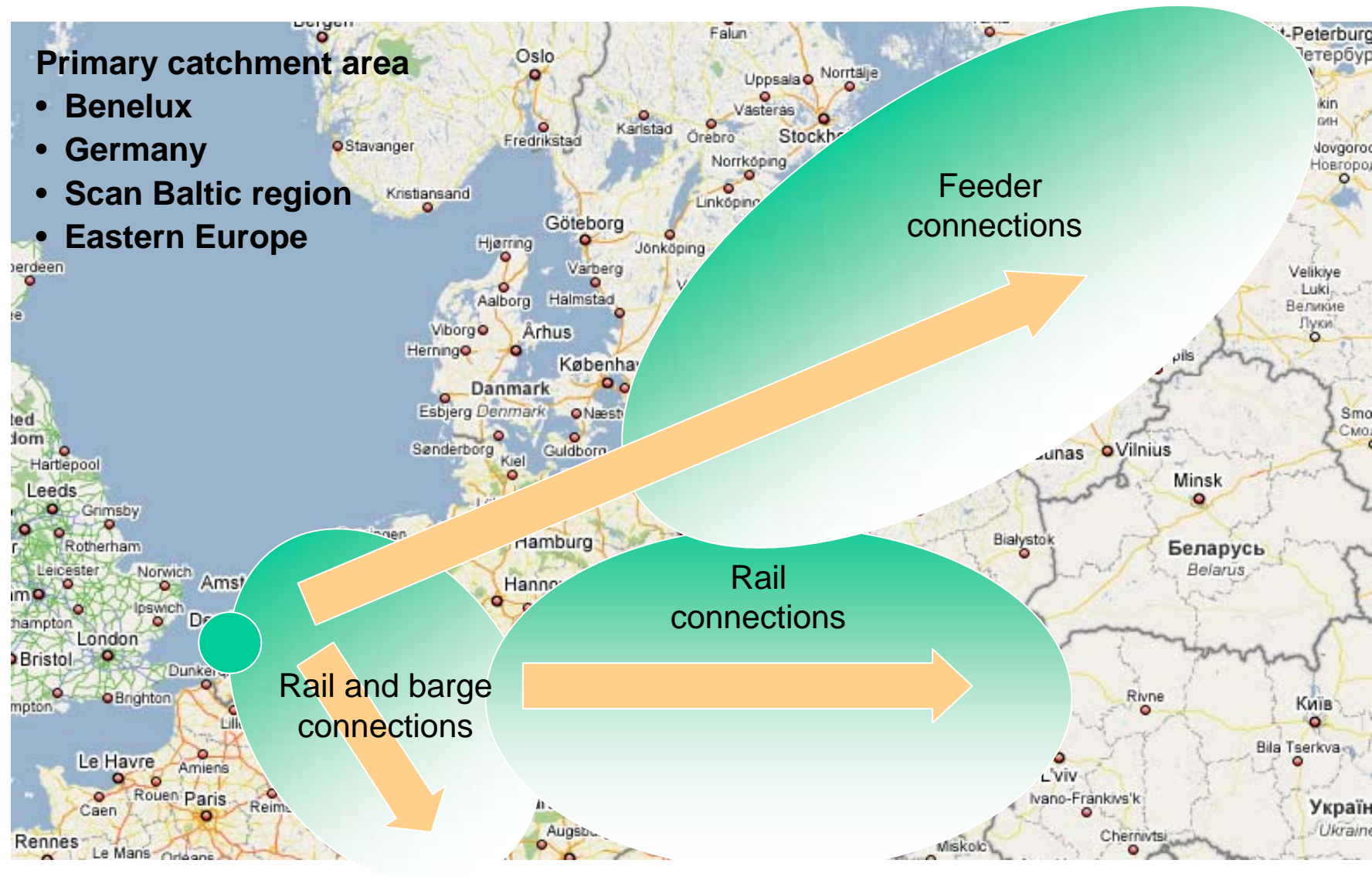


- The 25-year agreement grants HPH the right to operate the container terminal within Stockholm Free Port from 1 March 2009
- The agreement paves the way for HPH to develop new container-handling facilities at the Port of Nynashamn, Norvikudden
 - The terminal will cover an area of 25 hectares and will be developed in three phases with a quay length of 800 metres and a depth alongside of 15 metres.
 - The terminal is expected to be operational in 2012

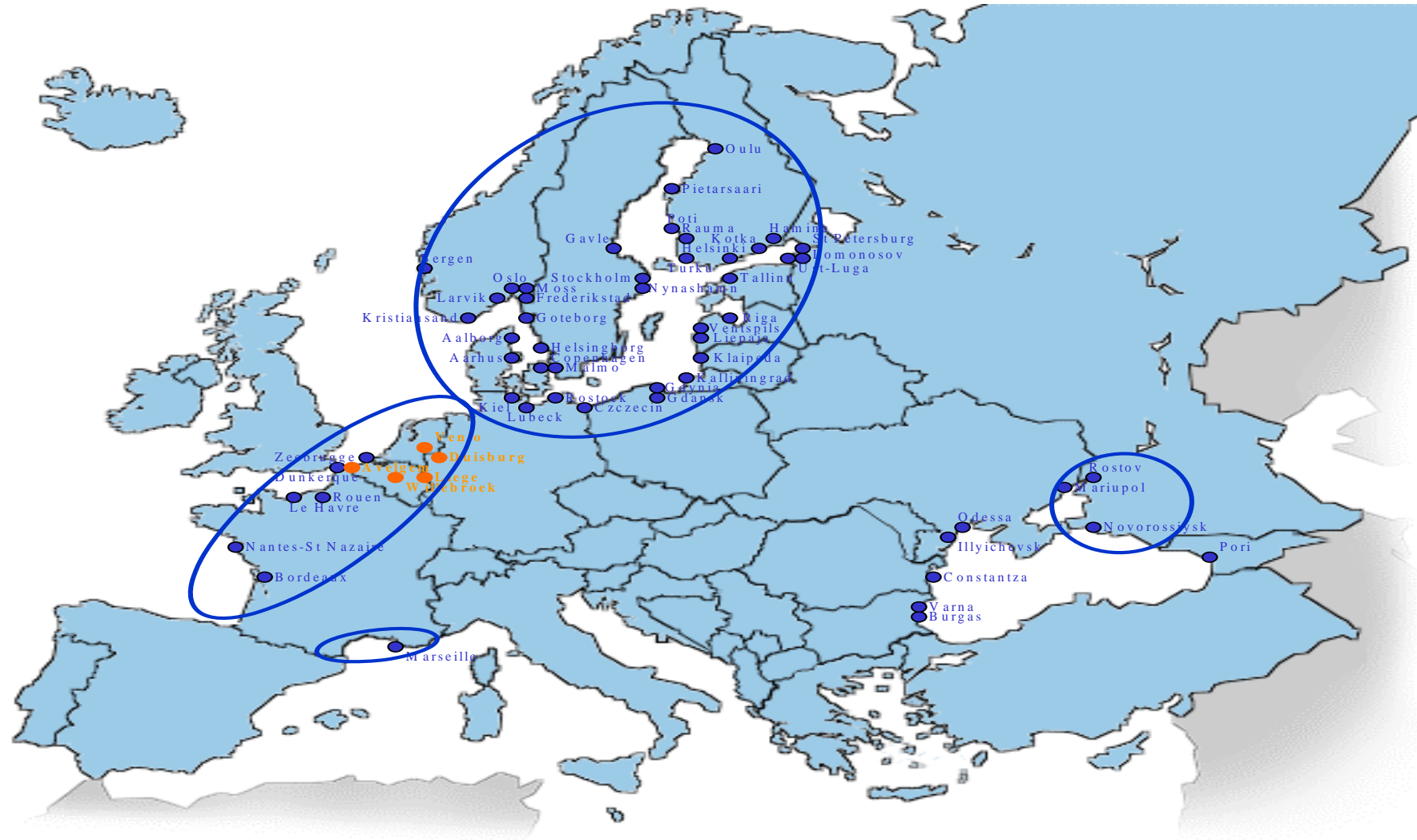
HPH Ports around the World



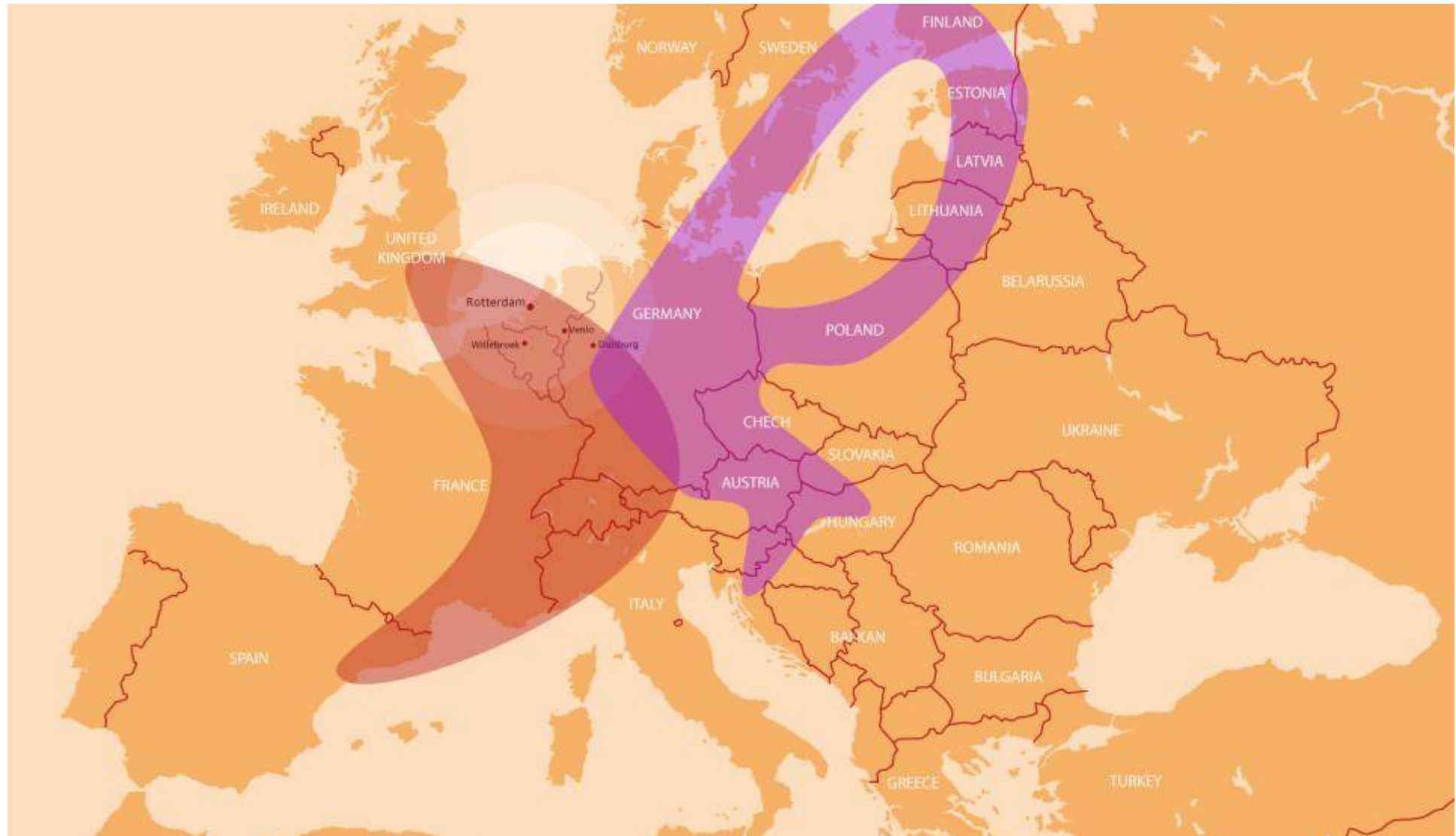
The focus is Northern Europe



HPH Northern Europe



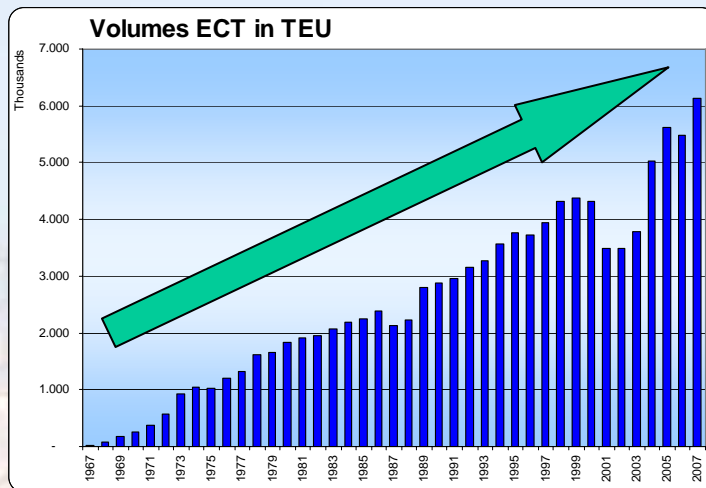
Economic Hotspots



Hinterland network of ECT

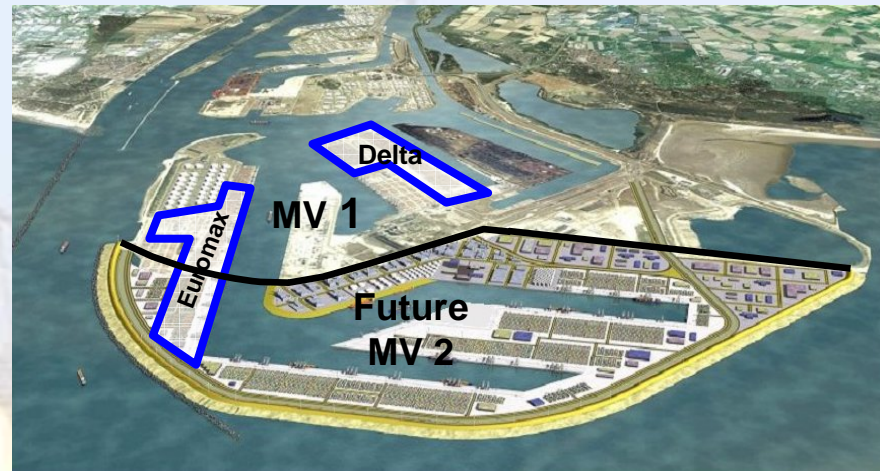


Increase volumes and scale



ECT: continuous growth

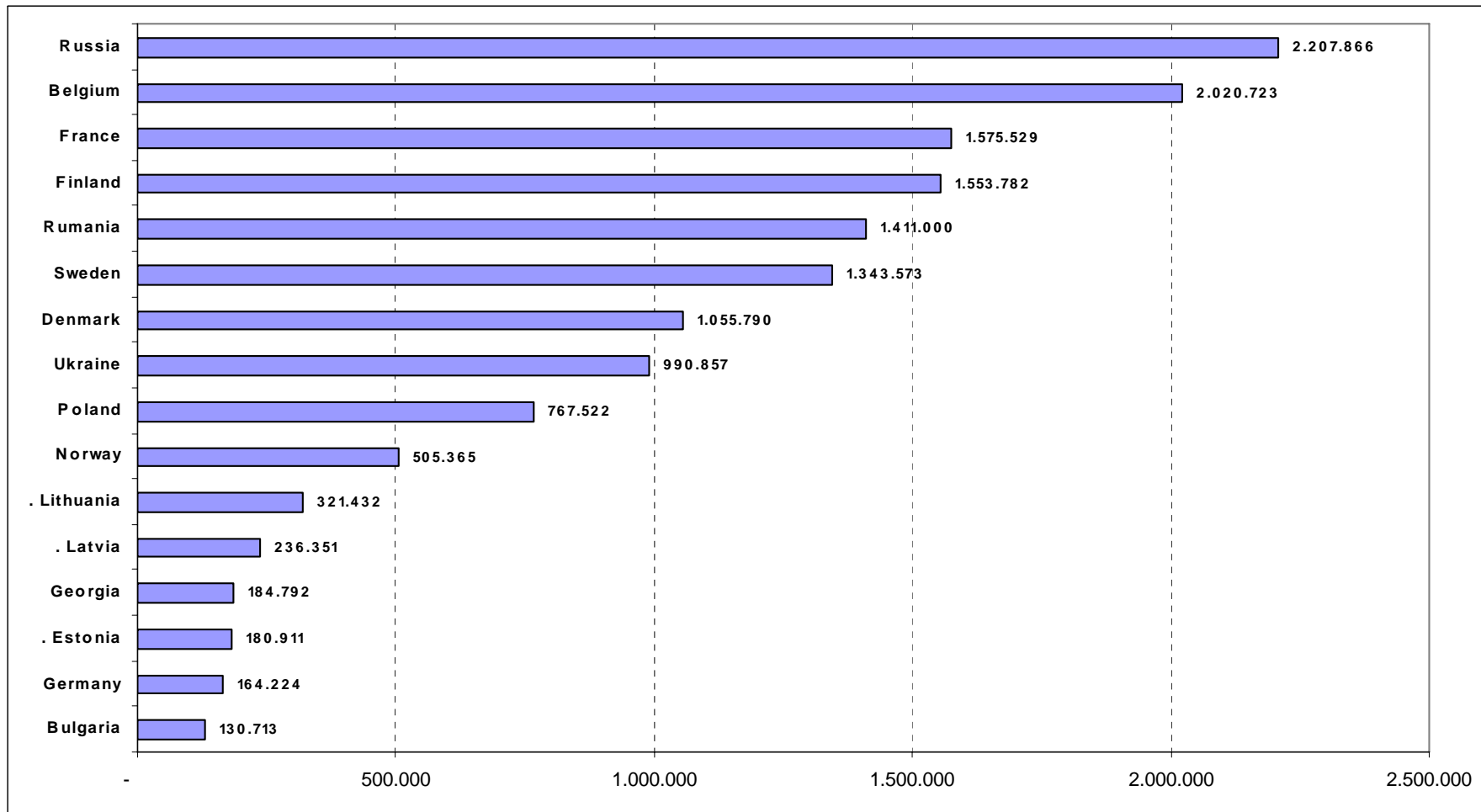
- 2007 weekly numbers:
- 80,000 deepsea/feeder moves
 - 40 deepsea calls
 - 100 feeder calls
 - 400 barge calls
 - 200 trains
- 17,000 trucks



Port of Rotterdam:
2007: 10,8 million TEU (+12%)

- To Benelux: 50%
- To Germany: 30%
- To other: 20%

Volume 2007 per country



Belgium excl. Antwerp, Germany excl. Hamburg / Bremerhaven and France excl. Le Havre

Our market is changing



- Strong pressure on volumes and volatility under current market conditions
- 12.000+ TEU container ships will become common to improve efficiency of container transport
- Liners are looking for more capacity and ‘ease of doing business’
- Road congestion is increasing in Europe
- Environmental friendly transport will become increasingly important
- Cooperation in the logistic chain is a must to improve the optimum flow of containers through its system

Building the best network in Europe



We want to improve our customer preference:

- Offering the best network of container terminals in Europe;
- Operating the most efficient container terminals;
- Delivering the highest degree of service with the “*ease of doing business*” and facilitating “*one-stop shopping*” in the European logistic chain

It is our aim to build a strong network of world-class container terminals and offer a range of value-added products and services to our customers with frequent and reliable connections to the hinterland.

Network cooperation



Cooperation between the container terminals in the HPH network benefits all

- Strengthening of the HPH network in Northern Europe with partners in the ports of Rotterdam, Gdynia (Poland) and Stockholm (Sweden)
- Create stronger positions in regional markets
- Cooperation between the ports will lead to more volume for each of the partners
- Enhancing HPH's hub function in Europe with a well-linked feeder network of HPH terminals

Scan Baltic area is important for HPH



- The Scan Baltic region is experiencing fast economic growth with a population of 110 million people across 10 countries
- The Scan Baltic region is one of the fastest growing trade areas in the world
- The Stockholm region is important:
 - Densely populated – 1/3 of Sweden's population lives and works in this area
 - High percentage GDP – 40% of Sweden's GDP is generated in this area

HPH views on the concession agreement



HPH is participating in the development plans for the Port of Stockholm because:

- The agreement supports the strategy of increasing the presence of HPH in growing markets, especially those as geographically significant as Stockholm and Nynashamn
- HPH will be able to enhance the Port of Stockholm's competitiveness in the Baltic region based on its extensive international network of ports and expertise in container terminal operations
- HPH will be able to provide its customers with value-added services based on its extensive expertise in container terminal operations

Environmental aspects



The Port of Stockholm

- has the ambition to reduce the environmental effects of terminal operations in the region

HPH

- has an integrated approach to environmental friendly terminal operations:
- Well-designed terminals and efficient operations
- Environmental friendly transport through a multimodal hinterland strategy
- Cooperation with other parties in the logistics chain
- Use of new energy sources
- Noise reduction and other measures

Great opportunities ahead



- This agreement is based on a **mutual understanding** that the **Ports of Stockholm** have been seeking a commitment for the long-term development of modern container-handling facilities in the Ports of Stockholm and to create a world class port operation in the Baltic region

And...

- that **HPH's** participation in the development plans will strengthen the position of the Ports of Stockholm in its every day business and contribute to the long term competitiveness of the region



HPH

Our Mission

**To be the global market leader in
port development, operations and logistics services**