

**Folketingets Erhvervsudvalg samt Trafikudvalg**

**Besøg hos Clipper / Unifeeder**

**Harbour House  
Sundkrogsgade 21  
2100 København Ø**

**onsdag den 18. april 2007 klokken 16.00 – 19.00**

- 16.00** Afhentning i bus, Folketingets store trappe.
- 16.30** Velkomst. Orientering om Clipper Group A/S ved  
Managing Director Henrik Dal / Clippers ledelse.
- 16.50** Orientering om Unifeeder A/S ved adm. direktør  
Tonny D. Paulsen.
- 17.10** Orientering om status for dansk søfart ved  
formand for Danmarks Rederiforenings  
erhvervsudvalg, direktør Jan Kastrup-Nielsen, J.  
Lauritzen A/S.
- 17.30** Spørgsmål og debat samt buffet dinner.
- 18.30** Afgang med bus.
- 19.00** Ankomst Folketinget.



# Status for dansk skibsfart

Direktør Jan Kastrup-Nielsen,  
J. Lauritzen A/S



DANMARKS REDERIFORENING

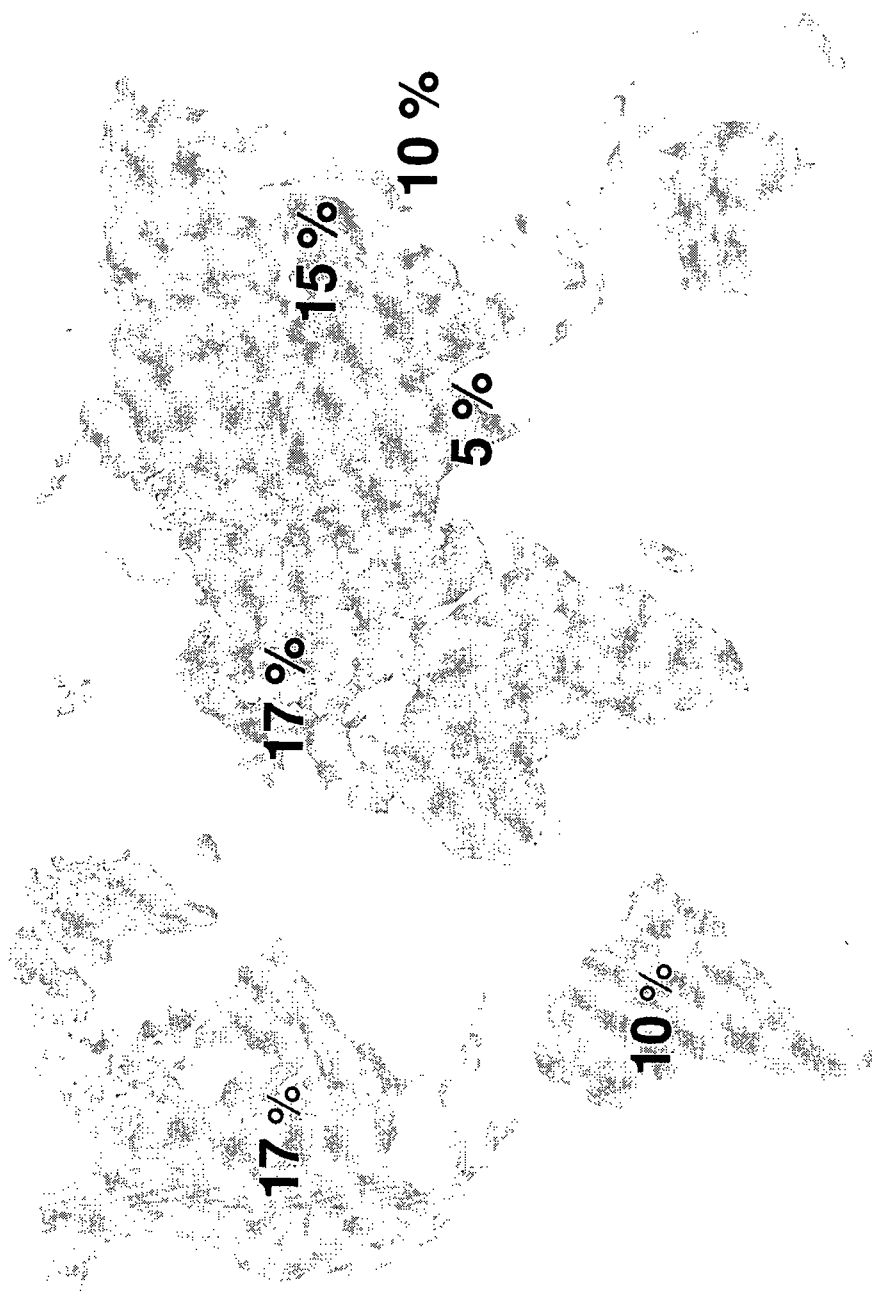
# Rederisektoren i historisk fremgang

Flådens udvikling og valutaindsejling  
1989 - 2006







DANSK REDEFLETT

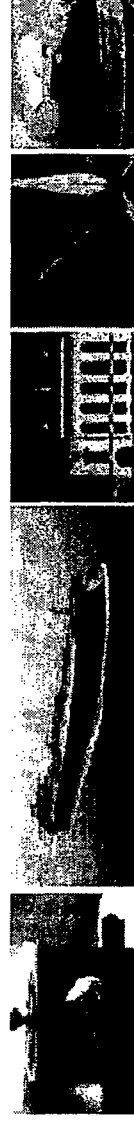
# Største markeder



DANMARKS REDERIFORENING

# Danmarks internationale placering

- 7 % af verdenstonnagen kontrolleres fra Danmark  

- Danske rederier transporterer 10 % af verdenshandelen  

- Danske rederier står for 5 % af verdens kontraheringer  

- Dansk eksport er få promiller af verdens samlede eksport  




DANMARKS REDERIFORENING

# En førende søfartsnation

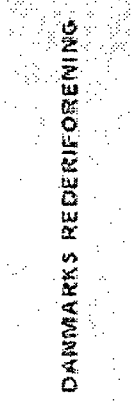
- Rederier
- Mæglere
- Værfter og udstyrsleverandører
- Finansiering
- Forskning og uddannelse
- Skibsfartskyndige myndigheder



DANMARKS REDERIFORENING

# Udfordringer

- Økonomiske rammevilkår er (ved at være) på plads
- Sikre fortsat europæisk forståelse for skibsfartens vilkår
- Kompetenceudvikling – befragtere, ingeniører, skibsofficerer m.v.
- Styre den fortsatte vækst i rederierne

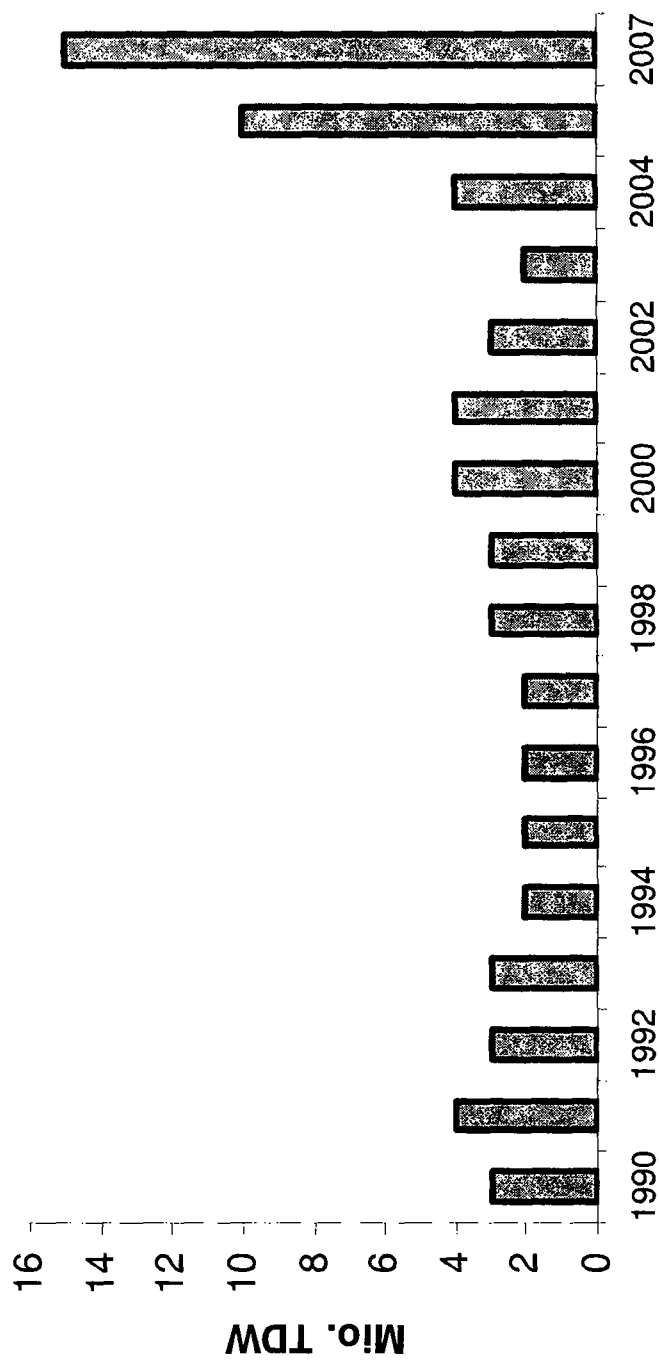


DANMARKS REDERIFORENING



# Rederierne er præget af optimisme

## Danske rederiers nybygningsprogram



maritime transportation in a changing world



# Folketingets Ervervs- og Trafikudvalg

København, april 2007




## Agenda

- Facts om Clipper
- Clippers 3 kerneområder
  - Clipper Bulk – Tørlast
  - Clipper Elite Carriers – Multi-purpose
  - Clipper Wonsild Tankers – Tank
  - Clipper Wonsild Tankers – Tank
- Clippers andre forretningsområder
- Clippers ledelse
- Clipper & Harbour House
- Spørgsmål



## Clipper facts

- 1972 – Clipper etableret af Torben G. Jensen som operatør
- 1991 – Clipper etableres som rederi
- 2005 – Clipper samler alle aktiviteter i Harbour House
- 2005 – Clipper har 3 strategiske forretningsenheder – tørlast, multi-purpose og tank
- 2007 - Clipper har kontrol over en flåde på ca. 250 skibe, hvoraf ca. 100 er ejet
- Clippers flåde rangerer fra 3.500 dwt små tankskibe til 250.000 dwt VLCC'er (Very Large Crude Carriers)
- Clipper har 62 nybygninger under konstruktion på forskellige værfter
- Clipper fragter årligt mere end 50 millioner tons last
- Clipper har 25 kontorer og ca. 500 ansatte globalt – ca. 250 er ansat i Kbh.



## Clippers strategiske forretningsenheder

### **CLIPPER BULK**

Handysize  
Handymax  
Panamax

### **CLIPPER ELITE CARRIERS**

Multi purpose  
Heavy lift  
Projektskibe

### **CLIPPER WONSILD TANKERS**

Kemikalietankere  
Produkttankere

### **CLIPPERS ANDRE FORRETNINGSAKTIVITETER**

RO/RO – VLCC - Krydstogtskibe - Linjeaktiviteter - Glomaris

the bulk of our business is bulk



Clipper Bulk

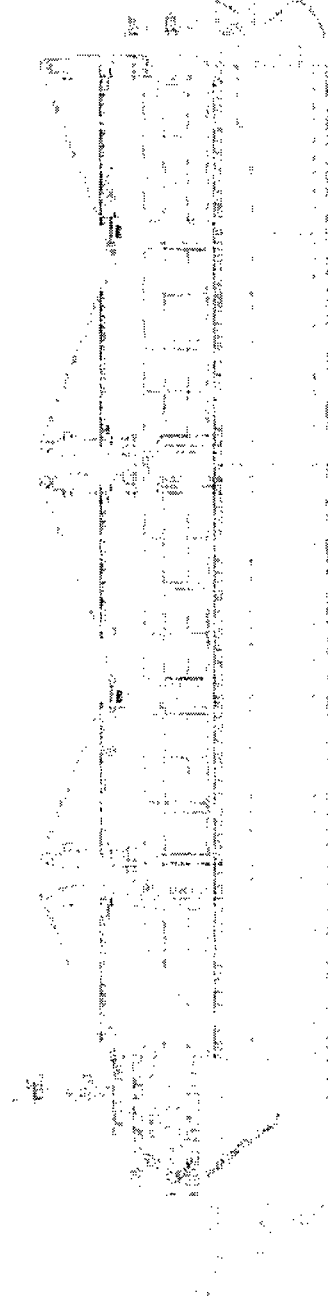


## Clipper Bulk

Clipper Bulk, Clippers tørlastsegment, opererer ca. 100 bulkskibe i forskellige størrelser:

Handysize bulkskibe	20-35.000 dwt
Handymax bulkskibe	35-55.000 dwt
Panamax bulkskibe	65-85.000 dwt

Clipper Bulk vil i de kommende år tage levering af mere end 40 nybygninger.



**CLIPPER**  
BULK





# Clipper Bulk

BULK = massegoods

Kornprodukter

Kul

Petroleumskoks

Bauxit

Aluminium

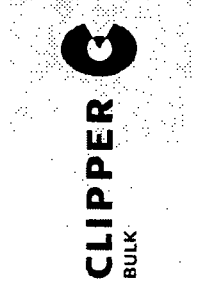
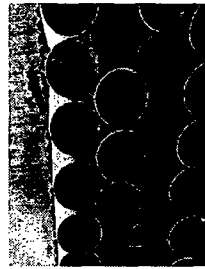
Gødning

Urea

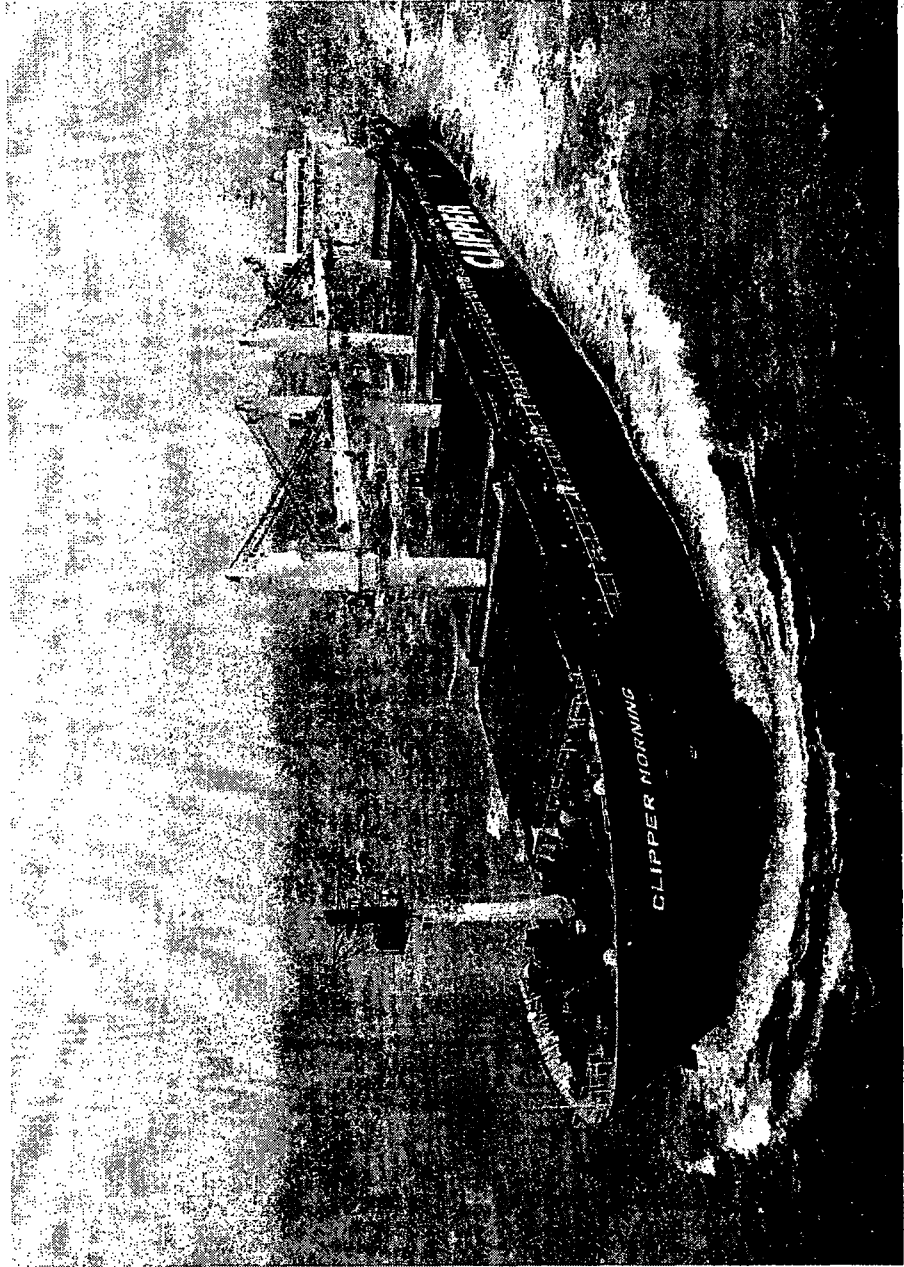
Pimpsten

Stål

Ris

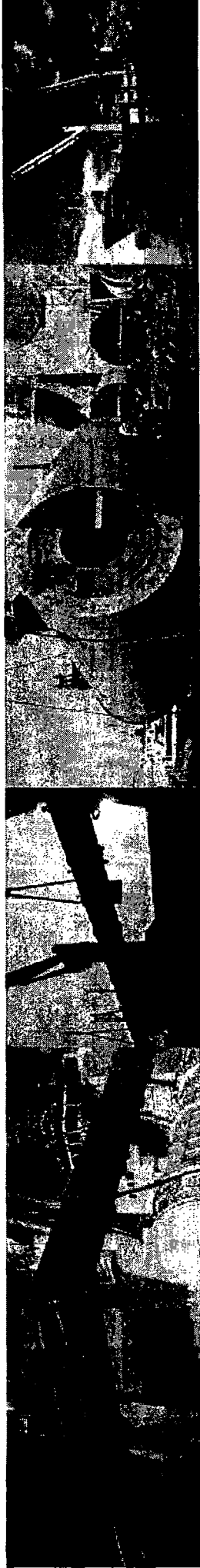






**CLIPPER** **C**  
BULK

on time – with care



## Clipper Elite Carriers



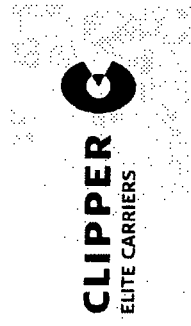


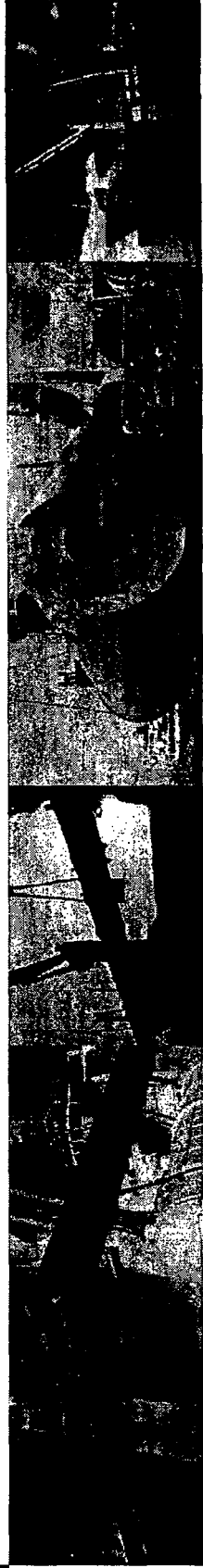
## Clipper Elite Carriers

Clipper Elite Carriers, Clippers multi-purpose segment, kontrollerer en flåde bestående af 60 multi-purpose/projektskibe på mellem 4.000 – 17.500 dwt. 28 af disse skibe er helt eller delvist ejet af Clipper.

Samtidig vil Clipper Elite Carriers tage levering af op til 30 nybygninger i de kommende år.

Clipper Elite Carriers har egen 'in-house' teknisk managementafdeling.

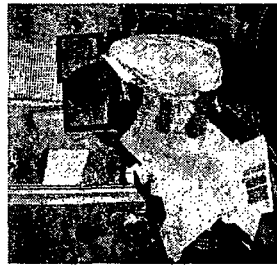




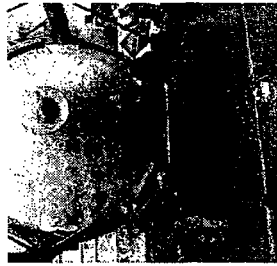
# Clipper Elite Carriers



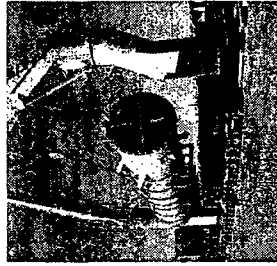
Planlægning



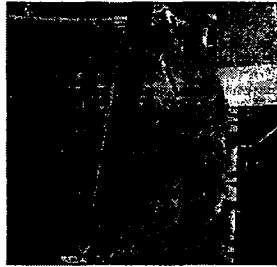
Stuvning og  
surrings-  
analyse



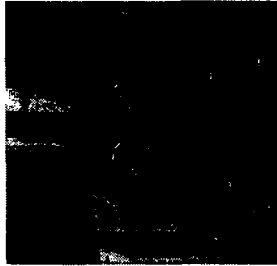
Forbere-  
delse og  
kordination



Last-  
håndtering

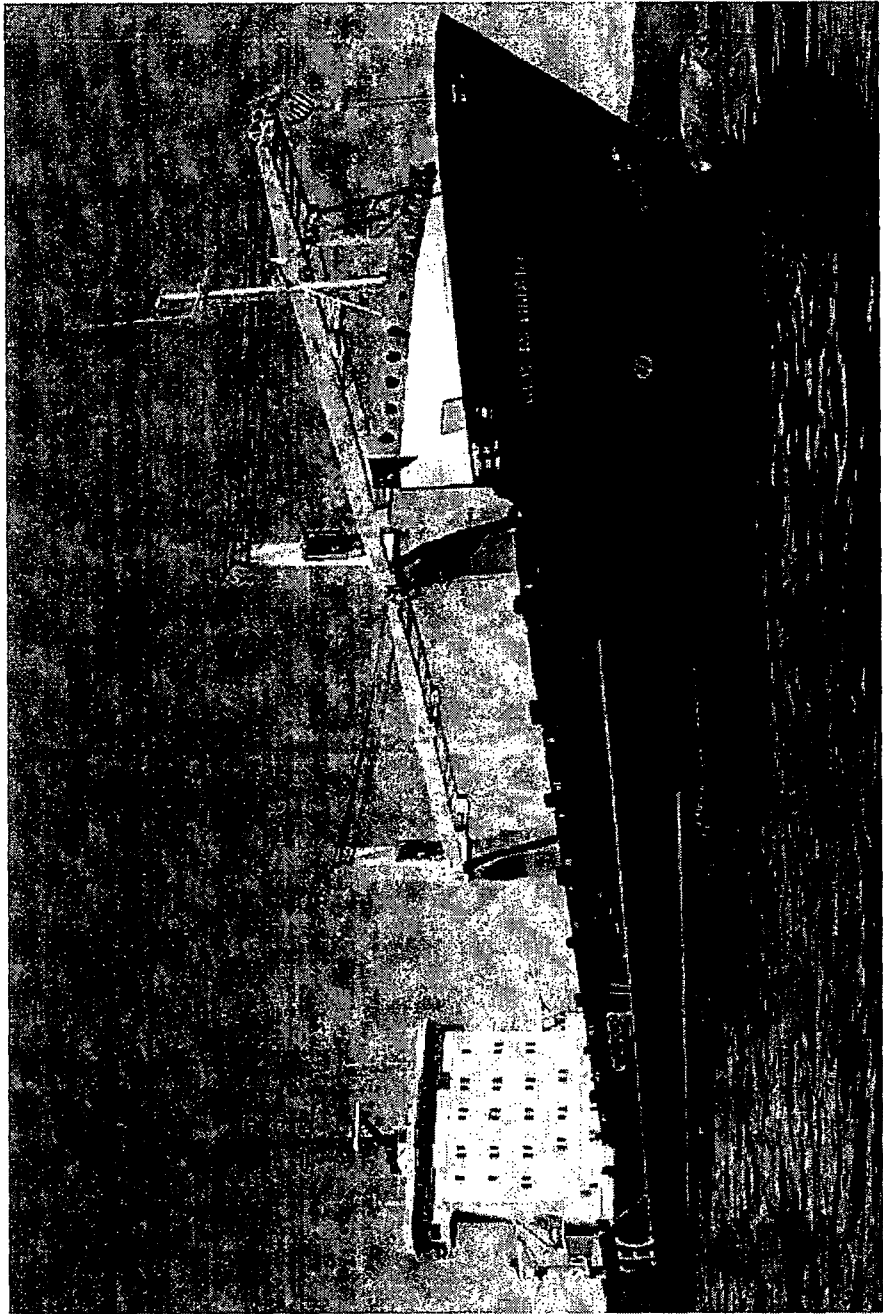
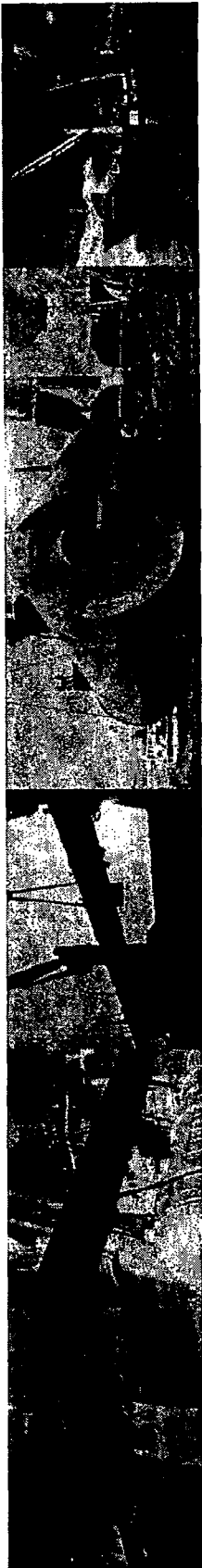


Specielt  
skibs-  
udstyr



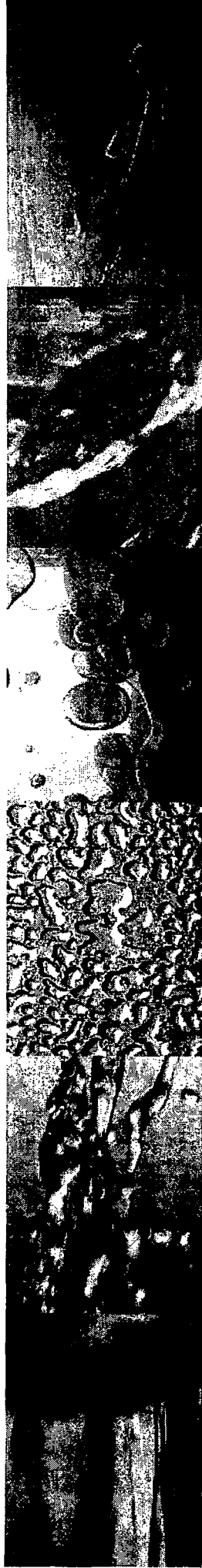
Sikker  
stuvning  
og fast-  
gørelse





**CLIPPER**  
ELITE CARRIERS

a better business move



## Clipper Wonsild Tankers





## Clipper Wonsild Tankers

Clipper Wonsild Tankers, Clippers tanksegment, kontrollerer en flåde bestående af ca. 60 kemikalie- og produkttankere, hvoraf 35 er helt eller delvist ejet af Clipper.

3.500 - 7.000 dwt	30 skibe
7.001 - 12.000 dwt	22 skibe
12.001 - 20.000 dwt	8 skibe

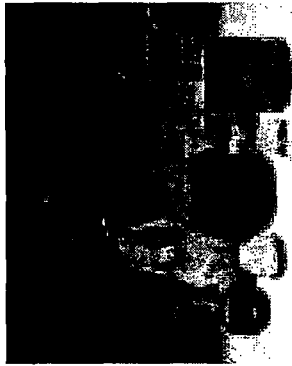
Derudover vil Clipper Wonsild Tankers tage levering af 16 nybygninger i de kommende år.

Clipper Wonsild Tankers har egen 'in-house' teknisk managementafdeling.

# Clipper Wonsild Tankers



Vegetabilske olier



Kemikalier



Melasse/sirup



Animalske  
olier

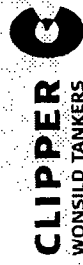


Petroleumprodukter

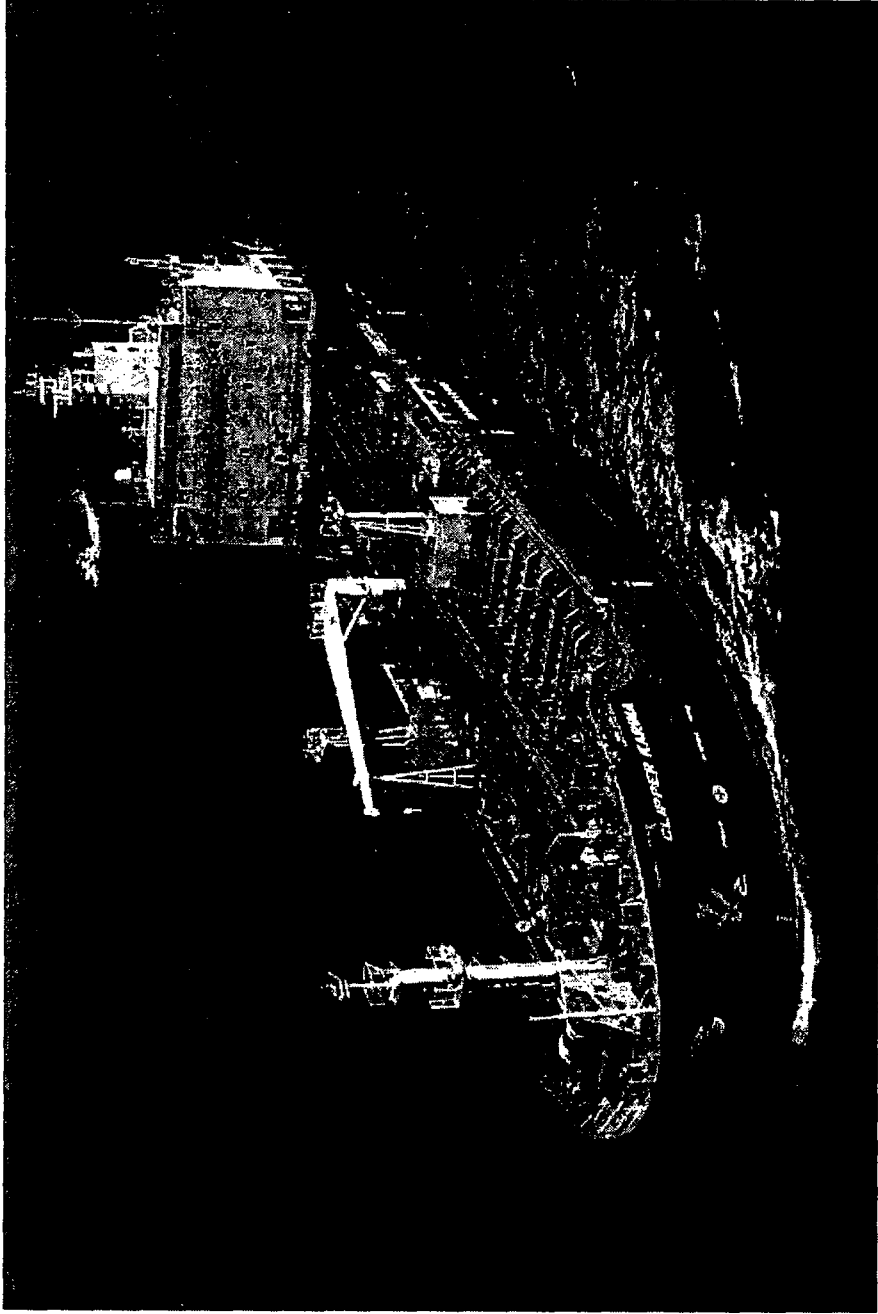


Smøreolier



Kunder:  
ExxonMobil  
ChevronTexaco  
BP  
Total  
ConocoPhillips  
Borealis  
PetroCanada  
BASF







**CLIPPER**   
WONSLD TANKERS



## Clippers andre forretningsområder

### **RO/RO færgeservice**

Clipper har en roll-on/roll-off færgeservice på det irske hav, der opererer under navnet Seatruck.

### **VLCC**

Clipper har investeret i 8 VLCC'er (Very Large Crude Carriers). De er mellem 240-300.000 dwt.

### **Krydstogtskibe**

Clipper har investering i 2 mindre krydstogtskibe (116 passagerer pr. skib).

### **Linjeaktiviteter**

I mere end 20 år har Clipper drevet linjeaktivitet mellem Sydamerika og Afrika.

### **Glomaris**

Clipper har udviklet sit eget Microsoftbaserede økonomi- og shippingsystem.



## Clippers topledelse

Clippers topledelse består af:

Torben G. Jensen, Group Chairman and CEO  
Frank G. Jensen, Managing Director Clipper Bulk A/S\*  
Henrik Lund Dal, Group CFO\*  
Per Gullestrup, Managing Director Clipper Elite Carriers A/S\*

\* Fælles Managing Director i Clipper Group A/S

Derudover er der følgende associerede medlemmer af Clippers topledelse:

Jan Meinertz, Chairman Clipper Wonsild Tankers A/S  
Bjarne Tvilde, Managing Director Clipper Wonsild Tankers A/S  
Gary S. Vogel, Managing Director Clipper Bulk (USA) Inc.



## Clipper og Harbour House

Clipper har på verdensplan ca. 500 medarbejdere og har hovedsæde i Nassau, Bahamas.

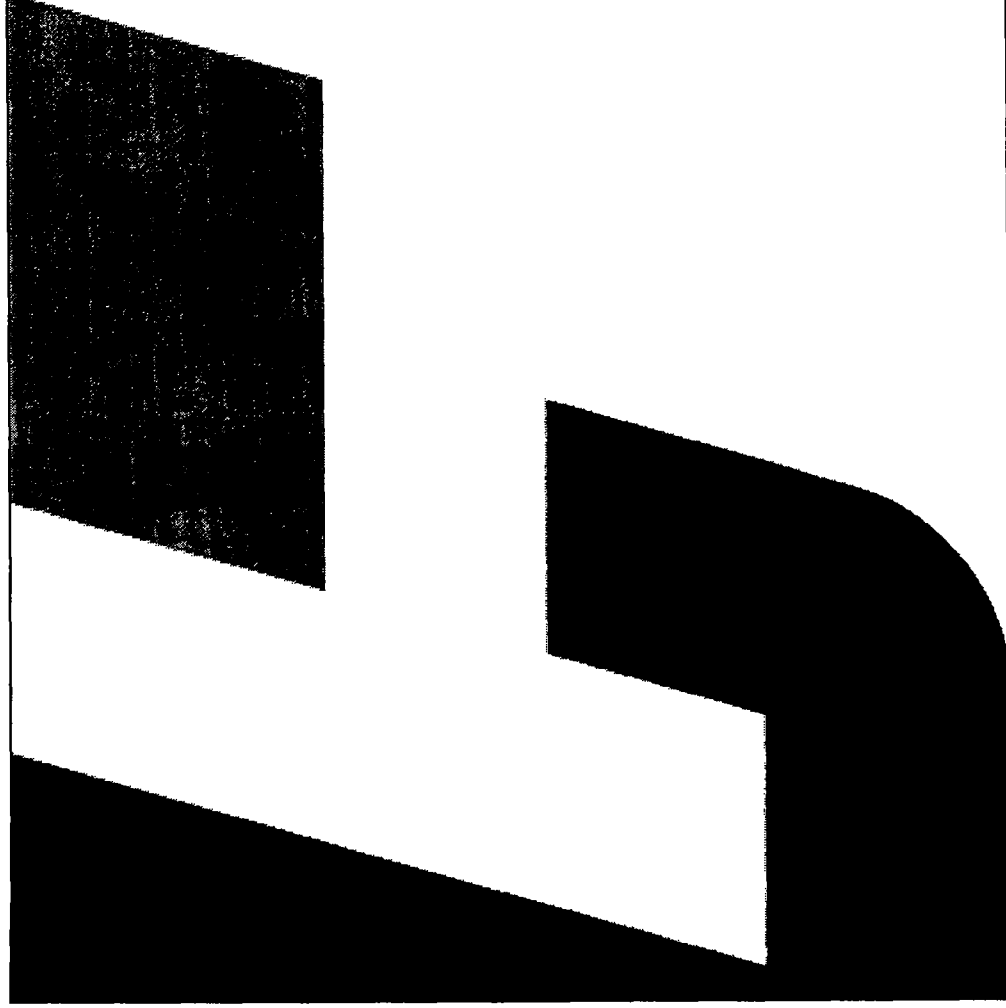
Clippers kommercielle hovedsæde er i Harbour House, Københavns Havn, hvor antallet af ansatte lyder på ca. 250 medarbejdere. Vi regner med at ansætte yderligere 40-50 personer i 2007 alene i København.

Samtidig udvider Clipper sit nuværende domicil i København med en tilbygning, Harbour House 2, på yderligere 6.000 M2.

Harbour House 2 påbegyndes i sidste halvår 2007 og forventes færdigt sommeren 2009.

Spørgsmål?

# Corporate presentation



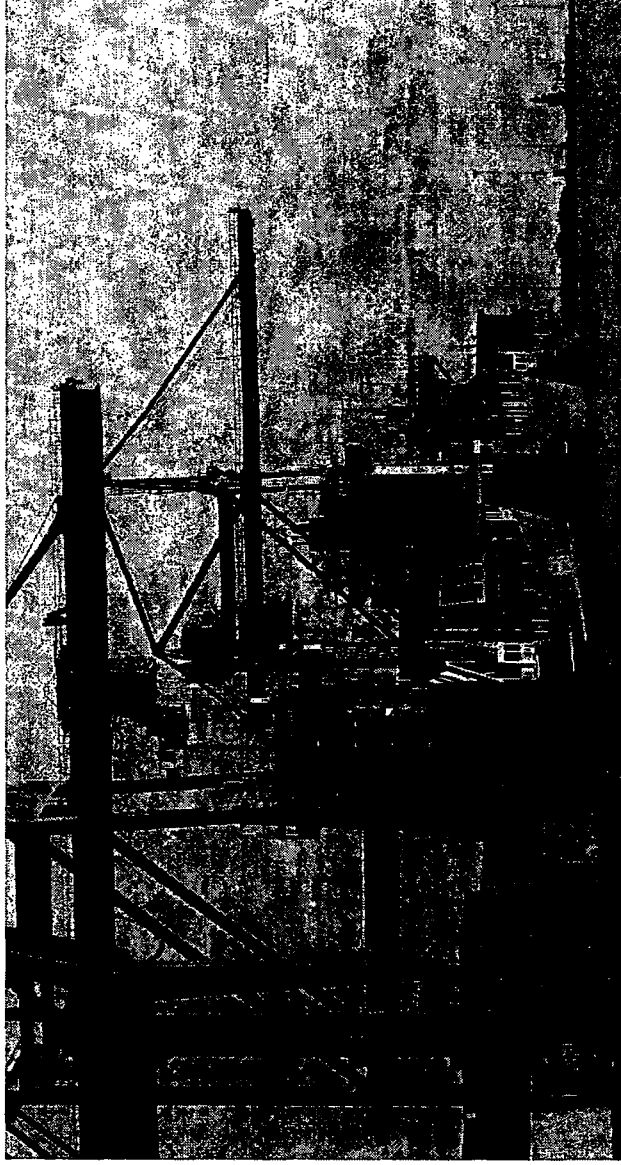
Besøg af  
Folketingets Erhvervsudvalg &  
Folketingets Trafikudvalg -  
onsdag den 18. april, 2007

19-04-2007

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**UNIFEEDER**

Presented by:  
Tonny D. Paulsen/Michael Bergh  
Unifeeder A/S



## General Unifeeder information

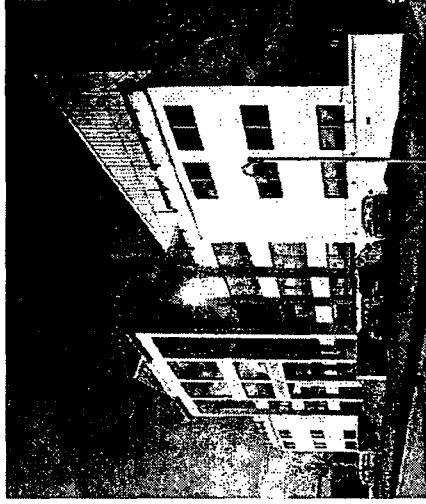
**UNIFEEDER**

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# Unifeeder A/S

- Founded in 1977
- Offices in Aarhus and Copenhagen
- Privately owned
- 200 employees
- 7 offices in 5 countries
  - Bremen
  - Gothenburg
  - Hamburg
  - Helsingborg
  - Helsinki
  - Oslo
  - Rotterdam
- Volume 2006: 1,5 mio TEUs



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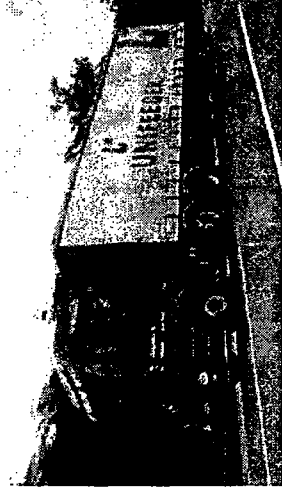
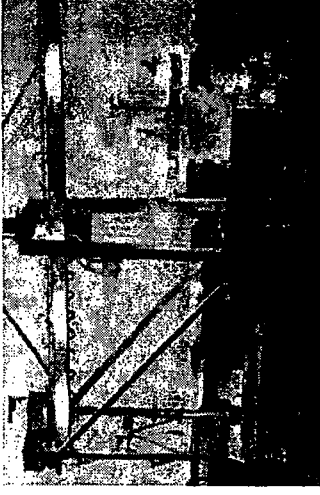
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**UNIFEEDER**



# Business areas

- **Container Feeder Service**  
Transport of containers for global deep-sea container carriers, linking them to the smaller and less accessible ports in Northern Europe
- **Shortsea Service Door-to-Door**  
Door-to-Door transport solutions within Europe for anything that can be containerized
- **Projects, Agency and Brokerage**
- **Forwarding**  
Primarily road transport between Denmark and Norway











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# Unifeeder Ports

		CALLS AT (per week):	
	PORTS CALLED	PORT	TERMINAL
	Russia	St Petersburg	5
	Estonia	Tallinn	2
	Latvia	Riga	2
	Lithuania	Klaipeda	2
<b>TRANSSHIPMENT PORTS</b>			
	Germany	Hamburg Bremerhaven	36 30
	Holland	Rotterdam	5
	England	Felixstowe	2
	Belgium	Antwerp	1
			14

Marks Unifeeder's own offices

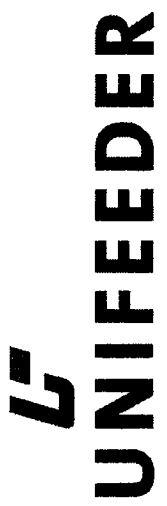
Total calls per week:  
154 Ports  
245 Terminals  
54 Passages

		CALLS AT (per week):	
	PORTS CALLED	PORT	TERMINAL
	Denmark	Aarhus Copenhagen Fredericia	10 11 1
	Sweden	Gothenburg Helsingborg Malmoe Halmstad	10 8 3
	Norway	Oslo Fredrikstad Moss Larvik Skien Halden	4 2 1 2 1 2
	Finland	Helsinki Kotka Hamina	6 6 1
			8

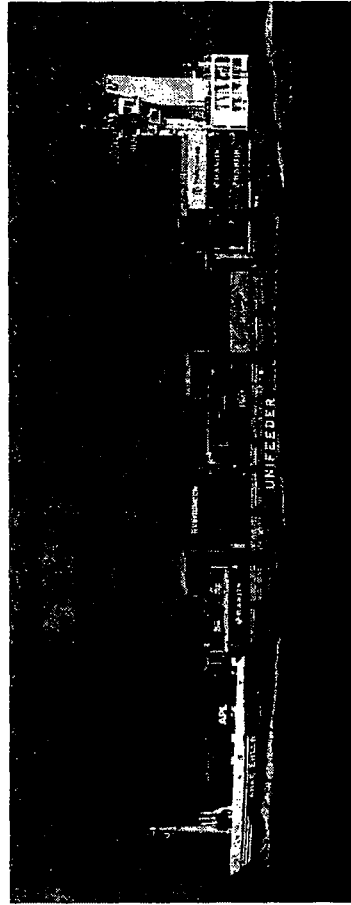
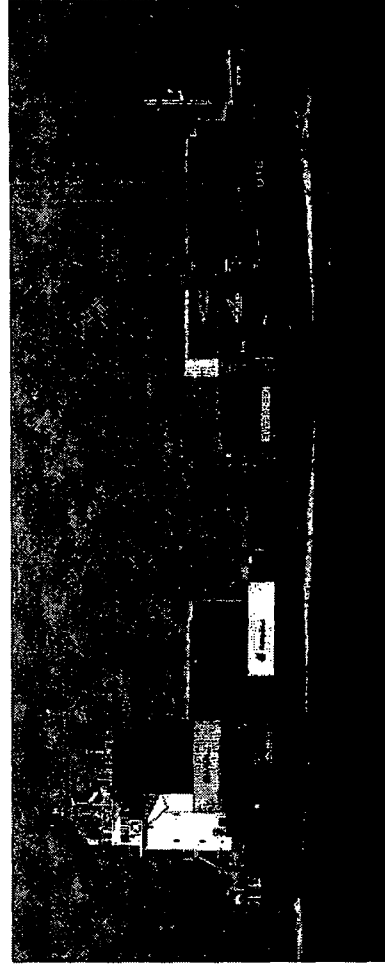
The Kiel Canal per week:

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# New and Modern Fleet



42 ships -500/1000 TEU – total 28,000 TEU – 329,729 DWAT

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# DynaLiners 28/2006

## - Survey of Common Feeder Lines

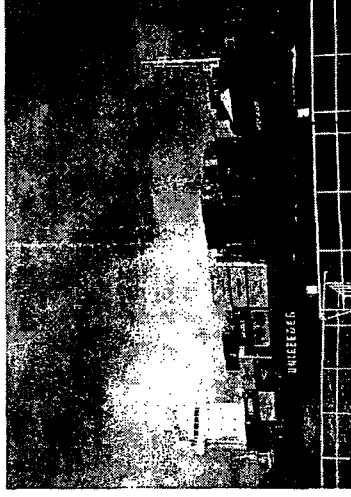
**Unifeeder holds:**

**The No. 4 position in the world**

**The No. 1 position on the North European continental feeder market!**

2006:

- Turnover around 300 mil. Euro
- Volume carried around 1,500,000 teu
- 7 offices in 5 countries – 200 employees.



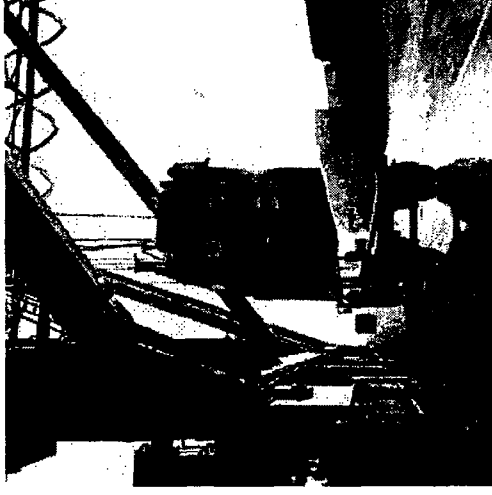
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# Feeder Service Concept

- Links to two dozen ports in Europe
- Daily calls on the busiest routes
- Reliable - fixed arrivals and departures
- Shortest possible transit time between ports
- Flexible – adjusting capacity and scheduling
- Network of subsidiaries and agents
- EDI connections and online real time schedule



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# Unifeeder Shortsea Door-to-Door

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- Presentation of Unifeeder Shortsea Service Door-to-Door  
- a unique intermodal concept in Europe

  
**UNIFEEDER**

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# Shortsea Service Door-to-Door Facts

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- Commenced in 1985
- 52 employees
- Operation in following countries:
  - Belgium
  - Ireland
  - Denmark
  - Finland
  - Latvia
  - The Netherlands
  - Germany
  - Sweden
  - Russia
  - Lithuania
  - UK
  - Italy
  - Norway
  - Estonia
- Turnover 2006: EURO 47 millions
- TEU Turnover 2006: 73,000 TEU





# Shortsea Geographic Coverage

- Operating in 14 countries



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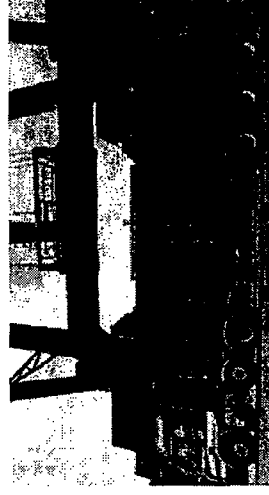
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# Shortsea Corporate Mission

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- To offer competitive environmentally safe intra-European transportation in competition with road transport
- Through efficiency and large-scale operation create logistical advantages for the industry
- Focus on core business areas
- Maintain our position as one of the market leaders in the Northern Europe Short Sea market.



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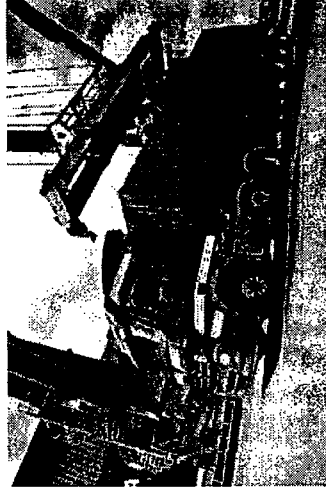
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# Shortsea Service Concept

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- Large capacity
- Regular and firm schedule
- Time accurate collection and delivery
- Fully intermodal
- Individual customer solutions



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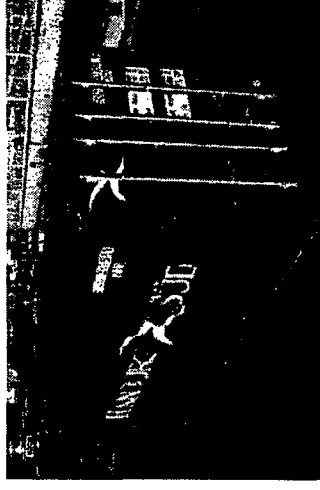
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# Shortsea Business Concept

- Full load container service
- Door-to-Door operation
- Equipment types:
  - 20' dry containers
  - 40' dry containers
  - 40' high cube containers

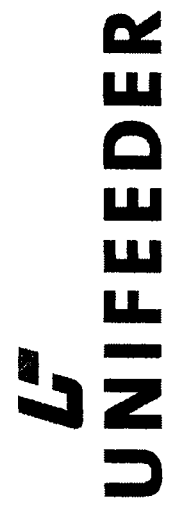
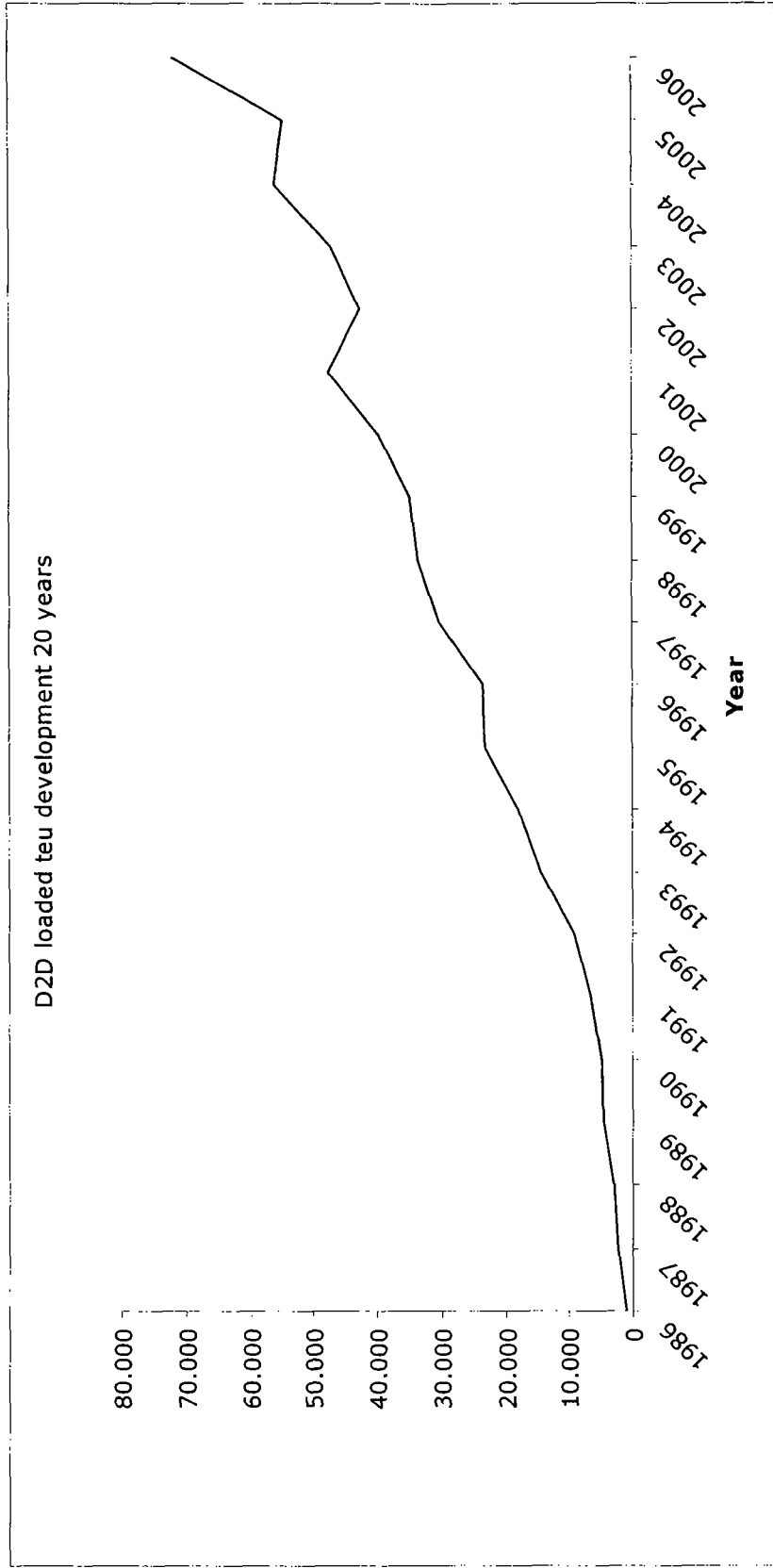


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# Shortsea Turnover since the beginning



# Shortsea Intermodal Transport

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- Definition af intermodal transport
- En intermodal transport er en kombineret transport, hvor flere transportmåder bliver benyttet for den samme lastbærer



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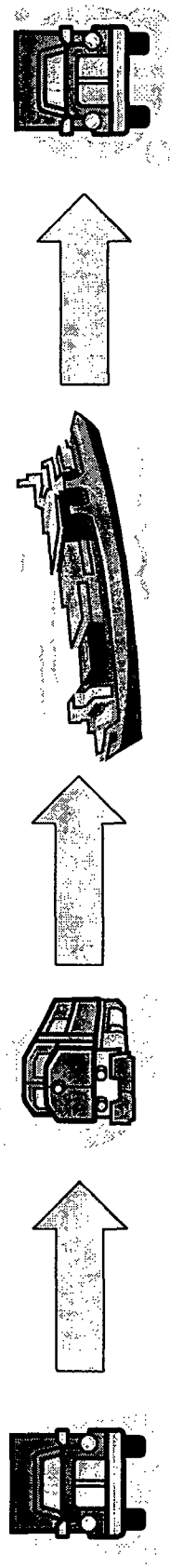
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# Shortsea Intermodal Transport

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Eksempel på intermodal transport



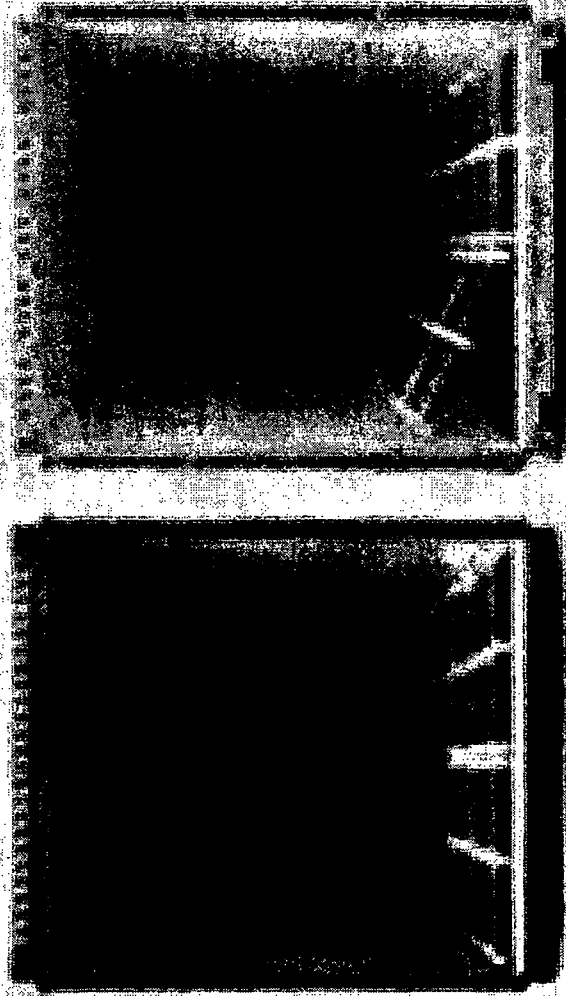
# Unifeeder Shortsea Today

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- **Strengths**
  - High volume capacity and high flexibility for customers
- **Weaknesses**
  - Bottlenecks in ports
  - Customs problems even for intra EU transport
  - Container types offered are not European (50 year old American invention)
- **Opportunities**
  - Plenty of space to grow in the Shortsea business segment in Europe
  - Palletwide containers (European type) can create strong growth
  - Marco Polo II projects partly financed by the European Union
- **Threats**
  - Limited capacities in European main ports

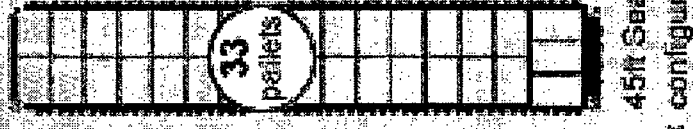
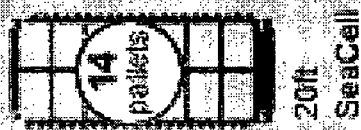
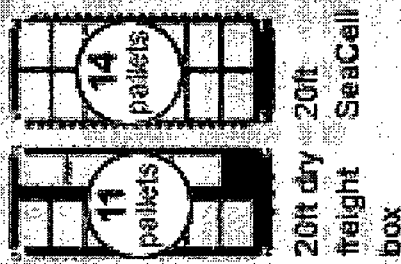


# Shortsea Container Types



SeaCub's extra internal width allows pallets to be stored side by side, maximizing pallet capacity and loading efficiency.

# Shortsea Container Types



Comparison of SeaCell to conventional dry freight boxes when loaded with 1200mm x 800mm pallets.

# Shortsea Customer Reference List


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- Monsanto
- Dow Chemicals
- SCA Packaging
- Akzo Schönox
- Canon
- Borealis
- Elocoat
- Tradall-Barcadi (Martini)
- Matsushita (Panasonic)
- Miele
- Ford Motor Co.
- J.F. Hillebrand
- Ilimpulp Paper
- Continental
- Kraft Coffee
- Dupont de Nemours
- Nokia Tyres
- Avebe
- Mohn Media
- Nissan

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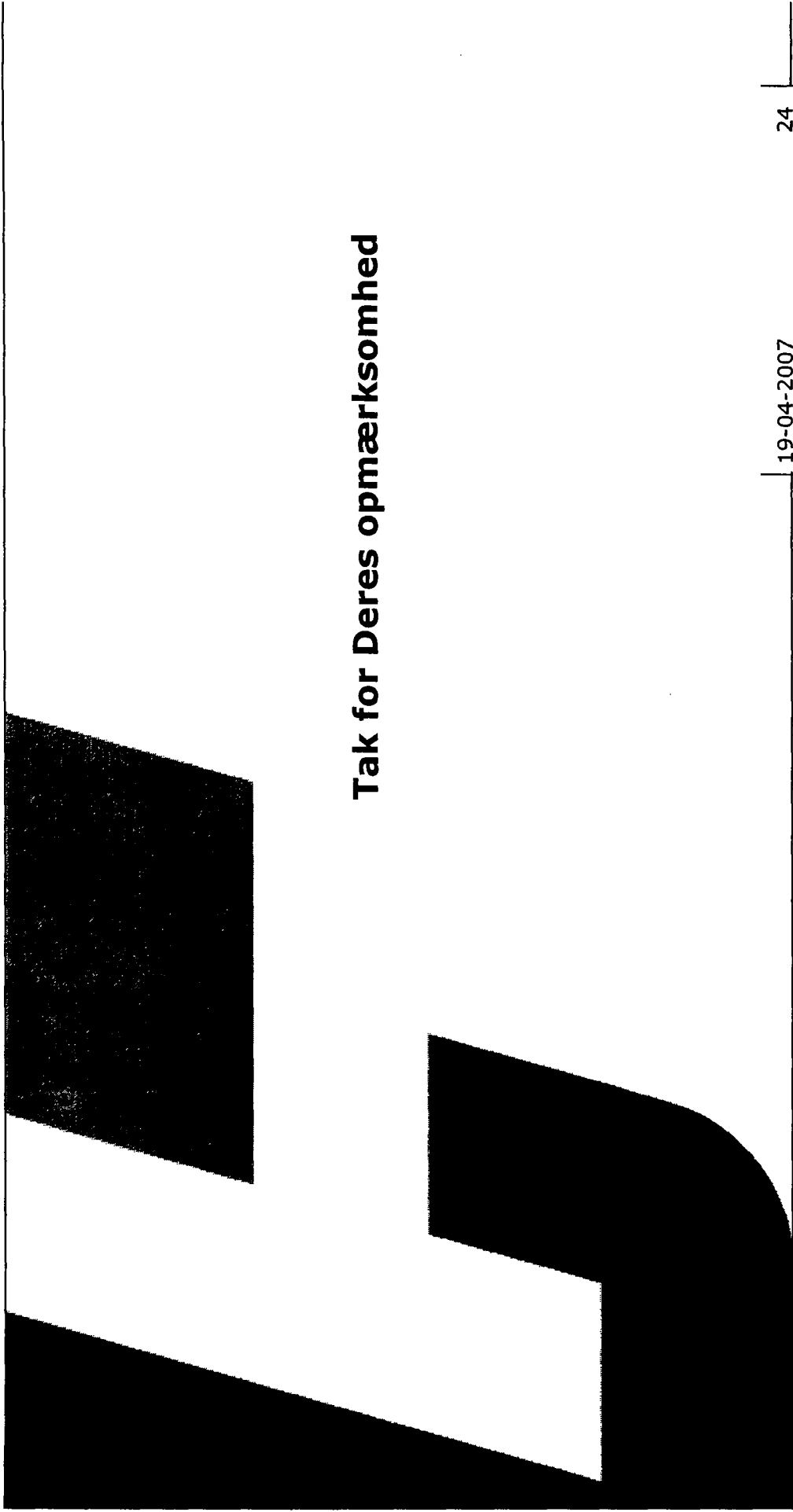
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# Greener Visions

- Reduce omissions from vessels by
  - Maximizing vessel size
  - Burn low-sulphur fuel
- New vessels with:
  - Special zinc-free antifouling underwater paint
  - No bunker tanks in the double bottom of the vessel
  - Advanced integrated waste treatment and waste separation systems
- Utilize combined transport
- Minimize empty haulage





**Tak for Deres opmærksomhed**

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