

Stena Line BV

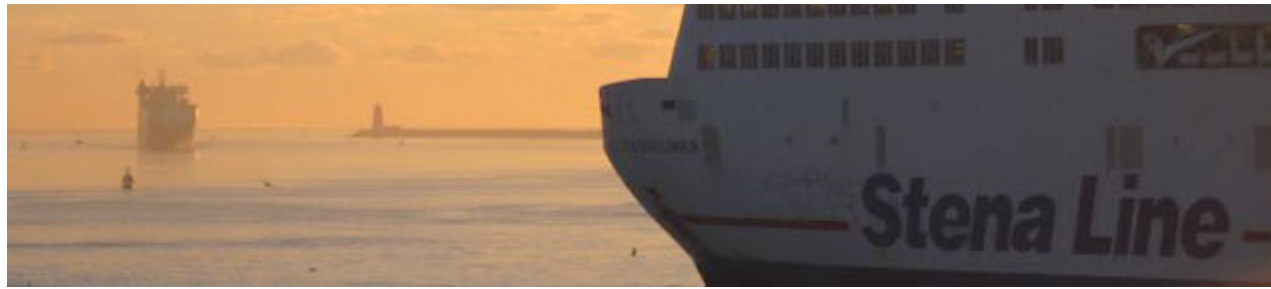
Pim de Lange, Algemeen Directeur



KIVI NIRIA
MARTEC

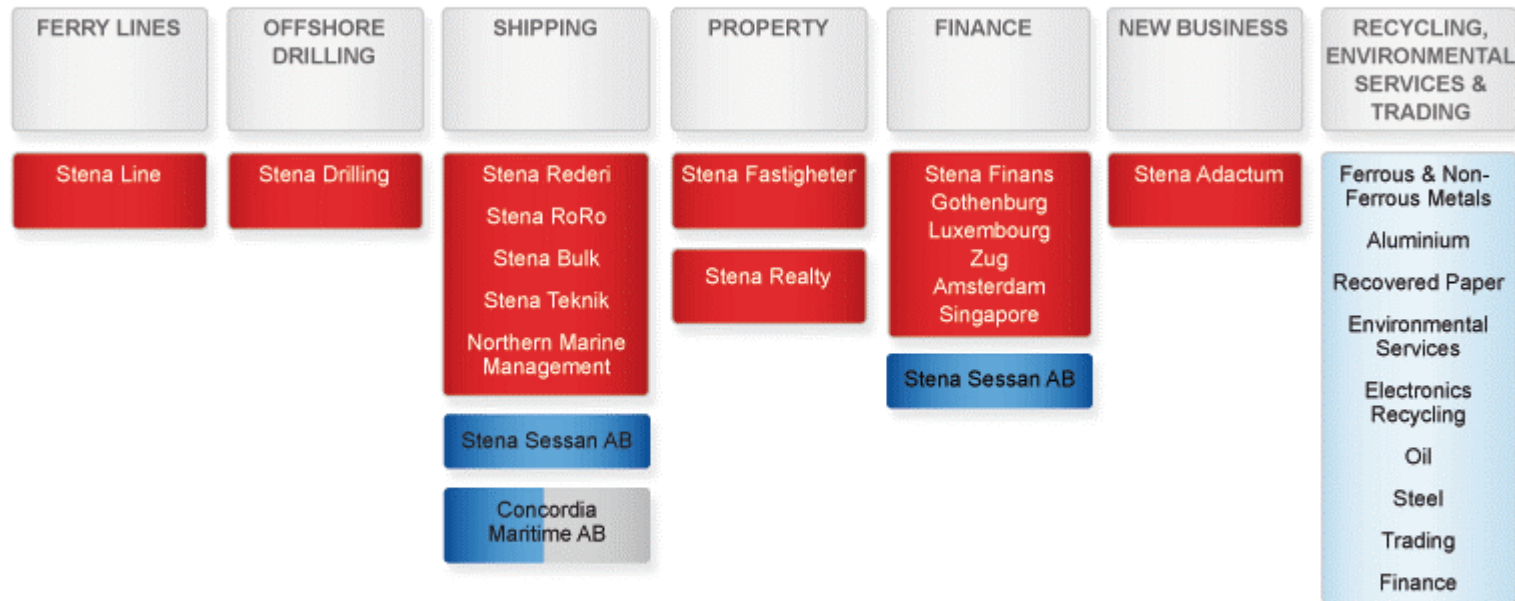
14 June 2012

VISION STENA LINE



**THE LEADING AND MOST ATTRACTIVE FERRY
COMPANY IN THE WORLD**

Stena Line is a part of the Stena Sphere



Route network Stena Line

35 ships on 19 ferry routes



Stena Line – Facts 2011

	SL Group	SL NL
Revenue (gross)	B€ 1.1	M€ 191
Passengers	14.500.000	560.000
Cars	3.100.000	105.000
Freight units	1.600.000	290.000
Employees	5.700	760

Stena Line Area North Sea Business Environment, 3 gateways

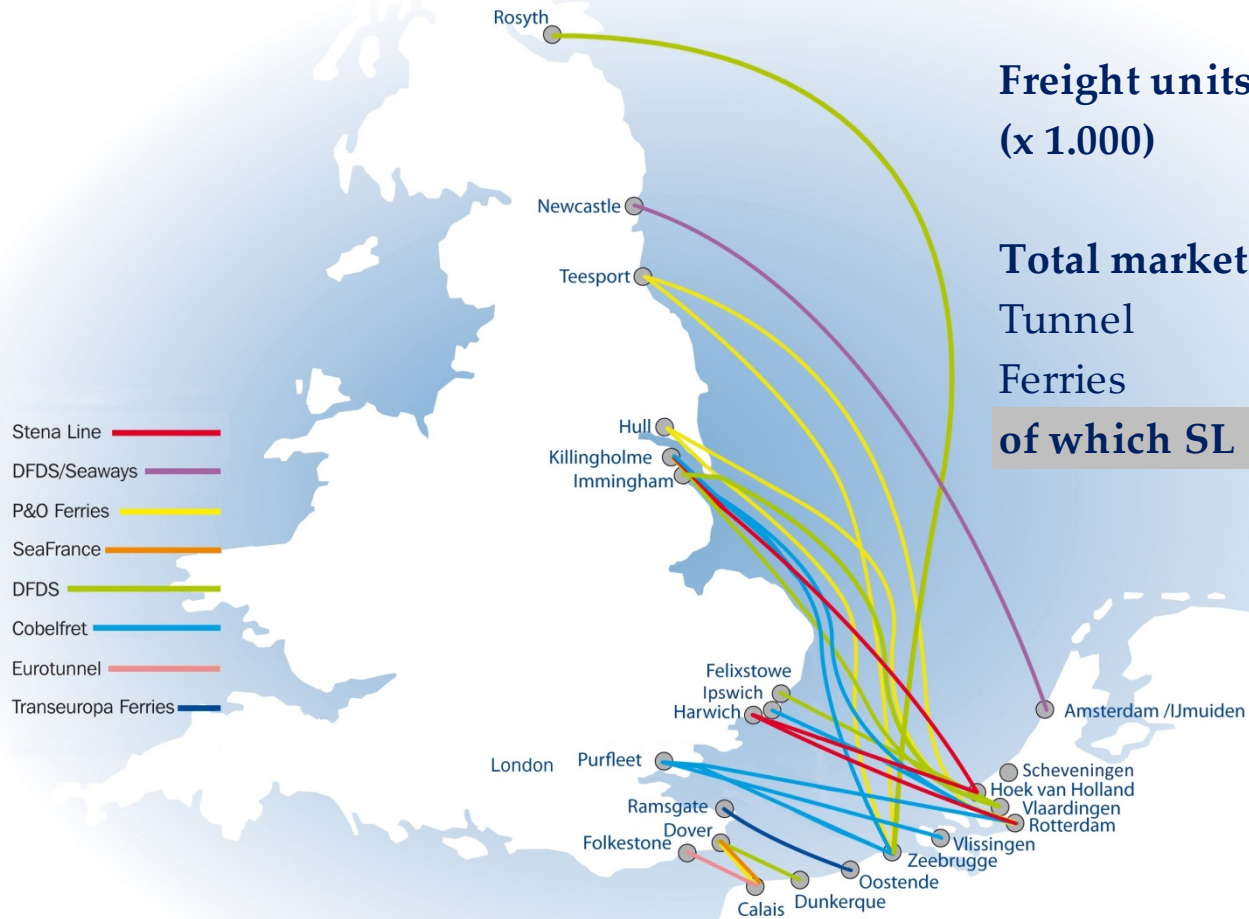


Stena Line Area North Sea

Passenger market / Continent-UK

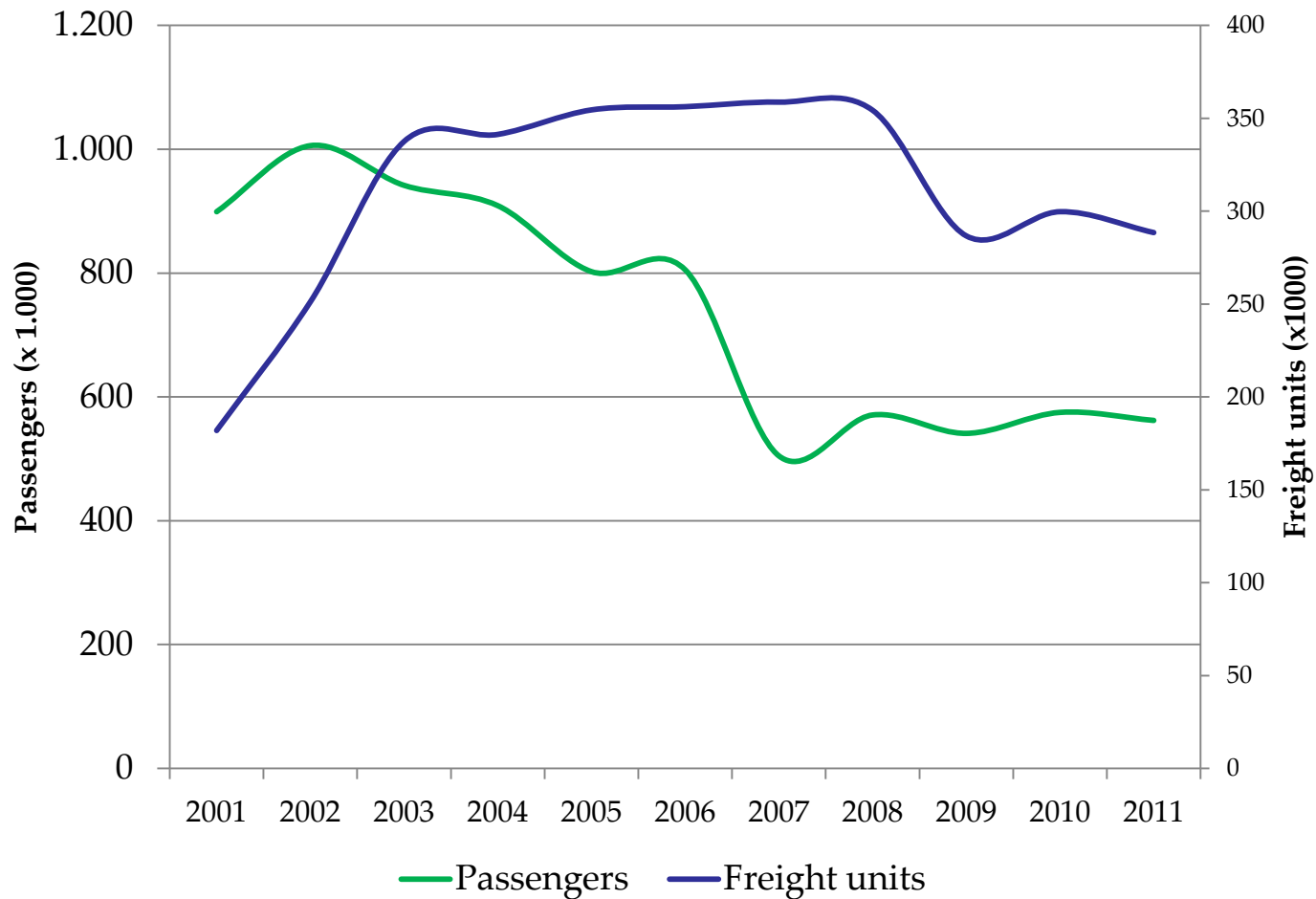


Stena Line Area North Sea Freight market / Continent-UK



Freight units (x 1.000)	2011
Total market	4.000
Tunnel	1.300
Ferries	2.700
of which SL	290 7%

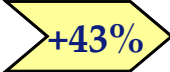
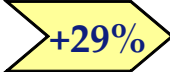
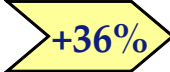
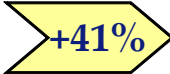
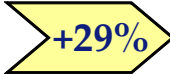
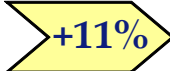
Stena Line Area North Sea Volume development 2001-2011



Fleet development Stena Line Area North Sea

Larger ferries would allow us to use economy of scale and generate less energy consumption per transported freight unit

Capacity development (avg. per vessel):

	<u>2000</u>	<u>2006</u>	<u>2008</u>	<u>2011</u>
Hoek-Harw.	2.200m / 120 pax	3.150m / 600 pax	4.050m / 900 pax	5.500m / 1.200 pax
				
Hoek-Kill.		2.200m / 120 pax	3.100m / 300 pax	4.000m / 300 pax
				
R'dam-Harw.			2.800m / 130 pax	3.100m / 300 pax
				

Stena Line Area North Sea – Fleet profile 2011



Stena Hollandica
Stena Britannica

Lanemeters	Pax
5.500	1.200



Stena Transporter
Stena Transit

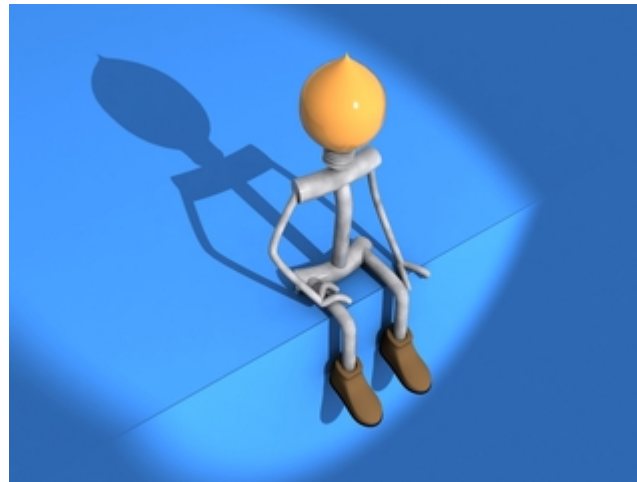
4.050	300
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Stena Carrier
Stena Freighter

2.715	12
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Innovations @ Stena Line



The ferry industry is a marginal business and therefore we have to be inventive.

Because of that Stena Line has an own **Innovation Department** supported by the CEO/owner of the Stena Sphere.

Target for 2012: Every employee has the task to submit at least one suggestion/innovation (can be any subject).

And we have 5.700 employees.....



Some examples of suggestions/innovations:



Power saving usage of luboil separators main engines



Testing of sprinklers



Bunker heating only switched on at sea



QR codes onboard/gangway with touristic/general info



Replacing magnetic strip by barcode on freight tickets



‘Talking’ rubbish bins onboard (kids love it☺)



Energy saving
&
Environmental features

@ Stena Line

New Superferries are equipped with:

- Father & son principle for ME + AE
- Common rail fuel system for ME
- Propulsion system with a speed pilot and route optimization system
- Shaft generators
- Load dependent frequency control for pumps, fans etc.
- Cabins, lighting and AC controlled via cabin key card

And since 13.06.12:

Stroom vanaf de kade in Hoek van Holland

Walstroom maakt de zeevaart schoner. Door stroom vanaf de kade te gebruiken, hoeven de scheepsdieselmotoren minder te draaien, waardoor de uitstoot van CO₂, stikstof en fijnstof sterk vermindert.



The future

Challenges for the Ferry industry

- The fuel prices will be structural high
- Too much freight capacity and too low rates
- Environmental issues:
 - 0,1%S in 2015
 - EEDI
 - NOx and CO₂ regulations
 - Ballast water treatment
- Passenger rights
- Possible safety measures after the 'Costa Concordia' accident

The passenger market in the future:

- Air travel is becoming increasingly less pleasant whilst ferry is becoming more enjoyable
- Make people aware of 'hassle free' and comfortable ferry travel
- Due to increasing costs for airlines, ferry travel will be price competitive

The freight market in the future:

- Further rationalization
- Business will come back (but it will take some time)
- Sea transport will be more favourable than road transport
- Ferries are (and will be) an important part of the total transport chain

Thank you for your attention!

Q&A