

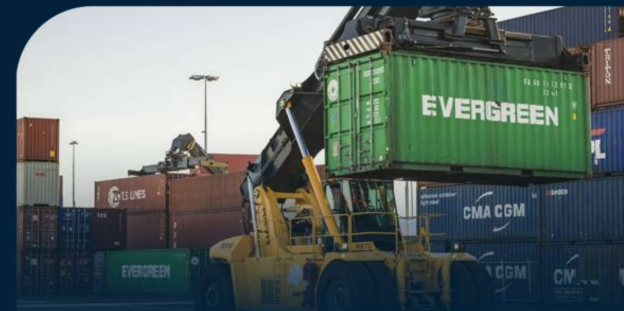
NSW Ports acknowledges the traditional owners of the land on which we meet today.

We pay our respects to Elders past, present and emerging



FUTURE-PROOFING OUR PORTS

PIANC Asia Pacific Conference
28 August 2024



nswPorts

Our assets

Our ports connect people and businesses with goods and trade opportunities in a global marketplace.





KEY

- Shared freight and passenger rail
- Dedicated freight-only rail
- NSW Ports assets



ENFIELD INTERMODAL LOGISTICS CENTRE

- Connected by dedicated freight-only rail to Port Botany
- Rail connections to regional NSW



PORT BOTANY

- NSW's container trade
- One-third of NSW's fuel supply
- Chemicals for domestic manufacturing
- NSW's bitumen and LPG supply


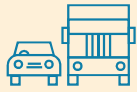
COOKS RIVER INTERMODAL TERMINAL

- Largest empty container storage facility in Australia
- Connected by dedicated freight-only rail to Port Botany

PORT KEMBLA

- NSW motor vehicle port
- Bulk agricultural, construction, steel making and mining trade
- Project cargo, including windfarm components

Master Plan

NSW PORTS
2063
OUR 40-YEAR MASTER PLAN
FOR SUSTAINABLE GROWTH

WE'RE SUPPORTING COMMUNITIES WITH THE EFFICIENT
SUPPLY OF GOODS AND CONNECTIONS TO GLOBAL MARKETS

Drivers of change



POPULATION
GROWTH



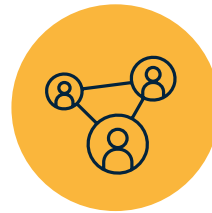
TECHNOLOGY
AND AUTOMATION



DECARBONISATION AND CIRCULAR
ECONOMY



LAND USE ALLOCATION

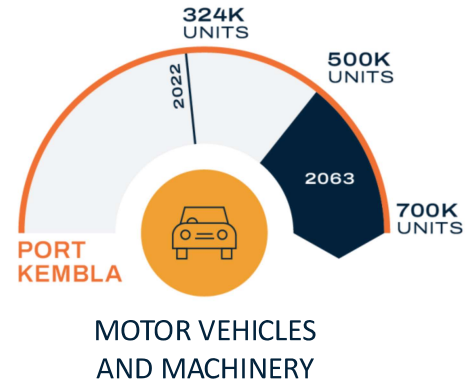
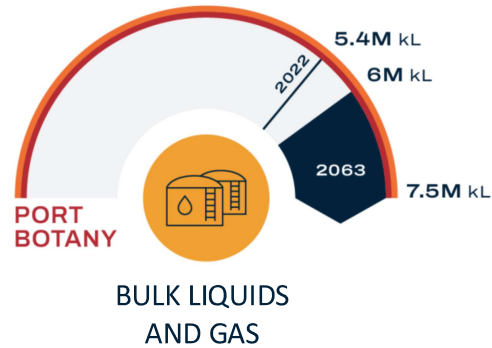
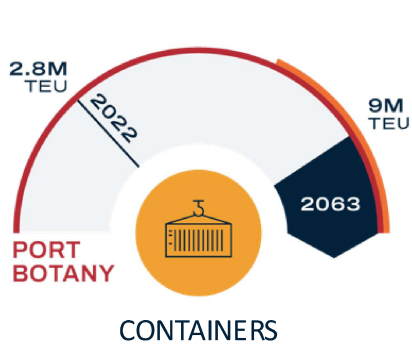


POLICY AND COLLABORATION

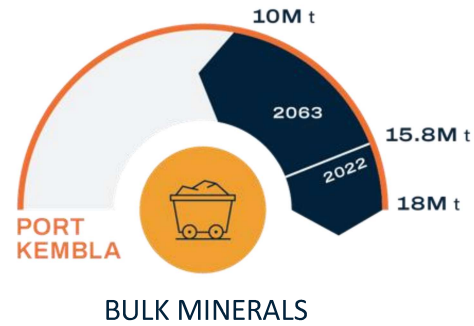
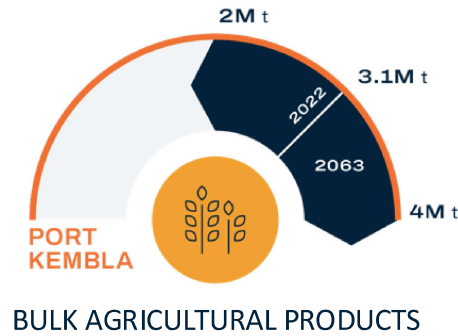
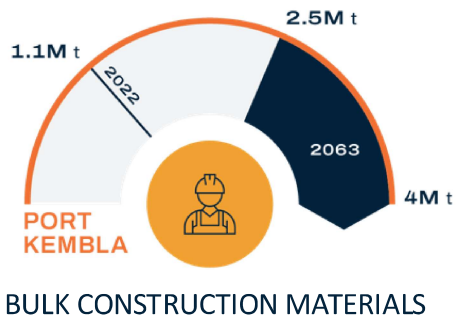


LABOUR
AND SKILLS

Future Trade Volumes



PROJECT/GENERAL CARGO
Wind turbines, towers and components for floating offshore wind



Master Plan 2063 Objectives

Achieving our Master Plan objectives will:

- Reduce emissions
- Minimise community impacts
- Support the competitiveness of NSW exports
- Support cost-effective goods for consumers and businesses in NSW.

NATION

Cater for the trade needs of NSW and Australia.



MOVEMENT

Grow the volume of freight moved by rail and improve the efficiency of road connections.



CAPACITY

Grow freight handling capacity.



LAND USE

Ensure the efficient and responsible use of land and infrastructure.



PLACE

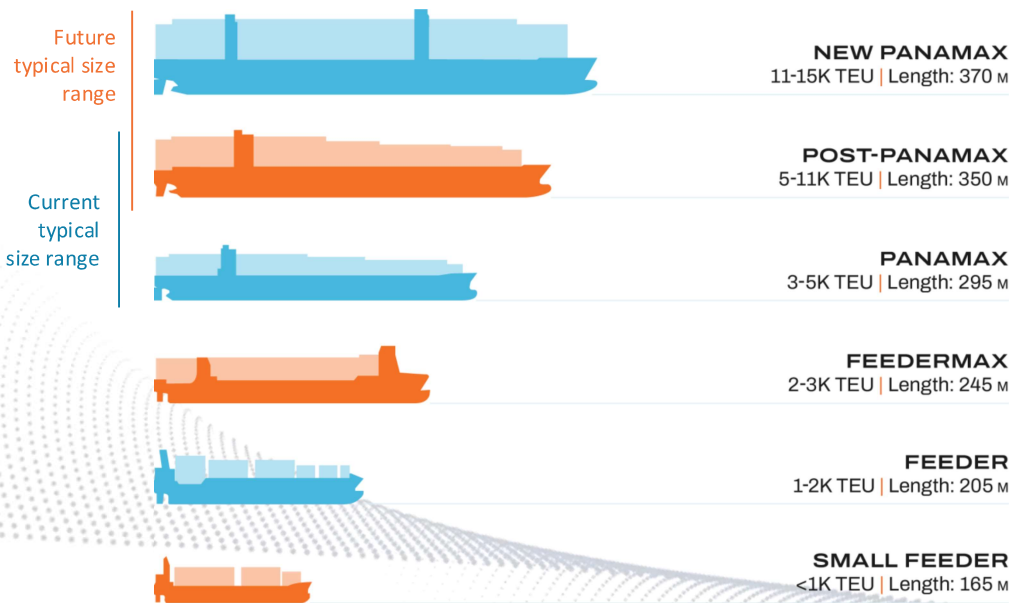
Protect our ports, freight-related lands and freight transport routes.



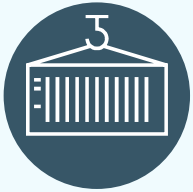
Larger vessels

Port Botany is ready to handle vessels of at least 15,000 TEU capacity – the largest expected to be servicing Australia over the next 20 years.

CHANGING CONTAINER VESSEL SIZE (MAX)



Project SABRE



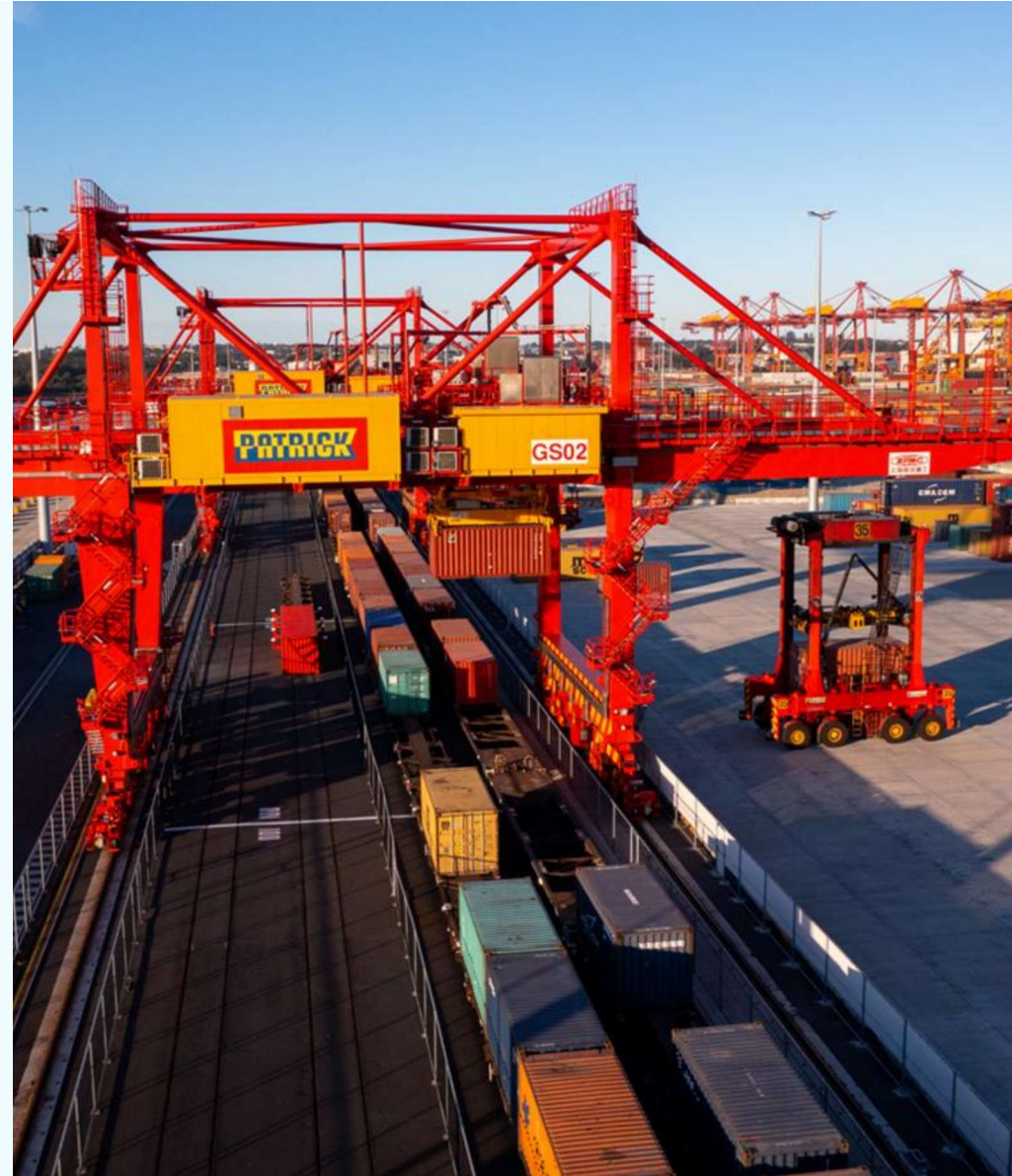
Increase in rail terminal capacity from 200,000 TEU annually to 500,000 TEU initially



Ultimate capacity of 1 million TEU with additional equipment



Four 600m long rail sidings and three Automated Rail Mounted Gantry (ARMG) cranes



Ports in the supply chain



Role no longer stops at the port gate



Sydney intermodal network designed to increase rail mode share

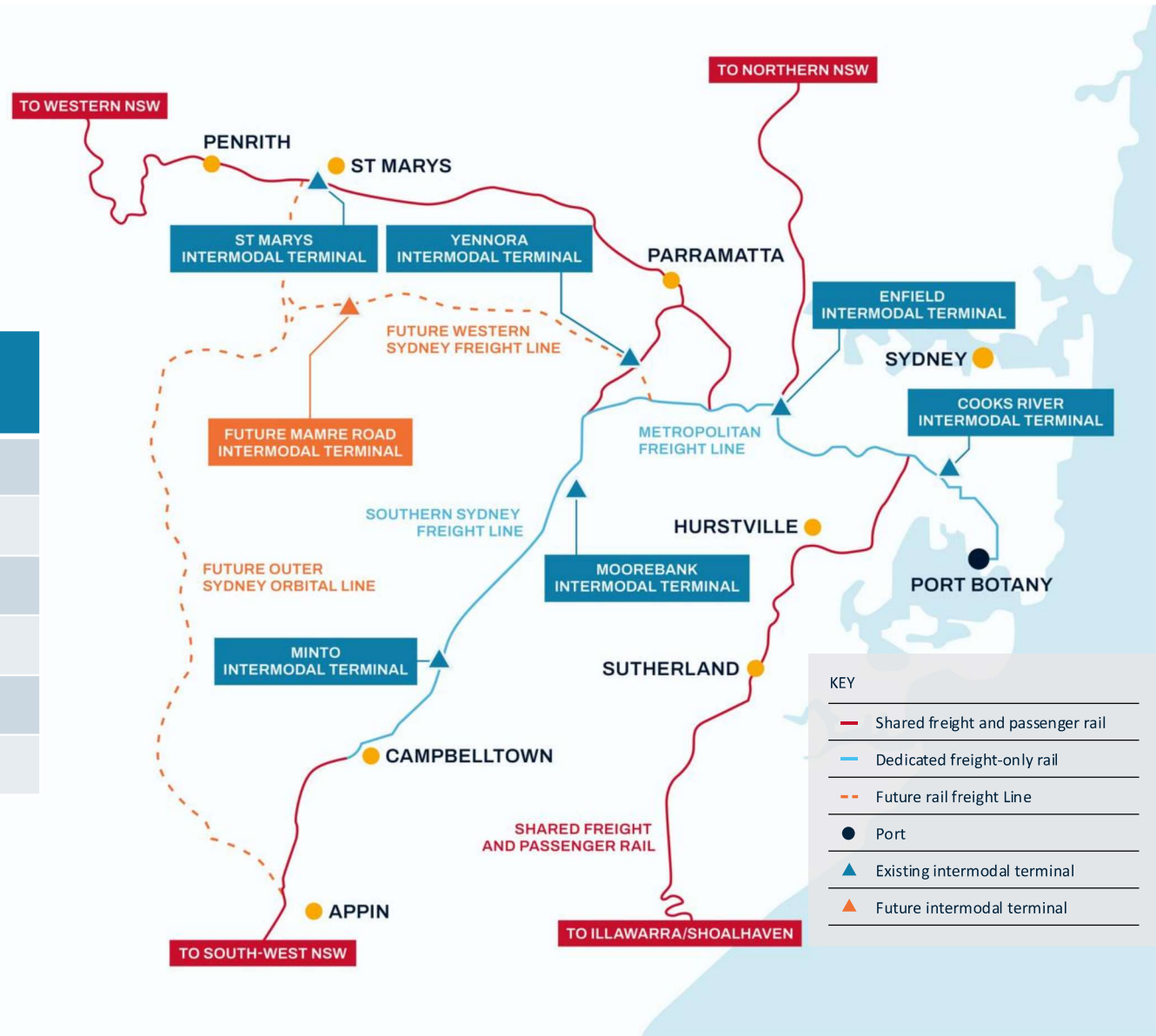


1 million TEU moved by rail removes 900 trucks a day from roads around the port



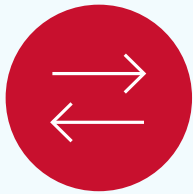
The intermodal network

IMT	FY24 Rail Volume
Enfield	100K
Minto	47K
Moorebank	64K
St Marys	79K
Yennora	1K*
Cooks River	39K



*Yennora was not operational for most of FY24

Population drives container destinations



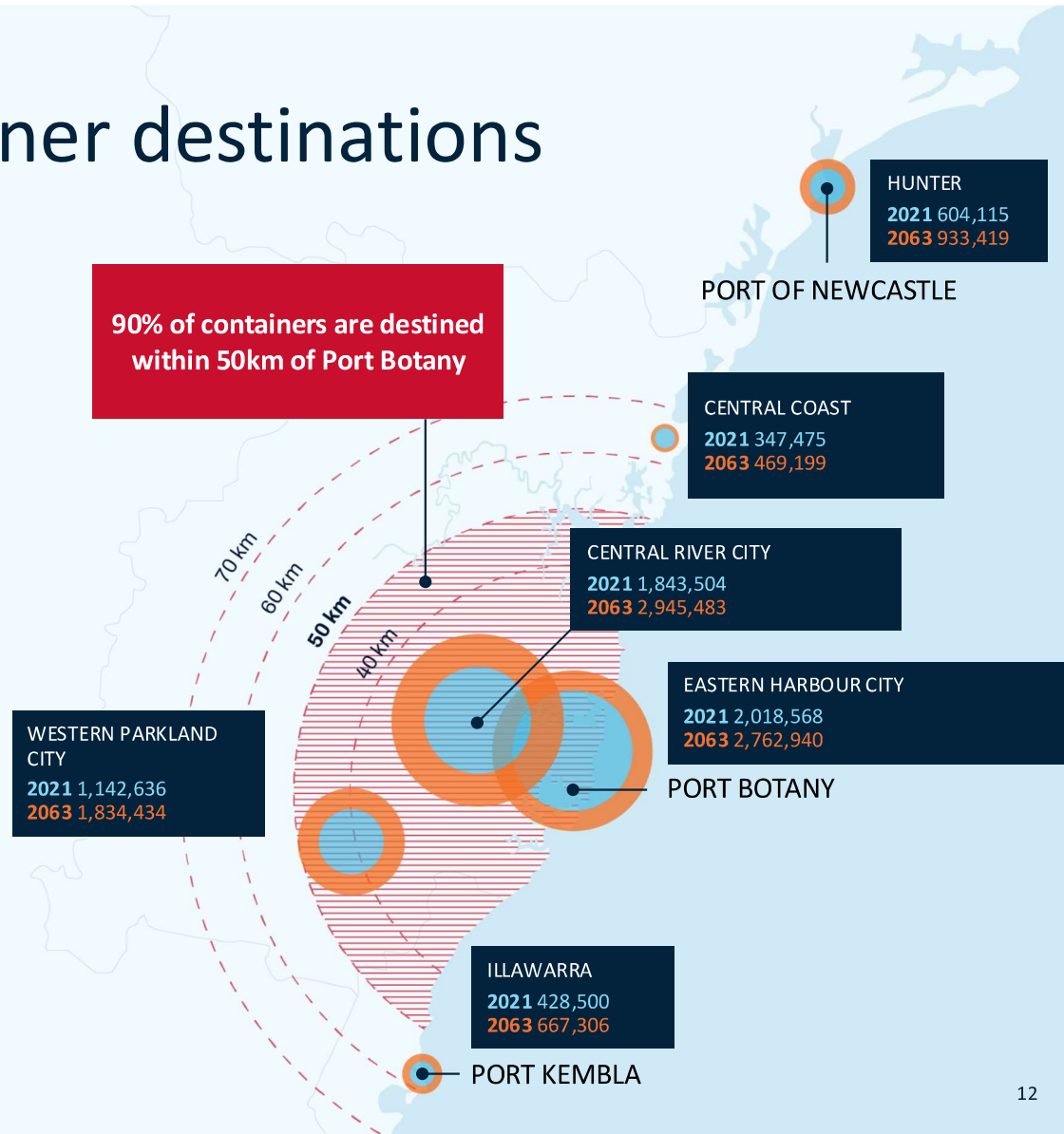
Population growth and business activity closely connected to consumer demand and import trade volumes



Port Botany currently operating at half its potential capacity



Port Kembla is the next closest port to the state's largest population centres



Source: 2022 NSW Population Projection published by the NSW Department of Planning and Environment planning.nsw.gov.au/research-and-demography/population-projections

Port Kembla LNG Terminal



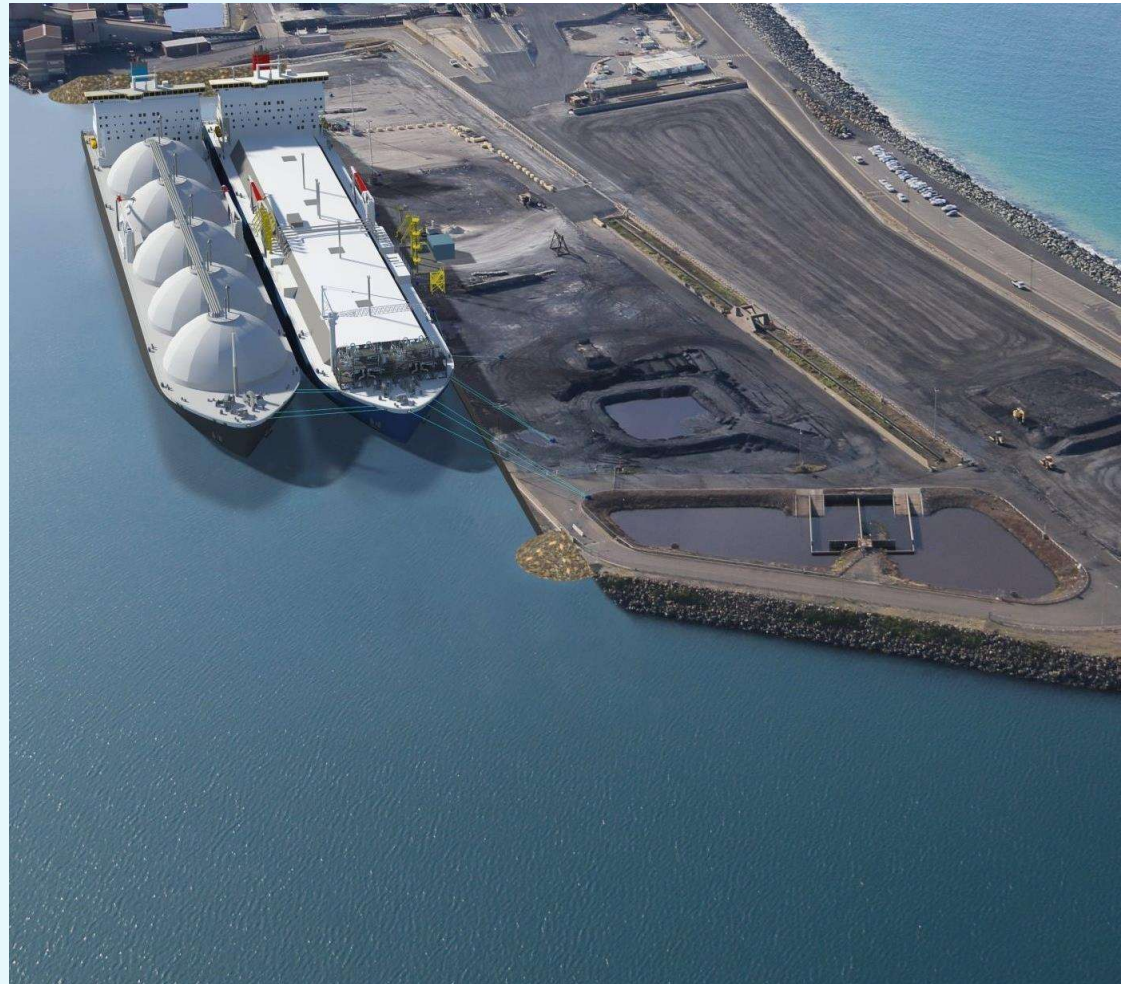
Under construction by Squadron Energy and on track for completion this year



Australia's first LNG import terminal to support domestic gas supply



Capacity to supply up to 500TJ per day upon completion



Port Kembla

An offshore wind port facility



Concept approval for Outer Harbour reclamation in place since 2011



30-40 hectares of vacant land, 750m of quayline and hardstand for heavy lift cranes



Could be up and running in 5 years if work commenced tomorrow



Artist's impression of potential development of the Port Kembla Outer Harbour to enable offshore wind farm construction.

Industrial Lands Supply

Availability of industrial lands in Greater Sydney has been in decline for decades



Sydney has among the lowest industrial lands vacancy rate in the world at 2.0%.*



Decline has been driven by rezoning and redevelopment of industrial land.

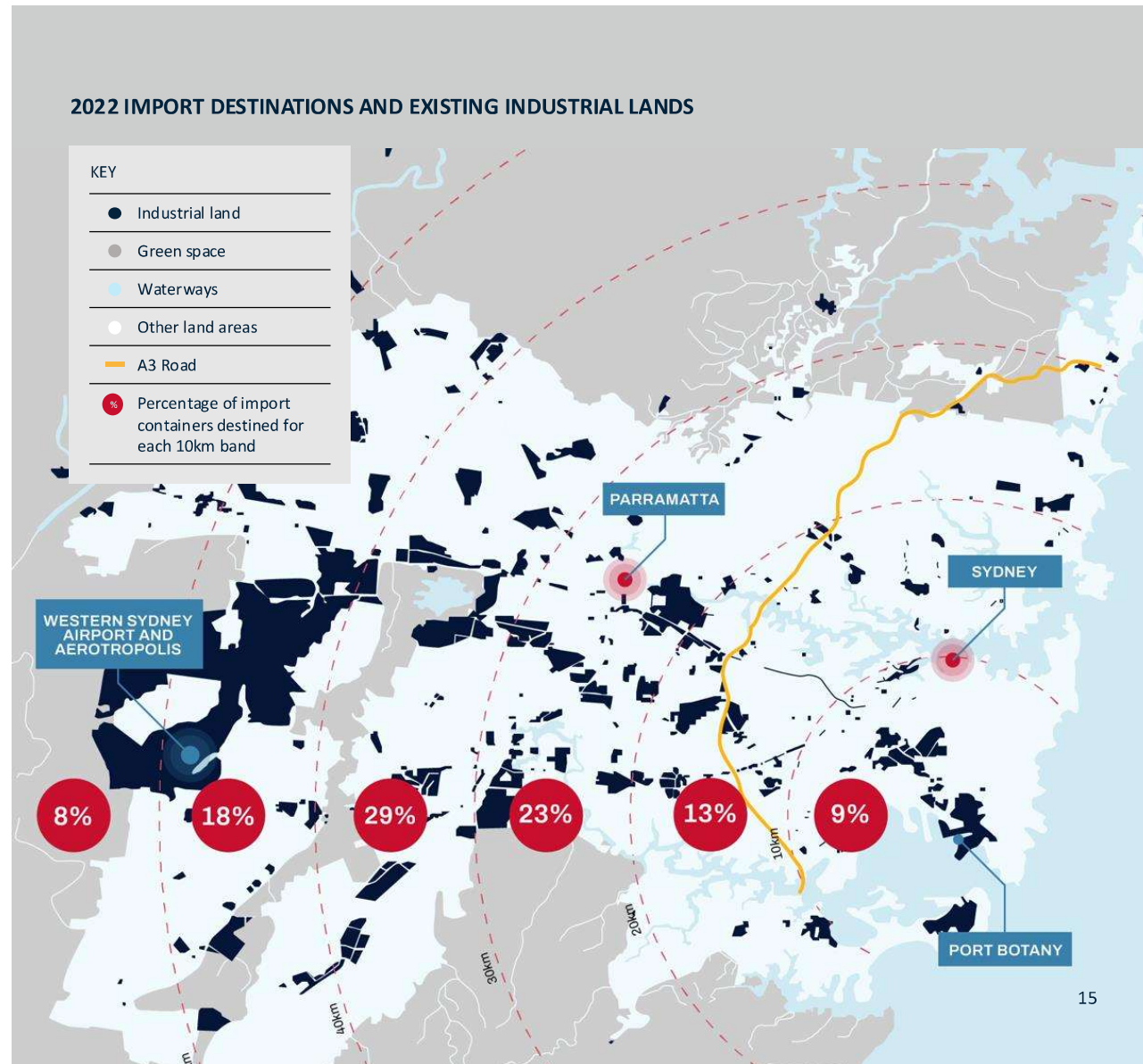


Container volumes have grown to meet population needs and could triple over next 40 years.



Industrial lands needed to service the state's key business district and largest population centre.

*Source: CBRE



Risk assessments

NSW Ports climate change and transition risk assessments.



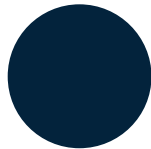
Key climate change risks include swell activities disrupting moorings at berths, increased weather events impacting supply chains, incursion of marine pests and health impacts from bushfire exposure.



Resilient responses include **building resilience requirements** into infrastructure planning, expand monitoring to include both land side and marine side risks and strengthening of breakwaters.



Key transformation risks include grid instability, reduced coal exports and fuel imports, delayed response to changing trade mix.



Key transformation opportunities include offshore wind, onshore power supply for ships and operational improvements.



Resilient responses include **adopting a position of anticipation and leadership** in the supply chain and adapting use of port land and infrastructure in response to changing trades.

Connecting ports in Asia Pacific



THANK YOU



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