Agenda

1. Outline

2. ATC – The Region

3. ATC – The Future
   - The Future of Business in ATC
   - The Future of Transport in ATC

4. Questions
What is Australia TradeCoast?

Port of Brisbane
Brisbane Airport
CBD

Australia TradeCoast Partners:

[Logos and text]
ATC Tenant Overview

• 2,000 businesses
• 66,000 employees
• 5,067 land parcels, 3,442 unique land owners

• Largest industries in ATC:
  • Manufacturing ~ 40%
  • Transport, Postal and Warehousing ~ 20%
  • Retail Trade ~20%
  • Wholesale Trade

• Highest density of business and employment occurs alongside the Gateway Bridge in Pinkenba/Eagle Farm in North ATC, and Murarrie/Hemmant in South ATC
# Contribution to the State’s Economy

<table>
<thead>
<tr>
<th></th>
<th>2005/06</th>
<th>2025/26 forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value-added impact to the state economy (GSP) from business activities within ATC</td>
<td>$4.1 billion</td>
<td>$9.4 billion</td>
</tr>
<tr>
<td>Annual capital expenditure by businesses within ATC</td>
<td>$7.5 billion</td>
<td>$17.4 billion</td>
</tr>
</tbody>
</table>
### QLD’s 2nd Largest Employment Region

<table>
<thead>
<tr>
<th></th>
<th>2005/06</th>
<th>2025/26 forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct employment within ATC</td>
<td>43,000 jobs</td>
<td>110,000 jobs</td>
</tr>
<tr>
<td>Additional indirect employment (i.e. outside the ATC region but generated from activities or services within)</td>
<td>31,000 jobs</td>
<td>69,000 jobs</td>
</tr>
</tbody>
</table>
The Future of Business in ATC
# ATC’s Competitive Position

<table>
<thead>
<tr>
<th>Area</th>
<th>Access to port/airport</th>
<th>Access to major roads</th>
<th>Access to rail</th>
<th>Land availability (medium/long term)</th>
<th>Land Price ($ per sqm for 0.25ha lots)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern region (Acacia Ridge)</td>
<td>-</td>
<td>-</td>
<td>++</td>
<td>-/-/--</td>
<td>260 to 340</td>
</tr>
<tr>
<td>Western Corridor</td>
<td>0</td>
<td>+</td>
<td>0</td>
<td>+/-</td>
<td>260 to 320</td>
</tr>
<tr>
<td>Ipswich</td>
<td>0</td>
<td>++</td>
<td>0</td>
<td>+/+</td>
<td>230 to 250</td>
</tr>
<tr>
<td>Southern Corridor/Northern Gold Coast</td>
<td>+</td>
<td>++</td>
<td>0</td>
<td>++/+</td>
<td>200 to 300</td>
</tr>
<tr>
<td>Northern Region</td>
<td>+</td>
<td>0</td>
<td>-</td>
<td>+/-</td>
<td>300 to 350</td>
</tr>
<tr>
<td>Australia TradeCoast</td>
<td>++</td>
<td>++</td>
<td>+</td>
<td>+/0</td>
<td>300 to 450</td>
</tr>
</tbody>
</table>

++ major positive  + positive  0 neutral  - negative  -- major negative

Source: BIS Shrapnel, 2009
Employment Growth in ATC to 2026

- Transport & Storage
- Manufacturing
- Construction
- Wholesale Trade
- Other

Source: NIEIR Research, Brisbane City Council
Employment Growth in ATC to 2026 - by region

• ATC employment is forecast to increase by 35,878 (64%)

• ATC North
  • Hamilton: reduction of 7 (-0.3%)
  • Pinkenba/Eagle Farm: increase of 29,855 (103%)

• ATC South
  • Hemmant/Lytton: increase of 1,971 (21%)
  • Morningside: increase of 2,359 (43%)
  • Murarrie: increase of 1,700 (17%)
The Future of Transport in ATC
Population Growth vs Employment Growth

• Population Growth
  • South-West Corridor

• Employment Growth
  • CBD and Australia TradeCoast

• Challenge?
  • How to efficiently move people and goods from origin to destination in an increasingly constrained environment?
Public Transport

- Challenges
  - Availability of Car Parks
  - Transport Modelling
    - Lack of Trip Origination
    - Scale of ATC
    - Cul-de-sac
  - Awareness of Public Transport
  - Shift Times
  - Safety
  - Last 500m
Public Transport

- Solutions
  - Increasing Land Values
  - Emergence of Hubs
    - Airport Village
    - Northshore Hamilton
  - Improved Intelligence
  - Economies of Scale
2026 Public Transport Scenario

Source: ATC Public Transport Study, 2006
ATC Freight Review

- Study completed in Dec 08
- 90% increase in freight movements (by volume) by 2026
- Volume increase from 30.5m tonnes to 58.1m tonnes
- 97% increase in road freight to the Port
- 3 x increase in international airfreight
- 2 ½ x increase in domestic airfreight
ATC Freight Review

- **Mode Share**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Current</th>
<th>2026</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rail</td>
<td>18%</td>
<td>14.6%</td>
</tr>
<tr>
<td>Road</td>
<td>82%</td>
<td>85.6%</td>
</tr>
</tbody>
</table>

**Air / Sea Mode Share**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Current</th>
<th>2026</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air</td>
<td>0.6%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Sea</td>
<td>99.4%</td>
<td>99.1%</td>
</tr>
</tbody>
</table>
ATC Freight Review

- Trip Breakdown
  - Rail trips to increase by 56% – 77%
  - Road trips to increase by three times

- Major concern is if the planned investment in road infrastructure will provide necessary capacity
THANK YOU

Australia TradeCoast Partners: