

Brisbane North Development Forum

27 July 2010

Andrew Greig
Business Development Manager

Australia TradeCoast Partners:



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

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ATC – The Region

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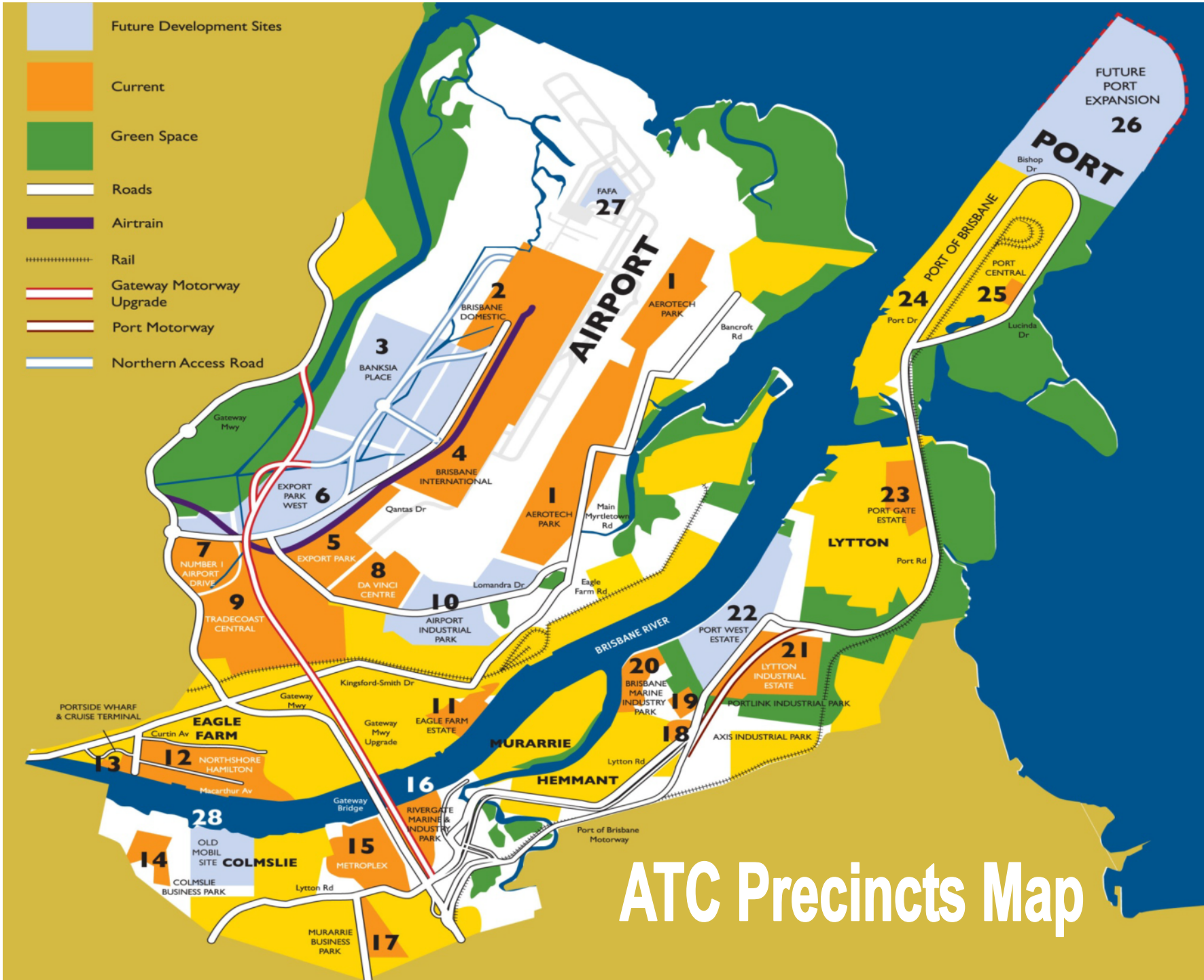


What is Australia TradeCoast?



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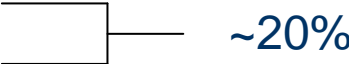


ATC Precincts Map

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

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Contribution to the State's Economy



| | 2005/06 | 2025/26 forecast |
|---|---------------|---------------------|
| Value-added impact to the state economy (GSP) from business activities within ATC | \$4.1 billion | \$9.4 billion |
| Annual capital expenditure by businesses within ATC | \$7.5 billion | \$17.4 billion |

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QLD's 2nd Largest Employment Region



| | 2005/06 | 2025/26 forecast |
|--|-------------|------------------|
| Direct employment within ATC | 43,000 jobs | 110,000 jobs |
| Additional indirect employment (i.e. outside the ATC region but generated from activities or services within) | 31,000 jobs | 69,000 jobs |

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The Future of Business in ATC

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ATC's Competitive Position



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

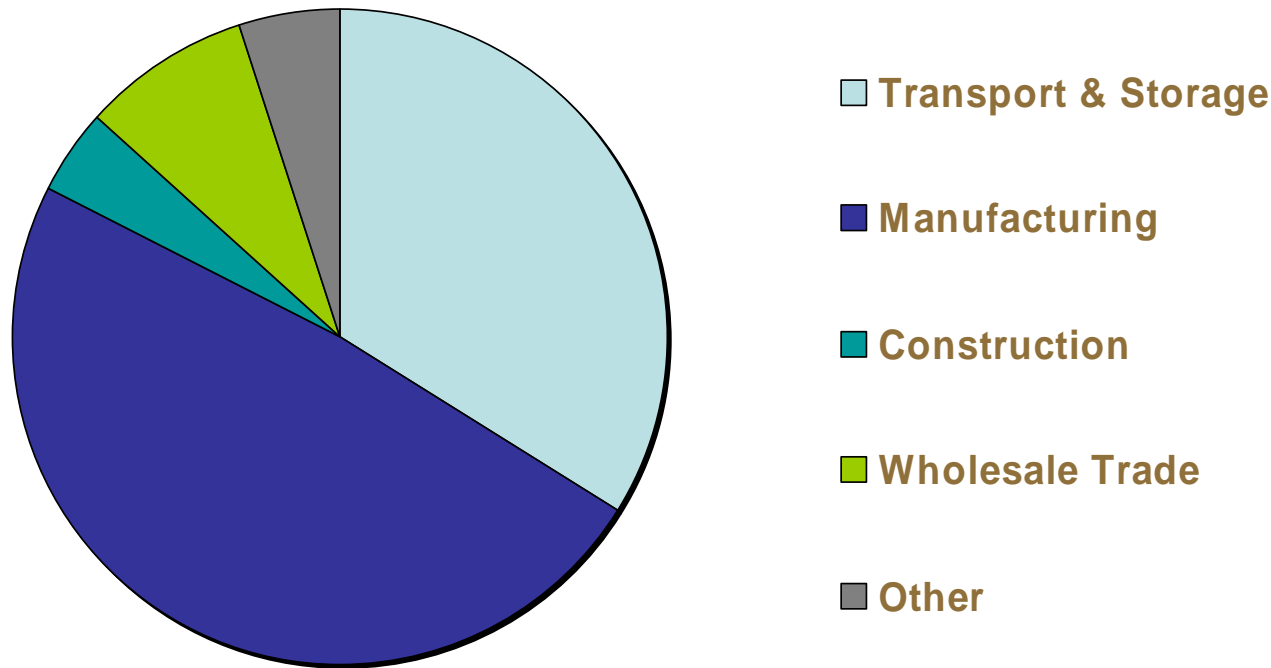
++ major positive + positive o neutral - negative -- major negative

Source: BIS Shrapnel, 2009

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Employment Growth in ATC to 2026



Source: NIEIR Research, Brisbane City Council

Australia TradeCoast Partners:



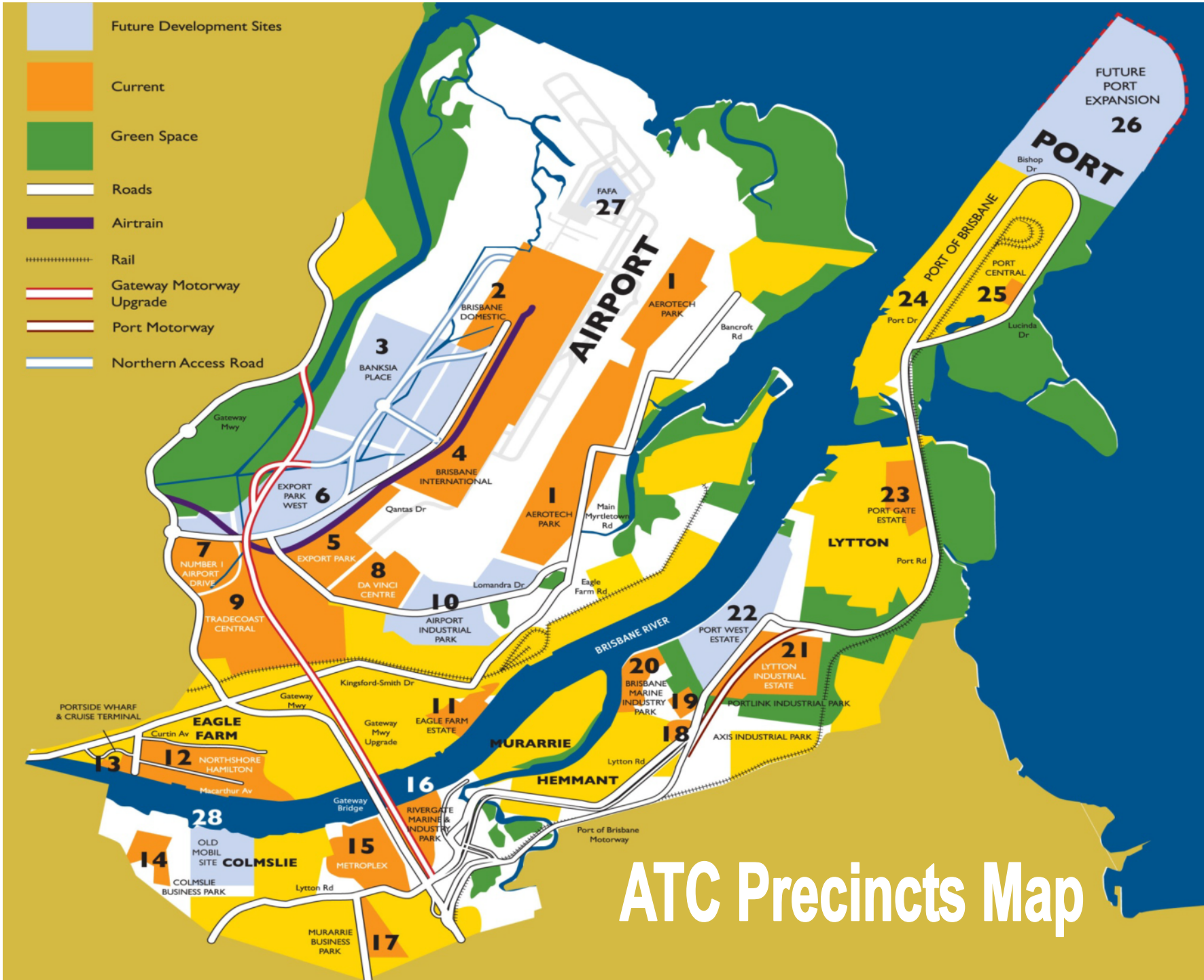
Employment Growth in ATC to 2026 - by region



- 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%)

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ATC Precincts Map

The Future of Transport in ATC

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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?**

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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**

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Public Transport

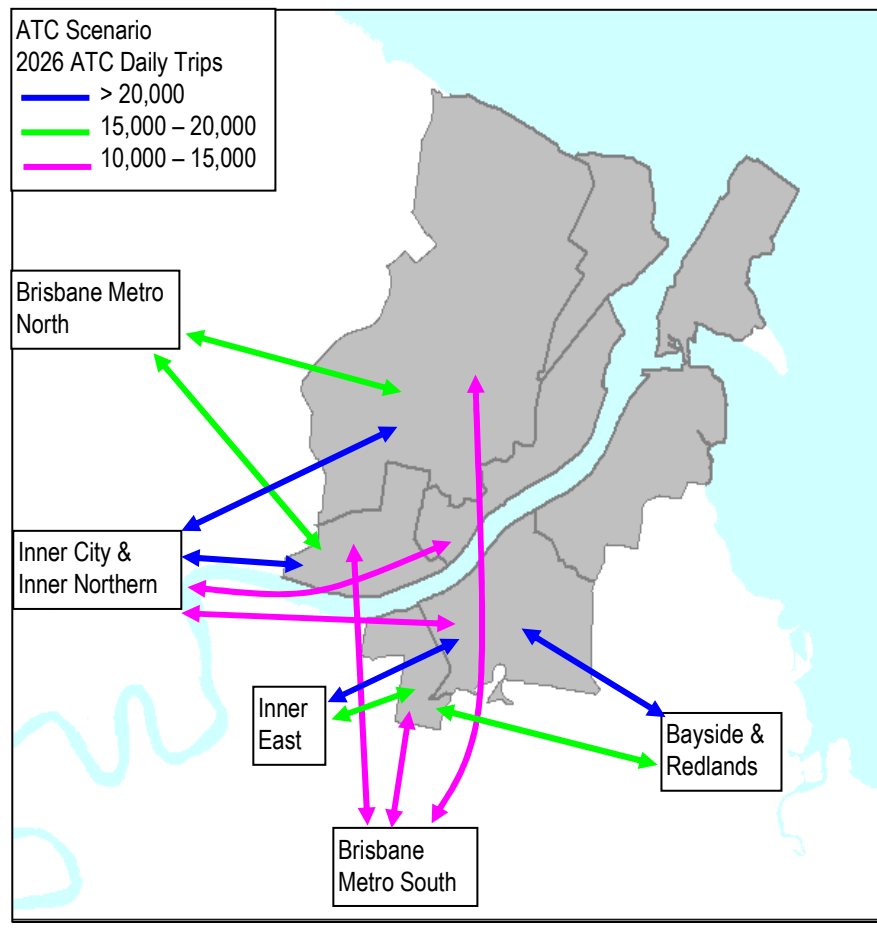


- **Solutions**
 - **Increasing Land Values**
 - **Emergence of Hubs**
 - **Airport Village**
 - **Northshore Hamilton**
 - **Improved Intelligence**
 - **Economies of Scale**

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2026 Public Transport Scenario



Source: ATC Public Transport Study, 2006



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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**

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ATC Freight Review



- Mode Share

| Mode | Current | 2026 |
|----------------------|---------|-------|
| Land | | |
| Rail | 18% | 14.6% |
| Road | 82% | 85.6% |
| Air / Sea Mode Share | | |
| Air | 0.6% | 0.9% |
| Sea | 99.4% | 99.1% |

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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

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