



10 DECEMBER 2025

Sydney Airport Master Plan 2045

Submission to Sydney Airport on behalf of Freight & Trade Alliance (FTA) and the
Australian Peak Shippers Association (APSA)

“KEEPING AUSTRALIA’S INTERNATIONAL TRADE MOVING”



Australian Peak Shippers
Association Inc. (APSA)

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ABOUT THE ALLIANCE

Freight & Trade Alliance (FTA) is the peak body for the international trade sector with a vision to establish a global benchmark of efficiency in Australian biosecurity, border related security, compliance, and logistics activities.

FTA represents more than 500 businesses including Australia's leading customs brokerages, freight forwarders and major importers.

On 1 January 2017, FTA was appointed the Secretariat role for the Australian Peak Shippers Association (APSA).

APSA is the peak body for Australia's containerised exporters and importers under *Part X of the Competition and Consumer Act 2010* as designated by the Federal Minister of Infrastructure and Transport.

APSA is also a member and has board representation on the Global Shippers Forum (GSF) that represents shippers' interests and that of their national and regional organisations in Asia, Europe, North and South America, Africa and Australasia.

FTA / APSA also provide international trade and logistics advocacy support to the following associations:

- Australian Council for Wool Exporters and Processors;
- Australian Dairy Products Federation;
- Australian Horticulture Trade;
- Australian International Movers Association;
- Australian Meat Industry Council;
- Australian Steel Association;
- Feed Ingredient and Additives Association of Australia;
- Grain Trade Australia; and
- Tyre Stewardship Association.

The current APSA Officers and Committee of Management are listed below:

- Olga Harriton (Manildra Group) - APSA Chair
- Brian Thorpe (Visy) - APSA Vice Chair
- Billy Davies (Australian Meat Industry Council) - Treasurer
- Mark Christmas (QMAG)
- Flaminio Dondina (Casella Family Brands)
- Sarah Granger (Fletcher International Exports)
- Brian Wright (Australian International Movers Association)
- Michael Brittain (AGT Foods Australia)
- Paul Zalai - APSA Secretary

A list of all members and further information about FTA / APSA is available at www.FTAlliance.com.au

EXECUTIVE SUMMARY

Freight & Trade Alliance (FTA) and the Australian Peak Shippers Association (APSA) represent the businesses at the heart of Australia's international supply chains. Our members include exporters, importers, freight forwarders, licensed customs brokers, and logistics providers, the operators who ensure cargo is cleared, stored, transported, and delivered every single day. These businesses are critical to the national economy, facilitating the movement of goods worth billions of dollars each year, and underpinning both Australia's domestic prosperity and its role in global trade.

Sydney Airport plays a central role in supporting high-value, time-critical freight flows, and FTA/APSA emphasise the need for clear, long-term planning for cargo operations. To ensure freight remains competitive and resilient, we recommend the publication of a detailed cargo infrastructure roadmap outlining future precinct design, warehousing and cold-chain capacity, automation, and inspection capabilities. Strengthening freight connectivity is essential, and we urge a coordinated "freight-first" approach to ground transport planning to protect efficient access to surrounding logistics precincts, as well as ensuring sufficient connectivity to major distribution centres and other key freight hubs.

Safeguarding on-airport and adjoining industrial land for freight, logistics and cold-storage operations is equally important. Increasing pressure for higher-yield commercial development risks displacing essential freight activity, reducing capacity, and constraining future growth opportunities. Protecting and clearly zoning this land ensures long-term operational capability is maintained.

To support competitiveness, we recommend transparent service-level metrics, competitive pricing, and incentives that encourage freighter activity, underpinned by a coordinated air-freight workforce strategy developed with industry and education partners. Cargo-specific sustainability measures should also be embedded, including support for SAF pathways, low-emission ground equipment, and renewable-powered cold-chain systems. Operational resilience must be strengthened through surge capacity, redundant clearance and IT systems, and robust crisis protocols. We further support the adoption of global best-practice cargo performance benchmarks, underpinned by a formal Freight Performance & Service Charter reporting against KPIs such as clearance times, landside dwell, cold-chain integrity and truck turnaround performance, aligned with state and national freight strategies.

As Sydney Airport continues to play a central role in Australia's air cargo network, it is essential that the Master Plan 2045 provides clear, long-term planning for freight operations. FTA/APSA offer the following recommendations to ensure Sydney Airport remains competitive, resilient and aligned with national freight and trade priorities.

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RECOMMENDATIONS

RECOMMENDATION 1 – Publish a long-term cargo infrastructure development roadmap

Given Sydney Airport's existing cargo precincts in the North West and North East sectors, FTA/APSA recommend the release of detailed future design, capability and land-use plans for freight infrastructure. This should include warehousing, cold-chain, automation, digital integration, and inspection/treatment capacity to support high-value and time-critical export/import flows.

RECOMMENDATION 2 – Strengthen and protect freight connectivity to key logistics hubs

Freight relies on efficient access to Port Botany and the major distribution centres, logistics precincts and transport corridors surrounding the airport. FTA/APSA recommend a "freight-first" approach to ground transport planning, including dedicated lanes where feasible, improved wayfinding, effective congestion management and alignment with broader NSW transport planning.

RECOMMENDATION 3 – Safeguard industrial land for air cargo, logistics and cold-storage operations

Sydney Airport's freight ecosystem depends on both on-airport and off-airport industrial land. FTA/APSA recommend ring-fencing land for freight and logistics use to avoid displacement by higher-yield retail or commercial developments which weaken long-term cargo capability.

RECOMMENDATION 4 – Support a competitive and attractive environment for air freight operators

Freight demand is highly responsive to price, reliability and turnaround times. FTA/APSA recommend maintaining competitive pricing structures, transparent service-level metrics and potential incentives to retain and grow freighter activity at Sydney Airport.

RECOMMENDATION 5 – Develop a coordinated air freight workforce strategy

Sydney's cargo sector requires a skilled labour pipeline across freight handling, cold-chain, aviation operations, security, and specialist logistics. We recommend a joint industry workforce plan with TAFE, universities and industry bodies, including targeted training subsidies and apprenticeships.

RECOMMENDATION 6 – Embed cargo-specific sustainability initiatives

FTA/APSA support sustainability advancement and recommend cargo-focused measures such as sustainable aviation fuel (SAF) pathways, hydrogen/electric ground support equipment (GSE), renewable-powered cold-chain systems, and resilience planning aligned with the Airport Environment Strategy.

RECOMMENDATION 7 – Enhance operational resilience and surge capacity for air cargo

Volatility and disruption (e-commerce spikes, supply chain shocks, biosecurity events) require scalable and redundant systems. FTA/APSA recommend planning for surge handling capacity, redundancy in clearance and IT systems, and robust crisis coordination protocols.

RECOMMENDATION 8 – Adopt measurable cargo performance benchmarks aligned with global leaders

To maintain global competitiveness, FTA/APSA recommend adopting cargo KPIs and performance benchmarks aligned with leading airports such as Changi, Doha and Incheon, covering areas such as throughput efficiency, dwell times, landside performance and cold-chain reliability. Sydney Airport should also implement a formal Freight Performance & Service Charter, publishing measurable KPIs and annual results to provide transparency and accountability to industry. Key metrics should include cargo clearance times, landside dwell times, cold-chain integrity and temperature-excursion rates, truck turnaround and congestion metrics, and cargo terminal performance benchmarking. Establishing these standards will align Sydney with global best practice and ensure operators have clear, consistent performance expectations.

RECOMMENDATION 9 – Ensure alignment with state and national freight strategies

Sydney Airport's cargo planning should be fully aligned with the NSW Freight & Ports Plan, the Federal Aviation White Paper, national supply chain resilience strategies, and Australia's broader trade and export priorities.

RESPONSES

Industrial Land Safeguards

Around Sydney Airport, decades of urban encroachment have pushed freight and logistics operators into increasingly constrained and expensive industrial zones. Higher-value residential and commercial developments have displaced critical warehousing and distribution functions, created long-term shortages and rising operating costs.

The Master Plan must include strong land-use protections to prevent further erosion of freight-dedicated industrial space. Ring-fencing land for warehousing, cold storage, freight forwarding, and distribution activity will ensure operators are not priced out and that Sydney Airport retains its capability to support long-term cargo growth.

Border and Biosecurity Processes

Sydney Airport has long been a focal point for ABF and DAFF operations, yet congestion, limited inspection capacity, and outdated infrastructure continue to create delays for exporters and importers.

The Master Plan must commit to upgrading bonded facilities, inspection bays, quarantine-approved premises, and supporting infrastructure to meet current and future volumes. Modern, scalable clearance capacity is essential to manage biosecurity risks and ensure efficient cargo flows, particularly during peak periods or emergency events.

Digital Integration and Data Flows

While the aviation industry has rapidly moved toward digital documentation, paperless processes, and end-to-end visibility, the Master Plan makes only limited reference to digital trade systems.

Sydney Airport should be repositioned as a digitally integrated cargo hub, adopting WCO standards, supporting MLETR-aligned document frameworks, enabling e-phytosanitary certificates, and facilitating freight community system integration. Embedding modern digital trade capabilities will reduce processing times, improve transparency, and make Sydney more competitive with emerging digital-first airports.

Workforce and Skills

Sydney Airport's cargo precinct relies heavily on a stable, skilled workforce, from freight handlers and forklift drivers to x-ray technicians and digital-trade specialists. However, workforce shortages continue to affect operational reliability.

The Master Plan should provide a clear strategy for labour development, including partnerships with TAFE, universities, and industry to create targeted training programs and apprenticeships. Developing a pipeline of skilled workers will ensure the airport can meet growing trade demands and rising regulatory requirements.

Sustainability and Decarbonisation

Freight customers are increasingly prioritising low-emission supply chains. While the Master Plan outlines environmental objectives at a high level, it lacks detail on freight-specific decarbonisation strategies.

Sydney Airport should incorporate sustainability initiatives tailored to cargo, including access to SAF, low-emissions ground handling equipment, renewable-powered cold-chain facilities, and infrastructure to support electric and hydrogen freight vehicles. Clear commitments in this area will strengthen Sydney Airport's position in an increasingly sustainability-driven global market.

Resilience and Future-Proofing

The pandemic highlighted vulnerabilities in Sydney's aviation supply chain, particularly the severe constraints that emerged when passenger flights, and the substantial belly cargo they carry, were grounded. The Master Plan must embed explicit resilience measures, including surge warehousing capacity, redundant inspection, clearance and IT systems, robust digital infrastructure, and clear operational contingencies for pandemics, biosecurity events, airline failures and technology outages.

FTA/APSA also recommend the development of a freight-specific Resilience and Continuity Blueprint, detailing surge apron capacity, dedicated recovery protocols for freight operations, and contingency arrangements designed to keep cargo moving during crises. A resilience-focused approach will safeguard trade continuity and protect Australia's national supply chains.

Global Benchmarking

Sydney Airport competes with world-leading cargo hubs that publish transparent performance metrics. Changi, Doha, and Incheon benchmark every stage of the cargo process from clearance times to cargo visibility.

To remain competitive, Sydney Airport should adopt measurable cargo performance KPIs and publish annual results. Transparent benchmarking will build industry confidence and drive continuous improvement

Policy Alignment

Sydney Airport must align its cargo strategy with broader national and state freight policies, including the NSW Freight & Ports Plan, the Federal Aviation White Paper, and the National Supply Chain Resilience Strategy.

Integrating the Master Plan with these frameworks ensures Sydney Airport functions as a cohesive part of Australia's wider freight ecosystem, supporting long-term productivity and national trade resilience.

Conclusion

Sydney Airport is a critical national gateway, and its future success relies on a freight precinct that is modern, resilient, and globally competitive. To meet growing trade demands, the Master Plan must treat freight as a core strategic priority, not an afterthought to passenger or commercial expansion.

Clear commitments to industrial land protection, border and biosecurity capacity, digital integration, sustainability, and workforce development are essential to avoid repeating the constraints that have long challenged freight operators on the Sydney Airport estate.

FTA/APSA look forward to working with Sydney Airport, government, and industry partners to ensure the final Master Plan delivers a future-ready freight environment that supports Australia's exporters, importers, and supply chain resilience for decades to come.