A summary of Pacific National’s performance from the last financial year:

- **TEUsHandled**: 0.8m (INTERMODAL)
- **Billion NTKs**:
- **REVENUE**: $2.4 BILLION
- **NUMBEROFEMPLOYEES**: 3,573
- **10% Improvement in Recordable Injury Frequency Rate**
- **187 MILLION (COAL/BULK)**
PACIFIC NATIONAL INTERMODAL AT A GLANCE

TOP STATS
- 174 ACTIVE LOCOS
- 3,300 ACTIVE WAGONS
- 1,275 STAFF HEADCOUNT

ANNUAL TONNAGE
FREIGHT
800,000 TEU*
9.6M tonnes

*TEU: twenty-foot equivalent unit

INTERMODAL TRAIN SERVICES
- 130
- Wysteria: Connecting your business to our container movement

STEEL PRODUCT TRAIN SERVICES
- 10
- WEST: Between Binningup & Port Kembla, and Wollongong to Kirkstall & Poonong

MAINTENANCE FACILITIES
- MELBOURNE PT KEMBLA SYDNEY ADELAIDE

PASSenger HOOK AND PULL Services
- WEEKLY: Adelaide to Perth, Dangriga, Melbourne & Sydney Enquiries

EXPORT PORTLINK SERVICES
- WEEKLY: Between Geraldton & Appleton Dock in Melbourne

INFORMATION CURRENT AS AT JANUARY 2017

Pacific National
METRO and REGIONAL HUB’s

Leveraging existing infrastructure
Leveraging Pacific National Intrastate & Interstate Network
Increasing Productivity
Minimising community impact

Metro Services
Port Services
Regional Services
SYDNEY FREIGHT TERMINAL - CHULLORA

- New RMG’s and Load Lifting Equipment
- Doubling capacity to 600,000 TEUs
- 14km Storage rail roads, 4 Km of loading rail roads
- Partnering with customers, governments and industry
- Close proximity to M4 and M5
- Good road access
- Leveraging Port Support rail
- Hub for Regional Export Volumes and close to Port Botany
- Direct services to Adelaide, Perth, Melbourne & Brisbane.
- Shuttle to Inland Rail
Pacific National has recommenced discussions with industry for the development of the Western Sydney Rail Freight terminal (St Marys) – a 43 hectare facility dedicated to IMEX movements

St Marys has the potential to provide significant advantages of the traditional road logistics solutions from Port Botany to Western Sydney.

• M5 Traffic Congestion:
  ▪ Road logistics out of Port Botany are significantly impacted by congestion on the M5.
  ▪ A significant number of the beneficial freight owners requests deliveries by midday. Meaning trucks are required to negotiate the M5 during peak traffic periods.
  ▪ The challenges with the M5 are anticipated to become worse over the coming years.

• The St Marys site is located in close proximity to major industrial parks including Eastern Creek, Erskine Park and Wetherill Park:
  ▪ Delivering full containers to St Marys via port shuttle will allow these industrial parks to be more easily serviced.
  ▪ Road logistics companies will be able to make better use of their fleet, and haul additional volume. Will allow road logistics companies to target new customers.

• Delivering full containers to St Marys via rail will allow road logistics companies with a scalable, reliable and predictable means to collect full containers.

• St Marys is planned to have a fully functioning container park and have in excess of 30 hectares available for on-site warehousing and distribution (for customers with material container throughput).
NEW WESTERN SYDNEY INTERMODAL TERMINAL – ST MARYS

• Investing from $14m up to $50 million

• Creating as a start an additional 300,000 TEUs

• Location – bounded by Christie Street (North), Lee Holm Road and privately owned lots (East), the Great Western Railway (South) and South Creek (West).

• The site is serviced by a spur line (used by PN Bulk)

• Site is subject to a development consent issued by NSW Department of Planning to the NSW Rail Authority in 2000 (DA 170-05-2000) for the St Marys. The consented facility covers a site area of 37 hectares for an integrated rail freight facility comprising:

  • a rail based grain receivable, storage and processing facility and;

  • a sand/sandstone recycling facility.
Services Available – St Marys

• Rail linehaul (from / to Port Botany).

• Movement of Import containers to St Mary’s / Western Sydney / Parkes – from Port Botany.

• Movement of Exports containers from St Mary’s / Western Sydney / Parkes – to Port Botany.

• Terminal lifting services (containerised freight).

• Full container park facilities (St Mary’s only):
  • Empty container availability (exports)
  • Wash Bay
  • Container repairs
  • Aqis
  • Bonded facility
  • Fumigation

• Warehousing (development) – potential to co-locate on either site (removal of transport legs).

• Co-location – bulk materials (e.g. Grain, concrete).
• The Commonwealth Government has announced the development and full funding for inland rail (Melbourne to Brisbane – Commonwealth Budget May 12) with the Narromine to Parkes section being one of the first sections earmarked for development.

• Pacific National will shortly be seeking development approval for the Parkes rail terminal on land it currently owns.

• The rail terminal will be developed in consultation with ARTC’s inland rail development to ensure the maximum benefit for participants of this key trade route and the Parkes region.

• The Parkes rail terminal will provide efficient rail access to all three key rail corridors:
  - Sydney to Perth;
  - Melbourne to Brisbane; and
  - Parkes to Sydney (including Port Botany).

• The site is 367 hectares in size with approximately 30% to be used for the rail terminal. The remaining 70% has been reserved for key customers to co-locate at this key rail junction.

• Pacific National is talking to industry participants about co-location opportunities (Cargolink) at the Parkes rail terminal and invites participants to seek us out.
Parkes Rail Terminal – Inland Rail
Opportunities for Improvement

• General treatment of freight as a second class user in rail networks where both freight and passenger traffic exist.

• Need to align port windows and rail windows.

• Need to align rail windows across different rail access providers – in NSW this includes aligning Sydney Trains, John Holland and ARTC.

• Need for more rail infrastructure dedicated to freight rail both in port precincts and within the broader rail network. In particular there needs to be a separation of freight and passenger rail infrastructure. In NSW this means that:
  - the Western Sydney rail freight corridor project should be prioritised as it will separate passenger and freight rail on the main western line;
  - the Port Botany line duplication should be supported; and
  - the Inland Rail project should be supported.

• Need for freight corridor preservation – the construction of future rail freight infrastructure requires that corridors be preserved now to ensure that land is available.

• Need to prevent urban encroachment – existing and future freight terminals need sufficient buffer zones to allow 24/7 operation.

• Need for road freight and rail freight to be subject to similar infrastructure pricing frameworks. Freight rail pays for freight infrastructure via a mass distance location charge based on the cost of the rail infrastructure whereas road freight pays road user charges based on fuel excise and licence fees:
  - the pricing for freight infrastructure should be moved to a common framework to ensure that freight users make an efficient choice of franchises mode, where the price for the transport infrastructure is based on the cost of the transport infrastructure.

• The impact of technology includes driverless vehicles – road freight, rail freight and terminal vehicles – this will require co-operation across the supply chain to ensure that autonomous operating systems are aligned and compatible.

• The impact of container tracking and similar technologies is increasing size of freight datasets (i.e. big data) – there will need to be co-operation as to whether these data sets are public or confidential and following from this consideration needs to be given as to the analysis of this “big data”.