MAJOR INDUSTRIAL SITES

TASMANIA 2011

DRAFT

Department of Economic Development, Tourism and the Arts

Tasmania
Explore the possibilities

MAJOR INDUSTRIAL SITES TASMANIA 2011

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INTRODUCTION

This document is intended to provide a high level overview of the major industrial sites and precincts available in Tasmania and their competitive advantages. It is not intended to be a definitive guide to any one location but provides information on the relative merits of different sites, regions and precincts and their comparative advantages. It should be used as a tool in guiding the decision making processes that will be critical for major investment decisions.

It is expected that much of the information referred to in this document will change over time. It is suggested that prior to the use of this information, contact be made with the relevant body or authority and/or the Department of Economic Development, Tourism and the Arts prior to any significant decision making process.

For further information, contact Business Point on 1800 440 026 or email businesspoint@development.tas.gov.au

A number of existing background reports have been used in compiling information in this document. They include:

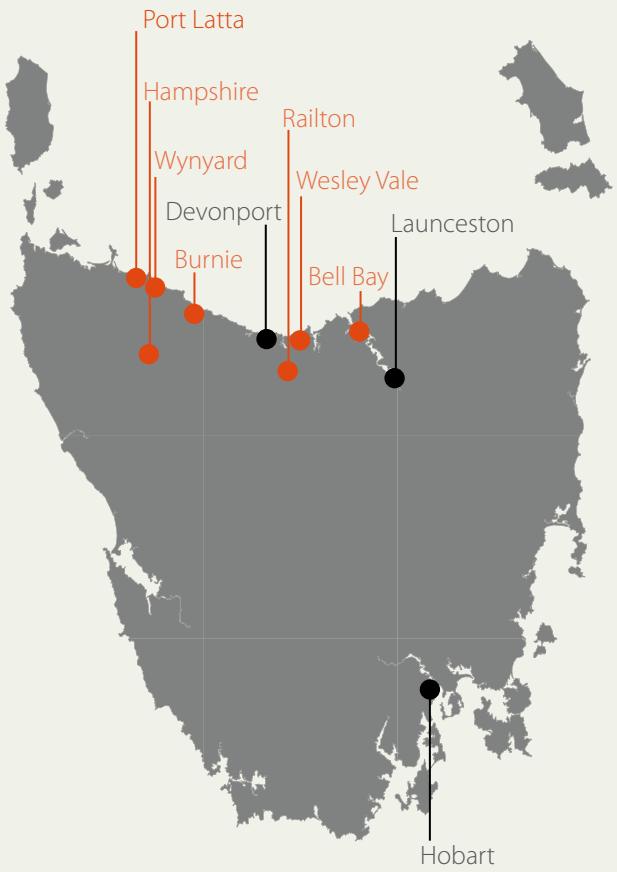
- Industrial Land Demand Tasmania - 2008 - 2011
- Industrial Land Use for Waratah Wynyard Mersey Region Industrial Area
- Demand Needs Assessment for the Burnie Paper mill site

These reports provide recent supply and demand needs for industrial land in the state and specific detail of the heavy industrial land use analysis.

The greatest opportunity for heavy industrial activity expansion is likely to occur geographically between Bell Bay and Port Latta, within a close proximity to the north coast. This is primarily due to the level of infrastructure and proximity to cost effective transport routes and the natural resources.

In addition to the sites identified, it is anticipated that further sites may become available due to the challenging operational environment in the forestry sector.

LOCATION OF MAJOR INDUSTRIAL SITES



MAJOR INDUSTRIAL ACTIVITY PROFILES

Mining and forestry dominate as the state's major export industries.

The mining industry includes exploration, mining, minerals processing and metals production, which can be single processes or combinations of the above. It also includes metal production from non state-based commodities such as aluminium production at Bell Bay (Rio Tinto), ferro-manganese and ferro-silicon at Bell Bay (TEMCO), and zinc concentrate at Hobart (Nystar).

Forestry in the State is focused around sawn timber, timber veneer and woodchip production.

MINING AND MINERALS

MINING OPERATIONS

While not as resource rich as Western Australia and Queensland, Tasmania has an extensive geological diversity and abundance of rich and high-grade mineral deposits with a supportive regulatory regime through the Mineral Resources Development Act 1995.

Tasmania is one of the most highly and diversely mineralised areas in the world. The mining and mineral processing sectors are major contributors to the Tasmanian economy.

These sectors combined employ approximately 3 500 people in Tasmania.

During 2008/2009 mineral products worth $1.56 billion represent 44.8% of Tasmania's export income.

New projects are constantly being brought into production. Total mine output in Tasmania is expected to increase in the next two to three years as nickel, silica, and magnesite operations are brought online.

With the recent increasing global demand for all metal commodities, investors are looking closely at Tasmania's rich mineral endowment as a source of new opportunities. Tasmanian exploration continues to rise, as are investment enquiries, particularly from China.

Tasmania's mines, smelters and processing plants are increasing their capacity. Rising mineral commodity prices are leading to a substantial increase in the value of production within the state. In such a favourable environment, Tasmania is actively looking for investors who wish to increase this growth further by investing in existing operations and supporting the development of new projects.

PRINCIPAL MINING AND MINERAL PROCESSING OPERATIONS IN TASMANIA

BUSINESS NAME	PRODUCT(S)	SITE	NEAREST TOWN
Cement Australia	Cement	Railton	Railton
Cornwall Coal	Black Coal	Fingal Valley	Fingal
Tasmanian Advanced Minerals	Silica Flour	Corinna	Waratah
Tasmanian Advanced Minerals	Silica Flour Beneficiation	Stennings Rd	Wynyard
Minerals and Metals Group	Nickel Concentrate	Avebury *	Zeehan
Minerals and Metal Group (MMG)	Zinc, Lead and Copper Concentrates	Rosebery	Rosebery
Bass Metals	Zinc, Lead, Copper concentrates	Hellyer	Waratah
Beaconsfield Gold	Gold Bullion	Beaconsfield	Beaconsfield
Unity Mining Ltd	Gold and Silver Dore	Henty	Queenstown
Copper Mines Tasmania	Copper Concentrate	Mt Lyell	Queenstown
Grange Resources	Magnetite Mine	Savage River	Waratah
Grange Resources	Magnetite Pelleting	Port Latta	Smithton
Metals X-Yunnan Tin Parksong	Tin Concentrate	Renison Bell	Renison
Rio Tinto Aluminium Bell Bay	Aluminium Metal	Comalco	Bell Bay
Nystar	Zinc metal	Risdon	Hobart
Tasmanian Metallurgical Co PL	Ferro alloys	Bell Bay	Bell Bay

* Currently closed on Care and Maintenance

MAIN PRODUCTS

LEAD, ZINC AND SILVER

MMG Rosebery Mine

Minerals and Metals Group (MMG) operates an underground zinc, lead, silver, gold and copper mine located at Rosebery on the West Coast of Tasmania.

Production for 2009 is estimated to be 80 000 to 90 000 tonnes zinc, 20 000 to 25 000 tonnes lead, 15 000 to 20 000 ounces of gold and 1.75 - 2.0 million ounces of silver, in concentrates.

Mineral concentrates are transported by rail to the port of Burnie in the North West. The zinc concentrate is shipped to Hobart, where it is treated at the Nyrstar Smelter Plant. Zinc concentrate is also supplied to Nyrstar's Port Pirie (South Australia) smelters. The lead and copper concentrates are shipped to mainland Australia or overseas smelters.

Bass Metals Ltd

Bass Metals Ltd, through the Que River Mining Alliance with Mancala Mining Pty Ltd, operates the Que River mine near Waratah in western Tasmania. Que River is an open-cut mine recovering remnant ore left by the previous underground operation conducted by Aberfoyle Resources in the 1980s.

In addition to the Que River mine, Bass Metals is developing the new Fossey Mine north of Tullah, and owns the significant mineral processing nearby Hellyer mill.

TIN

Metals X Ltd.

Bluestone Mines Tasmania Joint Venture between Metals X Ltd and with Yunnan Tin Parksong Australia Holdings Pty Ltd controls a tin mining operation in western Tasmania.

The operations include the world class Renison Bell Mine, the Renison Tin Concentrator, the Mt Bischoff Tin Project, and the Renison Expansion Project, Rentails.

IRON ORE

Grange Resources Ltd

The Savage River Mine is administered by Grange Resources which operates an open-cut magnetite mine and ore crushing plant at Savage River in North West Tasmania.

In 2008-2009, ore crushed totalled 5 715 677 tonnes with 2 289 699 tonnes of concentrate being produced.

The slurry concentrate is pumped via an 85 kilometre pipeline to the iron ore pellet plant and loading facility at Port Latta.

In 2008-09 the Pellet production totalled 2 174 415 tonnes, with 2 174 318 tonnes of pellets, 60 144 tonnes of concentrate and 103 281 tonnes of iron ore chips being sold. The pellets are exported to Australian and Asian steel mills.

Tasmania Mines NL

Tasmania Mines operates an open cut mine and processing plant at Kara. The company produces up to 200 000 tonnes of magnetite ore annually. The magnetite is used to wash coal for the steelmaking industry. Tasmania Mines is also currently the only producer of tungsten in Tasmania. Tungsten is produced as a by-product of magnetite from its operations.

COPPER

Copper Mines of Tasmania Pty Ltd

The Mount Lyell Mine is located in Queenstown, Tasmania, and is operated by Copper Mines of Tasmania (CMT), a wholly own subsidiary of the London-based company Vedanta.

As of March 2010, the actual measured, indicated and inferred mineral resource at the Prince Lyell ore body was estimated at 24.3 million tonnes. Production in 2009 - 2010 was 89 899 tonnes of concentrate containing 23 160 tonnes of copper. The concentrated material from Mt Lyell is shipped to India.

NICKEL

MMG

The Avebury nickel mine is presently on care and maintenance but is capable of producing 7500 to 8500 tonnes of nickel in concentrate from 900 000 tonnes of ore per annum.

GOLD

BCD Resources NL

BCD Resources operates the Beaconsfield mine located over the Tasmania gold reef in the state's north. The operation milled 271 391 tonnes of ore with 70 178 ounces of gold produced in the 2008-09 financial year. In 2008-2009 there was a total resource 979 000 tonnes at 13.2 g/t gold, equivalent 416 000 ounces contained gold.

Unity Mining Ltd

Unity Mining recently aquired the Henty Gold mine in Western Tasmania. It will be moving the site back into a steady state operation, producing 50 000 ounces per annum. Production for 2009 -10 was 45 000 ounces of gold and 27 000 ounces of silver.

Ongoing exploration in the Tyndall, Newton and Mt. Julia zones offers a significant increase in resource and mine life.

SILICA

Tasmanian Advanced Minerals Pty Ltd

Tasmanian Advanced Minerals Pty Ltd extracts silica flour from tenements at Corinna and Blackwater which is processed at its plant near Wynyard.

COAL

Cornwall Coal

The Cornwall Coal Company is the only supplier of coal mined in Tasmania. The company currently mines black coal from its three mines. Production of raw coal in 2008/2009 totalled 484 450 tonnes, with 384 155 tonnes of saleable coal being produced. The primary market for the coal is the Cement Australia plant at Railton, Tasmania.

;MINERAL PROCESSING OPERATIONS

Rio Tinto Aluminium (Bell Bay) Ltd

A subsidiary of Rio Tinto, Rio Tinto Aluminium (Bell Bay) Ltd operates an electro metallurgical aluminium refinery at Bell Bay. The metal production for the refinery is approximately 180 000 tonnes per year.

Tasmanian Electro Metallurgical Co Pty Ltd (TEMCO)

BHP Billiton operates the TEMCO electro-metallurgical smelter making ferroalloys at Bell Bay, the only manganese ferroalloy plant in Australia. Four electric-arc furnaces produce approximately 260 000 tonnes of high-carbon ferromanganese, silicomanganese and sinter per year.

Nyrstar Hobart Smelter

Nyrstar Hobart Smelter is a large-scale zinc smelter with a capacity of 260,000 tonnes. The site's main products are SHG zinc, zinc die-casting alloys and zinc galvanizing alloys, which are exported predominately to Asia and, in particular, to China.

INDUSTRY OUTLOOK

Increased interest from India and China in both ownership of Tasmanian mines and in off-take agreements, and the strong financial performance of the sector indicates the sector has recovered well from the global financial crisis.

The broad, global economic factors that shape the industry make it difficult to forecast, with any certainty, the likely future of the Tasmanian mining sector. Commodity markets are notoriously cyclical. However, there has been for most of the last decade a broad trend toward growth in the sector principally driven by resource demand from China, which is likely to continue into the medium term, providing a solid base for the sector.

Emerging opportunities in the Tasmanian mining sector are being developed, and many of these projects will include downstream processing within Tasmania.

The industry outlook continues to be positive following the GFC and increased prices in most commodities. The following are a number of opportunities currently under consideration.

Macquarie Harbour Mining Silicon Smelter Opportunity

Macquarie Harbour Mining (MHM) is currently seeking to develop a quartz silica resource the company holds at Cape Sorell on the West Coast. MHM is liaising with potential interested parties in relation to securing off take agreements and also the potential to develop a silicon smelting operation. Three proponents are exploring the possibility of establishing a silicon smelter. One proposal envisages a 48 000 tonne per annum plant with a minimum projected life of 25 years the most suitable location identified being in the North West Coast region.

Venture Minerals Tin-Tungsten Project

Venture Minerals is focussing on its Mt Lindsay tin-tungsten project in North-West Tasmania. The deposit is the third largest JORC compliant tin resource in Tasmania, behind Renison Bell and the Rentails Project.

The recently completed pre-feasibility study at Mt Lindsay focussing on all aspects of mine development, indicates a resource of over 120 000 tonnes of tin/tungsten metal.

Shree Magnetite Project

Shree Minerals Limited is a mineral exploration and mine development company whose focus is the successful exploration of prospective mineral tenements and the development of these ore bodies into production. Shree has a portfolio of projects within Tasmania. The most advanced proposal is to initially direct ship magnetite ore from its recently upgraded resource at the Nelson Bay Ore Project (to 12.7Mt at 36.1% Fe).

Maydena Sands Silica Resource

Maydena Sands Pty. Ltd. is a privately owned and funded resource company. Its current primary focus is on high quality silica raw materials, including silica flour, silica sand and silica rock. Its main activities, consisting of two projects, are located in south central Tasmania, near the township of Maydena.

The silica rock project, driven by the growing demand for high purity silicon, is in the early stages of investigation and evaluation. Its purpose is to identify and supply high quality silica rock feed for the production of high purity polysilicon, mainly for the photovoltaic (PV) industry.

The drilling has an indicated resource sufficient to support a 20 plus year silicas flour operation, generating 25,000 to 50,000 tonnes per annum of saleable product from processed, naturally occurring silica flour in the 35 to 250 micron size band.

Yunnan Tin Group (YTG) Tin Project

Metals X Limited is the operator of the Renison Bell underground mine and the Mount Bischoff open cut mine site, producing approximately 2.5 per cent of the global supply of tin from its mines and processing plant in Tasmania. YTG-Parksong Group is a 50 per cent shareholder in Metals X. In September YTG-Parksong executives visited the state to explore the potential for establishing a tin smelter. The North West Coast has been identified as the most suitable potential region.

TEMCO Char Project

TEMCO are developing a project to build a char plant in the Fingal Valley with a capacity of 28 000 to 30 000 tpa of char. TEMCO currently uses around 40 000 tonnes of coal supplied by Cornwall Coal and the establishment of a char plant would see this consumption increase to 100 000 tpa. The use of char would provide greater efficiencies for TEMCO in their production process and be a more valuable use of Cornwall Coal's resource.

Grange Resources Magnetite Production Expansion

Since January 2010, Grange Resources has been increasing its production from the Savage River mine and the pelletising facility at Port Latta, and reducing unit costs across its operations. The company expects to produce 2.6 million tonnes per annum (mtpa) in 2010, up from 2.2 mtpa in 2009.

King Island Scheelite

King Island Scheelite Ltd and Hunan Nonferrous Metals Corporation (HNC), plans to produce 3 300 tonnes of tungsten oxide per annum over 10 years from a site near Grassy. The operations would employ 75 - 100. The initial plan was to develop open cut pit protected by cut-off and sea walls. The company is also examining a nearby deposit at Bold Head.

Proto Resources Nickel and Cobalt Project

Proto Resources and Investments Ltd proposes to construct and operate a nickel laterite mine and processing facility four kilometres west of Beaconsfield, Tasmania. The Barnes Hill Project contains approximately 12.1 million tonnes of resource at 0.83 per cent nickel and 0.07 per cent cobalt.

CHALLENGES TO ACHIEVING GROWTH

The major factor affecting the performance of mining will continue to be the pace of world economic growth, resource demand, commodity prices, the competitiveness of Australian producers and the value of the Australian dollar. In particular the continued growth and reliance of the Chinese economy will impact on the industry in Tasmania. Australian and Tasmanian Governments have little control over these factors.

ROLE OF GOVERNMENT

The Australian and Tasmanian Governments both have roles in relation to the minerals and petroleum sectors. They are:

- establish the broad macroeconomic and taxation environment
- remove or reduce impediments to industry competitiveness and red tape
- reduce commercial risk in exploration, by generating and disseminating geoscientific information at reasonable cost
- provide a world class regulatory framework for exploration, development, project approval, safety and environmental assessment
- market Tasmania as an investment location, and in particular countering misconceptions about sovereign risk issues

THE REGULATORY ENVIRONMENT IN TASMANIA

The Tasmanian Government works actively to ensure the state is attractive to mining and mineral processing investors, and minimizes 'sovereign risk'. These measures include:

- Strategic Prospectivity Zones to ensure that the government cannot block developers from highly prospective areas of the state
- the Mineral Resources Development Act 1995
- the Tasmanian Regional Forest Agreement, which provides security of access by providing defined land tenures which allow for exploration and mining.

APPROVALS FOR EXPLORATION ACTIVITIES

Approvals for exploration activities are managed by Mineral Resources Tasmania (MRT).

Explorers are required to submit a rough outline of the work they intend to undertake. MRT then coordinates the approvals of all relevant land managers before granting an exploration license and requesting a more detailed work plan.

All Exploration Activities are required to conform to the Mineral Exploration Code of Practice, which is freely available from MRT. www.mrt.tas.gov.au

MINING LAW IN TASMANIA

Tasmania has established seven strategic prospectivity zones, within which the status of Crown land cannot be changed without consideration being given to the mineral prospectivity.

The approval of the Director of Mines is required for the change in status of parcels of land less than 500 hectares and Parliament must approve the change of larger parcels.

ENVIRONMENT AND PLANNING LAWS

Tasmania has a streamlined framework for approving major development projects.

The framework is intended to ensure that all development projects are environmentally sustainable and conform to health and safety standards.

Smaller projects are approved by local councils once all environmental conditions have been met.

Larger projects, such as mineral processing plants, require that a development application and environmental impact study are completed prior to assesment.

There are strict time lines governing planning approval, and proponents have the right to appeal unfavourable decisions.

There is an integrated assessment process for projects that are of regional or state significance. This system is used for larger projects that could significantly affect the future of a region or the state.

The Minister may declare a Project of Regional Significance (PORS) under the Land Use Planning and Approvals Act, 1993 if it meets certain criteria including the project:

- has regional planning significance
- requires high-level assessment
- would have significant environmental impact

At this stage, there have been no projects assessed under the PORS process.

A project of State Significance (POSS) means that a major development proposal will be assessed under Part 3 of the State Policies and Projects Act, 1993, rather than under the Land Use Planning and Approvals Act 1993.

The Governor can declare a project to be of State Significance if it meets certain criteria.

The Bass Link project linking the Tasmanian and Victorian electricity grid by a combined subsea and overland high voltage direct current interconnector between the two states was assessed under this model.

Local Government plays a significant role in planning in Tasmania, primarily through the preparation and administration of the planning schemes themselves, but also as the initial assessment and determination point for the vast majority of development applications.

FORESTRY INDUSTRY

INDUSTRY PROFILE

In terms of forestry resource, Tasmania has an area of 6.8 million hectares, of which approximately 3.35 million hectares (49% of the State's landmass) is covered by forest. The forest estate can be broadly split into two categories: native forest and plantation forest. Tasmania's native forest estate totals 3,116,000 hectares and the plantation estate is 274,000 hectares.

Approximately 47% of Tasmania's native forests are reserved, within World Heritage wilderness areas, national parks and other formal or informal reserves.

Forestry Tasmania has statutory responsibility for the management of 1.5 million hectares of public forest land, comprising both Forest Reserves (conservation) and State Forest (wood production).

Privately owned forests make up about 30 per cent of the total forested area of the state. The largest private forest owner in the state is Gunns Limited.

The Regional Forest Agreement is an inter-governmental agreement between the Tasmanian and Australian Governments that was signed in November 1997. The Agreement provides for the long term sustainable management of Tasmania's forests, both public and privately owned, and applies for 20 years, with five-yearly reviews.

Tasmania was the first state in Australia to be fully covered by an RFA.

However, the Tasmanian forest industry is currently undergoing major changes, both through changing government policies and national and international competition.

There is widespread acceptance both within the wider community, industry and environment groups that there needs to be a resolution to issues surrounding the forest industry.

In October 2010, the Tasmanian forestry industry and several environmental non-government organisations reached an historic high level principles agreement for protecting native forests and developing a sustainable timber industry in Tasmania.

The Australian Government appointed an independent facilitator to assist signatories to progress the agreement and report back to the Government.

The Australian Government will consider the findings and recommendations in the report, and is expected to respond to it in mid 2011.

FOREST AND TIMBER PRODUCTS

The main products from forestry operations in Tasmania have changed over the years due to various factors.

The most significant change is the reduction of the use of native forest resource which is to be replaced with both plantation and regrowth timber. This change has varying effects on the different forestry operations.

Woodchips – Over the years the source for input for woodchips have been produced as a by product from the harvesting of saw logs, veneer logs, thinning's, regeneration and sawmill residue. Both hardwood and softwood have been utilised. The demand for Tasmania's woodchips has diminished due to the current volatile market and the demand for product with AFS and FSC certification. Due to these changes, Gunns Limited, the largest processor of woodchips in Tasmania is planning an exit from its native forest based operations. This has led to the closure of some of its facilities, either temporarily or permanently.

Sawmilling – There are several sawmills of varying size and ownership throughout the state, utilising both softwood and hardwood resource. There is a growing trend towards softwood in preference to hardwood due to the decline in quality and demand for hardwood. Existing sawmills are not geared to utilise the smaller logs from regrowth and plantation forests. Recently, there has been significant rationalisation of the main sawmilling operations in the state.

Composite Wood Products – A small particle board operation produces wood paneling from softwood woodchips for furniture manufacture in Victoria.

Rotary Veneer –The development of two rotary veneer plants in Tasmania was the result of foreign investment in the state providing a greater utilisation of an existing Tasmanian resource. There is also a sliced veneer mill operating in the state.

Pulp and Paper – Norske Skog at Boyer in the states south produces newsprint, processing softwood sourced from its own plantations. The annual production is approximately 290 000 tonnes of newsprint and related products, representing 40% of Australia's newsprint production.

INDUSTRY OUTLOOK

Australia competes with Asian and Northern hemisphere producers in terms of wood production capacity. However, Australia and Tasmania do have a significant competitive advantage in terms of our proximity to Asia, especially China, which is driving growth in the international forest products industry. New investment is being sought to process the plantation resource.

The availability of softwood sawlogs is expected to increase by around 165,000 m3 per year by 2020. There is also the opportunity to harvest biomass as part of forest operations and indicative estimates suggest that there could be around 2.5 million tonnes per year of hardwood biomass and around 430,000 tonnes per year of softwood biomass available for harvest in Tasmania.

Government policies with regards to environmental issues (including Greenhouse gas emissions) will be of importance to the growth of forestry activity, as will gradual moves to introduce carbon credit trading. Taxation policies will also impact on the industry, especially future ATO rulings regarding tax deductibility for plantation investments.

One of the primary factors underlying this growth will be the continued increase in plantation area. Although domestic consumption of wood products is not expected to grow significantly over the next five years, exports are anticipated to rise, due to higher demand for forest products in Asia and a predicted future cyclical depreciation of the Australian dollar which will cause Australian exports become cheaper in export markets.

INFRASTRUCTURE OVERVIEW

ENERGY

ELECTRICITY

GENERATION

Current Tasmanian annual electricity consumption is estimated at 10,441 GWh, comprising residential (19%) and commercial and industrial (81%).

Tasmanian electricity consumption is dominated by sixteen large industrial customers in the metal smelting, mining, forestry and pulp and paper manufacturing sectors, accounting for around 60% of total energy consumption. Of these large consumers, four large industrial processing facilities account for around half of Tasmania's total electricity demand.

Business as usual electricity consumption in Tasmania is forecast to grow by an average of 0.69% annually to 2023, and annual consumption is projected to reach 11,504 GWh.

The National Electricity Market provides a comprehensive market and institutional framework to ensure that supply reliability is maintained in Tasmania at the lowest possible cost. Under this framework, responsibility for ensuring that there is sufficient generation capacity to meet future demand is effectively vested in the market, and not in any particular energy sector company – a fundamental change from the pre-electricity reform era, where until recently, Hydro Tasmania shouldered this responsibility.

Current maximum electricity demand in the Tasmanian electricity system is 1,861 MW, achieved during winter, unlike mainland states, where maximum demand occurs in summer, due to air conditioning load. Maximum demand is projected to grow at 1.42% annually, reaching 2,299 MW in 2020.

Electricity production by major generation sources in the Tasmanian mainland in 2007–08 and the relative contributions of each fuel type are described below:

TASMANIAN ELECTRICITY GENERATION

Generator	Fuel Type	Capacity (MW)
Hydro Tasmania	Hydro	2,270
Basslink *		478
Roaring 40's	Wind	140
Aurora Energy Tamar Valley	Gas	105
AGL Energy Services	Landfill Gas	4

Reference: *Electricity in Tasmania a Hydro Tasmania Perspective*

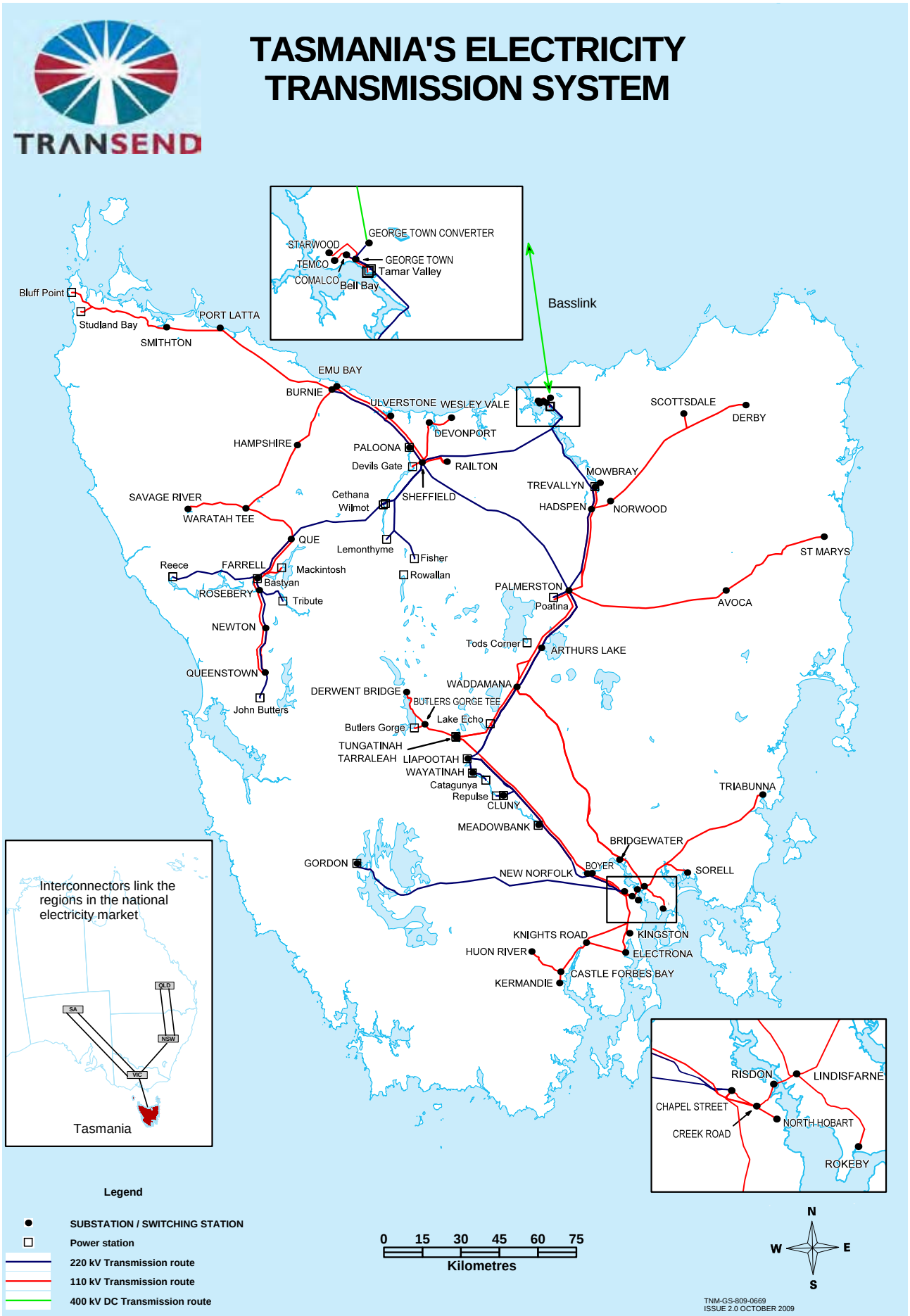
* In 2000 the Tasmanian Government entered into an agreement with National Grid Australia for the construction of an interconnector between Tasmania and Victoria, known as Basslink. This high voltage, direct current link with a continuous rating of 478 MW, enhances security of supply for both Tasmania and Victoria.

Tasmania's hydro generation capacity is provided by 29 power stations using water storages in six major catchments.

Natural gas is supplied to Tasmania from offshore Victoria gas fields, providing gas for process requirements distributed around the state, and for 105 MW electricity generation by Aurora Energy (Tamar Valley) at Bell Bay.

A Joint Venture between Hydro Tasmania and the China Light and Power Group provides wind generation from two wind farms on Tasmania's far North West region with a combined capacity of 140 MW.

Tasmania currently generates 40.4% of the national renewable energy supply.


TASMANIA'S ELECTRICITY TRANSMISSION SYSTEM
TRANSEND
GEORGE TOWN CONVERTER
STARWOOD
TEMCO
COMALCO
GEORGE TOWN
Tamar Valley
Bell Bay
Basslink
Bluff Point
Studland Bay
PORT LATTA
SMITHTON
EMU BAY
BURNIE
ULVERSTONE
WESLEY VALE
DEVONPORT
SCOTTSDALE
DERBY
HAMPSHIRE
PALOONA
Devils Gate
RAILTON
MOWBRAY
TREVALLYN
HADSPEN
NORWOOD
SAVAGE RIVER
WARATAH TEE
Cethana
Wilmot
SHEFFIELD
QUE
Lemonthyme
Fisher
Reece
FARRELL
Mackintosh
Bastyan
Rowallan
ROSEBERY
Tribute
PALMERSTON
Poatina
ST MARYS
AVOCA
NEWTON
Tods Corner
ARTHURS LAKE
QUEENSTOWN
John Butters
WADDAMANA
DERWENT BRIDGE
BUTLERS GORGE TEE
Lake Echo
Butlers Gorge
TUNGATINAH
TARRALEAH
LIAPOOTAH
WAYATINAH
Catagunya
Repulse
CLUNY
TRIABUNNA
MEADOWBANK
BRIDGEWATER
GORDON
BOYER
NEW NORFOLK
SORELL
KNIGHTS ROAD
KINGSTON
HUON RIVER
ELECTRONA
CASTLE FORBES BAY
KERMANDIE
RISDON
LINDISFARNE
CHAPEL STREET
NORTH HOBART
CREEK ROAD
ROKEBY
Interconnectors link the regions in the national electricity market
QLD
SA
NSW
VIC
Tasmania
Legend
SUBSTATION / SWITCHING STATION
Power station
220 kV Transmission route
110 kV Transmission route
400 kV DC Transmission route
0 15 30 45 60 75
Kilometres
N
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TRANSMISSION

Tasmania's transmission system is characterised by a 220 kV and a 110 kV transmission network that connects generators to the distribution system, major industrial customers and the undersea cable, Basslink. It's an intricate system of 3469 circuit kilometres of transmission lines, 47 substations and nine switching stations as well as a telecommunications system and control centre.

In many instances, the generating load is located at remote sites, which requires extensive transmission infrastructure crossing difficult terrain and environmentally sensitive areas, including World Heritage.

Main load centres are connected to the 220 kV transmission system at Burnie, Chapel Street (Hobart), George Town, Hadspen (Launceston) and Sheffield substations. Other load centres are connected via the 110 kV peripheral transmission system. (Transend web site Nov 2010)

The transmission system map gives an indication of the location of actual transmission infrastructure. While close proximity to this infrastructure is likely to be beneficial for any significant end user of electrical energy the factors that may influence access are many and complex. Significant consultation would need to occur with a number of entities to arrive at final design and costings.

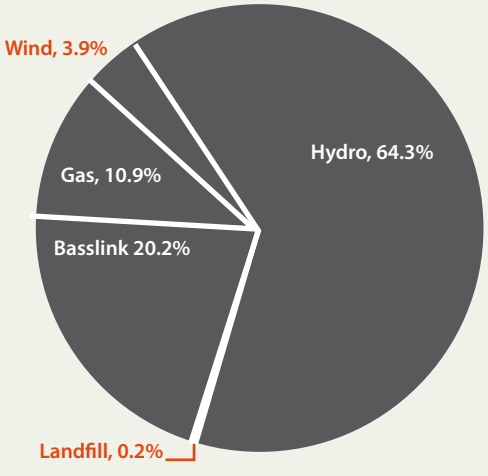


Figure 1 : Tasmania's electricity generation mix 2007/2008 from *Electricity in Tasmania a Hydro Tasmania Perspective*

NATURAL GAS

Gas for the emerging Tasmanian market is sourced primarily from the Gippsland Basin, offshore of south-east Victoria.

Tasmania is connected to the mainland natural gas network via a 753km subsea and underground transmission pipeline. This pipeline, costing over $400 million, was commissioned in 2002. Reaching Tasmania near Low Head, the pipeline has two 'arms', one delivering gas to Hobart and the other to Port Latta in the North West.

The pipeline and associated assets are managed and operated by Tas Gas Networks on behalf of the asset owner Tasmanian Gas Pipeline Pty. Ltd.

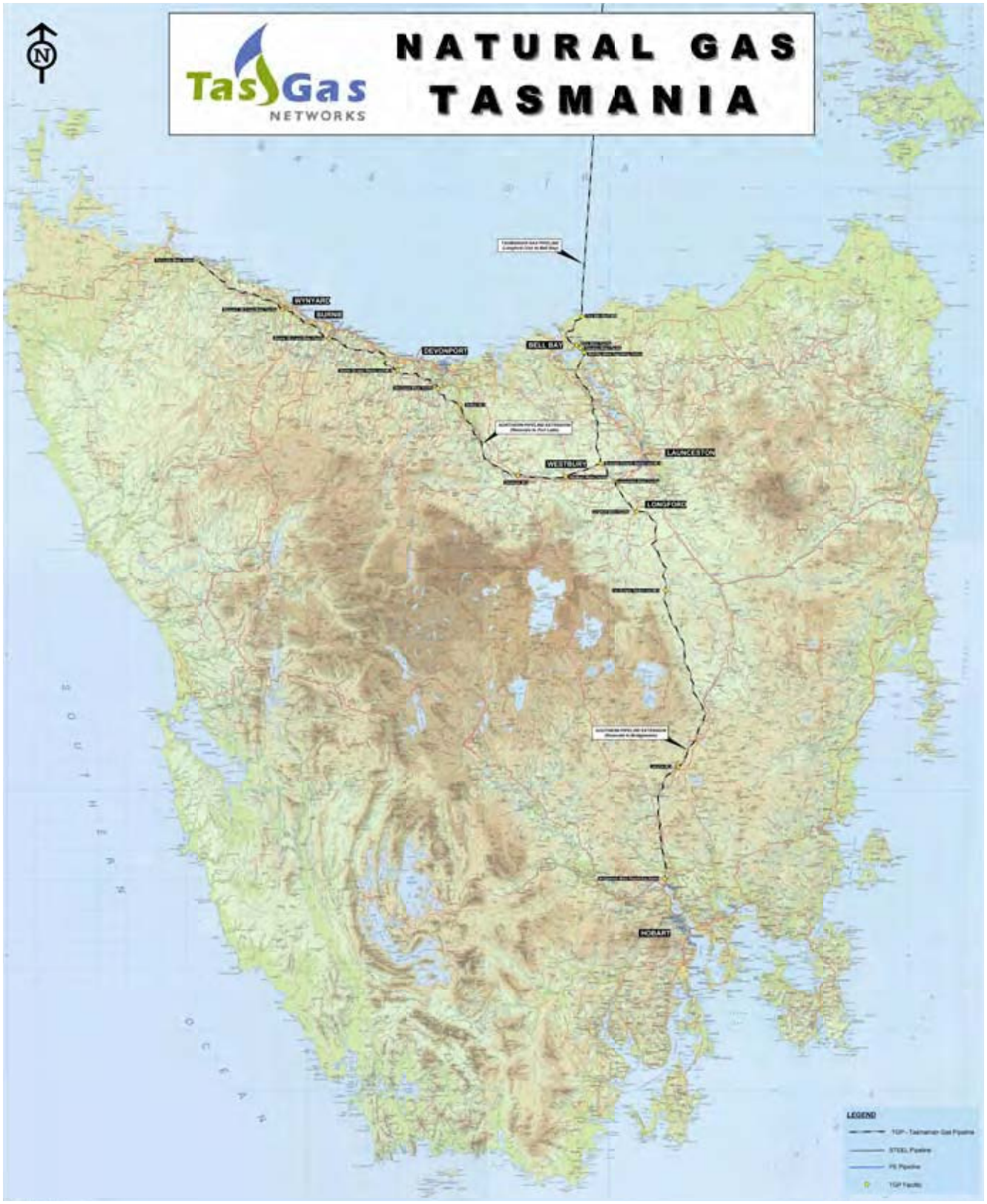
Excluding power generation, the total amount of natural gas delivered to Tasmanian customers is the equivalent of 520.2 GWh of electricity. Capacity is not currently fully utilised, with significant ability to increase throughput without additional major capital expenditure. The current capacity is rated at 100Tj per day.

The gas fired Tamar Valley Power Station at Bell Bay, commissioned in October 2009, has an output capacity of 390 MW. The power station, with the Grange Resources iron ore pellet producing plant at Port Latta and Rio Tinto Aluminium are the major gas consumers in the state.

Gas-fired generation, by virtue of lower greenhouse gas emissions intensity compared to coal, is expected to increase significantly in the National Electricity Market following the introduction of a price on carbon emissions.

FACTS AND FIGURES

- Commissioned in 2002 and it is the only supply pipeline of natural gas to Tasmania.
- Sub-sea and onshore gas pipeline system that transports predominately Gippsland Basin gas from Longford to Tasmania.
- Current capacity of 100Tj per day.
- 734 km in length.
- Supplies Tamar Valley Power Stations; ABM Iron Ore processing facility, Comalco Aluminium Smelter and the Tas Gas Distribution Networks.
- Supplies Tas Gas Networks facilities in: Bell Bay & George Town; Launceston; Longford (Tas); Westbury; Burnie; Hobart; Wynyard and Devonport.


NATURAL GAS
TASMANIA
TasGas
NETWORKS
WYNYARD
BURNIE
DEVONPORT
BELL BAY
LAUNCESTON
WESTBURY
LONGFORD
HOBART
LEGEND

WATER

Tasmania is endowed with generous water resources.

The water sector in Tasmania has recently undergone wide-ranging structural regulatory reforms. This includes the establishment of three new local government-owned regional water and sewerage corporations and a common services corporation (Southern Water, Ben Lomond Water, Cradle Mountain Water and OnStream) and the establishment of the Tasmanian Irrigation Development Board (TIDB) to develop a series of major water infrastructure projects in Tasmania.

The three regional corporations supply around 80% of Tasmania with fully treated water through a number of local councils. In 2007-08, such supplies accounted for around 100 GL.

The TIDB is responsible for progressing major irrigation development projects from the feasibility assessment stage to the construction and operational stages following the estimated increase in agricultural commodity demand.

Agriculture is the largest consumer of water, accounting for approximately 60% of all water consumed, followed by households (16.0%), and manufacturing (11%).

Water used for electricity generation is regarded as 'non-consumptive' as water is usually not lost from the catchment.

Hydro Tasmania holds a special water licence that entitles it to all surface water in the declared Hydro-Electric Districts.

Stored water is managed to meet the needs of a range of users, including irrigation, recreation, electricity generation, downstream communities, thermoelectric plants, industries and in-stream users such as fisheries and wildlife habitats.

The majority of water for irrigation is sourced from unregulated watercourses under water licences. Other irrigation water is supplied via regulated irrigation schemes.

The Water Management Act 1999 (WMA) creates the statutory basis for the management and use of water in Tasmania. Under the WMA, water licences are issued for the extraction of water from surface water sources.

Water is allocated according to different levels of 'surety' – which reflect the priority to extract water at times of low flow or water availability.

ROADS

Tasmania has a road network covering approximately 24,000km. It includes:

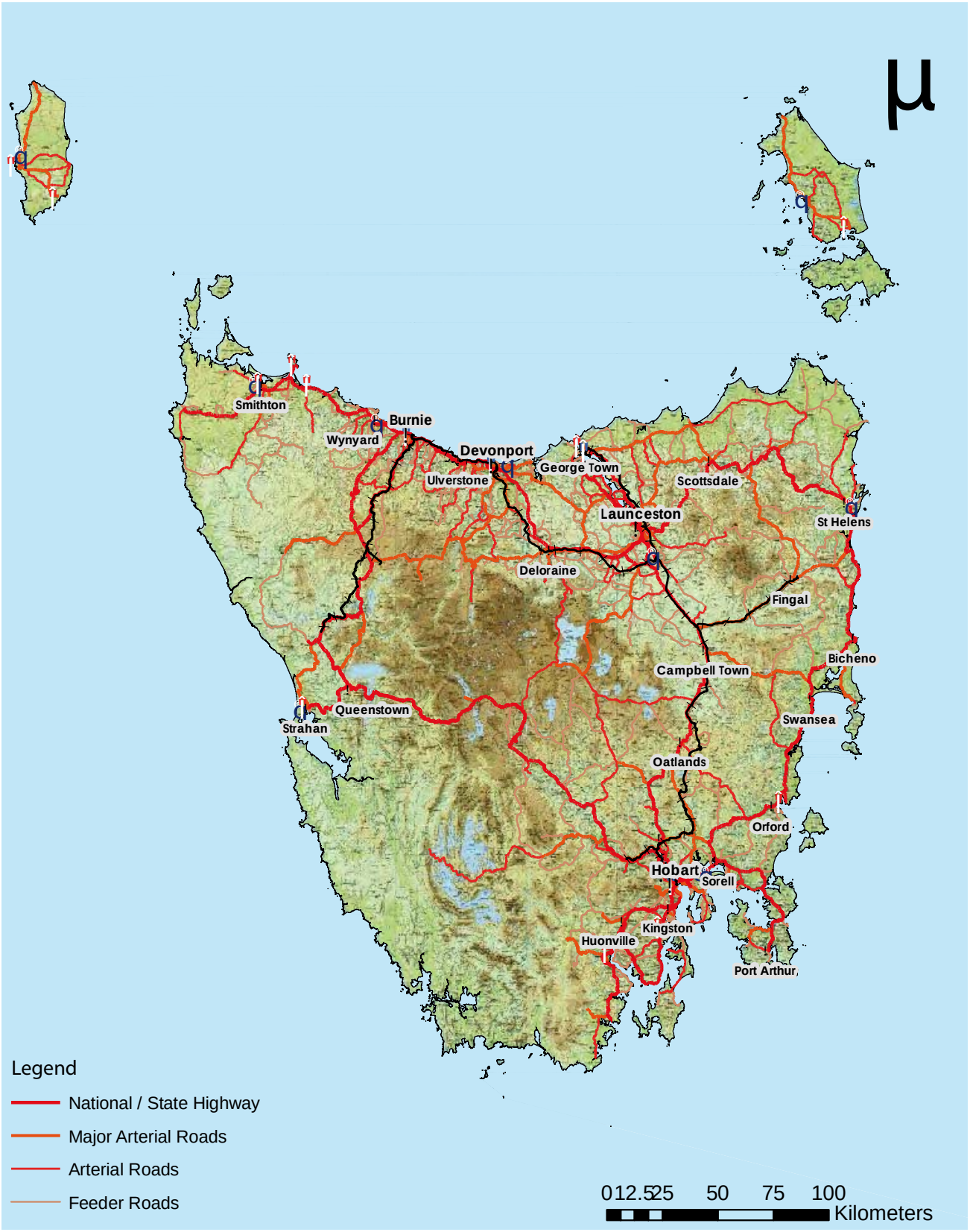
- major highways, connecting cities and ports.
- urban connectors - linking suburbs with commercial areas;
- residential streets; and
- forestry roads within individual coupes.

The Tasmanian Government owned State Road network, including the National Network and major regional roads, carries the most intensive transport task. The National Network covers Tasmania's major interregional freight and passenger routes, linking major urban centres (Hobart, Launceston Burnie-Devonport) and major ports and airports. Both the Australian and Tasmanian Government are investing over $312 million between 2008-2009 and 2013-2014 on new road projects and road maintenance programs.

Tasmania has well maintained road assets with 97.3 per cent of state roads are considered to be a smooth ride under the International Roughness Index Guide. Vehicles up to the size of tri-axle semi trailers have general access to the entire road network. Roads are assessed as suitable for High Productivity Vehicles (HPV) and Higher Mass Limit Vehicles (HMLV). The approved HPV/HMLV networks allow movement of vehicles up to the size of B-doubles along most of Tasmania's key freight routes.

Road is the dominant mode for freight and passengers.

TASMANIA KEY INFRASTRUCTURE - ROADS



RAIL

The Tasmanian Government has recently taken ownership of rail operations in Tasmania through formation of the Tasmanian Railway Pty Ltd. The Tasmanian Railway Pty Ltd (Tas Rail) is both the owner and operator of the Tasmanian rail network.

Tasmania's rail network is freight only. It is an essential transport mode for the movement of bulk goods, including mineral products, and provides an alternative transport mode to road in a contestable freight market. Rail in Tasmania connects major ports, cities and processing industries. There are currently six operational lines:

- South line, 199km, running from the Hobart (Macquarie Point terminal) to Western Junction.
- Derwent Valley line, 14km, running from Bridgewater to Boyer.
- Fingal line, 54km, running from Conara Junction to Fingal.
- Western line, 179 km, running from East Tamar Junction to Burnie.
- Melba line (also known as Emu Bay line), 130km, running from Burnie to Melba Flats.
- Bell Bay line, running between East Tamar Junction and Bell Bay.

The Australian Government is investing $188 million in Tasmania's rail infrastructure to improve capacity and upgrade key lines (2008-2009 to 2013-2014). The Tasmanian Government is funding a new $79 million modern road and rail hub at Brighton to service southern Tasmania. The Brighton Transport Hub will address major deficiencies associated with the existing intermodal facility at Hobart port and improve rail turnaround times between the southern region and northern ports.

PORTS

Tasmania has four major ports at Bell Bay, Devonport, Burnie and Hobart. Freight movements are focused on the three northern ports (Bell Bay, Devonport and Burnie), all of which have regular freight shipping services to the Port of Melbourne.

Tasmania's four major ports are owned by the Tasmanian Ports Corporation Pty Ltd (Tasports), a government business enterprise. In 2008-2009, Bell Bay was Tasmania's major port in terms of tonnage, moving 4.75 million tonnes. Burnie is Tasmania's main container port.

AIRPORTS

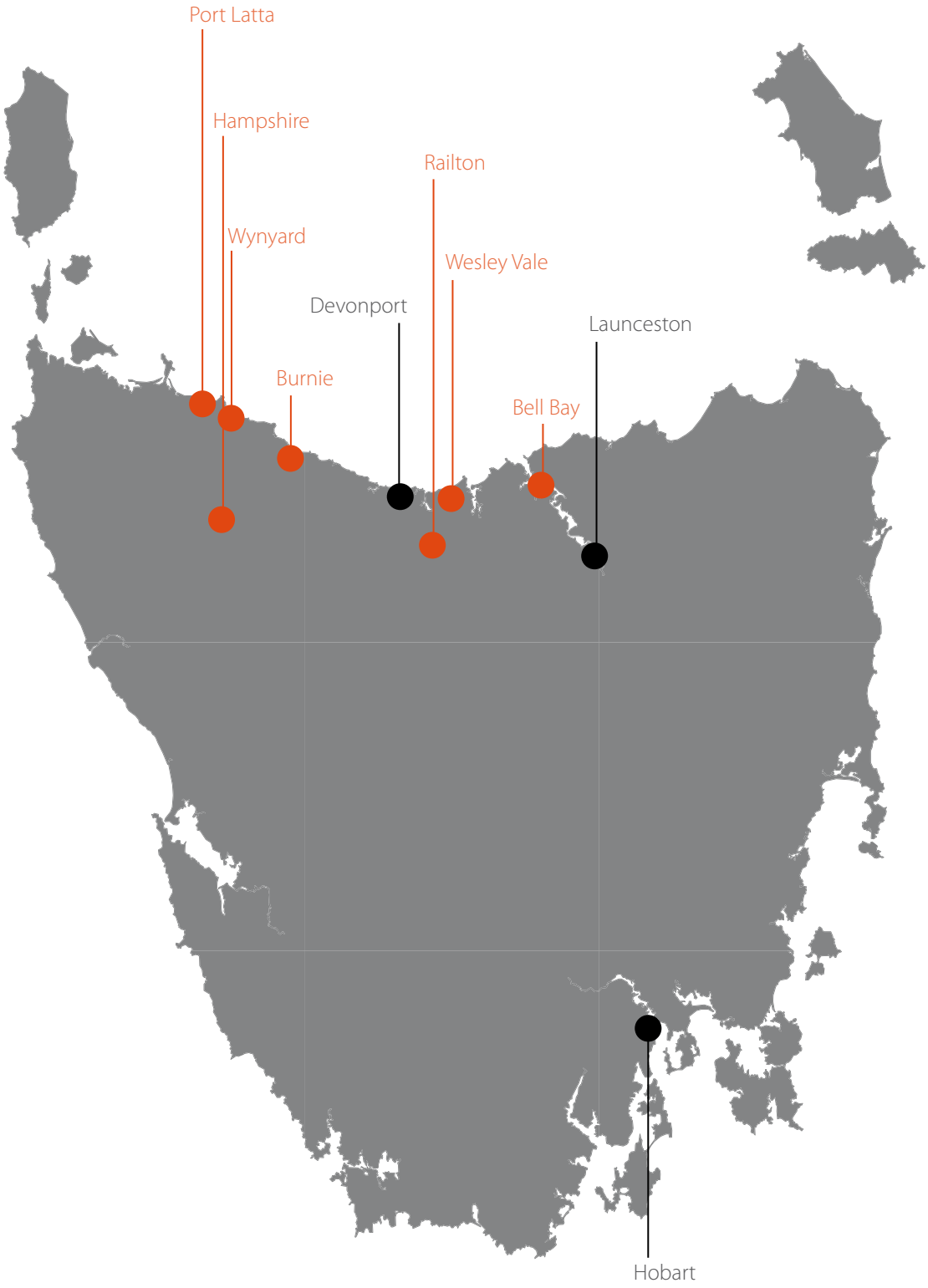
As Tasmania is an island state, it is more reliant on air transport than other Australian states where alternative modes for interstate passenger and freight transport exist. Over 88 percent of Tasmanian passenger arrivals and departures are by air. Around 1 percent of Tasmania's freight by mass is carried by air; it is a critical mode for time sensitive products.

Tasmania currently has a high standard of interstate air services, with service levels at a record high. The introduction of low-cost airlines has been a significant contributing factor in increased services and the decreased cost of interstate air transport.

Tasmania has an ample supply of airport infrastructure, with four major airports at Burnie, Devonport, Launceston and Hobart, and a number of minor airports. Hobart is the major passenger airport, and has experienced significant growth over the past five years.

TASMANIA KEY INFRASTRUCTURE - RAIL, PORTS AND AIRPORTS

LOCATION OF MAJOR INDUSTRIAL SITES



INDUSTRIAL SITES

Eight sites have been identified as having the capability of supporting new industrial development based on:

1. Proximity to resources:
2. Availability of major energy sources and services:
3. Proximity to efficient transport infrastructure to enable the distribution and receipt of products in a timely and cost effective manner:
4. Proximity to skilled labour, components, suppliers and related activities.

These sites are:

North West Industrial Area (Port Latta)

Bell Bay precinct

Bell Bay power station site

Wesley Vale paper mill site

Burnie paper mill site

Railton precinct

Hampshire precinct

Wynyard (Stennings Road) precinct

Each site has been represented by a Factsheet that outlines what is considered to be the main elements for the requirements for an industrial activity. These elements are described in a seemingly lower level of detail as the information required can be both complex and difficult to evaluate or in some cases the detail not being available.

Due to the variation between the sites themselves and the complex nature of the services and infrastructure available (or potentially available) at each, the information provided in this document is deliberately at a high level. Furthermore, some elements such as land valuation and potential environmental constraints have not been considered, as these can vary significantly with both time and the specifics of any given industrial activity.

The information contained in this document is considered sufficient only to provide a prospective proponent with a starting point for more detailed examination of a particular site and/or its potential for a particular use.

In addition to the sites listed, there may be other opportunities resulting from current operating site closures and/or changes. There may also be an opportunity for co-location with already established industrial operations. For example, companies requiring smaller site footprints as a result of technological efficiencies and changes in their operations generally.

NORTH WEST INDUSTRIAL AREA (PORT LATTA)

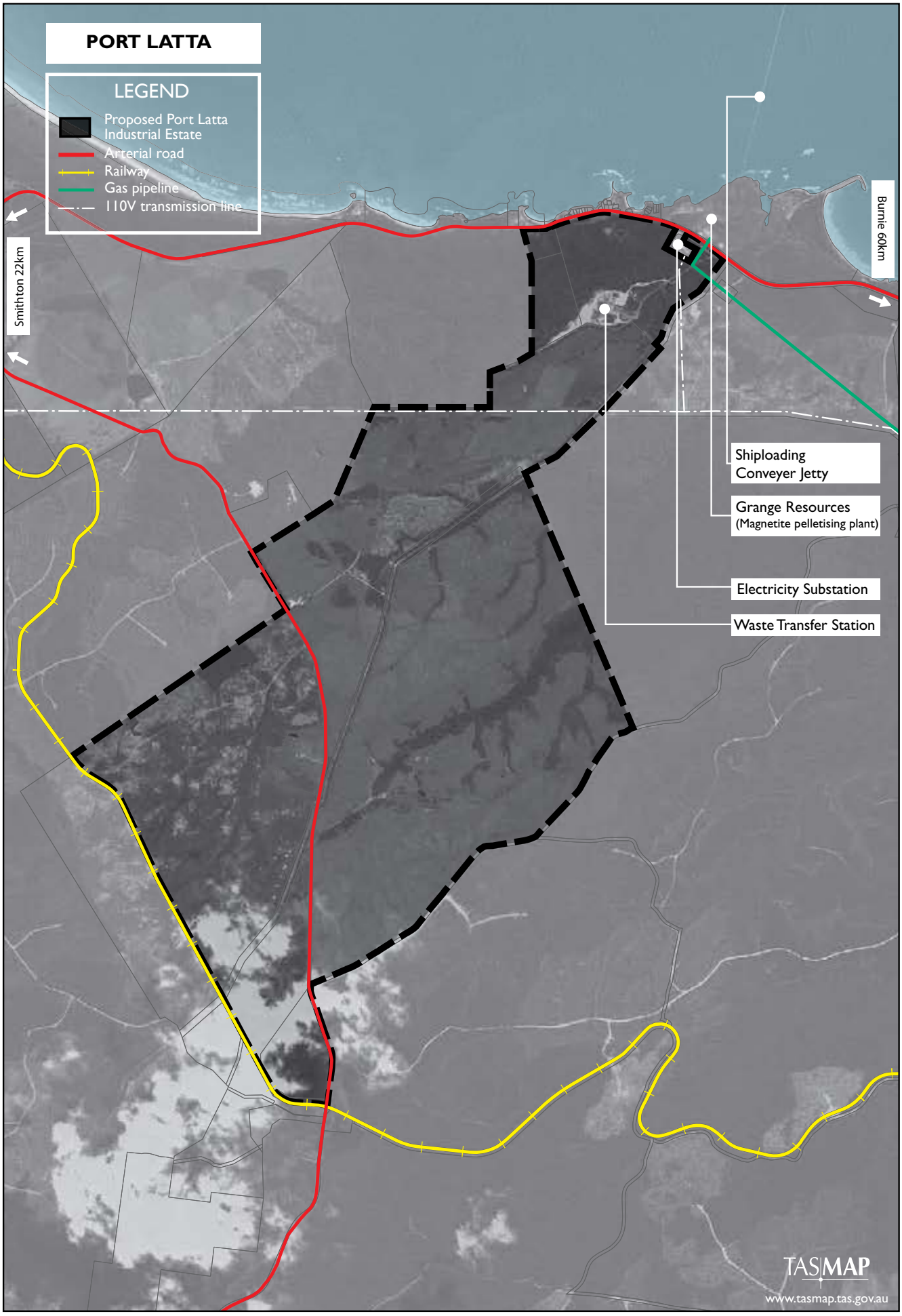
North West Industrial Area (Port Latta)

INDUSTRIAL SITE FACT SHEET

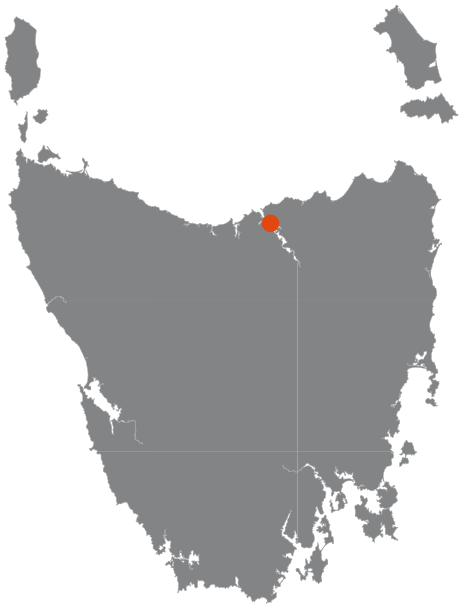
DESCRIPTION	This region is best known for its proximity adjacent to the Port Latta iron ore pellet plant. In 2002 the Tasmanian government released a plan for this area for the provision of a broad acre site allowing planning flexibility with access to energy and infrastructure, raw materials and a stable workforce.
LOCATION	30 Km east of Smithton, within the Circular Head municipal area, 60 Km west of Burnie by good road system.
OWNERSHIP	Combination of Crown owned land with a mix of forestry and parks, and privately owned land of general farmland.
NEIGHBOURS	Circular Head Council, the Crown and privately owned land.
SITE SIZE	1000 ha area reserved for industrial use without designated sites.
SITE ZONING	Grazing pastoral-not irrigated comprises the bulk of the land, with forestry and utility as required for Council use, included in the industrial reserve overlay.

SERVICES AND INFRASTRUCTURE

ROAD	High productivity vehicle route passes the site from Smithton to Burnie through to Bell Bay and to the South
RAIL	Non operative rail line from the site to Burnie
AIRPORT	40 Km to Burnie airport (at Wynyard)
WHARF	60 Km by road to Burnie port
GAS	High pressure gas transmission off-take at the site.
POWER	The site is adjacent to the 110 kV Port Latta substation, with two 22.5 MVA 110/22kV transformers. There is an existing possibility for constraints on the 110 kV Port Latta-Burnie and Port Latta- Smithton lines (both have 47 MVA rating @ 200 C), particularly at times of high wind generation at Woolnorth and/or high temperatures.)
LABOUR FORCE	Skilled workforce and services from Smithton (8 000) to Burnie region (30 000)
COMMUNICATION	Optical fibre at Smithton
WATER	Possibly available from the Arthur River requiring extensive capital investment and environmental approvals
SEWERAGE	No connection and no system in place
BUILDINGS	Nil
HERITAGE	Heritage, flora and fauna studies have been through an initial assessment but will require further investigation prior to development approval
ENVIRONMENTAL	Air quality and noise issues not likely to be a problem
COMMENTS	While the land has been considered a strategic development opportunity, the land would need to be rezoned. The total area consists of several ownerships including government and private land.


PORT LATTA
LEGEND
Proposed Port Latta Industrial Estate
Arterial road
Railway
Gas pipeline
110V transmission line
Smithton 22km
Burnie 60km
Shiploading Conveyer Jetty
Grange Resources
(Magnetite pelletising plant)
Electricity Substation
Waste Transfer Station
TASMAP
www.tasmap.tas.gov.au

BELL BAY PRECINCT



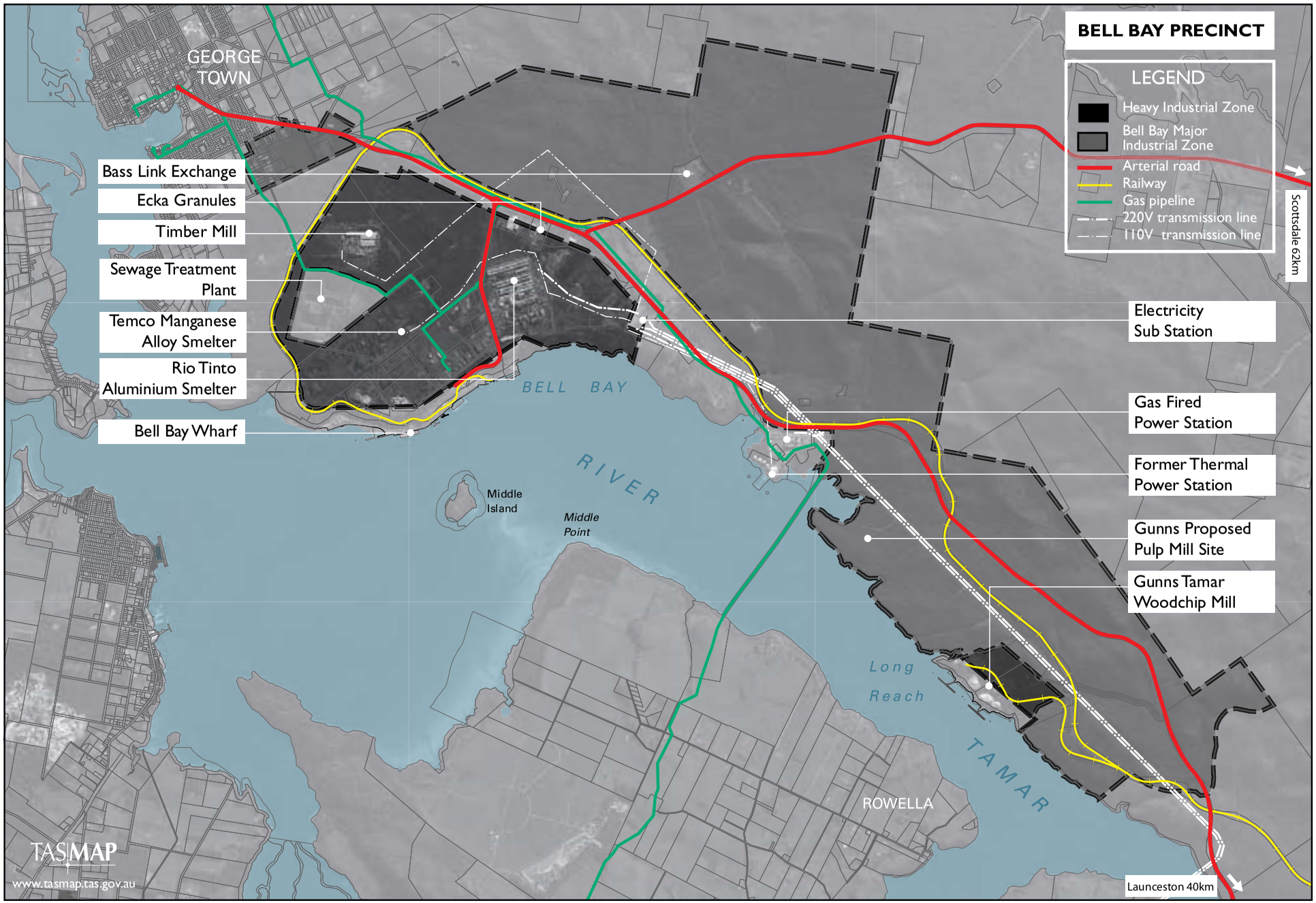
Bell Bay Precint

INDUSTRIAL SITE FACT SHEET

DESCRIPTION	There are industrial site opportunities within this precinct that is currently utilised by several of Tasmania's larger heavy industrial operations. The area is also the home of Tasmania's second largest port with a supporting railhead providing connectivity with the remainder of the state. The area is well provided with infrastructure and services
LOCATION	Adjacent to the township of George Town. There are no specific titles of land available but with the area being the site of significant manufacturing industries including Comalco Aluminium, Temco and several others, the area has an opportunity for further development for industrial use
OWNERSHIP	Private, corporate multiple owners
NEIGHBOURS	Rio Tinto Aluminium, TEMCO Ferromanganese, Ecka Granules, Gunns sawmill, TasPorts, Marstel (oil companies)
SITE SIZE	No designated sites available, infill and expansion potential
SITE ZONING	Generally industrial, with range heavy industrial to rural

SERVICES AND INFRASTRUCTURE

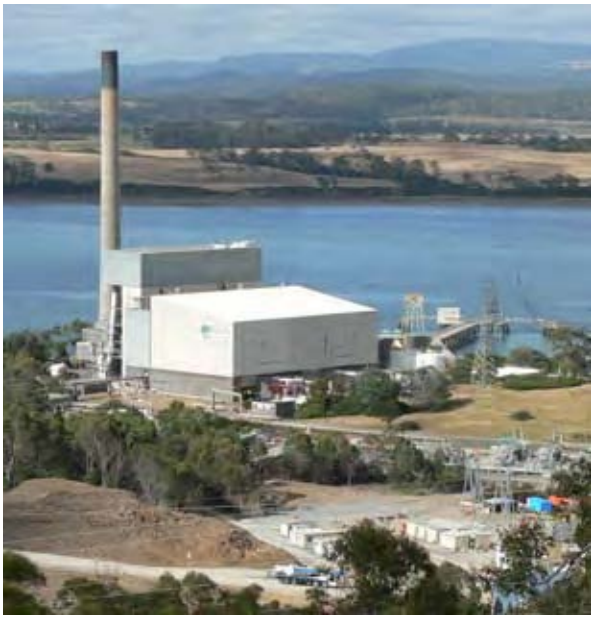
ROAD	Adjacent to Category 1 road linking Bell Bay to Launceston
RAIL	Within 4 km of Bell Bay railhead
AIRPORT	Launceston 60km
WHARF	With 4 km of the Bell Bay port
GAS	High pressure gas transmission off-take at the site
POWER	Adjacent to a 110kV substation, strong 110 kV double circuit connections. This site is well suited for large electrical loads.
LABOUR FORCE	George Town population 5000, Launceston 60 km east has a population of 100 000
COMMUNICATIONS	Sufficient services available
WATER	Available within the precinct
SEWERAGE	Available within the parts of the precinct
BUILDINGS	Generally vacant land
HERITAGE	No listed heritage issues known
ENVIRONMENTAL	There are regulatory controls in place, site specific investiagtions need to be made.
COMMENTS	The precinct is considered within the Bell Bay major Industrial Zone within which significant industries such as Rio Tinto Comalco Aluminium, TEMCO ferromanganese, sawmills, woodchip mills operate, attracted by excellent port, rail, energy and other services


BELL BAY PRECINCT
LEGEND
Heavy Industrial Zone
Bell Bay Major Industrial Zone
Arterial road
Railway
Gas pipeline
220V transmission line
110V transmission line
GEORGE TOWN
Bass Link Exchange
Ecka Granules
Timber Mill
Sewage Treatment Plant
Temco Manganese Alloy Smelter
Rio Tinto Aluminium Smelter
Bell Bay Wharf
Electricity Sub Station
Gas Fired Power Station
Former Thermal Power Station
Gunns Proposed Pulp Mill Site
Gunns Tamar Woodchip Mill
Scottsdale 62km
Launceston 40km
BELL BAY
RIVER
Middle Island
Middle Point
Long Reach
TAMAR
ROWELLA
TASMAP
www.tasmap.tas.gov.au

BELL BAY POWER STATION SITE

INDUSTRIAL SITE FACT SHEET

DESCRIPTION	The thermal power station was decommissioned in August 2009 and all of the generating equipment and associated infrastructure are still in place. The equipment is currently offered for sale in preparation for the sale of the land and wharf. The sites proximity to all energy and infrastructure services provides an opportunity for its reuse for future industrial development.
LOCATION	50 Km north of Launceston, within the municipality of George Town, on the banks of the Tamar River, 7 km from George Town and Bell bay precinct.
OWNERSHIP	Bell Bay Power Pty Ltd, a wholly owned subsidiary of Hydro Tasmania
NEIGHBOURS	Tamar Valley Power Station, George Town golf course, Rio Tinto, Gunns Long Reach
SITE SIZE	12.9 Ha
SITE ZONING	Currently zoned as Utility Services. Extractive industry, manufacturing and processing will be permitted under the draft George Town Planning Scheme

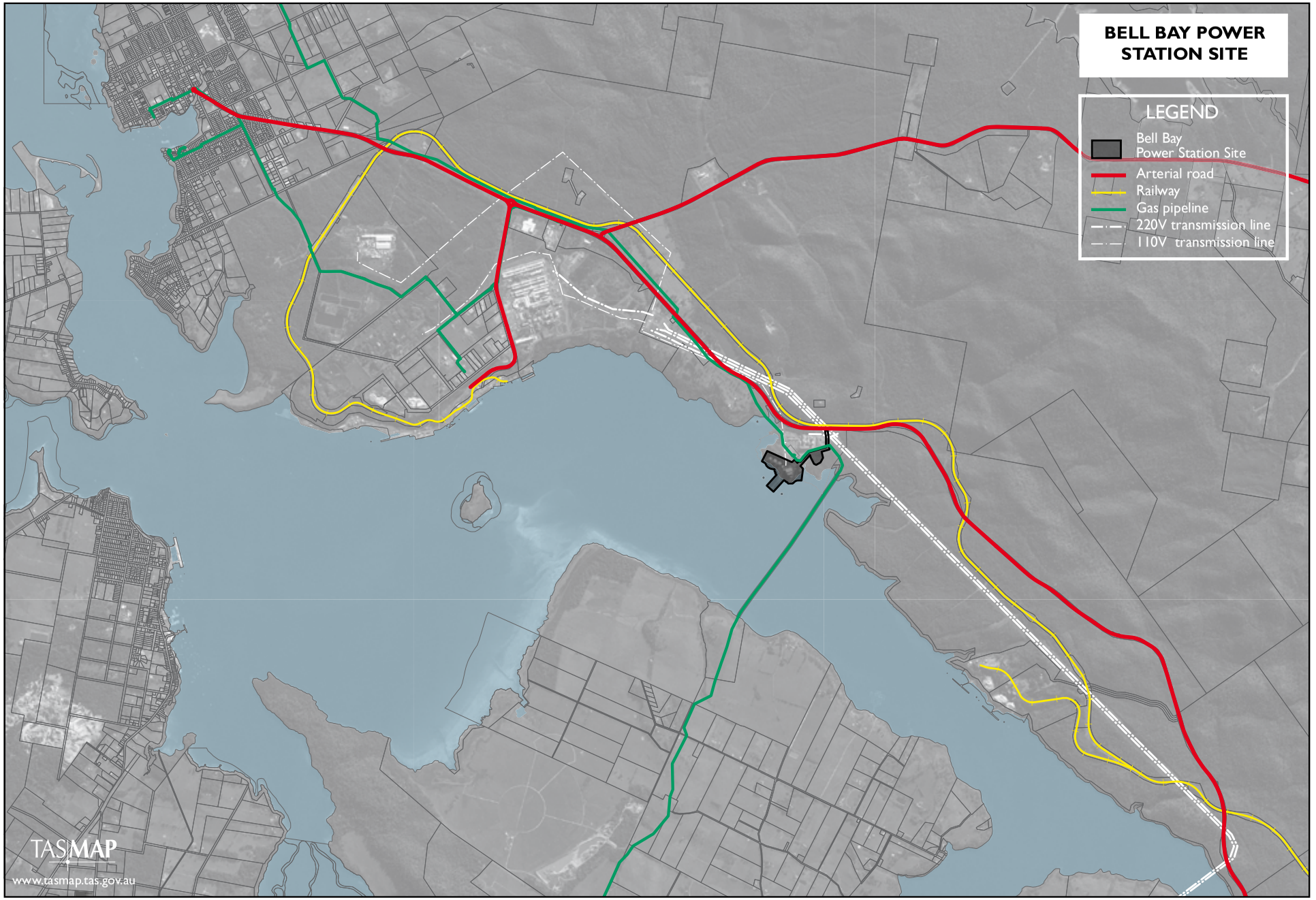


Bell Bay Power Station

SERVICES AND INFRASTRUCTURE

ROAD	Adjacent to a Category 1 road, the East Tamar Highway, from Launceston to Georgetown
RAIL	Launceston-Bell Bay rail link passes nearby without any current access, with Bell Bay railhead 8 km away.
AIRPORT	Launceston Airport approximately 60 km
WHARF	Substantial river depth at dolphin moorings capable of mooring large ships, connected to the foreshore with a pipeline jetty with limited loading, and 8 km from the Bell Bay port facilities.
GAS	The site is located adjacent to the main Tasmanian gas pressure reduction station enabling substantial gas connection capability
POWER	Adjacent to a 110kV substation, strong 110 kV double circuit connections. This site is well suited for large electrical loads.
LABOUR FORCE	Close to George Town and Bell Bay, population 5000, with labour and service facilities, and Launceston region population 100 000 with services.
COMMUNICATIONS	Serviced by fibre connection and copper cabling
WATER	Mains water with 2 water tanks on site
SEWERAGE	On site system
BUILDINGS	3 X 15 000 tonne fuel tanks, wharf and moorings, significant boiler and generator building
HERITAGE	No known listed issues
ENVIRONMENTAL	Asbestos from building and lagging use, hydro carbon from oil not regarded as significant on site, and the Tamar Valley Airshed conditions.

COMMENTS	The site is comprised of 2 x 120MW gas fired generators, decommissioned August 2009. Hydro plans to sell the generating equipment and demolish the site to foundations.


BELL BAY POWER STATION SITE
LEGEND
Bell Bay Power Station Site
Arterial road
Railway
Gas pipeline
220V transmission line
110V transmission line
TASMAP
www.tasmap.tas.gov.au

WESLEY VALE PAPER MILL SITE

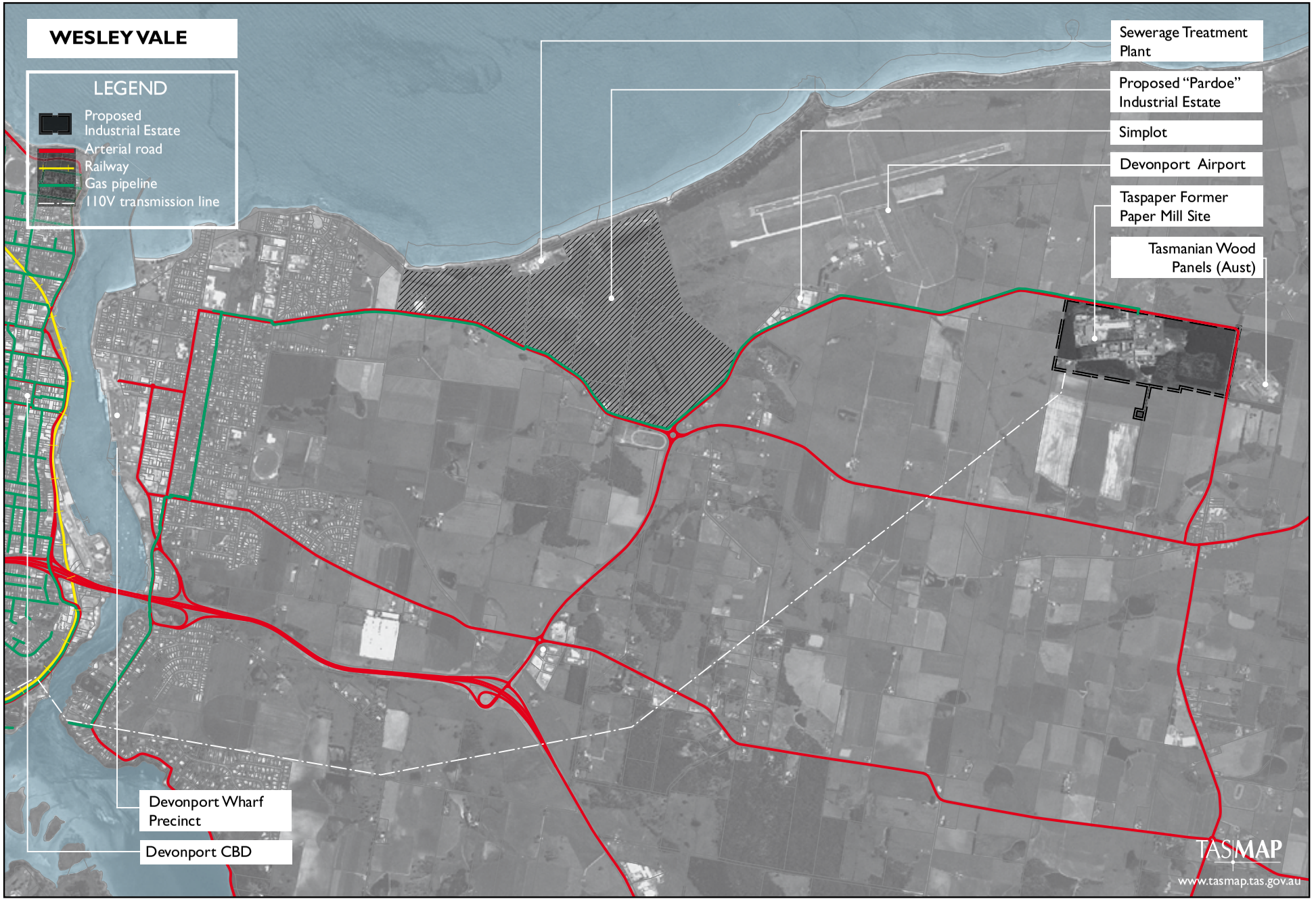
Wesley Vale Precinct

INDUSTRIAL SITE FACT SHEET

DESCRIPTION	Paper making ceased at the site in March 2010. This is a large brownfields site with appropriate zoning ready for industrial use once the area has been remediated. It has good access to infrastructure and services and a stable workforce.
LOCATION	226 Mill Road, Wesley Vale, 12 Km to Devonport and 11 Km to Latrobe within the Latrobe municipality
OWNERSHIP	Tas paper Pty Ltd, a subsidiary of PaperlinX Ltd
NEIGHBOURS	Surrounded by several titles of irrigated agricultural land and one other manufacturing site.
SITE SIZE	Approximately 56 Hectares
SITE ZONING	General Industry in the Municipal boundary of Latrobe Council

SERVICES AND INFRASTRUCTURE

ROAD	Access to Bass Highway via Mill Vale Road, Pardoe Road and Brooke Street into Devonport. 6 km to Category 1 Bass Highway to Devonport and Burnie.
RAIL	The Tasrail Western Line links Hobart, Launceston, Bell Bay and Burnie. Burnie rail head 56 Km, Devonport 10 km, via good roads.
AIRPORT	Devonport airport situated 3 Km to the North West
WHARF	Approximately 56 Km the Port of Burnie, 12 km to port of Devonport
GAS	Distribution gas line follows the access road onto the site.
POWER	Adjacent Wesley vale 110kV substation with two 25 MVA transformers. 110kV double circuit connection to the Sheffield substation.
LABOUR FORCE	Approximately 12 Km to the Devonport region with a population of approximately 22 000, with an additional 8 000 in the Latrobe region, 11 Km away.
COMMUNICATIONS	Sufficient services available
WATER	Currently available from the adjacent Mersey River via pipeline (currently 3 ML/day)
SEWERAGE	Whole of site reticulated system.
BUILDINGS	There are numerous of varying size and quality.
HERITAGE	No known listed heritage issues.
ENVIRONMENTAL	The site is currently undergoing environmental rehabilitation under EPA regulations
COMMENTS	The papermaking operations ceased in March 2010. The site is being rehabilitated to remediate the contaminated areas resulting from the manufacturing process. The Wesley Vale Pulp and Paper Industry Act covered issues a ssociated with the supply of water, easements, stormwater and others that may be altered with the closure of the plant.


WESLEY VALE
LEGEND
Proposed Industrial Estate
Arterial road
Railway
Gas pipeline
110V transmission line
Sewerage Treatment Plant
Proposed "Pardoe" Industrial Estate
Simplot
Devonport Airport
Taspaper Former Paper Mill Site
Tasmanian Wood Panels (Aust)
Devonport Wharf Precinct
Devonport CBD
TASMAP
www.tasmap.tas.gov.au

BURNIE PAPER MILL SITE

Burnie Paper Mill Site. Image courtesy PaperlinX

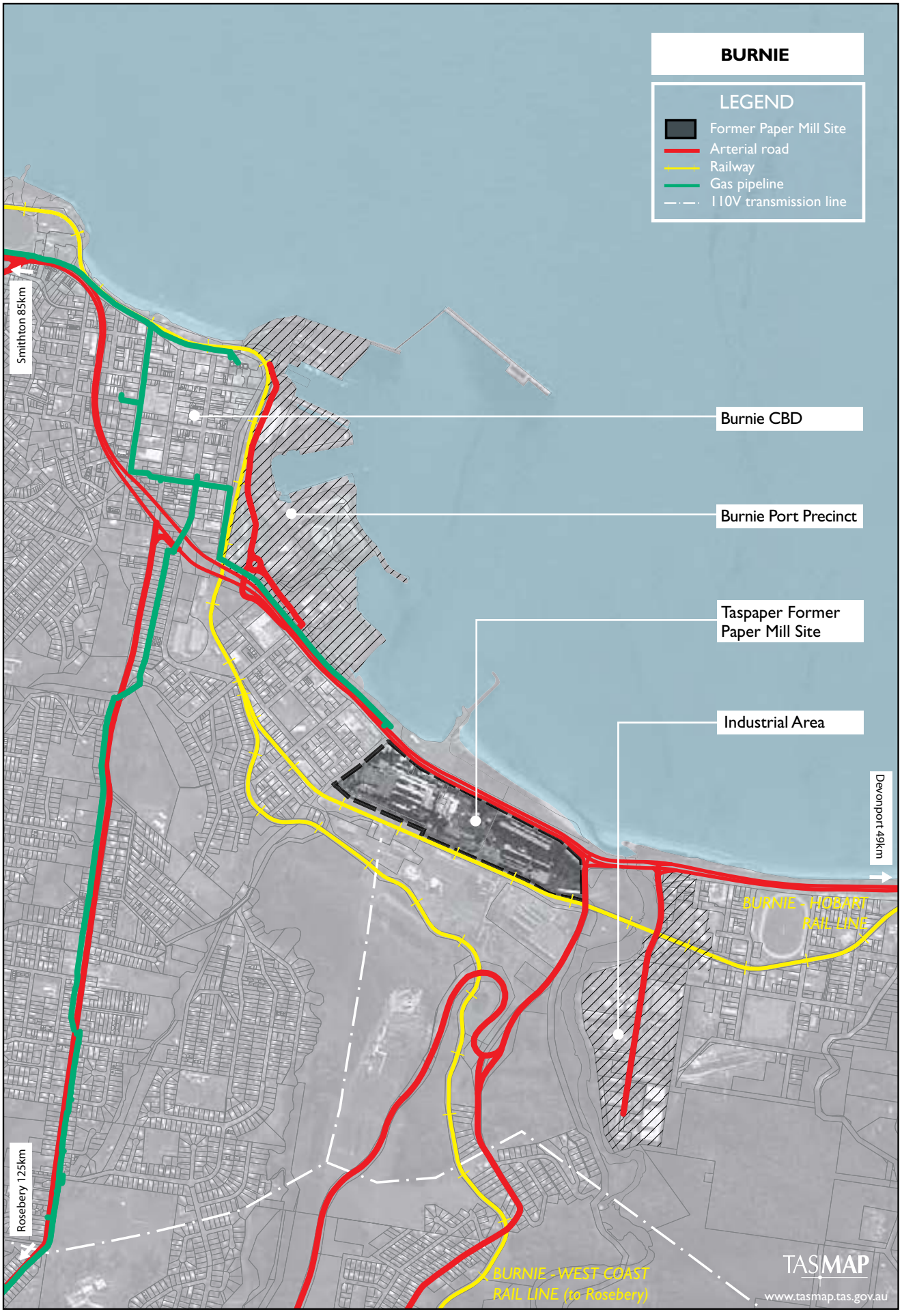
Burnie Paper Mill Site. Image courtesy DPIPWE

INDUSTRIAL SITE FACT SHEET

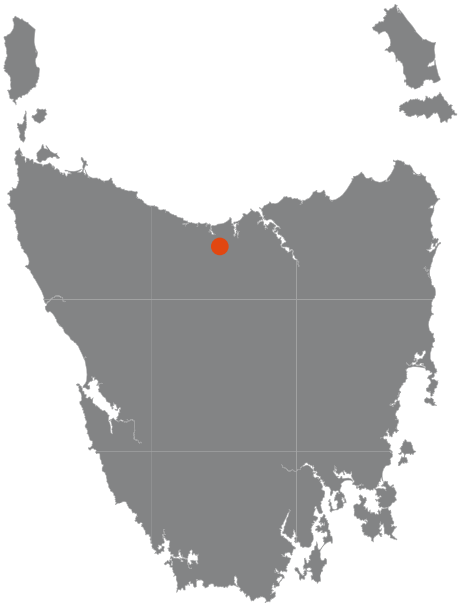
DESCRIPTION	Paper making operations ceased in July 2010 providing a brownfields industrial site with significant infrastructure and services within the Burnie city precinct. The site is adjacent to Tasmanias largest port and has two rail systems passing through and near the area as well as access to the Burnie railhead.
LOCATION CBD	72 Marine Terrace South Burnie, 1.6 kms SE of Burnie fronting the Bass Highway, 148 kms west of Launceston, within the Burnie City Council municipal area.
LABOUR FORCE	Burnie population of approximately 20 000
OWNERSHIP	Tas paper PTY LTD, a subsidiary of PaperlinX Ltd
NEIGHBOURS	The total land parcel is bounded by the Bass Highway and Bass Strait to the north, Massey Greene Drive to the east, Gunns timber mill industrial land to the south, and Reeve Street and further commercial operations to the west
SITE SIZE	Approximately 40 Hectares of which possibly 36 hectares available for use
SITE ZONING	Industrial

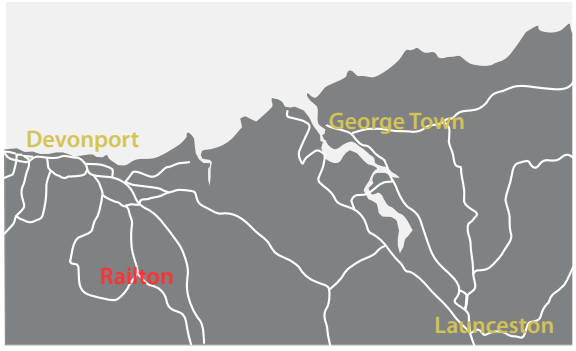
SERVICES AND INFRASTRUCTURE

ROAD	Limited direct access via Bass Highway, access via Reeve Street, Devon Street and Massey Greene Drive
RAIL	Tasrail Western Line passes through the site, linking Hobart, Launceston and Burnie. The Emu Bay rail line, connecting Burnie with the West Coast is at the Southern boundary of the site
AIRPORT	Burnie airport situated at Wynyard, 20 kms northwest of the site
WHARF	Approximately 2 kms to the Port of Burnie
GAS	Metropolitan gas main adjacent to the North West corner of the land, not connected
POWER	Burnie 110 kV substation 2.3 km away from the site. Possible to connect to the Burnie distribution system.
COMMUNICATIONS	Sufficient services available
WATER	Significant volume currently available from the adjacent Emu River
SEWERAGE	Reticulated system on site managed by Cradle Mountain Water
BUILDINGS	Numerous of varying size and quality. Availability on request.
HERITAGE	No listed heritage buildings but two of historical significance
ENVIRONMENTAL	The site is currently undergoing environmental rehabilitation under EPA regulations
COMMENTS	The papermaking operations ceased in July 2010. The site is being rehabilitated to remediate the contaminated areas resulting from the manufacturing process. There are 3 other title holders on the expanded site


BURNIE
LEGEND
Former Paper Mill Site
Arterial road
Railway
Gas pipeline
110V transmission line
Smithton 85km
Burnie CBD
Burnie Port Precinct
Taspaper Former Paper Mill Site
Industrial Area
Devonport 49km
BURNIE - HOBART RAIL LINE
BURNIE - WEST COAST RAIL LINE (to Rosebery)
Rosebery 125km
TASMAP
www.tasmap.tas.gov.au

RAILTON PRECINCT





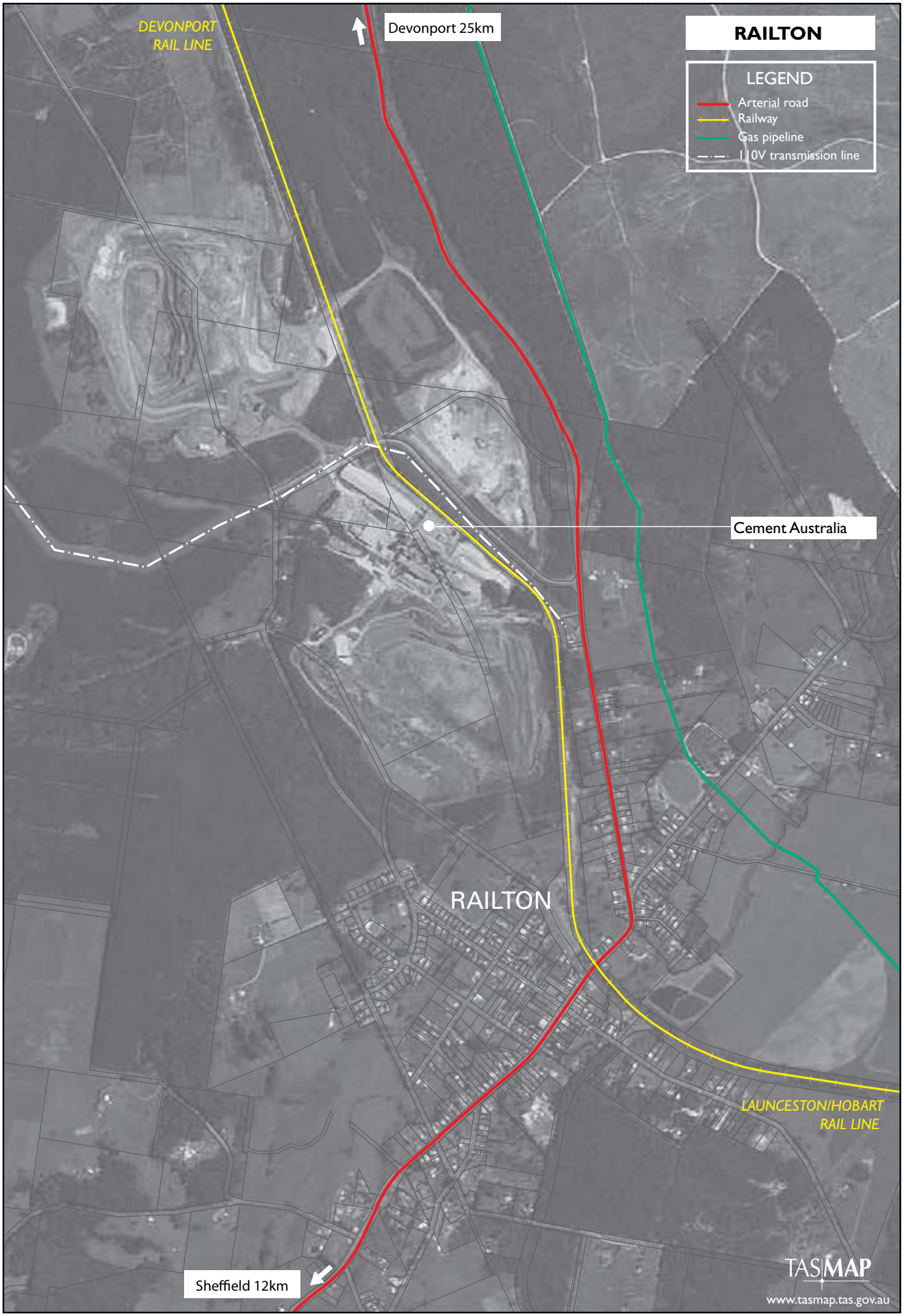
Railton precinct. Image courtesy DPIPWE

INDUSTRIAL SITE FACT SHEET

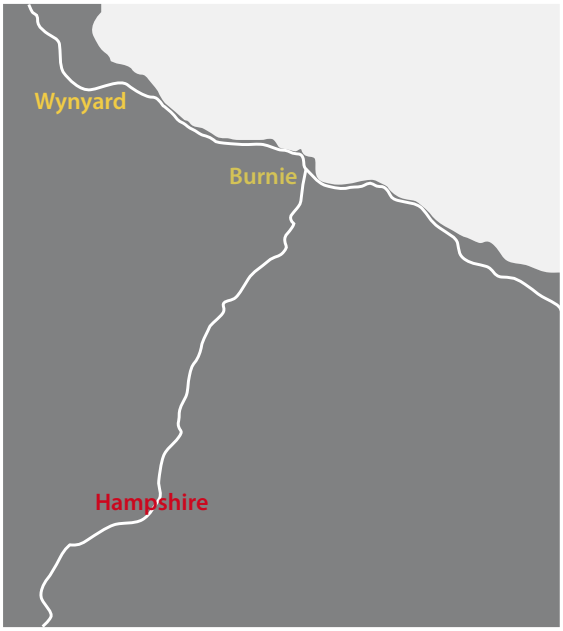
DESCRIPTION	While there are no designated areas for immediate sale or use, this precinct is considered suitable for industrial use due the location of one of the power transmission hubs, gas line access, forest reserves and rail access for coal from the Fingal mines and to the Burnie port. Rail also provides for a link to the west coast mineralisation.
LOCATION	There are no specific titles of land available but it is recognised as a most suitable site with the availability of infrastructure, and 15 Km to Latrobe and 29 Km to the City of Devonport. Located adjacent to Cement Australia works and quarry within the Kentish municipal area
OWNERSHIP	Various, but mainly Cement Australia, and state and private forest land
NEIGHBOURS	Cement Australia's Railton cement works and associated limestone mine and significant adjacent land holdings, Gunns forestry land and some smaller land holdings distant to the infrastructure and services.
SITE SIZE	Several parcels of land of various sizes owned by Cement Australia and Gunns
SITE ZONING	Manufacturing Factory and Forestry

SERVICES AND INFRASTRUCTURE

ROAD	Good access to main road to Latrobe and Devonpoprt
RAIL	Tasrail Western Line linking Hobart, Launceston and Burnie, passes near most potential sites with the Burnie and Devonport rail head access 70 Km and 25 km from the area respectively.
AIRPORT	Devonport airport situated approximately 30 kms from the area
GAS	Approximately 30 km to mail line at Burnie
POWER	Adjacent to the Railton 110 kV substation. Strong 110 kV double circuit connection to the Sheffield substation.50 MVA 110/22kV transformers.
LABOUR FORCE	Latrobe (3000) and Devonport (20 000) with services to industry
COMMUNICATIONS	Sufficient services available
WATER	Some volume may be available from local rivers or Cement Australia
SEWERAGE	Limited availability
BUILDINGS	Some parcels of land have houses and outbuildings
HERITAGE	No listed heritage issues known
WHARF	Approximately 23 kms to the Port of Burnie
ENVIRONMENTAL	There are no known environmental issues or restrictions
COMMENTS	Regarded as a potential site due to very good electricity, gas and rail access and availability adjacent to an industrial operation.


DEVONPORT
RAIL LINE
Devonport 25km
RAILTON
LEGEND
Arterial road
Railway
Gas pipeline
110V transmission line
Cement Australia
RAILTON
LAUNCESTON/HOBART
RAIL LINE
Sheffield 12km
TASMAP
www.tasmap.tas.gov.au

HAMPSHIRE PRECINCT

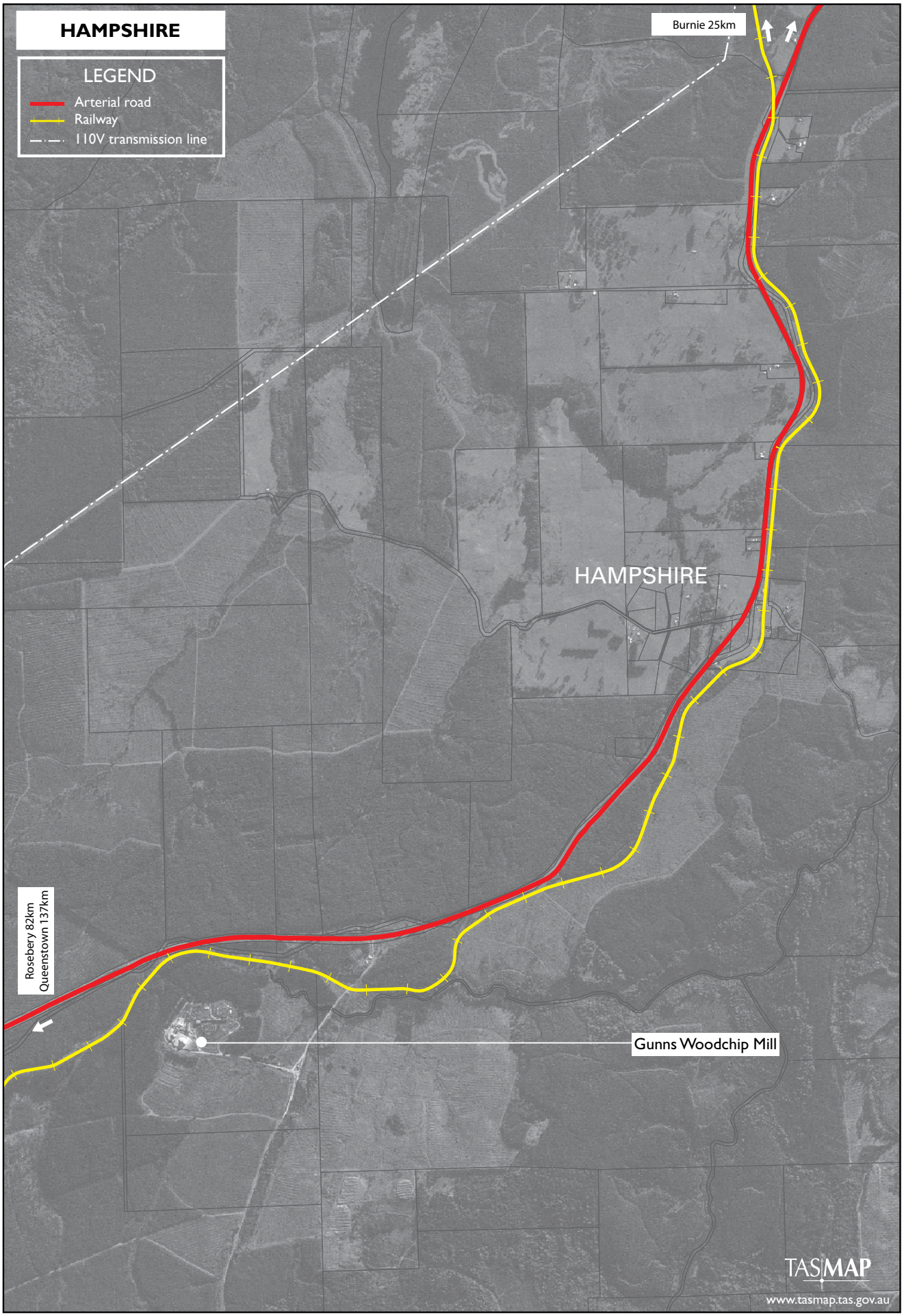


INDUSTRIAL SITE FACT SHEET

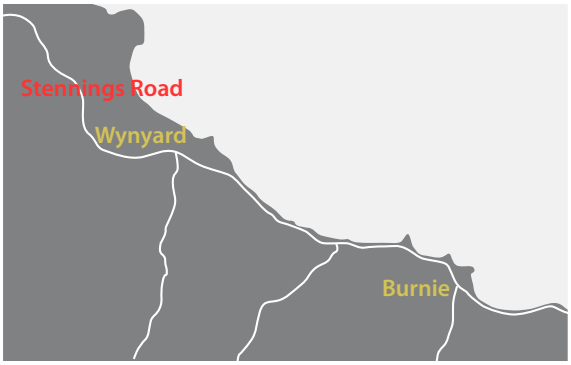
DESCRIPTION	This region is best known for the forest reserves and woodchip mill and a potentially considered site for a pulp mill. While there are no designated areas for sale or currently available, the precinct is considered to be attractive for development given its proximity to Burnie and infrastructure.
LOCATION	27 Km south of Burnie within the Burnie City municipal area
OWNERSHIP	Privately owned commercial plantation forest generally owned by Gunns Limited
NEIGHBOURS	Gunns Hampshire wood chip mill
SITE SIZE	25 Ha (with potential to be larger)
SITE ZONING	Rural Forestry. Current allowance for forestry related activity

SERVICES AND INFRASTRUCTURE

ROAD	Approximately 1 km to Category 1 road
RAIL	Not available on site but Emu Bay rail line approximately 5 km to West, and approximately 30 km to Burnie railhead via good roads
AIRPORT	Burnie Airport (at Wynyard) 42 km
WHARF	27 Km by road to Burnie wharf
GAS	No gas connection. Approximately 22 km by road from the high pressure gas transmission line located at Burnie
POWER	This area is adjacent to the 110 kV Burnie-Farrell power line. A 22 kV connection exists at Hampshire.
LABOUR FORCE	27 Km to Burnie of population of approximately 20 000 with services to heavy industry including mining
COMMUNICATIONS	Unknown
WATER	Possibly available from the Emu River catchment
SEWERAGE	No connection and no system in place
BUILDINGS	Nil
HERITAGE	No known issues but investigation recommended
ENVIRONMENTAL	Air quality and noise issues unlikely to be of concern
COMMENTS	No discrete parcel of land currently available but considered highly probable that land may be available.


HAMPSHIRE
LEGEND
Arterial road
Railway
110V transmission line
Burnie 25km
HAMPSHIRE
Rosebery 82km
Queenstown 137km
Gunns Woodchip Mill
TASMAP
www.tasmap.tas.gov.au

WYNYARD (STENNINGS ROAD) PRECINCT

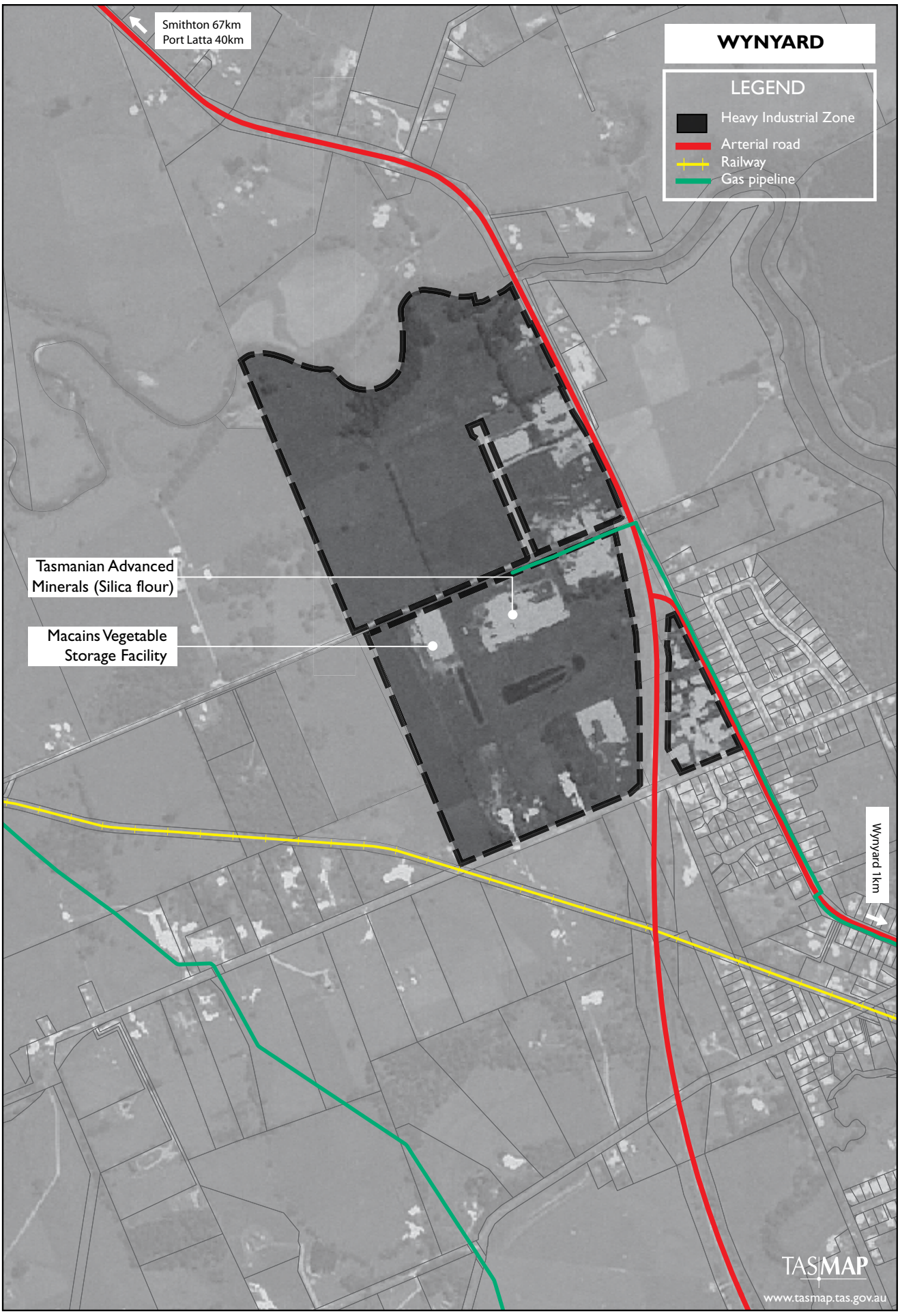


INDUSTRIAL SITE FACT SHEET

DESCRIPTION	Originally rural land this precinct is already home to a silica flour beneficiation plant, potato storage facility and other smaller industries offering good access to port, rail, power and gas infrastructure and a stable workforce. The area is provides scope for further industrial development.
LOCATION	Adjacent to the township of Wynyard, within the Waratah-Wynyard municipal area. There are no specific titles of land available but with the area being the site of the Tasmanian Advanced Minerals silica flour production plant and a potato storage shed, has encouraged the extension to this area for industrial use
OWNERSHIP	Private
NEIGHBOURS	Tasmanian Advanced Minerals silica plant, Macains potato storage, smaller commercial enterprises and rural land
SITE SIZE	Several parcels of land of various sizes owned by a local farmer are to be developed
SITE ZONING	Range from Manufacturing Factory through to Rural Residential

SERVICES AND INFRASTRUCTURE

ROAD	Good access to the Bass Highway, Category 1 road, 24 km west of Burnie
RAIL	West Coast line passes very close to the general area, 25 km to Burnie railhead.
AIRPORT	Burnie airport at Wynyard situated approximately 1 km from the area
WHARF	Approximately 24 kilometres to the Port of Burnie
GAS	No gas transmission off-take at the site, but high pressure transmission line close by
POWER	This site is 5.6 km away from the Port Latta-Burnie power line with some possible line constraints. The nearest 110 kV substation is 20 km at Burnie. Without significant substation/transmission line investment, this site is not suited to large load requirements.
COMMUNICATIONS	Sufficient services available
WATER	Site serviced with a good supply but not large volumes
SEWERAGE	Limited service available
BUILDINGS	Vacant land
HERITAGE	No known listed heritage issues
ENVIRONMENTAL	There are no known environmental issues or restrictions
COMMENTS	The site attracted the silica refining manufacturer sourcing raw material from the West Coast area, and potato storage shed for local producers. The site has good main road access, gas, population, power supplies and near access to port, airport and rail


WYNYARD
LEGEND
Heavy Industrial Zone
Arterial road
Railway
Gas pipeline
Smithton 67km
Port Latta 40km
Tasmanian Advanced Minerals (Silica flour)
Macains Vegetable Storage Facility
Wynyard 1km
TASMAP
www.tasmap.tas.gov.au

SITE SUITABILITY MATRIX

	North West Industrial Area (Port Latta) Precinct	**Bell Bay Precinct**	**Bell Bay Power Station Site**	**Wesley Vale Paper Mill Site**
DESCRIPTION	2000 Ha precinct reserved for industrial use by Circular Head Council	Heavy industrial zone and deep water port	Closed thermal power station site	Closed paper mill site
LAND AREA	No designated land sites	No designated sites with infill opportunities	12.9 Ha	56 Ha
LAND TENURE	Private and State owned, multiple owners	Private land, multiple owners	State owned	Single corporate owner
ZONING	Forestry, agricultural with reserved industrial overlay	Major, heavy, general industrial	Currently utility services	General Industry
LAND USE (Current)	Forestry, agricultural	Major industrial, utility services	Former power station and related infrastructure	Former paper mill and related infrastructure, vacant
TOPOGRAPHY: slope, orientation, elevation	Generally flat through developable area	Generally level sites	Generally level site	Generally level site
PROXIMITY TO MAJOR RESIDENTIAL POPULATION	Burnie: 55km Wynyard: 35km Smithton: 30km	Launceston: 55km George Town: 5km	Launceston: 50km George Town: 7km	Devonport: 12km Latrobe: 7km

PROXIMITY TO INFRASTRUCTURE

ELECTRICITY	100KV supply located adjacent to the site	220KV in the precinct	Adjacent to thermal power station	Transend power substation on site
GAS: Distance to pipeline	Adjacent (<1km)	Within the precinct	On site connection	On site connection
WATER: Access to nearest water supply	Dependant on quantity required but limited	Available but dependant on volumes required	On site connection	On site connection
SEWER	None	Available but dependant on capacity required	None	Site system
STORMWATER	None	Available but dependant on capacity required	None	Available
ROAD: Distance from Category 1 or 2 road	Adjacent to Ct 1 Road	Adjacent to Ct 1 Road	Adjacent to Ct 1 Road	Adjacent to Ct 2 Road, 6km to Cat 1 Road
RAIL: Distance to rail connection	Burnie Rail head: 60km	Bell Bay: <1km	Bell Bay: 8 km	Devonport: 12km Burnie: 56km
PORT: Distance to sea port	Burnie port: 60km	Burnie port: <1km	Dolphins, jetty on site for deep water berthing. Bell Bay 8km	Devonport: 10km
AIRPORT: Distance to airport	Wynyard: 40km	Launceston: 60km	Launceston: 55km	Devonport: 2km

KEY

High rating for criterion. Favorable for development.
Medium rating for development. Some constraint to development.
Low rating for criterion. Development may be seriously constrained.

	Burnie Paper Mill Site	**Railton Precinct**	**Hampshire Precinct**	**Wynyard (Stennings Road) Precinct**
DESCRIPTION	Closed paper mill site	Greenfields site opportunity near current heavy industry	Greenfields site opportunity near current heavy industry	New precinct with some industrial activity
LAND AREA	36 Ha	No designated land sites	No designated land sites	Various
LAND TENURE	Single corporate owner	Private, state forestry, corporate ownership	Private, state forestry, corporate ownership	Private land, development may be limited
ZONING	Industrial, currently under review	Manufacturing, forestry and agriculture	Rural forestry	Industrial- Primary Use Class, Rural residential
LAND USE (Current)	Former paper mill and related infrastructure, vacant	Vacand land	Vacand land	Low level graxzing, industrial
TOPOGRAPHY: slope, orientation, elevation	Generally level site	Undulating, significant level areas	Undulating, significant level areas	Generally flat, suited to industrial development
PROXIMITY TO MAJOR RESIDENTIAL POPULATION	Burnie: <1km	Devonport: 25km Latrobe: 11km	Burnie: 27km	Wynyard: <1km Burnie: 25km

PROXIMITY TO INFRASTRUCTURE

ELECTRICITY	Transend power substation on site	Transend substation at Cement works	110KV transmission line nearby	Transmission line 5.5km
GAS: Distance to pipeline	Adjacent to site, not connected	Main line <2km	Approximately 22km to main line at Burnie	Distribution line in Stennings Road
WATER: Access to nearest water supply	On site connection	Potentially available from local rivers	Potentially available from local rivers	Good volume, dependent
SEWER	Site system	None	None	Acess to existing but some limitations
STORMWATER	Available	None	None	Acess to existing but some limitations
ROAD: Distance from Category 1 or 2 road	Adjacent to Ct 1 Road	Adjacent to Ct 2 road, 15km to Cat 1 road	1km from Cat 1 road	Adjacent to Cat 1 road
RAIL: Distance to rail connection	Burnie: <1km. Southern line and West Coast line on site	Devonport: 25km, Burnie: 70km	Burnie: 30km	Good <1km, Burnie rail head: 25km
PORT: Distance to sea port	Burnie: 2km	Devonport: 25km, Burnie: 70km	Burnie: 27km	Burnie: 25km
AIRPORT: Distance to airport	Wynyard: 20km	Devonport: 25km	Wynyard: 42km	Wynyard: <2km