

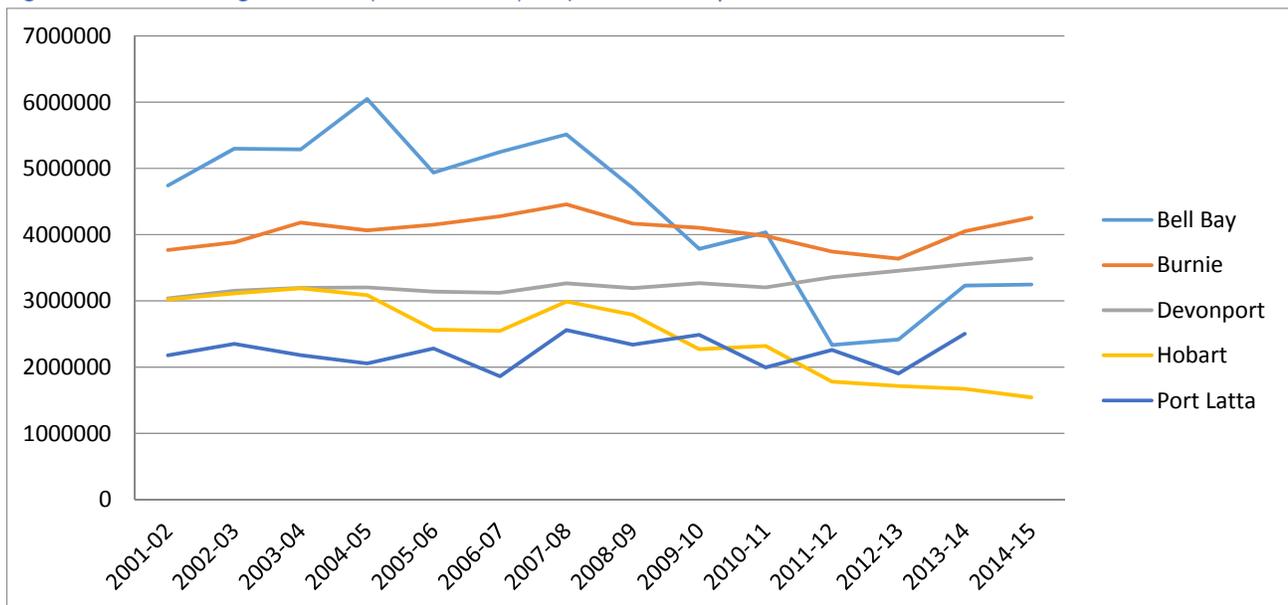
Tasmania's major ports and intermodal connections



Port throughput

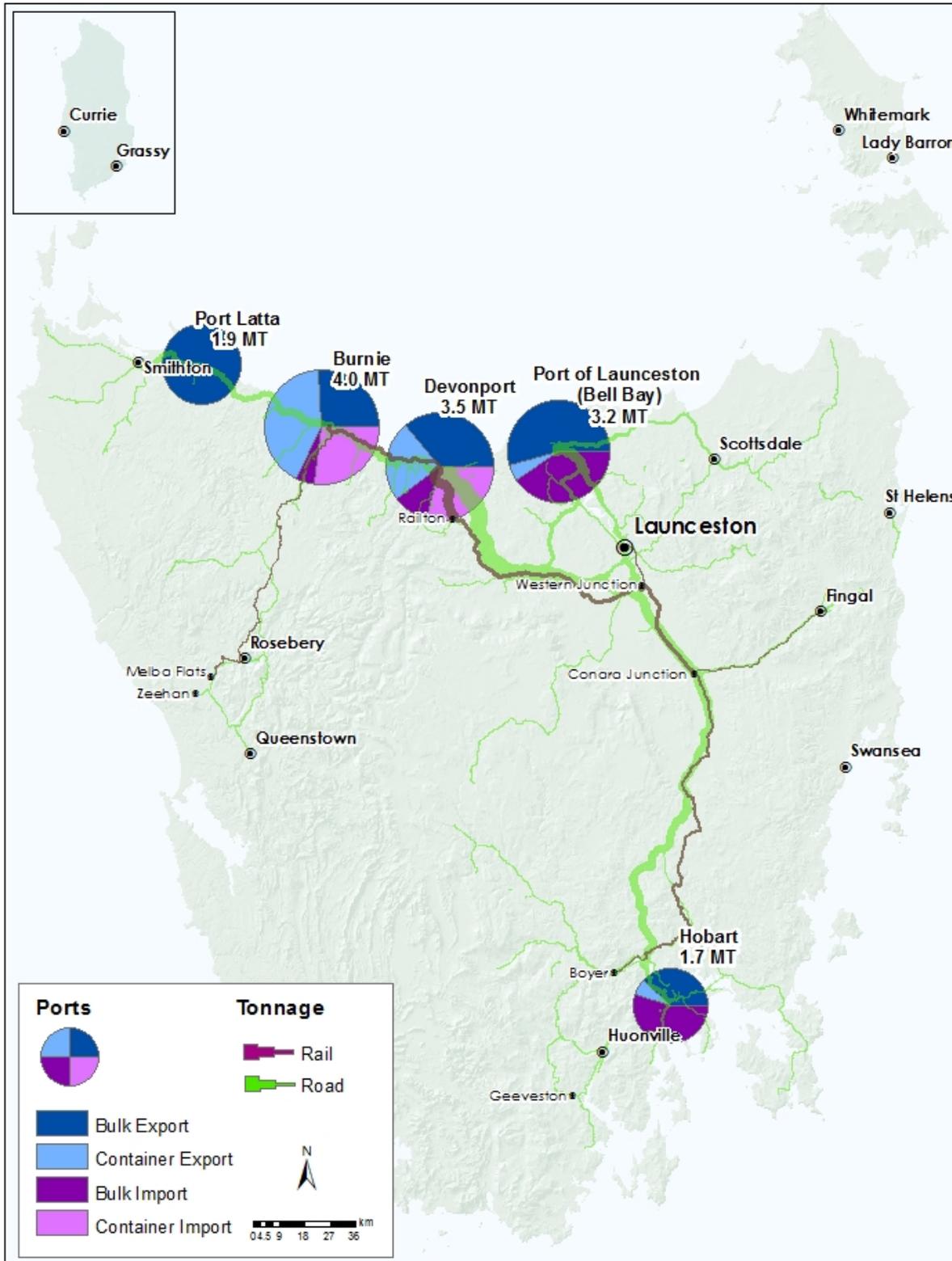
- In 2014-15, over 15 million tonnes of freight moved through Tasmania's ports:
 - 12.7 million tonnes moved through Tasmania's four publicly-owned ports, with the highest volumes at Burnie, Devonport and Bell Bay.
 - 2.5 million tonnes moved through the privately-owned Port Latta (2015 calendar year).
- Major bulk freight sectors include mining, mineral processing and forestry. Agricultural products and retail goods account for a high volume of containerised commodities.
- Burnie is Tasmania's largest port, handling over 4 million tonnes of freight and 55% of Tasmania's container task.
- 92% of container movements are through Burnie and Devonport ports.
- Throughput at Tasmania's publicly-owned ports declined from a peak of 16.2 million tonnes in 2007-08 to 12.7 million tonnes in 2014-15. Over the same period, container volumes also decreased from 491,485 TEU to 461,565 (Figure 1).
- With the exception of the Brighton Hub, all of Tasmania's intermodal facilities are located at a port.

Figure 1. Trends in freight volumes (million tonnes), major Tasmanian ports



Source: TasPorts and Grange Resources

Figure 2. Bulk and container task, by major port



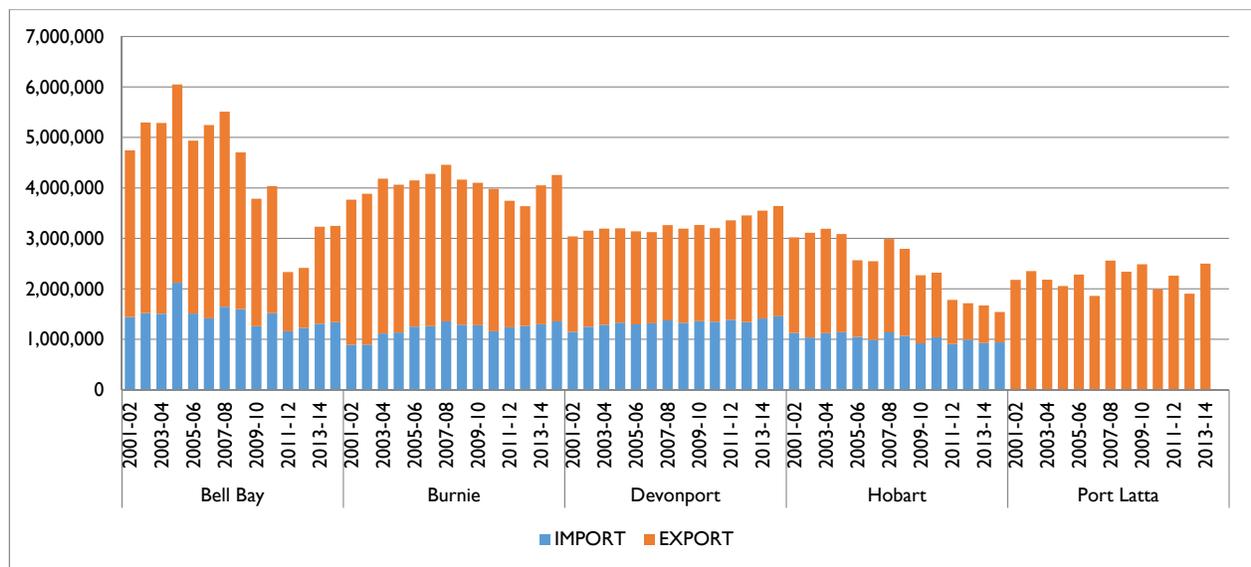
Note: Ports data from 2014-15 financial year. Land freight data from Tasmanian Freight Survey, 2011-12

Activity at individual ports

Bulk

- Bulk freight accounts for two thirds of Tasmania's port throughput by volume.
- Total bulk freight volumes have decreased over time, largely driven by a decline in forestry exports.
- Major bulk commodities include woodchips, cement, mineral ores, and general cargo.
- Total bulk freight volumes (import and export) are highest at Bell Bay. Port Latta is Tasmania's largest bulk export port (Figure 3).

Figure 3. Imports and exports by port (tonnes)



Source: Ports Australia, TasPorts and Grange Resources

- Tasmania's ports have developed to support bulk commodities and major industrial customers.

Hobart Port

- 72% of throughput is moved over Nystar's private wharf at Lutana.
- Around 19% of remaining port throughput is petroleum products through Self's Point.

Bell Bay

- 61% of throughput at Bell Bay Port has an origin or destination in the adjacent Bell Bay Industrial Estate.
- Around 30% of remaining port throughput is forestry freight.

Devonport

- 35% of throughput is cement, originating at Railton. The task is transported via a dedicated rail service between Railton and Devonport Port (west).

Burnie

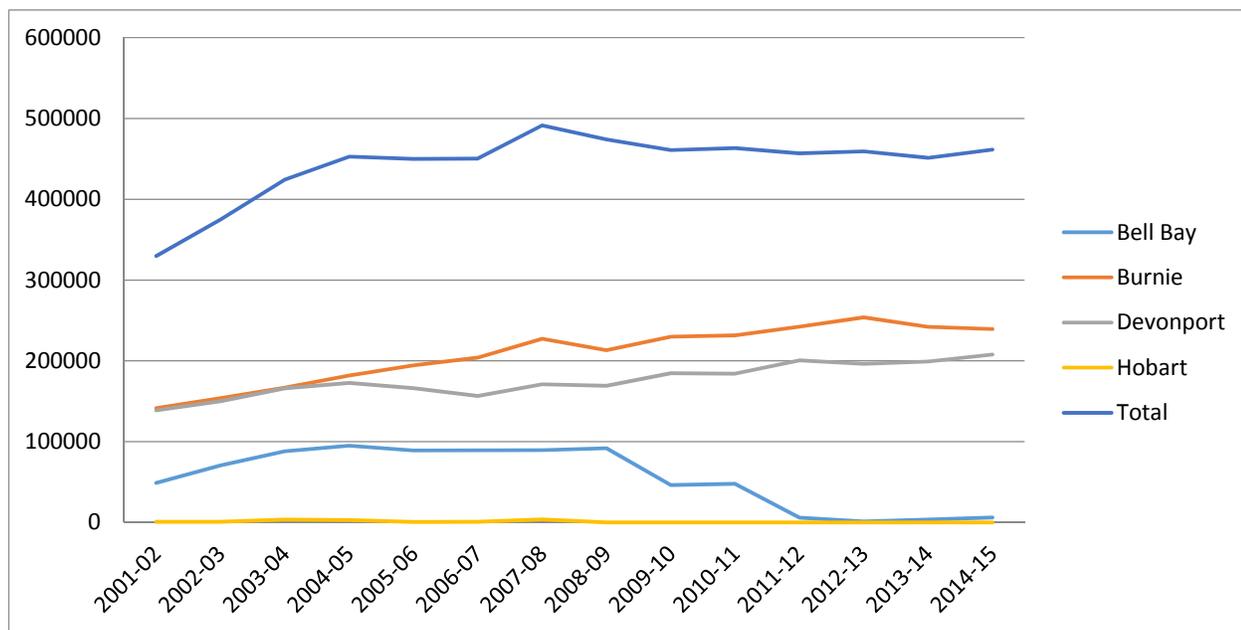
- 13% of throughput is mineral ore/concentrate from the West Coast.

- The proximity of major industrial users to some ports means there is limited use of the land transport network for the movement of some large bulk tasks.

Containers

- In 2014-15, 461,565 TEU were moved through Tasmania's ports.
- Container volumes are highest at Burnie (239,254 TEU) and Devonport ports (207,888 TEU), which together account for 97% of Tasmania's total container volumes.
- Container services are provided at Burnie Port by Toll (market share 55%), and by SeaRoad (market share 25%) and TT-Line (market share 20%) at Devonport Port.

Figure 4. Container volumes, total and individual ports



Source: TasPorts

Port planning

- The Tasmanian Government owns and operates Burnie, Devonport, Bell Bay and Hobart ports through the state-owned company, TasPorts.
- TasPorts was established in 2006 following the amalgamation of four existing port companies: Hobart Ports Corporation Pty Ltd, Port of Launceston Pty Ltd, Port of Devonport Corporation Pty Ltd and Burnie Port Corporation Pty Ltd.
- TasPorts' primary role is to facilitate trade for the benefit of Tasmania. It is responsible for port infrastructure maintenance and development at Burnie, Devonport, Bell Bay and Hobart, in addition to smaller regional ports at Triabunna, Strahan, Stanley, Smithton, King Island and Flinders Island.
- TasPorts has developed a 30-year port plan, *TasPorts 2043*, to guide future port planning and investment. Individual port master plans are now being developed.

Intermodal hubs

- The co-location of intermodal hubs with major industrial or freight-generating activities has the potential to support localised freight aggregation and maximise access to, and use of, key freight corridors and modes.
- Significant investment in intermodal infrastructure has included the Brighton Transport Hub (\$83 million), Burnie Port redevelopment (\$12 million) and Bell Bay intermodal hub (\$7 million).
- The Brighton Hub is a purpose-built road-rail hub located on the Burnie to Hobart freight corridor. It has played a key role in opening up large areas of industrial land, close to Hobart, with direct access to high-standard road and rail networks.
- The Hub is operated by TasRail, with the private transport company Toll also investing in a major freight distribution centre at the site.

Overview of major and key regional ports

Burnie Port

- Located on the north coast, adjacent to Burnie.
- Tasmania's highest volume port – 4.3 million tonnes in 2014-15.
- Four berths including RoRo containers/general freight (Toll-ANL), bulk mining, general and container freight, and woodchips.
- Intermodal infrastructure includes a bulk minerals concentrate ship-loader (1,000 tonnes per hour capacity) and storage shed; bulk woodchip loader (1,200 tonnes per hour capacity) and stockpile area (200,000 tonne capacity).
- Road (Bass Highway via local government roads) and rail (Western Line, Melba Line) connections.
- Privately owned assets include Toll's long-term container terminal lease and TasRail's bulk mineral ship-loader and storage facility.

Devonport Port

- Located on both sides of the Mersey River at Devonport. Container freight (SeaRoad Shipping) and passenger services (TT-Line) are located at Devonport East; bulk freight at Devonport West.
- Total throughput of 3.6 million tonnes in 2014-15.
- Limitations on length of vessels due to narrow river.
- Routine dredging required due to silt build up in the Mersey River.
- Land transport connections by local road to the Bass Highway (National Network) on both sides. Rail connection to Devonport West only.
- Privately owned assets include long-term terminal leases to SeaRoad and TT-Line, and Cement Australia's bulk storage and loading facility.

Bell Bay Port

- Located on the Tamar River, nine nautical miles from the river entrance.
- Total throughput of 3.2 million tonnes in 2014-15, the majority as bulk freight.
- River transit lengthens navigational time to and from port. A tidal bar at the mouth of the river experiences strong currents.
- Permanent access for vessels up to 11.4 metres draft and less than 170 metres in length. Vessels up to 250 metres can enter on a flood tide and longer vessels by agreement.
- Land transport connections via Bell Bay Main Road to the East Tamar Highway (National Network). Rail access largely via a new intermodal facility, but a direct connection to the port exists.
- Strong relationship between the port and businesses located in the adjacent Bell Bay Industrial Estate.

Hobart Port

- Located on the Derwent River directly adjacent to the Hobart CBD.
- Total throughput of 1.5 million tonnes in 2014-15, comprised mainly of bulk freight at Nyrstar and Self's Point.
- Includes berths at Macquarie and Princes wharves; a privately owned terminal at Lutana (Nyrstar) and fuel storage at Self's Point.
- Focus on Antarctic supply and research vessels, cruise and naval vessels.
- Land transport connections constrained by local roads to the Tasman and Brooker Highways (National Network). Freight rail connection now non-operational.

Port Latta

- Port Latta is located on Tasmania's north-west coast.
- Port Latta is privately owned by Grange Resources and is used to transport iron ore.
- Port Latta is Tasmania's largest bulk port with throughput of around 2.5 million tonnes of iron ore per annum (2015 calendar year).
- Iron ore is pumped in a slurry pipeline from the mine site in Western Tasmania to the port where it is turned into pellets.
- Intermodal infrastructure includes two 2,000-2,500 tonnes per hour ship-loaders.

Key Regional Ports

- Key regional ports are located on King Island (Grassy Port) and Flinders Island (Lady Barron Port).
- Although freight throughput is substantially less than major Tasmanian ports, Grassy and Lady Barron ports are critical for connecting the Bass Strait islands to mainland Tasmania, and interstate and international markets.
- Freight task is dominated by agriculture – particularly livestock and farming inputs – and general cargo.