

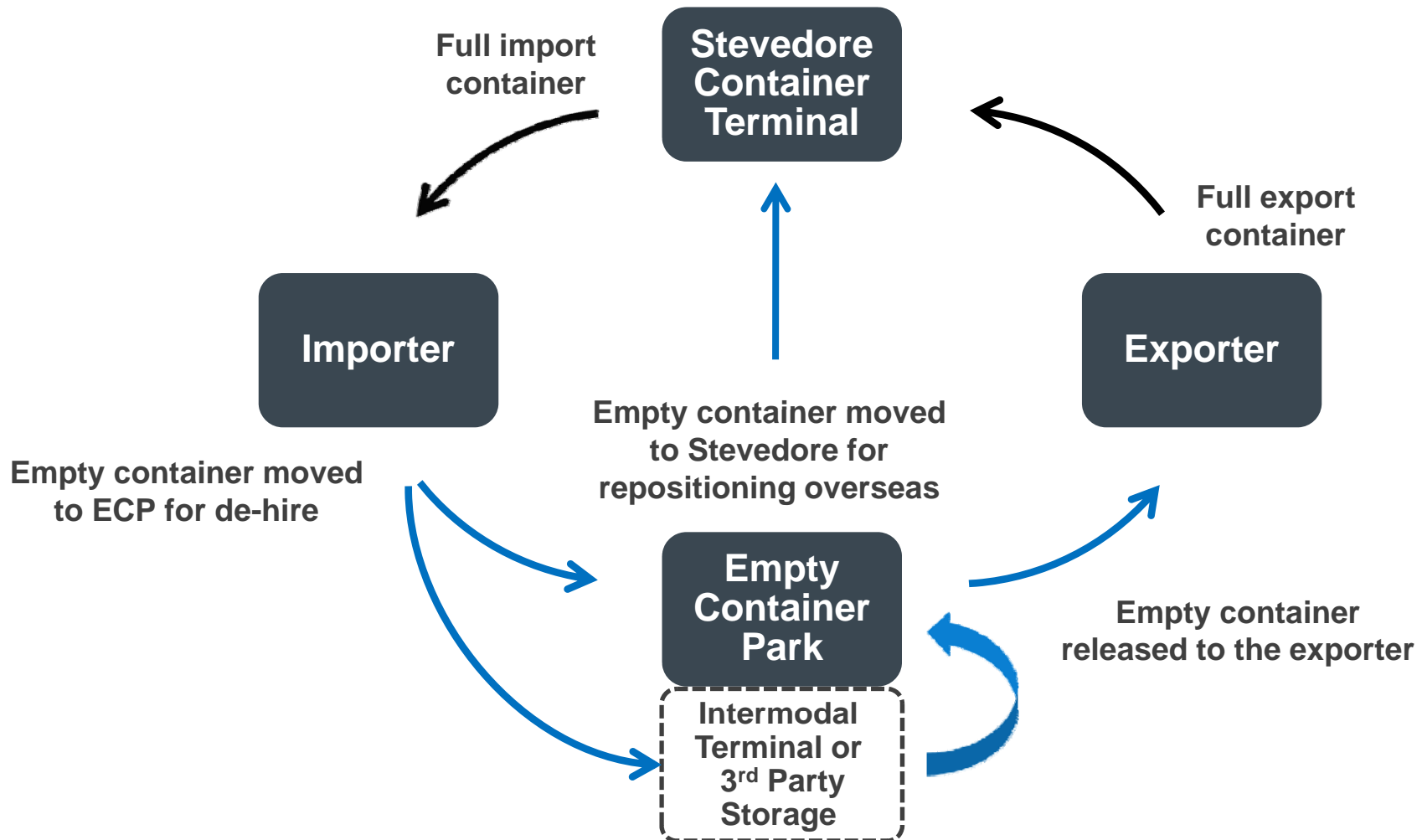
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Empty Container Parks Trend Volume Issues

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The Role of Empty Container Parks in the Port Related Supply Chain



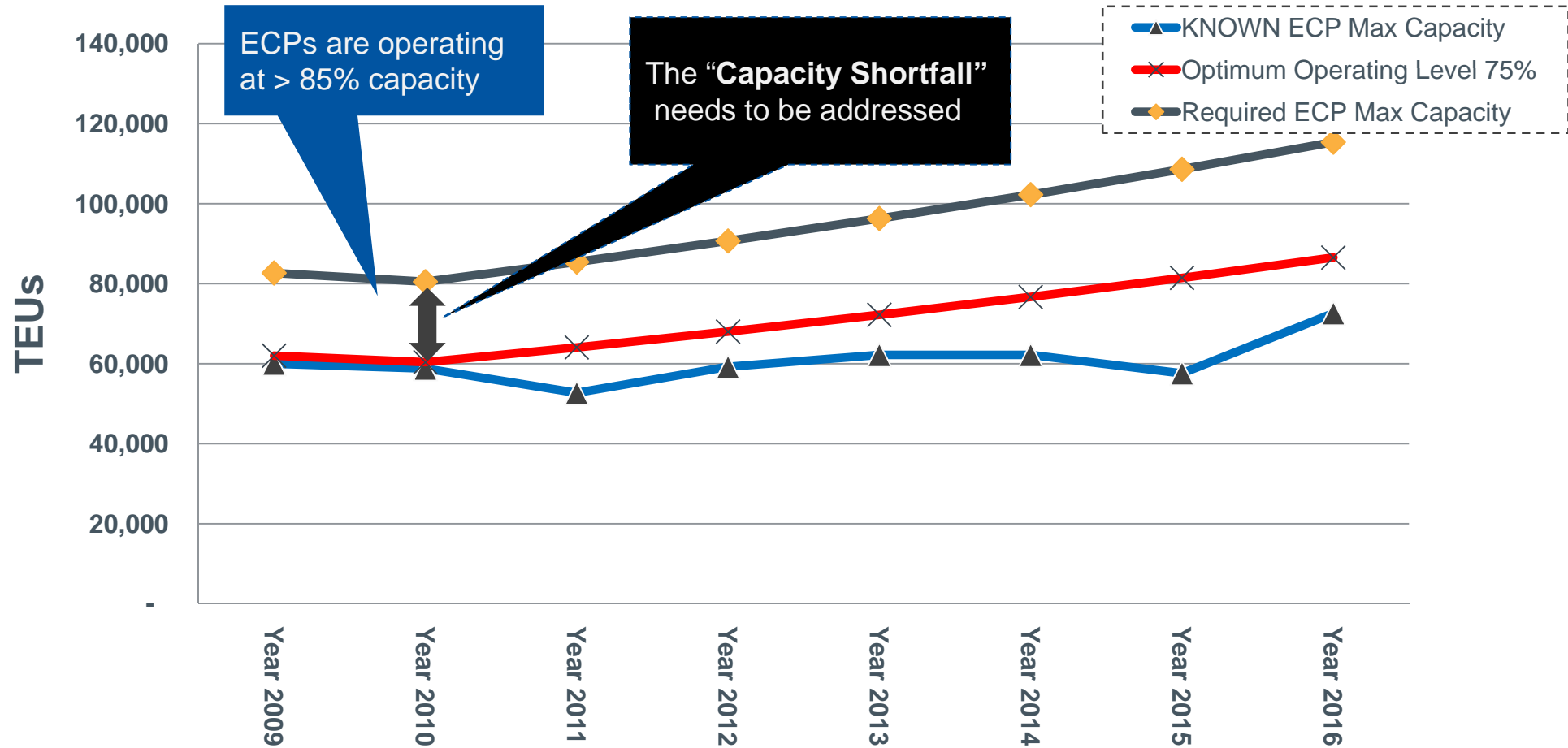
Relationship Between Port Throughput and Empty Container Park Performance

- Import and export TEUs for the 2009/10 financial year will exceed 1.9 million.
- Empty Container Park (ECP) average inventory (prior to Camellia closure) was 41,312 TEUs. This represents 2.17% of port turnover. ECP maximum capacity in 2009/10 was 60,000 TEUs.
- If average inventory remains at 2.17% of port throughput, then the Port Botany Expansion approval of 3.2 million TEUs will require ECPs to hold an average monthly inventory of 69,500 TEUs.
- In order to effectively manage 69,500 TEUs, it is estimated that ECP capacity will need to be approximately 92,700 TEUs (a 54% increase on current capacity).

Future Empty Container Park Storage

Empty Container Park Capacity	2009	2010	2011	2012	2013	2014	2015	2016
ECP 1	5,000	5,000						
ECP 2	9,000	10,500	13,500	13,500	13,500	13,500	13,500	13,500
ECP 3	3,000	3,000	3,000					
ECP 4	2,720							
ECP 5	4,080	4,080						
ECP 6	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000
ECP 7	11,500	11,500	11,500	11,500	11,500	11,500	6,900	6,900
ECP 8	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500
ECP 9	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500
ECP 10	2,200	2,200	2,200	2,200	2,200	2,200	2,200	2,200
ECP 11	2,500	2,500	2,500					
ECP 12	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
Enfield				12,000	12,000	12,000	12,000	12,000
Moorebank								15,000
TECP - Glebe Is.					3,000	3,000	3,000	3,000
Other?								
TOTAL	60,000	58,780	52,700	59,200	62,200	62,200	57,600	72,600

Empty Container Park Storage Forecast



The Implications for Empty Container Parks (ECPs)

- If current ECPs capacity remains the same, and TEU turnover does not improve (i.e. remains at an average of 12 working days), then demand for ECPs storage will quickly exceed current operational capabilities.
- ECP business models need to consider placing a higher value on TEU turnover ratios.
- All direct and indirect factors that adversely impact on the ability for ECPs to turnover higher volumes of containers during the coming peak period, need to be minimised to benefit all port stakeholders.