

Today's Presentation

- Indygroup
- Opportunities for Growth
 - Feeding India and China
 - Rational national distribution
- Urban freight logistics priorities ?





- Developer of open access intermodal business parks.
- Provider of freight and logistics services utilising road and rail as appropriate.
- Focus on :
 - moving containerised freight
 - facilitating agribusiness development in Australia
 - new (sustainable) models for national distribution in Australia





Indygroup - Minto

- Macarthur (Minto Sydney) 16.5Ha
 - 327,000 TEU annual capacity
 - Rail siding 380m (ext. to 2 x 600m)
 - Top Loading forks and reach stackers









Indygroup – Wagga Wagga



- 87000 sqm industrial facilities
- 540 Ha industrial estate







Indygroup - Transport

















Current activities

Rail services

- Containerised grain / meat transport from Narrabri, Moree, Tamworth, Blayney and Dubbo to Sydney.
- Aluminium from Newcastle to Sydney
- 30% of all container movements on rail through Port Botany (linked to Minto terminal)

Business park clients

 Cargill Beef, Chargeurs Wool, ABB – Riverwool, ABB Grain, Visy Pulp and Paper, Vinidex, Sunbeam



Indygroup

- An integrated freight & logistics and industrial development company with a passion for agribusiness and the environment.
- We aim to stimulate agribusiness growth in Australia by providing creative market driven logistics solutions from paddock to plate.
- This will:
 - help foster job growth and prosperity in regional Australia
 - grow export opportunities for Australia.

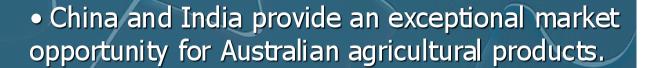


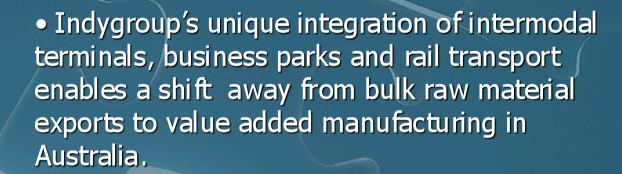


THE OPPORTUNITIES

1. Feeding India and China









 Converting this opportunity and generating value added manufacturing jobs in Australia is a primary goal of Indygroup.





1. Feeding India and China



Case Study 1 — Riverina Oils & Bio Energy

- Edible Oil Market identified as growth opportunity in India
- Currently 11kg / person/ annum consumption c.f. 46kg in western markets
- Each additional 1kg consumption =
 1Billion kgs/annum additional demand.
- The company identified Australia as a likely location to source canola and safflower BUT what convinced them to invest?







1. Feeding India and China



Indygroup: • Source 165,000 tonnes canola / safflower from Aussie farmers (\$75M per annum).

- Locate (cost effective) manufacturing facility on Indygroup Business Park in Wagga Wagga (\$75M project / 70 jobs)
- Provide integrated transport solution for all aspects of the business using road, rail and intermodal handling.
- Facilitate export through rail linkages to Sydney / Melbourne ports.
- Direct "organic waste streams" back into agriculture









1. Feeding India and China



Case Study 2 - Joe White Maltings

- Market opportunity to supply malt to brewers in SE Asia
- Require an efficient logistics solution to source up to 500,000T of barley per annum.
- Require a manufacturing location that minimises handling given volumes involved.







1. Feeding India and China



Case Study - Joe White Maltings

Indygroup:

- Provide manufacturing location located at our intermodal business park at Minto in Sydney.
- Provide containerised rail freight solution to deliver raw materials from regional Australia to Sydney for manufacture.







2. Rational National Distribution



- There is a shift in thinking occurring within some Australian companies when it comes to national distribution.
- A move away from state based strategies to a national focus driven in part by the size of the Australian market and the costs to hold property in capital cities.
- Regional manufacturing and distribution is emerging as an alternative.

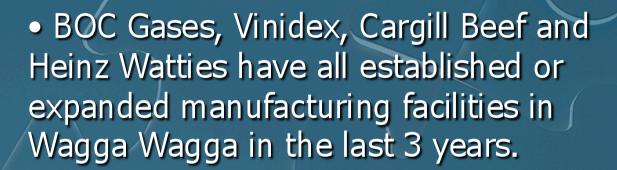






2. Rational National Distribution







•All of these companies have recognised the benefits of establishing ONE national manufacturing and distribution facility linked to efficient freight services.





2. Rational National Distribution



The "Orbitas" model

- Southern Oil used oil recovery and refining – 30,000,000 litres per annum (2006)
- Renewed Metal Technologies lead acid battery recycling – 150,000 tonnes per annum (2009)
- Plastics recycling (2011).





2. Rational National Distribution



The "Orbitas" model

• Indygroup structure of co-located intermodal facilities on our business parks provides cost effective solution for large volume freight management.









- Open access intermodal freight terminals with colocated business parks.
- Access to rail infrastructure that facilitates commercial movement of freight across the network.
 - Dedicated rail freight paths
 - Port access for rail
 - Competitive stevedores / Port Authorities
 - Simplification of rail regulatory requirements for access
 - Storage and maintenance facilities for rail rolling stock
- Integration of urban and regional strategies.





- Southern Sydney Freight Line (physical linkage and appropriate access)
- Development of Enfield ILC
- City of Wagga Wagga Bomen Masterplan Rail Infrastructure
- Port Kembla Outer Harbour Container Terminal





Conclusion

Open access intermodal business parks with efficient road & rail links will be a critical enabler of agribusiness manufacturing growth in Australia in the future.

Government policy needs to reflect a coordinated urban and regional freight and logistics plan to maximise Australian business growth.





