

▶ *NSW Coal Infrastructure Developments
Australia Japan Coal Conference*



▶ *Jonathan Vandervoort
CEO - Hunter Valley Coal Chain Coordinator*

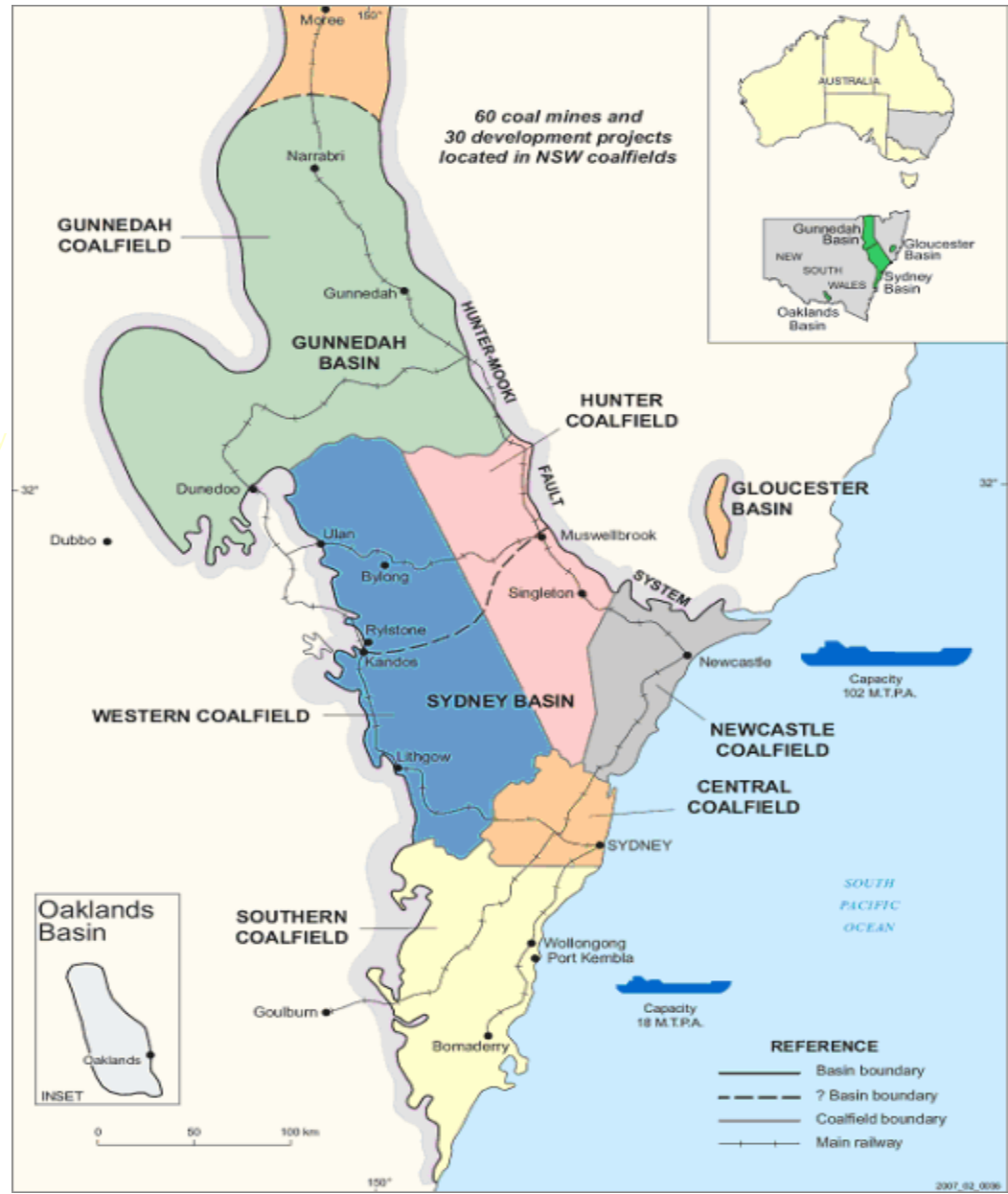
▶ *October 2010*

Map of NSW Coalfields

Source: NSW DPI-Mineral Resources



15 Paths / Day



Illawarra Coal Chain

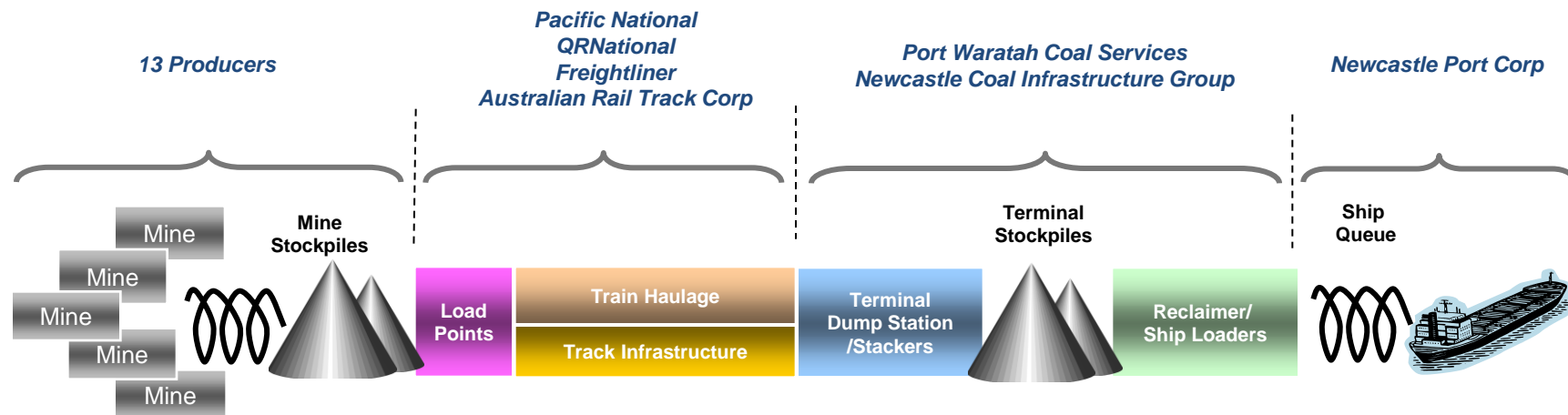


The Illawarra Coal Chain has some unique coal system characteristics. It is geographically widespread. Coal origins and destinations are between 20 and 350 kilometres apart. Much of the rail coal is hauled through the Sydney metropolitan rail network and 35% is hauled by road

Hunter Valley Coal Chain



For the Hunter Valley Coal Chain the volume of rail coal movement through the Central Valley is currently in excess of 100 million tonnes per annum and the trains operate in a far more congested environment due to the predominately short distances involved



Producers

- 40 coal mines
- 13 producers
- 27 load points
- > 80 different brands of coal

Track

- 3 large train haulage operators
- Further 2 smaller train haulage operators
- 40+ trains / 16,000 trips per year
- 2 track owner / operators
- Haulage distances up to 364km

Export Coal Terminals

- 3 coal loading terminals
- 6 dump stations
- 6 ship berths and loaders
- 1.8 Mt of rapid cargo build stockpiles at PWCS
- Longer horizon dedicated stockpiles at NCIG

Antiene Domestic Terminal

- Muswellbrook Power Stations

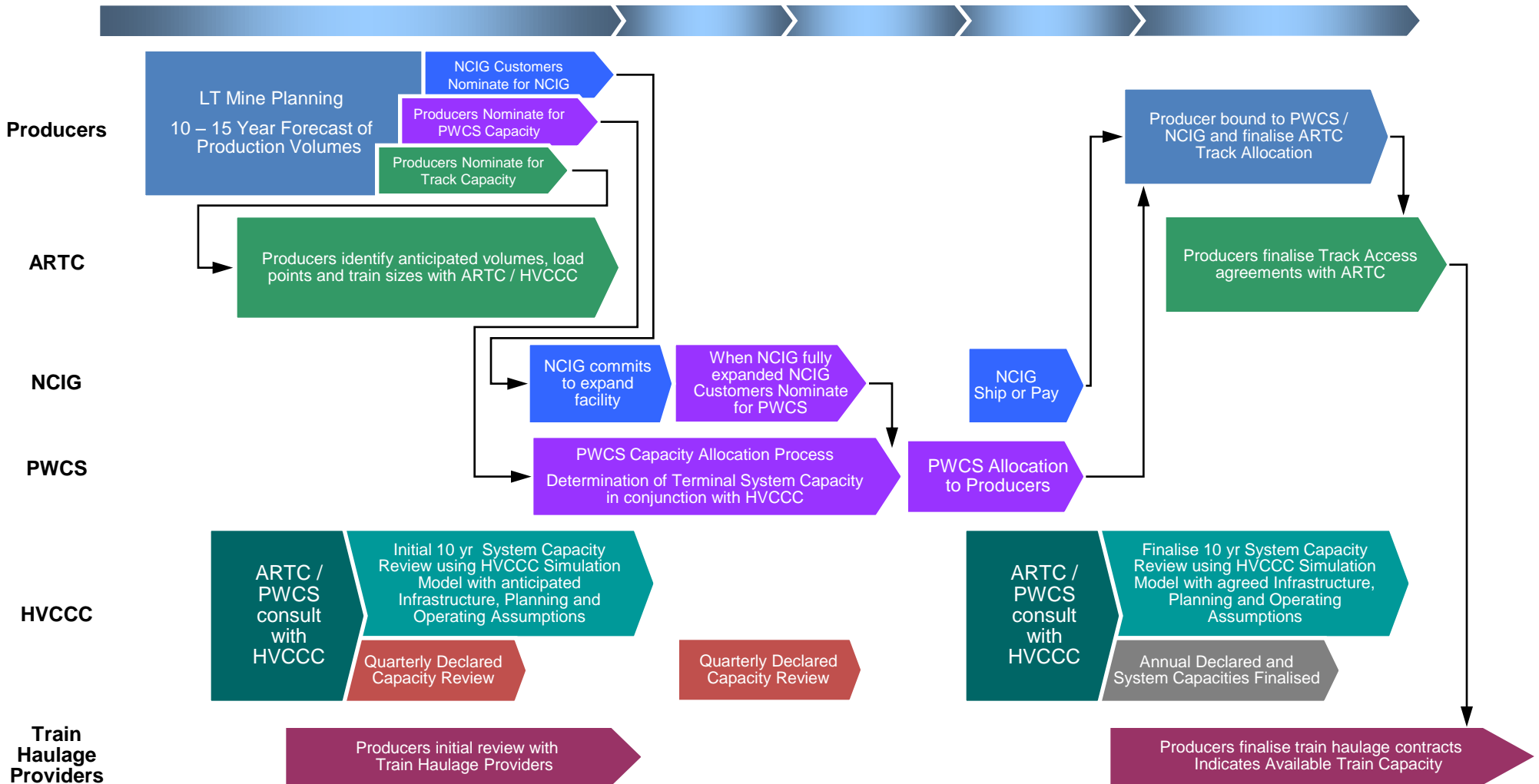
Port/Vessels

- Approx 1,200 vessels per year
- Average vessel size is 89,000 tonnes
- Average 1 to 4 cargoes per vessel
- Tidal constrained river port

End Buyers

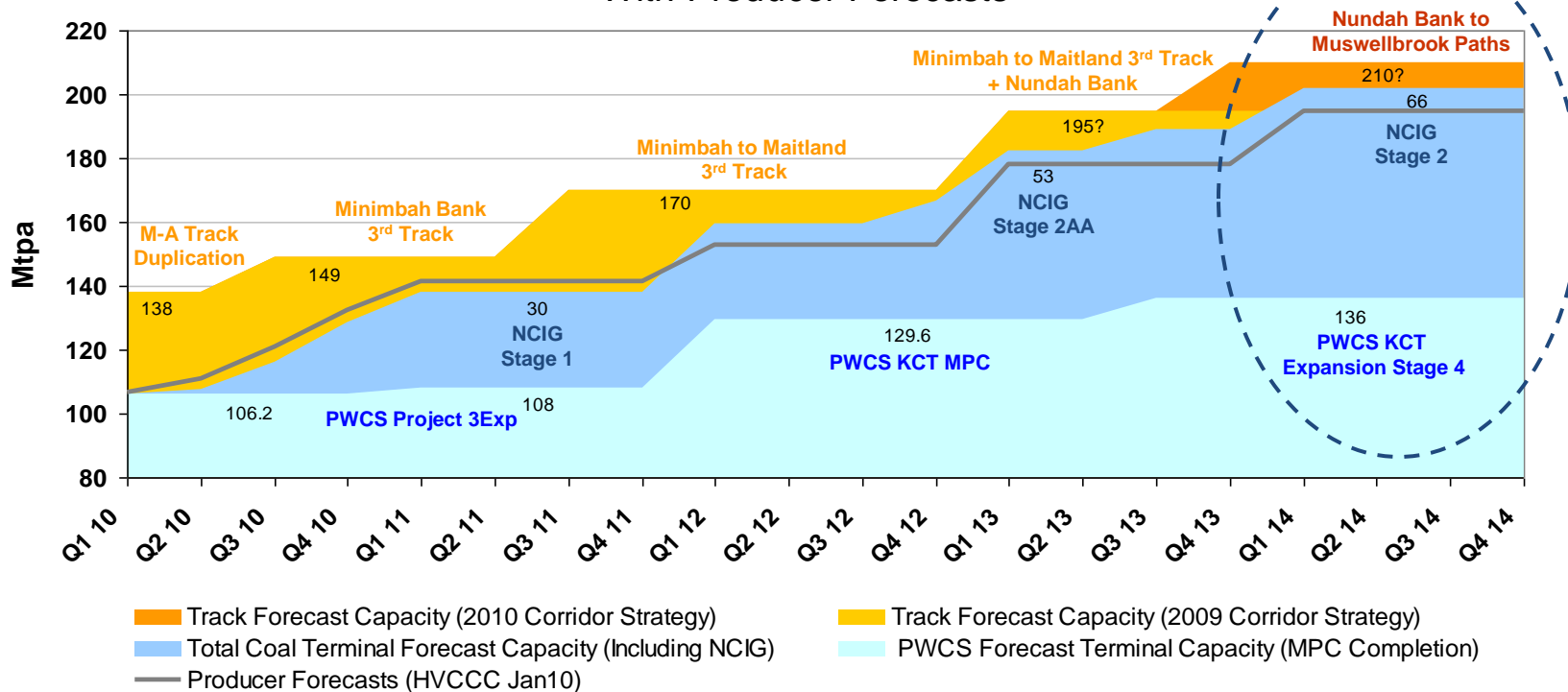
- 10% domestic consumption
- 90% export – mostly thermal
- 79% to Japan and Korean markets

Access to Hunter Valley Coal Chain Capacity



- PWCS & NCIG subject to Board approvals
- Currently exploring with ARTC initiatives to lift track delivered capacity around 210Mtpa
- Focus of initiatives on track capacity;
 - Nundah Bank to Muswellbrook
 - Ulan branch

Estimated Coal Terminal and Track Delivered System Capacity With Producer Forecasts



Key Assumptions

- There are sufficient coal trains to meet delivered capacity
- Load point improvements for all new or expanding mines would be delivered from 2011 as required
- A "dump and go" train operations model is employed at all Coal Terminal dump stations from 2011
- Required berth load rates to be met at all Coal Terminals
- Train congestion mitigation strategies are implemented



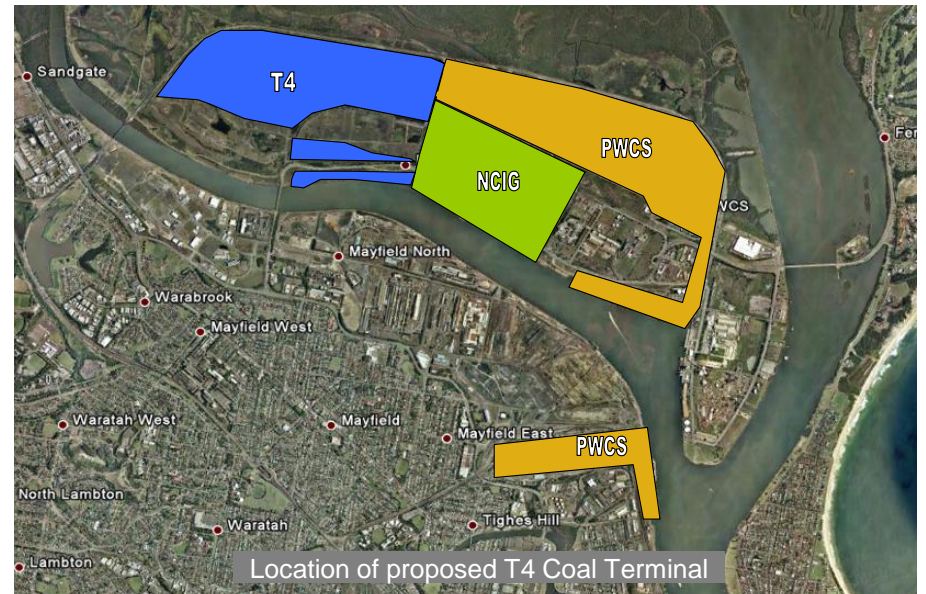
New Reclaimer Commissioned June 10



Work to extend stockpiles as part of PWCS expansion to 130 Mtpa



Work on 4th KCT Berth as part of PWCS expansion to 130 Mtpa



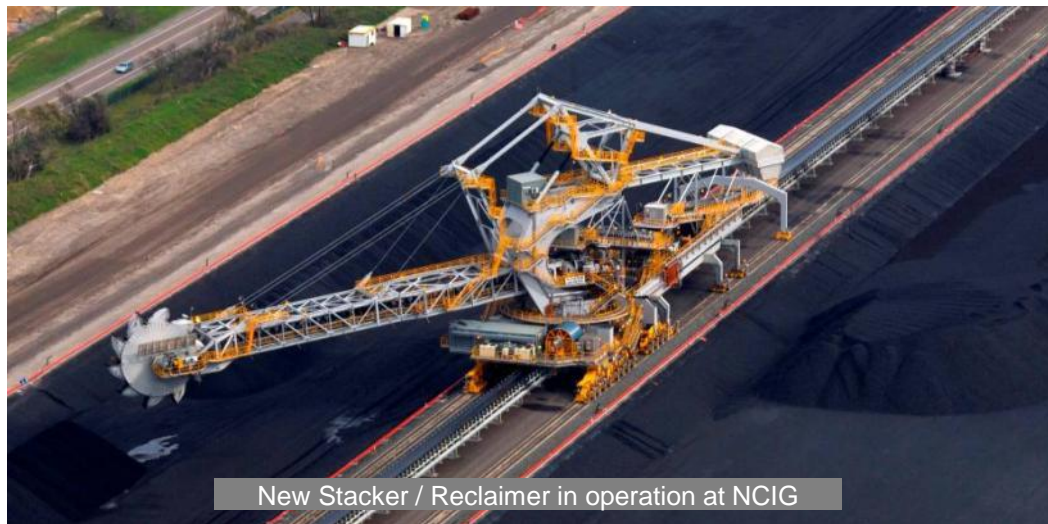
Location of proposed T4 Coal Terminal



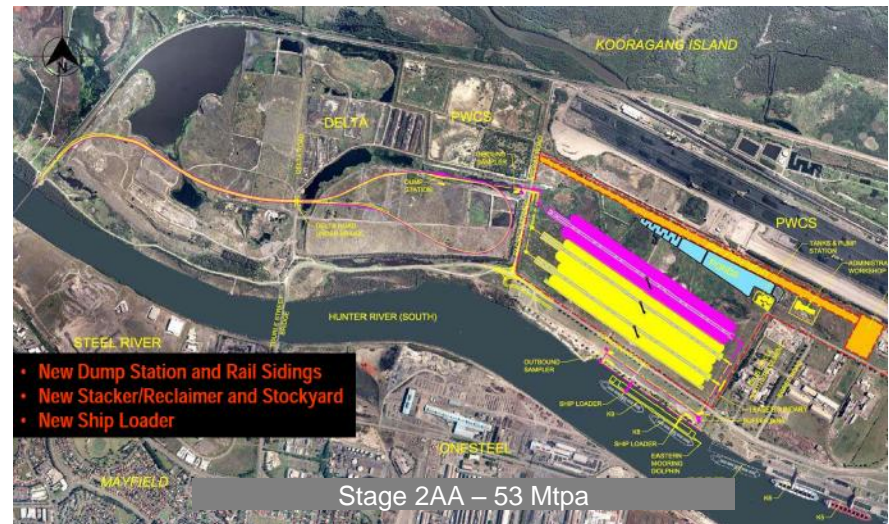
Stage 1 – 30 Mtpa



Train Entering New Dump Station

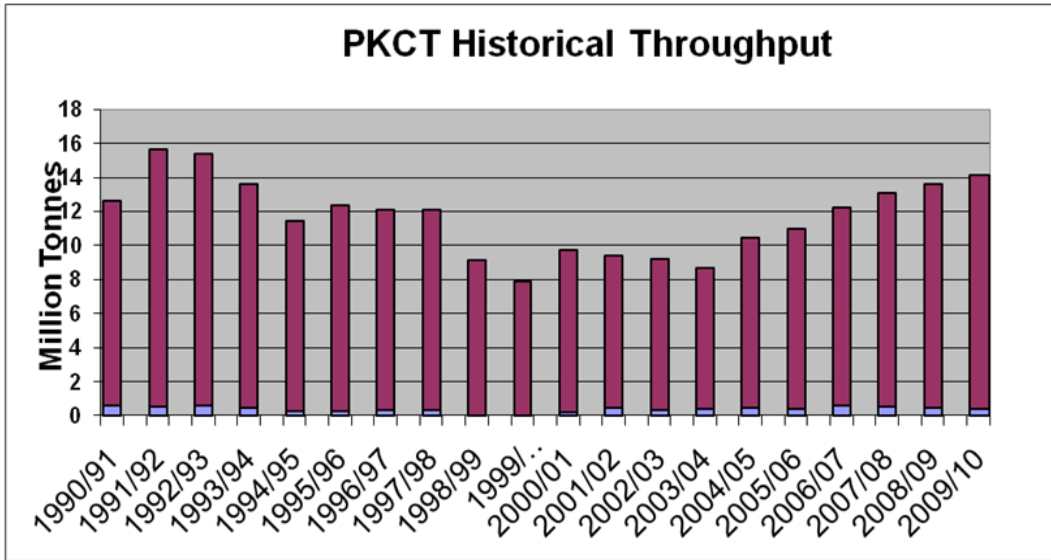


New Stacker / Reclaimer in operation at NCIG



Stage 2AA – 53 Mtpa

PKCT Historical Throughput



Update on Hunter Valley Track Projects

- 2009: Bidi Signalling / Mbrook duplication / Extra loops
- 2010: Minimbah 3rd Road / Extra loops
- 2012: Minimbah - Maitland 3rd Road
- 2013: Nundah Bank
- Beyond: New Liverpool Range Alignment



- 2009: 2 additional train units
 - 2010: 8 additional train units
3rd train operator
 - 2011: 6 additional train units expected
4th train operator
- Forecast completion of PN
train support facility at Greta



New 5000 Class QR Train at Mt Arthur Mine



Pacific National Train Facility Site



New PN 92 Class Locomotive



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DEFINITIONS

Target for month		
July 2010	MTPA	120.56
Month to date*		
	KTPD	MTPA
Inbound	274	99.85
Outbound	256	93.36

*PWCS data only

as at midnight * 12/07/2010	
Vessel Queue	43
Port Stocks (KT)	1168
Vessels Assembled	3

last 24 hours*			
	KTPD	MTPA	% vs plan
Inbound	265	96.57	75
Outbound	283	103.28	111

