

Infrastructure Australia

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Subject: National Land Freight Strategy

Dear Sir / Madam

Please find our response to the National Land Freight Strategy discussion paper.

Regional Development Australia (RDA) is a partnership between the Australian, state and local governments to support the growth and development of Australia's regions. RDA committees will build partnerships between governments, regional development organisations, local businesses, community groups and key regional stakeholders to provide strategic and targeted responses to economic, environmental and social issues affecting the regions of Australia.

There are four RDAs in northern QLD. They are responsible for the Far North Queensland and the Torres Strait, Townsville and North West Queensland, Mackay Whitsundays and Fitzroy Central West regions. These cover 72% of the state's geographical area and house 20% of the state's population. In 2005/06 this region accounted for 28% of Gross State Product. There has been a further expansion in the resources sector since 2005/06; therefore the contribution to Gross State Product would now exceed 30%. The region's ports exported 77% of Queensland's total export value in 2009/10, a total of \$43.5 billion.

The attached submission presents some initial thoughts on areas for consideration in the National Land Freight Strategy as an indication of the current and potential value of the region. The region is co-operatively developing a fifty year strategy for transport including freight across the entire region, and would welcome the opportunity to have this considered in the ongoing development of the National Land Freight Strategy.

RDA committees in regional areas in particular could have a role to play in facilitating dialogue between all levels of government to develop regional freight strategies consistent with the National Land Freight Strategy.

Yours Sincerely



Ron McCullough AM

Chairperson

Regional Development Australia Townsville and North West Queensland Inc.

National Land Freight Strategy

Submission from



Regional Development Australia Committees for:

Far North Queensland and Torres Strait
Townsville and North West
Mackay Whitsunday
Fitzroy and Central West

April 2011

1 Introduction

Regional Development Australia (RDA) is an Australian Government initiative that has developed 55 Committees nationwide to develop the long term sustainability of Australia's regions.

There are four RDAs in central and northern QLD. They are responsible for the Far North Queensland and the Torres Strait, Townsville and North West Queensland, Mackay Whitsundays and Fitzroy Central West regions. These cover 72% of the state's geographical area and house 20% of the state's population. In 2005/06 this region accounted for 28% of Gross State Product.¹ There has been a further expansion in the resources sector since 2005/06; therefore the contribution to Gross State Product would now exceed 30%. The region's ports exported 77% of Queensland's total export value in 2009/10, a total of \$43.5 billion.

Each RDA committee has developed a regional roadmap identifying where their region should be headed. These roadmaps also provide advice to Government on the key priorities for the region. A consistent theme across the four roadmaps was the need to provide infrastructure to meet the needs of communities and to support sustainable economic growth. Roadmaps can be accessed from:

www.rdanwq.org.au

www.rdamackaywhitsunday.org.au

www.rdafnqts.org.au

The region's main economic activities include mining, agriculture, base metal production, pastoral production, defence, public administration, education and tourism. The region accounts for 50% of Queensland agricultural production.

There is significant transport infrastructure within the region to ensure the carriage of freight both within the region and into and out of the region. The ability of the region to undertake trading activities is highly dependent on its freight networks, more so than most other regions of Australia due to so many communities being remotely located.

In February 2011 the Honourable Anthony Albanese MP Minister for Infrastructure and Transport released the *National Land Freight Strategy Discussion Paper*. This will provide a basis for Federal Government policy and budget allocations for land freight infrastructure. Submissions in relation to this Discussion paper are required to be lodged by the end of April 2011.

The National Land Freight Strategy will complement the National Ports Strategy developed by Infrastructure Australia in 2010.

The Regional Development Australia (RDA) committees representing central and northern Queensland commend Infrastructure Australia on the proposal to develop a National Land Freight Strategy closely linked with the recently completed National Ports Strategy 2010.

¹ Experimental Estimates of Gross Regional Product, Queensland Government 2008.

2 Executive Summary

Central and Northern Queensland is an economic powerhouse of Australia, punching far above its weight with respect to population and providing equivalent export value to its area. With strategic investment in key freight infrastructure there is the potential to increase the region's productivity significantly providing a sound return on investment in increased exports.

Statistic	Central and Nth Qld	% QLD	% Australia
Area (km ²)	1,249,343	72.2%	16.2%
Population June 2010	945,692	21.0%	4.2%
Export value 2009/10	\$43.5b	77.2%	17.2%

Source: Australian Bureau of Statistics

With projected investment in resource developments in the region to 2015 in the order of \$107b, there is clearly enormous potential for further growth in the region.

The freight network is restricting growth, with key industry inputs such as petroleum delivered "just in time". Growth will put pressure on the network with increased potential for delays and failures in the freight network.

The region supports the development of the National Land Freight Strategy and through the RDA committees would like to have further input in to the development of the Strategy to maximise the ultimate benefits to the Australian economy.

This submission presents some initial thoughts on areas for consideration in the National Land Freight Strategy as an indication of the current and potential value of the region. The region is co-operatively developing a fifty year strategy for transport including freight across the entire region, and would welcome the opportunity to have this considered in the ongoing development of the National Land Freight Strategy.

3 Background

Central and northern Queensland covers the resource rich areas of the North West minerals province around Mt Isa, The NE Minerals province west of Cairns, the Bowen Basin, the rapidly developing Galilee Basin and parts of the Surat Basin. The rapidly developing LNG industry in Queensland is largely centred around Gladstone and there are massive port developments in Gladstone to accommodate this anticipated growth.

In view of the importance of freight and freight infrastructure to the on-going growth within the region, RDAs in Far North Queensland and the Torres Strait, Townsville and North West Queensland, Mackay Whitsundays and Fitzroy Central West are providing a coordinated submission to the Discussion Paper.

4 Current situation

The Central and Northern parts of Queensland are the economic powerhouse of Queensland. They are internationally recognised as an important source of a broad range of minerals, coal and agricultural produce including sugar, beef, grain, fruit and small crops.

A report on Queensland's minerals² Identifies metals of major importance produced in this region including aluminium, copper, zinc, lead, gold and silver. After coal, base metals are the most important sector of the state's mining industry. The North West Minerals Province is one of the world's leading base metal provinces, and the North East minerals province is poised for future development.

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Population June 2010	945,692	21.0%	4.2%
Export value 2009/10	\$43.5b	77.2%	17.2%

Source: Australian Bureau of Statistics

The region's contribution to exports is commensurate with its area as a percentage of Queensland and Australia. This makes it clear why freight transport is a crucial factor in the current and future growth in export value from the region, making a strong case for particular consideration for this region in the National Land Freight Strategy.

Freight transport is crucial to the ongoing productivity of the region. The current freight network is barely meeting existing demand with little capacity for anticipated growth particularly in the resources sector.

Townsville City Council commissioned the AEC Group to investigate Taxation and Expenditure Balance in Greater North Queensland in 2008³. This study identified that the region from Mackay north and west (not including Fitzroy and Central West) generated on average \$2b per annum in Commonwealth revenues in excess of Commonwealth expenditure in the region.

5 Future Growth

The region anticipates continued economic growth across the entire region. The latest report from ABARE⁴ shows potential investment in the region for projects reporting capital expenditure as shown in the following table. As not all projects provide details, this would be an anticipated minimum value and covers the period from 2011 to 2015.

Mining Developments Central and North Queensland	
	\$m
Coal	\$28,830
Minerals	\$3,735
LNG	\$60,538
Coal infrastructure	\$2,682
Gas Pipelines	\$1,075
Total	\$106,860

Source: Australian Bureau of Agricultural and Resource Economics and Sciences

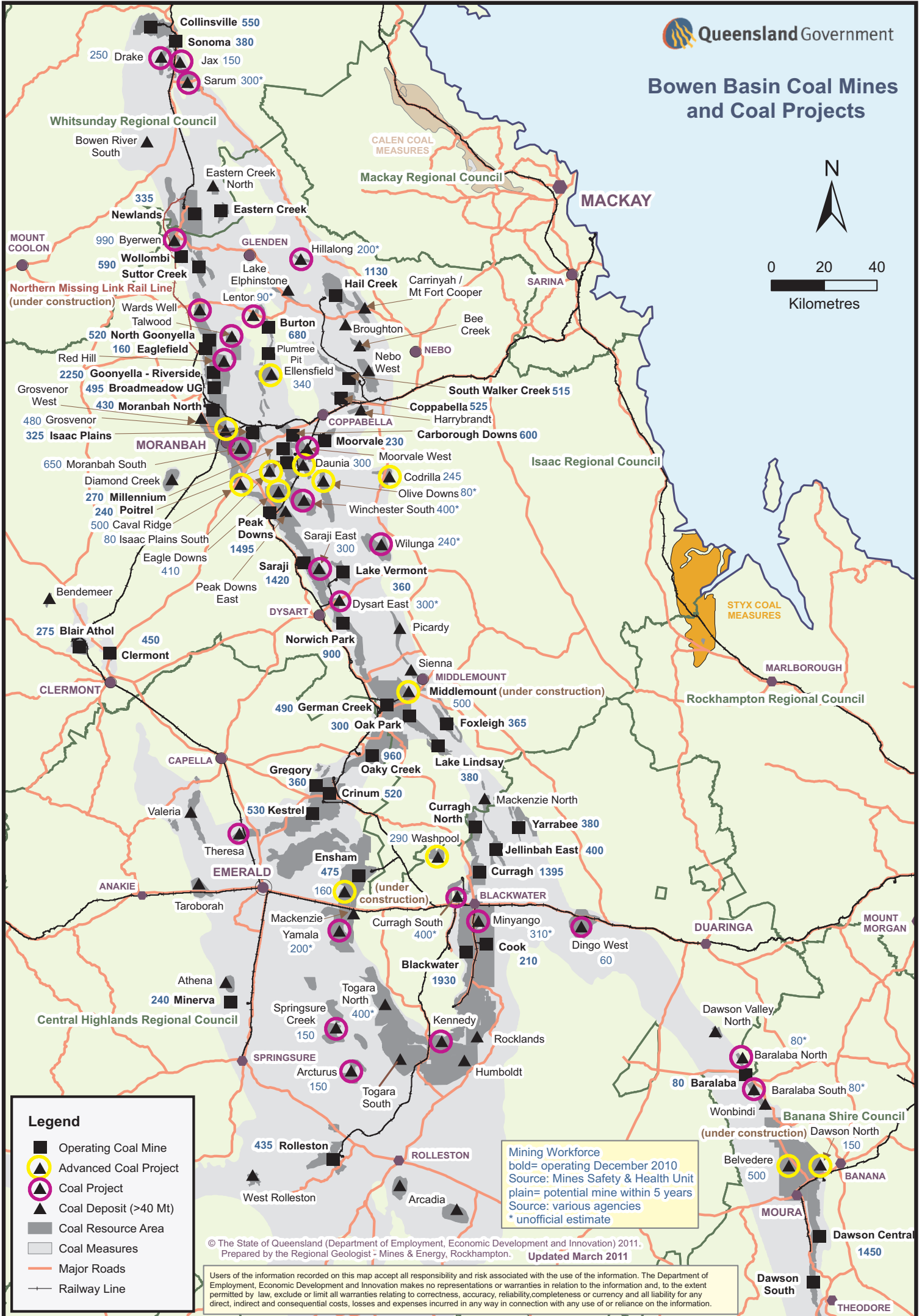
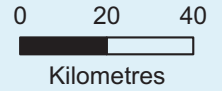
The following maps show the current developments in the Bowen and Galilee Basins and the vicinity of Gladstone, metallic minerals and industrial minerals. This graphically demonstrates the high productivity and planned developments in central and northern Queensland.

² Queensland's metalliferous and industrial minerals 2010, Queensland Government, Department of Employment, Economic Development and Innovation.

³ Taxation and Expenditure Balance in Greater North Queensland, AEC Group 2008

⁴ Minerals and Energy: Major Development Projects October 2010, ABARE

Bowen Basin Coal Mines and Coal Projects



Legend

- Operating Coal Mine
- Advanced Coal Project
- Coal Project
- ▲ Coal Deposit (>40 Mt)
- Coal Resource Area
- Coal Measures
- Major Roads
- Railway Line

Mining Workforce
bold= operating December 2010
 Source: Mines Safety & Health Unit
 plain= potential mine within 5 years
 Source: various agencies
 * unofficial estimate

© The State of Queensland (Department of Employment, Economic Development and Innovation) 2011.
 Prepared by the Regional Geologist - Mines & Energy, Rockhampton. Updated March 2011

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Queensland Government

Central Galilee Basin Exploration and Mining Projects

WINTON

MUTTABURRA

ARAMAC

Koburra UCG

Rodney Creek CSG

LONGREACH

BARCOLDINE

North Alpha

Kevin's Corner 1600

Tad's Corner (Alpha) 2300

China First 1500

South Galilee 750

ALPHA

BLACKALL

Boree Salt

Blackall

TAMBO

Twin Hills Gold 50

Belyando Gold

Anthony Molybdenum

Miclere Gold

Blair Athol 275

Proposed Hancock Railway Line

Proposed Galilee IGCC Power Station 60

Willows Zeolite

Springvale Zeolite

Avoca Zeolite

Mantuan Downs Bentonite 5

Alpha Shale Oil

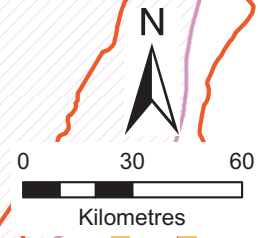
Gilmore Gas Field

Updated March 2011

Operational Workforce
bold= operating December 2010
plain= potential mine within 5 years

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Prepared by the Regional Geologist - Mines & Energy, Rockhampton

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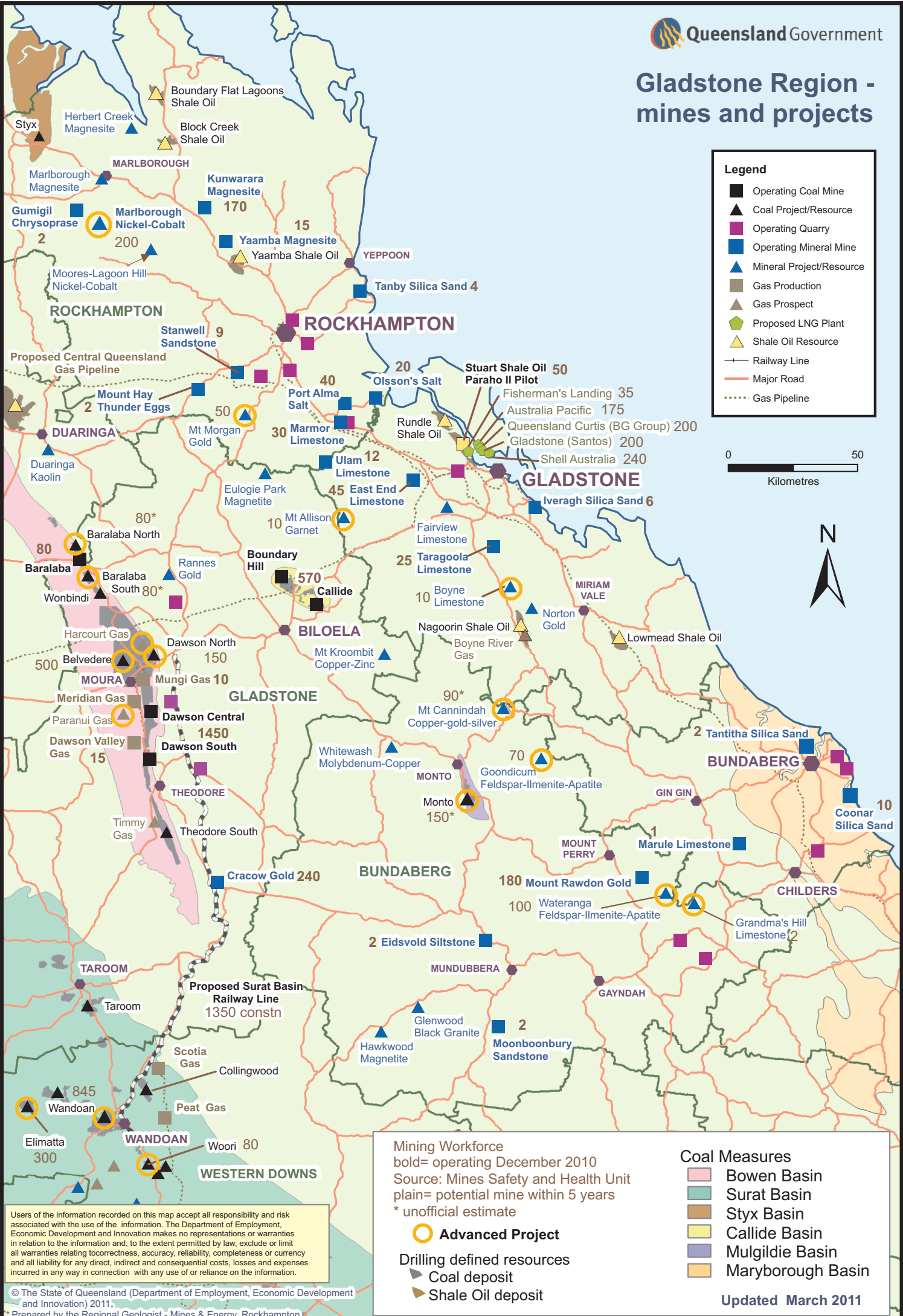
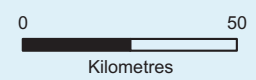
Legend

- Operating Mineral Mine
 - Mineral Resource/Project
 - Coal Resource/Project
 - Gas Resource/Project
 - Shale Oil Resource/Project
 - Borehole - CSG
 - Major roads
 - Railway Lines
 - Proposed Railway
 - Gas Pipeline
 - Defined Coal Resources
 - Mining Lease appln
 - Mineral Development Licence
 - GALILEE BASIN
- ### Exploration Permit- Petroleum
- Others
 - AGL Energy Ltd
 - Apati Oil & Gas Expln Ltd
 - Blue Energy Ltd
 - Comet Ridge Ltd
 - Coomooroo Energy Ltd
 - Galilee Energy Ltd
 - Exoma Energy Ltd
 - Lodestone Energy Ltd
 - Origin Energy Ltd
 - Galilee Energy Ltd
 - QER Ltd
 - Sentry Petroleum Ltd

Gladstone Region - mines and projects

Legend

- Operating Coal Mine
- Coal Project/Resource
- Operating Quarry
- Operating Mineral Mine
- Mineral Project/Resource
- Gas Production
- Gas Prospect
- Proposed LNG Plant
- Shale Oil Resource
- Railway Line
- Major Road
- Gas Pipeline



Mining Workforce
bold= operating December 2010
 Source: Mines Safety and Health Unit
 plain= potential mine within 5 years
 * unofficial estimate

○ Advanced Project

Drilling defined resources
 ▲ Coal deposit
 ▼ Shale Oil deposit

- Coal Measures**
- Bowen Basin
 - Surat Basin
 - Styx Basin
 - Callide Basin
 - Mulgildie Basin
 - Maryborough Basin

Updated March 2011

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Figure 5: Queensland metallic minerals

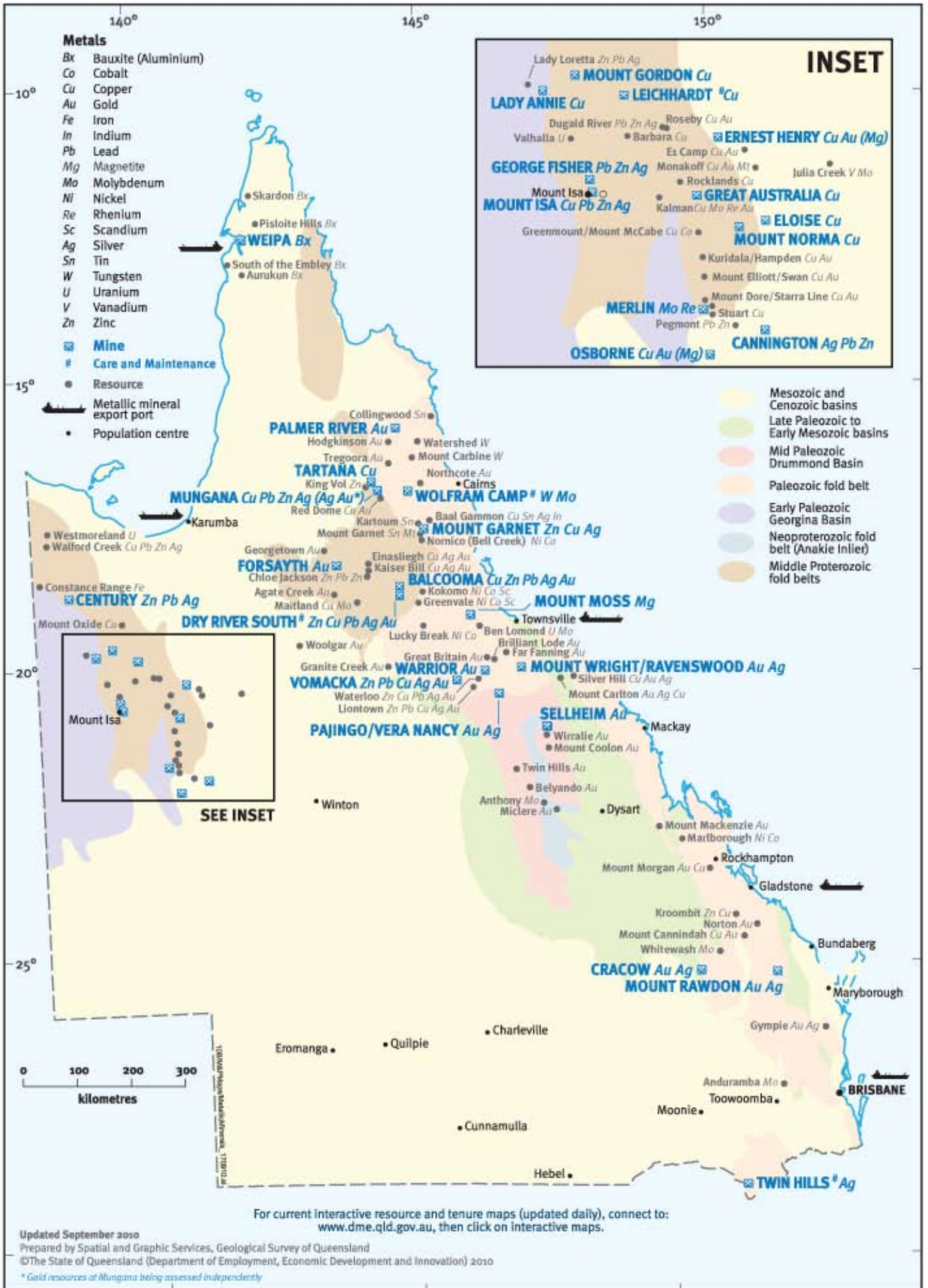
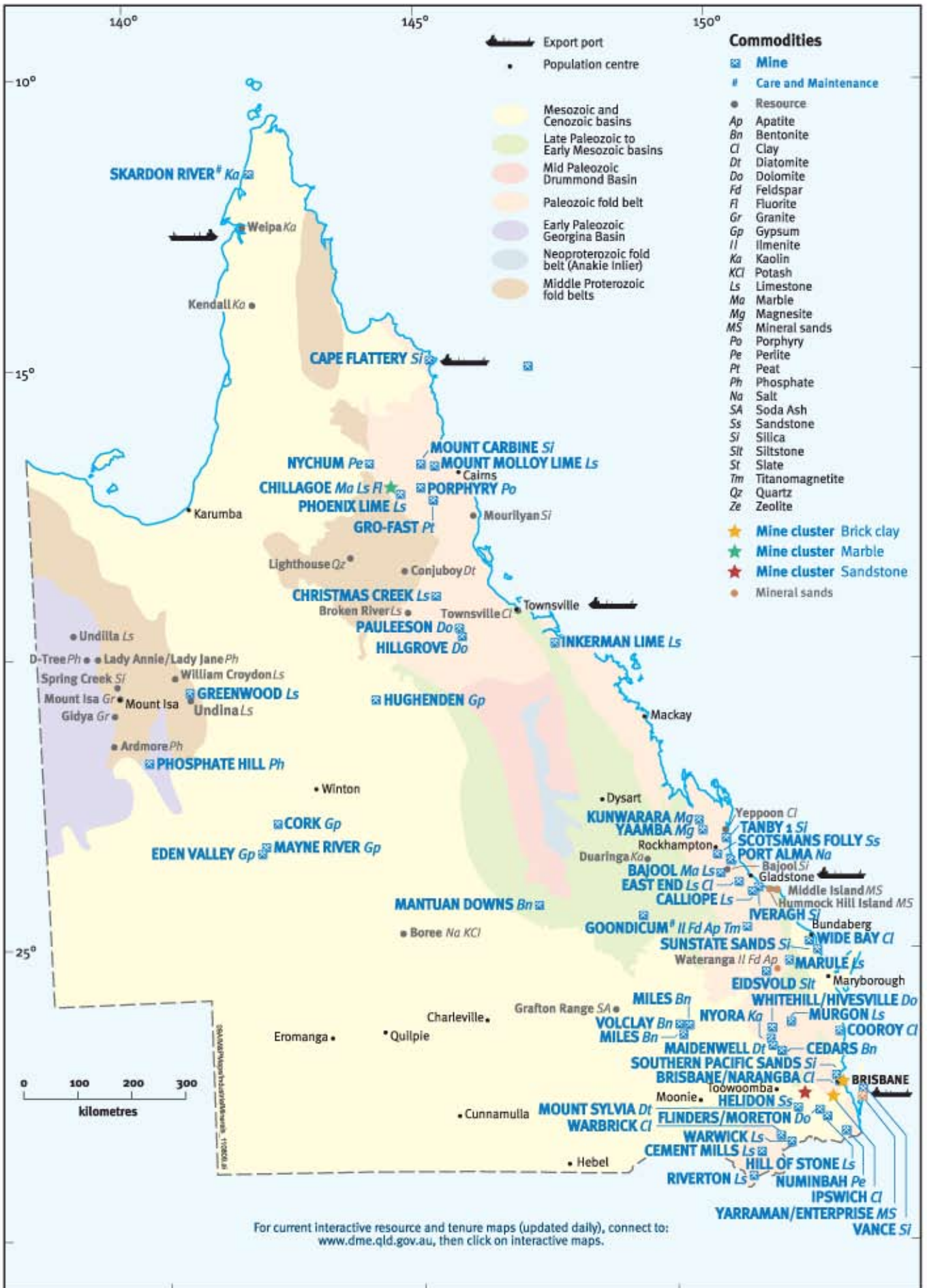


Figure 6: Queensland industrial minerals



6 Comments on the Case for a National Land Freight Strategy

6.1 Productivity Imperative

We totally agree with the statement that

“Any national freight network policy should increase national productivity compared against international benchmarks, and be durable and positively contribute to community safety, amenity and the environment.”

The options presented for addressing the productivity imperative have been considered and the hybrid approach is the supported stance at this point in time.

We are concerned that there have been issues with rail pricing in the past, particularly when the assets move between public and private ownership. This has resulted in pricing strategies that seek to recover the capital costs over a much shorter timeframe than the original life of the asset.

In moving to a transport market approach with respect to road pricing, it is critical that a sufficient level of detailed data is captured to fairly price the usage of road infrastructure between the freight and private transport sectors. As is often the case in these instances, more detailed data exists on the freight sector, with the risk that this could be used to set a price structure that would see the freight sector contributing well above its usage of infrastructure due to inconsistency in data collection between the sectors.

A move to a market based approach for road transportation is likely to impact the Central West region in particular due to the scarcity of rail infrastructure. The entire region is particularly concerned about the cumulative impacts of the market based approach in conjunction with rising oil prices and proposed carbon pricing mechanism which could see significant increase in costs of road transportation.

Whilst we support the principle of the hybrid approach, we would anticipate that central and northern Queensland would not be included in the market approach until such times as it is serviced with an appropriate rail network.

6.2 Freight Constraints

6.2.1 Restricted Use of Infrastructure

There are freight constraints within the national land freight network within Queensland given that one of the major components of the network is the Bruce Highway which carries a large private transport contingent. The Bruce Highway is inadequate, particularly from Sarina to Cairns, to meet the current needs with no capacity to service projected future growth in the region.

Lack of sealed roads in the western parts of the region impacts the freight network, with B triples trying to negotiate unsealed roads in wet weather laden with live cattle. Delays in these conditions adversely affect cattle condition and can even result in animal fatalities.

It is recommended that the best way to secure some level of separation between freight and private transport to allow the use of interoperable high productivity vehicles on the Queensland network would be to develop an alternate North-South corridor inland from the coast.

This would contribute to the following outcomes:

- Increased safety through some separation for freight and private transport;
- Risk management for impacts of extreme weather events which have a higher likelihood of impacting a coastal rather than inland route in Queensland;
- Improved productivity through:
 - Use of higher productivity vehicles;
 - Shorter route;
 - Closer to productivity areas for mining and agriculture
- Supports regional development in inland areas.

6.2.2 Encroachment of freight activities

Central and North Queensland have a number of important strategic ports that service both the outputs and inputs to the region's export oriented industries.

Outputs

There has been a focus on the output network for the resources sector, improving the supply chain from mines to ports, particularly for the resources sector. There are vulnerabilities in the minerals supply chain, with large trains passing through the Townsville CBD to access the port of Townsville. As the city of Townsville continues to grow this is a matter that needs to be addressed in the national land freight strategy. The Townsville Port Access Corridor was designed to service as an effective road and rail link to the port, however only the road component is currently funded, with no timeframe for funding the rail component. This impacts both the input and output supply chains to the north west and north east minerals provinces, as well as general freight servicing the growing population.

There needs to be redundancy in the output network for processed minerals. The Port of Abbot Point is strategically located to fulfil this role with the development of additional freight networks to enable it to meet some of the current demand for export of processed minerals and position itself to meet the future demand as minerals processing is developed in the State Development area at Abbot Point.

The majority of agricultural products in the region are transported via road due to:

- Capacity constraints on the rail network due to increased mining activity;
- Pricing structure between road and rail;
- Seasonal peaks and need for timely delivery of product

Inputs

There has been little focus on the input supply chain. Key inputs of petroleum, cement and fertiliser are impacted by the encroachment of freight activities around the region's primary import ports of Mackay and Townsville.

Current work on road access to the Port of Townsville will meet future needs for some time, but the Port of Mackay is severely impacted. Major petroleum companies are doubling and trebling their storage capacity at the Port of Mackay to service projected future demand from the resources sector. These companies see the strategic position of the Port of Mackay and are making 40 year investments in infrastructure. Developments of new infrastructure to store an additional 200 mega litres of petroleum are well advanced.

A port access corridor has been proposed for some time to follow the current rail line from the Bruce Highway to the Port of Mackay, avoiding the severe urban congestion through the current route. North Queensland Bulk Ports has secured all the land for the corridor, but

there is no commitment to develop the corridor. Doubling and trebling the amount of petroleum products traversing urban areas in the next five years is a national safety matter.

Urban congestion on the Bruce Highway through Mackay will require major investment in augmenting the current route or development of an alternate route by 2018.

6.3 Uncertainty about capacity for growth

The potential for growth in the central and north Queensland region is certain. Whilst it is true that the resources sector is prone to global fluctuations, indications are that the demand for coal (coking coal and thermal coal) and base minerals is increasing. Demand for agricultural products is increasing globally as the world population continues to expand and areas for production decline. Tourism across the region contributes \$2.7b to the Queensland economy, 30% of Tourism in Queensland.

The only uncertainty about this region is how long much of the aging and inadequate freight infrastructure can meet current needs let alone service projected growth.

The competition on the Bruce Highway between freight and private transport is seeing a decline in “grey nomads” in particular risking the trip from Sarina to Cairns, through the worst sections of the highway. The tourism industry will always face fluctuations caused by global and local events; it does not need to be impacted by inadequate infrastructure.

Planning now for an alternate North-South Freight corridor in this region with upgraded East-West linkages to service the coastal cities, will deliver significant benefits to the national economy through increased exports in the resources, agriculture and tourism industries.

6.4 Lack of responsiveness of infrastructure to economic demand

As detailed above, much of the freight infrastructure in the region is barely meeting current needs, and will therefore be unable to respond to economic demand.

6.5 Criteria for inclusion

We propose that the criteria for inclusion of places and routes in the network should relate to Quantum of freight and economic contribution. A dollar per tonne formula should be developed to measure the true economic value of the freight, such that lower volume higher economic value freight routes will get consideration for inclusion in the network.

This economic value is not just the actual \$ value of the freight being transported but also the opportunity cost of the freight being transported. For example, what is the cost to mining production if transportation of a dragline bucket is delayed by x days due to limitations of the freight network? We cannot be responding to the productivity imperative until decisions on the freight transport network relate to economic value rather than quantum of freight.

6.6 Building on the National Ports Strategy

We totally support the synergies between the National Ports Strategy and the National Land Freight Strategy. In regional Queensland, the ports are the lifeblood of industry and need to be linked into the National Land Freight Strategy.

7 National Land Freight Strategy Outline

Regional Development Australia (RDA) is a partnership between the Australian, state and local governments to support the growth and development of Australia's regions. RDA committees will build partnerships between governments, regional development organisations, local businesses, community groups and key regional stakeholders to provide strategic and targeted responses to economic, environmental and social issues affecting the regions of Australia.

RDA committees in regional areas in particular could have a role to play in facilitating dialogue between all levels of government to develop regional freight strategies consistent with the National Land Freight Strategy.

7.1 Vision and Objectives

We totally support the concept of the National Land Freight Strategy with the vision and objectives under consideration. Something as critical to the nation's economy as freight must be planned at a national level in the first instance, and then augmented by planning at a state and local level. Strategic Planning at the national level will provide the framework for state and local governments to consider their freight strategy to augment the national network by providing key state and local links into the network.

7.1.1 Broadening the Vision

The Vision needs to be broader than what is the value of the region at this point in time, it needs to consider what can be achieved given appropriate freight infrastructure. Investment decisions should consider the potential return on investment through increased productivity and exports. "If you build it they will come" is so pertinent to the further development of Central and Northern Queensland.

A long term vision for the network would see development of the "Outback Way" to sealed standard, linking Queensland to Western Australia from Winton, crossing north of Alice Springs, down to Uluru and across to Laverton in WA.

7.1.2 National Ports Strategy

Whilst we appreciate the intent to align the National Land Freight Strategy with the National Ports Strategy, we feel this needs to develop into an integrated strategy between road, rail and sea, working towards segregation as much as possible of the freight task from other road users.

As an example, the lack of a container port in the Mackay Whitsunday region means that many value add products are transported by road to Brisbane to access container port facilities. Even though Townsville is a container port, economics dictate that road transport to Brisbane is currently the most cost effective route. Products impacted here include refined sugar, meat products and Furfural. Expansion of these value-adding industries and development of new industries in regional Queensland is impacted by the freight network.

7.1.3 Developing Regional Australia

If government wants to develop regional Australia, they need to look closely at the freight network servicing regional Australia, as this is the key restriction to development. You just need to look at the extensive freight network in Victoria to appreciate its role in development of regional Victoria. Given the vast potential in regional Queensland in particular, strategic investment in the freight network would be repaid multiple times by increased Goss Regional Product and exports.

Rail is not servicing the freight task in Northern Queensland to the level it should be. Some rail assets are currently underutilised due to pricing policies or inadequate networks to facilitate optimal use. Coastal shipping has declined in the past decades, but provides an opportunity to reduce the carbon footprint of the transport sector significantly. As a nation, we need to think strategically to maximise usage of existing assets such as ports and rail and provide connecting networks and intermodal facilities to make these cost effective transport modes.

7.2 Principal Freight Nodes

We support the principal freight nodes to include capital cities and some nationally significant networked ports in regional centres, including Townsville, Abbot Point and Gladstone in the Central and North Queensland Region.

We would suggest another tier of developing regional ports to be included, recognising their potentially increased freight task in the future. This may require some Strategic Planning to ensure they will be able to fulfil this role as required by the developing regional economies. This would include general ports such as Mackay, Cairns and Mourilyan, as well as resource/export ports of Hay Point and Karumba.

The Port of Cairns plays a strategic role in servicing the Cape York and Torres Strait communities including many indigenous communities. It is seeking to expand into servicing developments in nearby countries such as Papua New Guinea.

The Port of Mackay sees an expanding role in servicing mining growth in hinterland areas, and Mourilyan has potential growth in timber and explosives exports.

7.3 Interoperability

This is a very important consideration for the Strategy. In our region there are new resource developments in the Galilee Basin that will see significant investment by the private sector in major freight infrastructure of roads and rail. These must conform to the national standards as historically infrastructure of this type passes between private and public hands over the life of the asset. This includes the requirement to be able to refit (new) corridors with either road or rail freight configurations.

7.4 Goals

Infrastructure to service new development such as the Galilee Basin must conform to all national standards regardless of private or public investment. There should be no duplication of assets by different investors.

The National Land Freight Strategy should provide the government with the facility to partner with private investors where new corridors are being developed, to ensure the initial corridor width is sufficient to allow for all potential future uses including road, rail, pipelines, communications and power. This may require partnership between the private and public sector on purchase and ownership of the corridor.

Greater intermodal capacity is required in regional centres that are impacted by frequent modal shifts for industry outputs.

We support high productivity/performance based standards road network for “national highways” pointing out that the stretch of the Bruce Highway from Sarina to Cairns would fall severely short of any standards. The flood resistance status and general safety aspects of this stretch of the national highway require urgent consideration. However it is recognised that its location on the coast make it impossible to provide a high level of resistance to severe

weather events, therefore this needs to be balanced with the development of an inland freight route with East-West connections to the National Highway.

There needs to be a strategic approach to the freight passage through the City of Mackay. Recent investments by the State Government in bridge infrastructure have not considered potential freight bypasses of the city that will be required in the next 10-20 years. The need to replace ageing infrastructure has not considered a strategic location of new assets that will improve the freight network in the future. We must maximise the return on investment in major infrastructure such as roads, rail, bridges and communications to ensure that we improve our ability to operate competitively in global markets.

8 Conclusion

Central and Northern Queensland is clearly an economic powerhouse of Australia, punching far above its weight with respect to population and providing equivalent export value to its area. With strategic investment in key freight infrastructure there is the potential to increase the region's productivity significantly providing a sound return on investment in increased exports.

Potential matters for inclusion in National Land Freight Strategy now or at a later date are:

- Inland North-South freight route in the region, ultimately linking Cairns through to Melbourne, providing a shorter national freight route between Victoria, NSW and Queensland.
- East-west connectors to the new inland route to divert as much through freight from the Bruce Highway as possible to improve safety for private transport.
- By pass of Mackay City or augmentation of existing route by 2018 due to urban congestion.
- Road corridor linking Port of Mackay to the Bruce Highway (and any new by-pass) to reduce transportation of petroleum products through urban areas.
- Rail bypass of Townsville CBD and inner urban areas, particularly the rail link component of the port access corridor.
- Upgrading Landsborough Highway to accommodate high productivity vehicles and improve safety.
- Planning freight network to Port of Abbot Point to enable it to develop into a general cargo port servicing the Northern Economic Triangle including Mt Isa and Townsville.
- Inclusion of second tier ports with considerable development potential such as Mackay, Mourilyn, Karumba and Cairns.
- Sealing freight routes beyond major trunk routes in the agriculture and mining sectors where there is significant volume and projected future growth.
- Outback Way linking Queensland, Northern Territory and Western Australia.