



# Port Development Strategy

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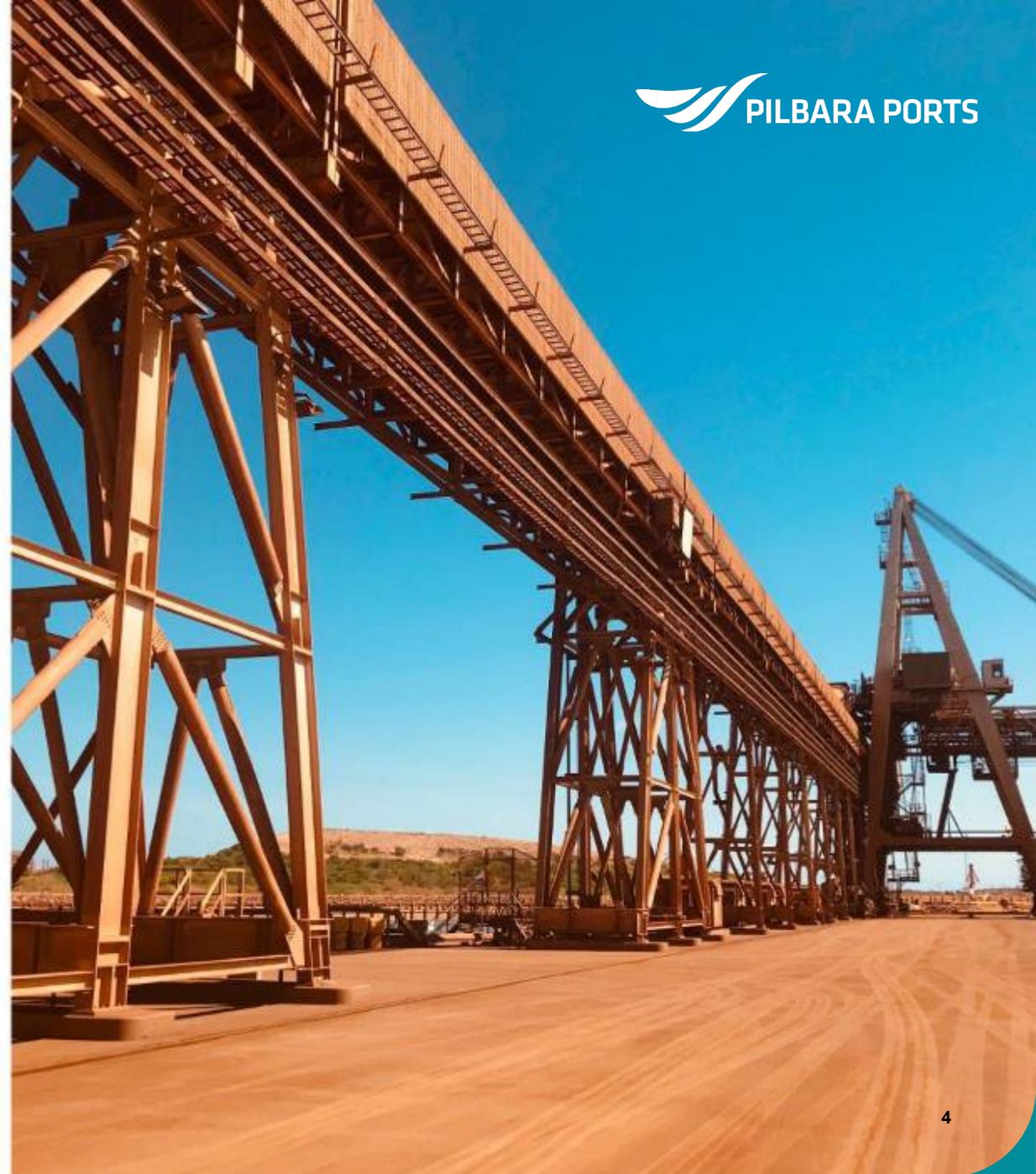
## Acknowledgement of Country

Pilbara Ports acknowledges the Traditional Owners of the land and waters in which we operate and pay our respects to Elders past and present.

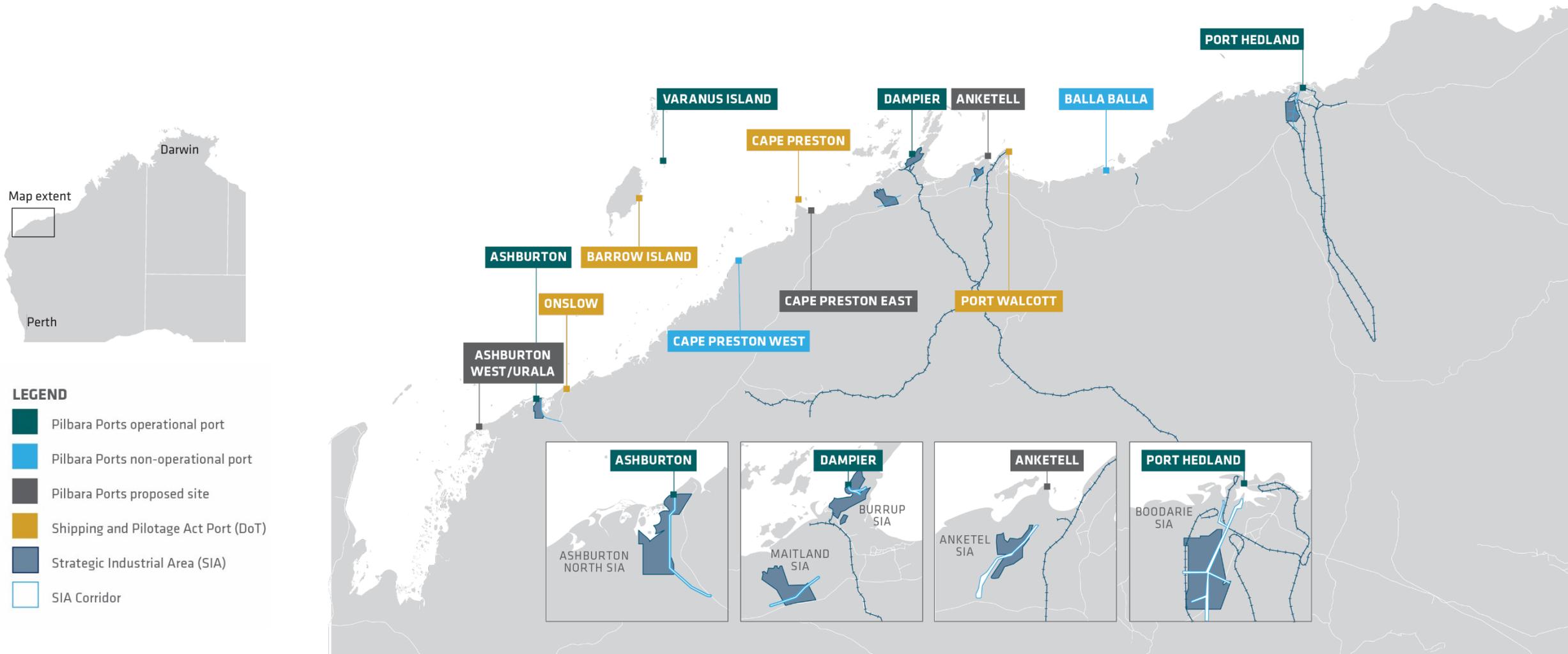
# What is the Port Development Strategy for?

# Why this matters

- The Pilbara accounts for **40 per cent of Australia's exports** and an estimated \$153 billion annually.
- Our ports enable 81 per cent of Australia's iron ore and 43 per cent of global seaborne trade.
- But the world is changing, **net-zero**, **critical minerals** and **regional diversification** are reshaping trade.
- The Port Development Strategy positions Pilbara Ports to remain a cornerstone of economic and industrial growth for WA and Australia.



# Our ports



# About the Port Development Strategy

- The Port Development Strategy sets the context, long-term strategic direction, objectives and strategies for how the port system will remain a critical enabler of economic growth and regional resilience.
- It responds to global and domestic shifts including **decarbonisation**, the rise of **critical minerals**, **clean energy technologies**, and new **ESG expectations**.
- It also recognises that government and customer priorities are evolving around diversification, emissions reduction, regional development, and First Nations empowerment.



# Where does it fit?

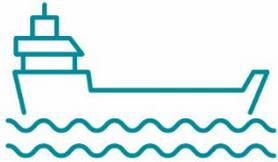
# Our port development framework

## Port Development Framework



# What is in the Port Development Strategy?

# Structure of the Port Development Strategy



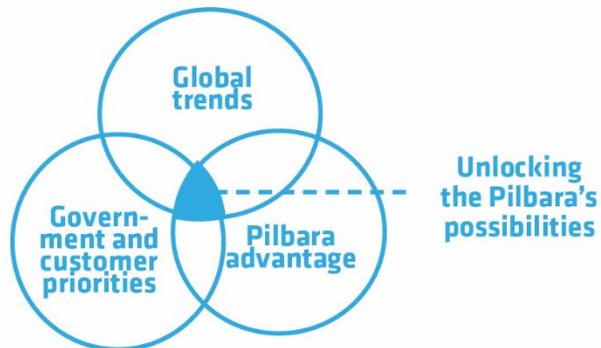
## 01 Where we are today

Establishes the baseline of current port operations, trade profiles, and recent performance.



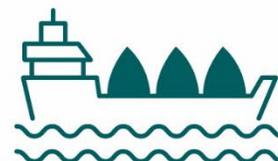
## 02 Understanding the context

Summarises the global, national, and regional forces shaping the future including decarbonisation, technology, government priorities, customer signals, and the strategic advantages of the Pilbara.



## 03 Unlocking the possibilities

Builds on Chapter 2 and explores the intersection of these forces to uncover the Pilbara's unique opportunities and limitations. It frames the case for change, applies scenario thinking, and identifies the conditions needed to unlock long-term growth.



## 04 Designing the path forward

Sets out the direction, capability shifts, objectives, and strategies required to meet today's needs and tomorrow's opportunities, supported by actionable priorities, performance indicators, and planning instruments.

# Context: Change drivers

## 1. Global megatrends

- Energy transition, ESG, capital shifts.

## 2. Government priorities

- Made in WA, Diversify WA, Critical Minerals, Hydrogen, Net Zero.

## 3. Customer Signals

- Diversification, value-adding, clean energy supply chains.

## 4. Pilbara's enduring advantage

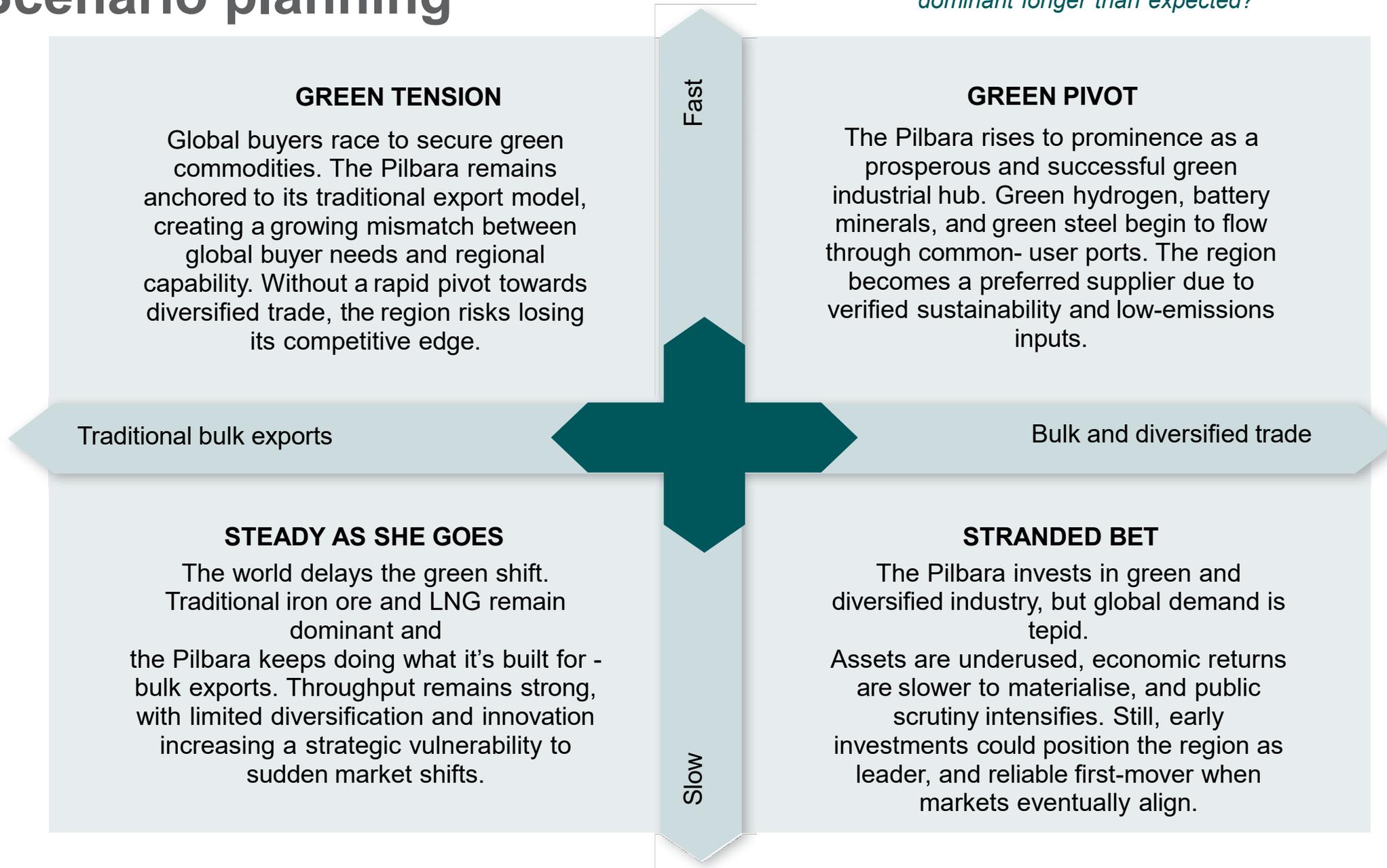
- Critical minerals, renewables, infrastructure and trust.



# Scenario planning

**Global decarbonisation pace**

*Will global markets shift rapidly to green energy and commodities - or will conventional and transitional fuels remain dominant longer than expected?*



**Pilbara diversification path**

*Will the Pilbara succeed in activating new industries such as hydrogen, green steel, and mid/ downstream processing at pace and scale?*

# Our horizon-based approach



## Horizon 1 (1-3 years) 70% of organisational effort

### Strengthen current core business

- Optimise iron ore and bulk commodity exports.
- Deliver committed capital projects.
- Improve safety and efficiency.
- Support transitional fuels, including low-carbon ammonia bunkering.

## Horizon 2 (3-10 years) 20% of organisational effort

### Enable decarbonisation and diversification

- Enable growth in critical minerals, lithium, hydrogen, and low-carbon ammonia exports.
- Invest in common user, flexible infrastructure.
- Support iron ore processing.
- Support industrial integration with ports.
- Achieve scope 1 and 2 net zero emissions targets.

## Horizon 3 (10+ years) 10% of organisational effort

### Support a clean, connected, and competitive industrial hub

- Support low-carbon manufacturing and advanced processing.
- Become a global hub and gateway for ESG-aligned trade.
- Export green iron, green processed minerals, and clean energy.

Uncertainty

# The opportunity for WA and Australia

- From **infrastructure operator** → to **strategic enabler and integrator**, we are supporting trade diversification, decarbonisation, and regional development.
- The Pilbara can evolve from a resource basin to a clean industrial hub. Opportunities include:
  - Green iron and steel;
  - Green hydrogen and ammonia;
  - Critical mineral refining; and
  - Decommissioning and clean energy exports.
- Ports are the gateway and catalyst for these industries.



# Regional enablers

Enabler	What's needed	Why it matters
Clean energy and water access	Renewable zones, transmission, desalination	Power low-carbon industries
Diversified trade infrastructure	Common-user, flexible facilities	Support emerging industries
Investment activation	Streamlined approvals, blended funding	Attract global investment
Skilled workforce	Training pathways, liveability	Retain capability in the Pilbara
Deep partnerships	Government alignment, First Nations inclusion	Shared prosperity and trust

# Strategic objectives

Enabling pillars	Core objectives
<b>01</b> → <b>People and culture</b>	<ul style="list-style-type: none"><li>✓ Build a trusted, adaptive organisation</li><li>✓ Make smarter, faster decisions</li></ul>
<b>02</b> → <b>Resilience and prosperity</b>	<ul style="list-style-type: none"><li>✓ Deliver future-ready port infrastructure</li><li>✓ Integrate beyond port boundaries</li></ul>
<b>03</b> → <b>Partnership</b>	<ul style="list-style-type: none"><li>✓ Enable a more diverse customer base</li><li>✓ Strengthen partnerships with government and industry</li><li>✓ Support vibrant, resilient Pilbara communities</li></ul>
<b>04</b> → <b>Planet</b>	<ul style="list-style-type: none"><li>✓ Support regional decarbonisation</li><li>✓ Embed ESG into decision-making</li></ul>

# Key priorities under way



**Lumsden Point** – enabling future trade diversification and clean energy industries.



**Dampier Cargo Wharf expansion** – supporting multi-user and diversified trade.



**Port Growth and Tenantry Strategy** – ensuring ports are ready for future trades.



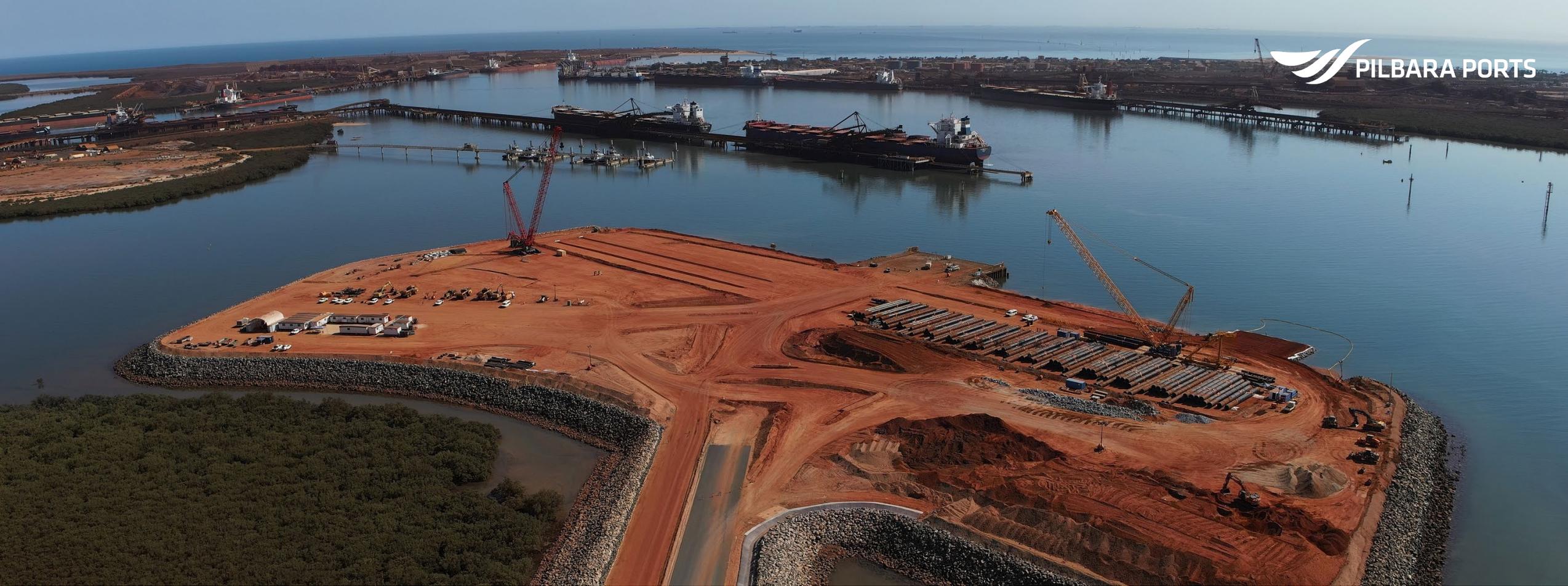
**Pilbara Clean Fuel Bunkering Hub** – advancing shipping decarbonisation.



# What does the Port Development Strategy mean for me?

# Supporting WA's long-term vision

- Aligned with State Government goals:
  - **Made in WA Plan**
  - **Investing in WA's Future**
  - **Diversify WA**
  - **Renewable Hydrogen Strategy**
  - **WA's Battery and Critical Minerals Strategy**
  - **Pilbara Energy Transition Plan**
- Investment readiness:
  - Provides a clear framework for targeted infrastructure funding and policy alignment.
- Partnerships:
  - Invites government collaboration to co-design regional infrastructure, planning and enabling policy.
- Delivery confidence:
  - Positions Pilbara Ports as a trusted delivery partner for sustainable economic growth.



Scan the QR code or visit our website  
view the Port Development Strategy.

**[www.pilbaraports.com.au/business-and-trade/port-planning-and-development](http://www.pilbaraports.com.au/business-and-trade/port-planning-and-development)**



# Thank you

Any questions?