



# PORT DEVELOPMENT STRATEGY

2025-2030



## ACKNOWLEDGMENT OF COUNTRY

Pilbara Ports acknowledges the Traditional Owners of the land and waters in which it operates – Kariyarra (Port Hedland), Thalanyji (Ashburton), Yaburara, Mardudhunera, Ngarluma, Wong-Goo-Tt-Oo, Yindjibarndi (Dampier), and Whadjuk Noongar (Perth) – and pays its respects to Elders past and present.



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## OUR VISION

Our ports connect the possibilities of the Pilbara to the world so our customers and communities thrive

## OUR VALUES

### SAFETY

ensuring everyone goes home safe and healthy everyday

### EXCELLENCE

taking pride in our work and striving to improve

### TEAMWORK

valuing difference and working collaboratively

### INTEGRITY

delivering on commitments and acting honestly and objectively

### CARE

respecting people, communities, and the environment





## CEO'S FOREWORD

**Western Australia's prosperity has long been anchored in its natural resources – iron ore, gas, agriculture, and energy. At the heart of this success is the Pilbara, which accounted for an estimated \$153 billion in exports during financial year 2024–25. This represents around 40 per cent of Australia's national export value, reaffirming the Pilbara's central role in the national and global economy.**

Iron ore remains foundational, with Pilbara Ports facilitating 81 per cent of Australia's and over 43 per cent of global seaborne iron ore trade. Exports of salt, liquid natural gas (LNG), condensate, and urea further underscore the region's industrial strength.

Yet the world is changing. The drive toward net zero, the rise of new technologies, and shifting geopolitical dynamics are redefining global trade. Emerging markets demand agility, innovation, and a new level of resilience from supply chains.

The Pilbara is uniquely positioned to lead in this transformation. With abundant critical minerals, large scale renewable energy potential, and deep operational experience, it can become a launchpad for both traditional and next generation industries.

To seize this opportunity, we must treat ports not merely as infrastructure, but as strategic enablers. Our decisions and investments must anticipate future trade flows, support industry diversification, and meet rising expectations around emissions, transparency, and regional value creation.

This Port Development Strategy sets our overarching direction in this time of transition. It reaffirms our commitment to enabling economic growth and diversification while staying true to our values of safety, excellence, integrity, teamwork, and care and staying focused on delivering our purpose to connect the possibilities of the Pilbara to the world so our customers and communities thrive.

**Sam McSkimming**

Chief Executive Officer

## OUR VISION

Our ports connect the possibilities of the Pilbara to the world so our customers and communities thrive

## PILBARA REGION ENABLERS

Clean energy and water access

Infrastructure for diversified trade

Investment and industry activation

A skilled and sustainable workforce

Deep and enduring partnerships

## PORT DEVELOPMENT STRATEGY

### People and culture

Build a trusted, adaptive organisation

Make smarter, faster decisions

### Resilience and prosperity

Deliver future-ready port infrastructure

Integrate beyond port boundaries

### Partnership

Enable a more diverse customer base

Strengthen partnerships with government and industry

Support vibrant, resilient Pilbara communities

### Planet

Support regional decarbonisation

Embed Environmental, Social and Governance into decision making

## EXECUTING THE PORT DEVELOPMENT STRATEGY

Trade growth and tenanting strategies

Master planning

Port plans

## KEY PERFORMANCE AREAS

# EXECUTIVE SUMMARY

**Pilbara Ports sits at the centre of one of the most globally significant trade systems which connects Australia's resource rich Pilbara region with the Indo-Pacific. In FY2024-25 alone, the ports enabled over \$153 billion in trade, anchored by global demand for iron ore and LNG.**

Today, the Pilbara's trade system is highly effective and purpose built to move vast volumes of bulk commodities with efficiency and reliability. But the world it operates in is changing.

Global markets are accelerating toward low emissions environment social and governance (ESG) aligned value chains. New industries are emerging, and governments are prioritising sovereign capability, diversification, decarbonisation, and regional development. In parallel, Pilbara-based customers are actively adapting to these shifts. These changes bring with them both risk and opportunity.

The Port Development Strategy (PDS) is Pilbara Ports strategic response. It sets the context, long-term direction, and strategies for how the port system will remain a critical enabler of economic growth and regional resilience by strengthening its bulk commodity capabilities while building capability for a more diversified, complex, and decarbonised industrial future.

## **A system at a strategic crossroads**

While iron ore and LNG will remain critical for the foreseeable future, three powerful, interconnected forces are reshaping the Pilbara's long-term trajectory:

- global megatrends: the energy transition, growing demand for critical minerals, rising ESG expectations, capital reallocation, and climate risk are redefining the future of trade;
- evolving government and customer priorities: a stronger focus on decarbonisation, economic diversification, regional development and a focus on Made in WA, and First Nations empowerment is reshaping expectations for how infrastructure supports national and regional objectives; and

- the Pilbara's enduring advantages: world-class mineral resources, significant renewable energy potential, mature infrastructure, and proximity to Indo-Pacific markets position the region to lead, if these advantages are strategically enabled.

These forces are not temporary, they are structural and accelerating. They signal a profound transformation in how ports operate, the industries they support, and the infrastructure they must enable.

## **Uncovering what's next**

Pilbara Ports has explored how the two critical enablers intersect to shape the region's future trade profile, industrial activity, and infrastructure needs. These enablers include:

- the pace of global decarbonisation; and
- the Pilbara's diversification trajectory.

From this analysis, market, and government signals point to a preferred strategic trajectory:

- The Pilbara as a globally-significant clean, connected, and competitive industrial hub extending from extraction to low-carbon, high-value processing, exports and imports - including direct freight, renewable energy infrastructure and green fleet.

This is not a departure from bulk commodities, but rather an evolution that builds upon core strengths. To enable this future, several regional enablers must be unlocked including clean energy, reliable water supply, flexible and scalable infrastructure, investment-ready land, skilled workforces, and enduring partnerships. Many regional enablers sit beyond the port boundaries, but ports play a pivotal enabling role and must not become bottlenecks for future growth.

## Pilbara Ports response

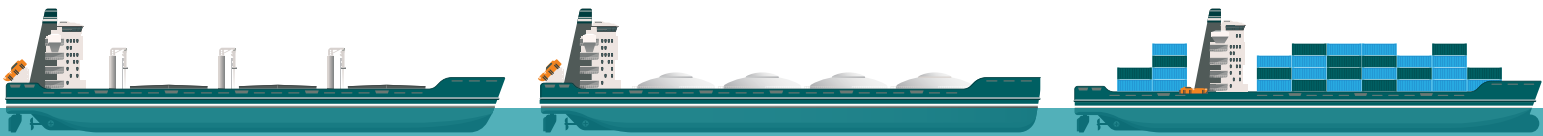
The PDS sets out a clear and coordinated pathway for Pilbara Ports to navigate this transformation. It introduces a staged, horizon-based approach that balances immediate priorities with long-term planning, recognising the need to act now while positioning for what's next.

This approach defines both short and long-term direction, expressed through a clear set of objectives including building a trusted, adaptive organisation that makes smarter, faster decisions to deliver a future ready port system. The objectives are supported by enabling strategies, measurable outcomes, deep insights, and a commitment to developing more detailed planning and delivery instruments.

Achieving the strategy requires sustained collaboration across governments, industries, and communities. It will demand ongoing insight gathering, adaptive planning, and a willingness to lead with long-term vision and purpose.

The direction ahead is clear which involves a layered transformation that retains core strengths, unlocks new possibilities, and ensures the port system continues to connect the Pilbara to the world so customers and communities continue to thrive in a changing world.

## Our planning horizons



### 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

# PURPOSE OF THE PORT DEVELOPMENT STRATEGY

The PDS sets the strategic direction for long-term growth and development of Pilbara Ports in response to an increasingly dynamic and complex global environment.

At its core, the PDS aims to deliver on Pilbara Ports purpose of connecting the possibilities of the Pilbara to the world so our customers and communities thrive. It does so by articulating the core objectives and strategies that guide decision making and inform more detailed port development instruments. These including master planning, integrated business planning, and port plans, all of which ensure that efforts are aligned, coordinated, and future-ready.

## Why is a PDS needed?

Pilbara Ports manages assets designed to serve generations. With lifespans often exceeding 50 years, decisions made today will shape the region's trade capacity, flexibility, and competitiveness for decades to come.

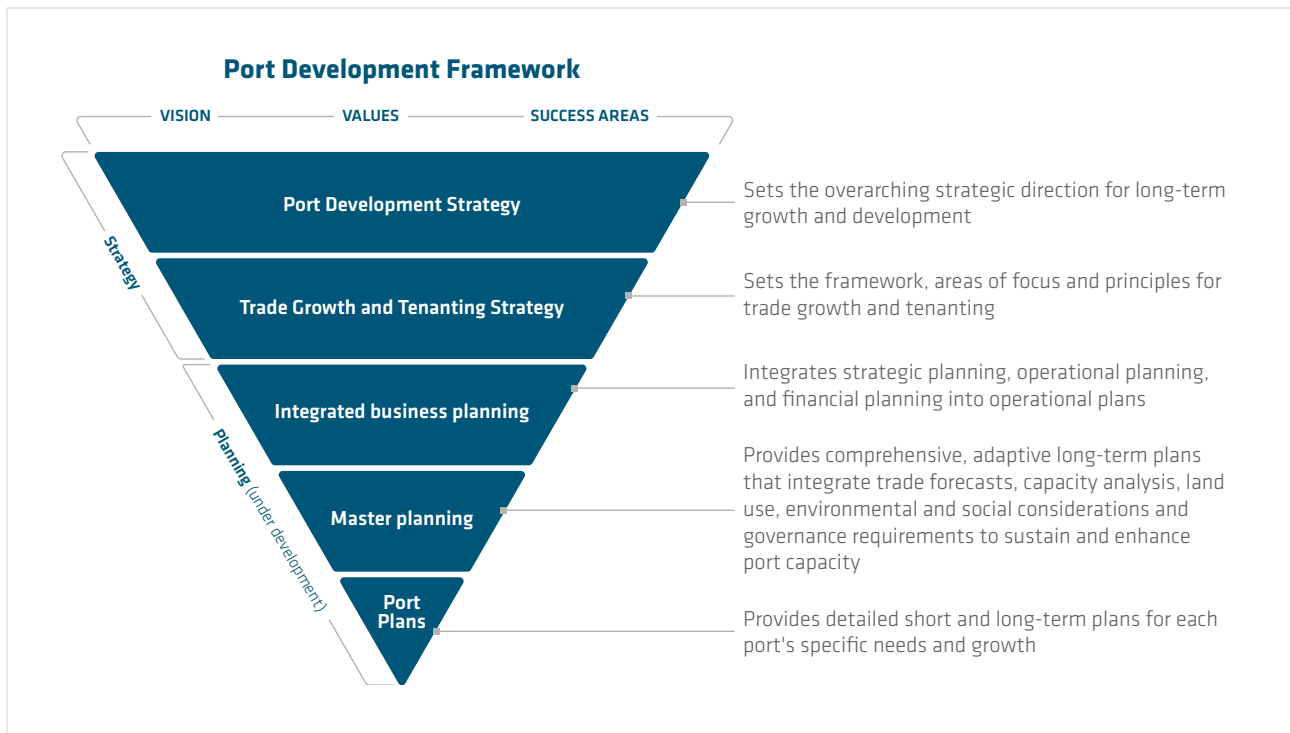
While port development can be viewed narrowly as the delivery of physical assets, this PDS takes a broader

perspective. It recognises that meaningful progress is not just achieved by building new infrastructure, but also by a wider set of enablers, including strengthening capability, improving operations, delivering positive community outcomes, and advancing sustainability.

Without a clear, integrated, and long-term strategy, there is risk of fragmented and short-term decision making that could constrain future opportunities or lead to inefficient investment.

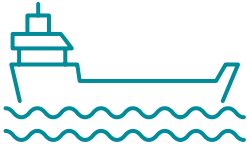
## What does the PDS enable?

- Alignment of decision making and collaboration at all levels of the organisation.
- Readiness to support emerging industries and new forms of trade.
- Stakeholder confidence through transparent, long-term planning.
- Avoidance of ad hoc decisions that may limit efficiency or long-term value.
- Ability to adapt to shifting market conditions, policy settings, and global trade trends.



# NAVIGATING THE PORT DEVELOPMENT STRATEGY

The PDS discusses many moving, integrated components. It is structured into four interconnected chapters, each one building on the last:



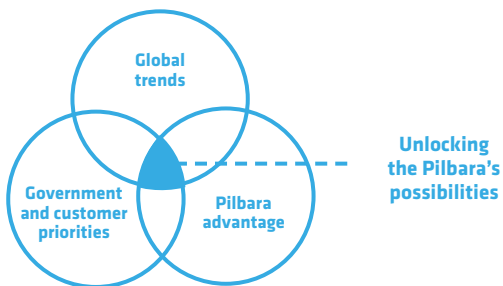
## 01 Where we are today

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



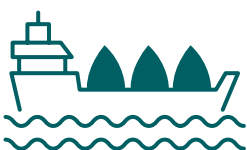
## 02 Understanding the context

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.

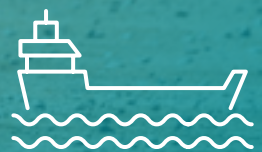


## 04 Designing the path forward

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.

CHAPTER 1:

# WHERE WE ARE TODAY



# ORGANISATIONAL PROFILE

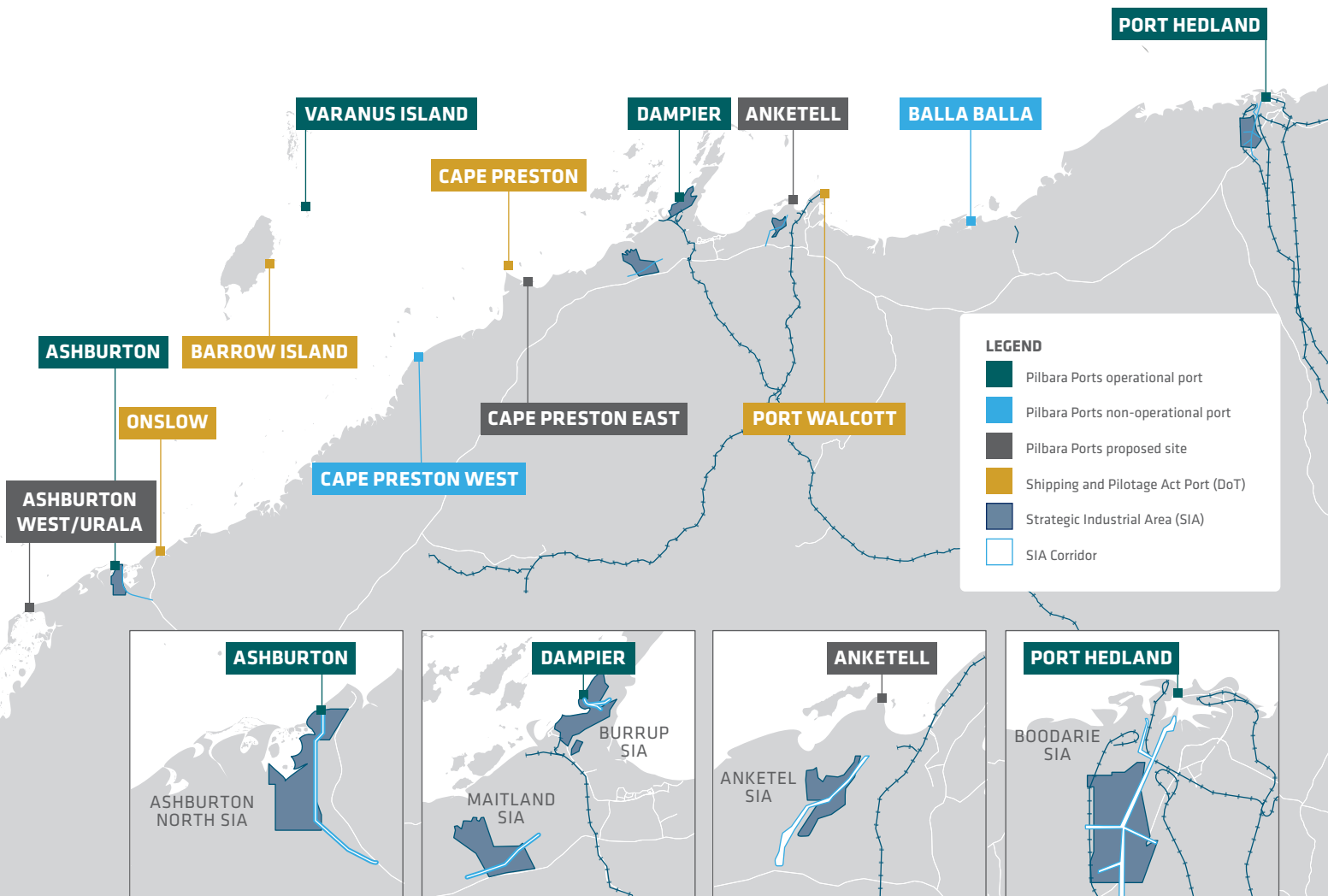
Pilbara Ports is the world's largest bulk export port authority, encompassing the operating ports of Ashburton, Dampier, Port Hedland, Varanus Island and five future port sites\*.

The ports of Dampier and Port Hedland are among the world's largest bulk export ports, responsible for about 81 per cent of Western Australia's, and about 43 per cent of the world's iron ore exports.

Other major export commodities include liquefied natural gas (LNG) and salt. LNG throughput at the ports of Ashburton and Dampier was 27Mt, which was about 34 per cent of Australia's exports and six per cent of global LNG trade.

There are 19 operational berths at the Port of Port Hedland. Pilbara Ports operate berths 1, 2 and 3 in the harbour's east side operations, and the Utah Facility. BHP owns and operates eight berths, Fortescue owns and operates five berths, and Roy Hill Infrastructure owns and operates two berths. During the 2024-25 financial year, we progressed development of the Lumsden Point General Cargo Facility and Logistics Hub, which will add two common user berths.

At the Port of Dampier, we own and operate the Bulk Liquids Berth and the Dampier Cargo Wharf that together provide up to three berths. Rio Tinto and Woodside Energy own and operate private port terminals; Toll and Qube also operate private facilities.



The Port of Ashburton is a multi-user facility located next to a strategic industrial area accommodating LNG facilities and other hydrocarbon-based and natural gas processing facilities for WA's domestic gas supply. Chevron and Mineral Resources each own and operate private terminals, utilising a single common-user shipping channel.

The ports of Ashburton, Dampier and Port Hedland are all located in proximity to Strategic Industrial Areas (SIA), with current and proposed Pilbara ports supporting five of the State's 13 SIAs. These are designed to support heavy industries and downstream processing, contributing significantly to the state's economy. The connection of the SIAs to port facilities provides a significant opportunity to support diversification, decarbonisation and regional development.

Pilbara Ports is responsible for managing the ports, including vessel traffic services, ship scheduling, berthing allocations for multi-user facilities and port communications. This includes pilot services, vessel movements, maintaining shipping channels, navigation aids and other port infrastructure. Third

party contracts or licences are issued for stevedoring, towage, pilotage, pilot transfer helicopters and pilot boat coordination, security services and waste management services.

We share responsibilities with numerous Federal and State Government agencies in relation to certain activities at our ports. We oversee marine safety and port security, cooperating with Commonwealth Government agencies responsible for customs, quarantine and marine safety. The Port of Ashburton has been approved to become an international port of arrival, as well as expansion of the Port of Port Hedland to include Lumsden Point, and the Port of Dampier for additional berths.

We oversee 141,532 hectares of land and seabed across the operating ports of Ashburton, Dampier, Port Hedland and Varanus Island, and a further 76,752 hectares of tenure at the future ports of Anketell, Balla Balla, Cape Preston East, and Cape Preston West.

We also facilitate port-related industries by leasing and licensing land to third parties. As of 30 June 2025, a total of 1,703 hectares of land were leased to more than 55 port users.



# TRADE DESTINATIONS AND THROUGHPUT

Pilbara Ports is one of the most globally connected trade gateways in the Indo-Pacific. Approximately 99.5 per cent of trade is comprised of exports, with the overwhelming majority bound for Indo-Pacific destinations.

Key trade relationships include:

- **China** remains the dominant market, accounting for ~80 per cent of total throughput,
- **Japan, Taiwan, South Korea,** and **Thailand** receive exports of LNG, liquefied petroleum gas (LPG), and condensate, with future demand expected to shift toward green energy alternatives.
- **Emerging markets** in Europe are showing increased interest in ESG-aligned, traceable supply chains.

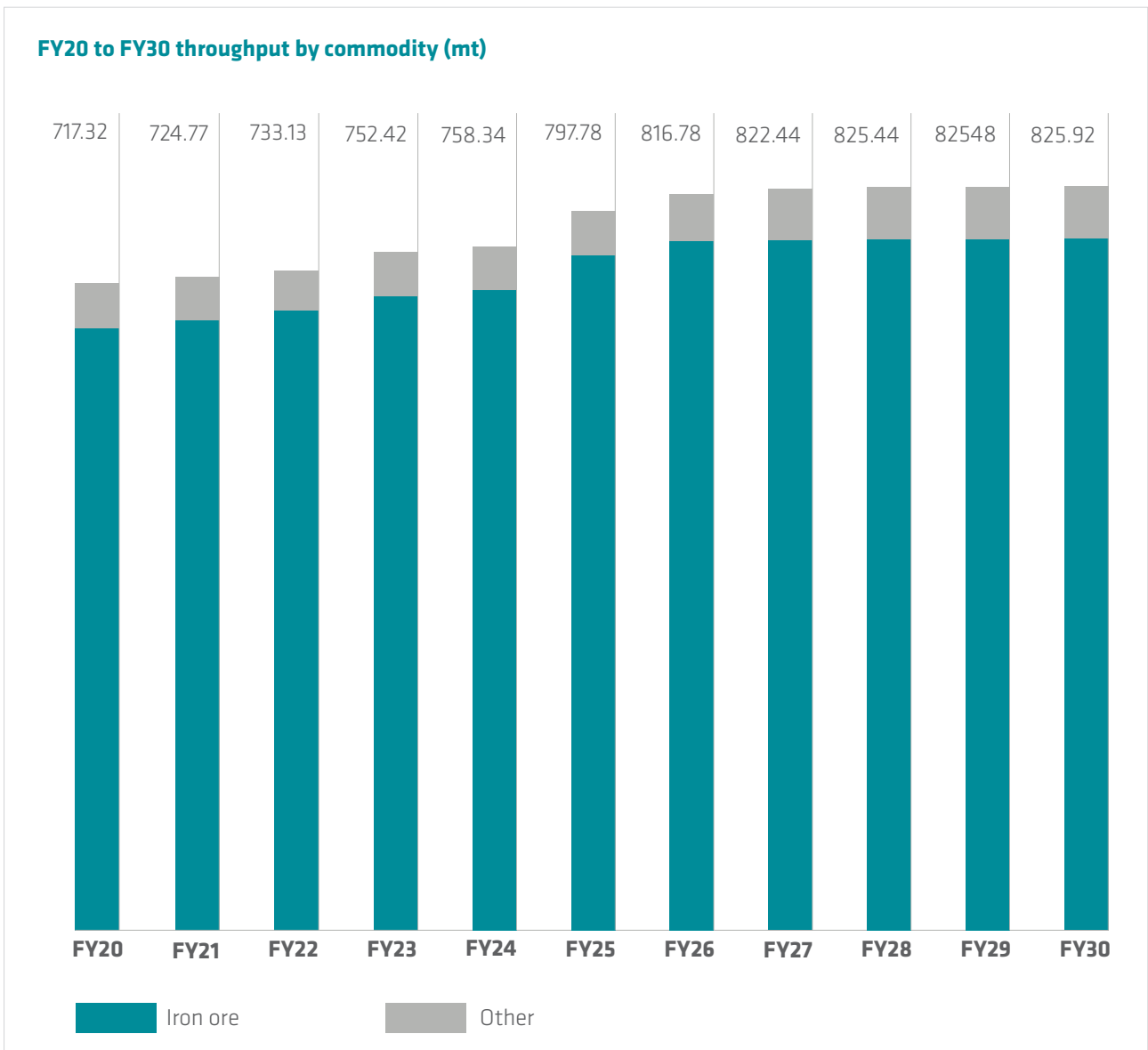


Exports are heavily weighted towards iron ore, comprising 707 Mt of the 758 Mt throughput (94 per cent) in FY2024-25, expected to rise modestly through to FY2029-30.

LNG, LPG, and condensate volumes account for around four per cent of throughput, also expected to rise modestly supported by sustained demand for transitional fuels.

General cargo and containerised trade is also growing, becoming more relevant as companies seek lower-carbon logistics routes for project cargo and equipment.

Future commodities will also deliver substantial upside nearing and beyond FY2029-30.

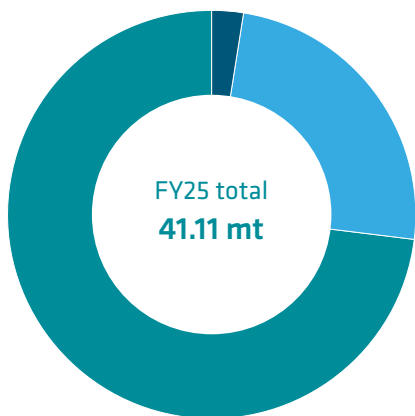


# PORT PROFILES

## Port of Ashburton

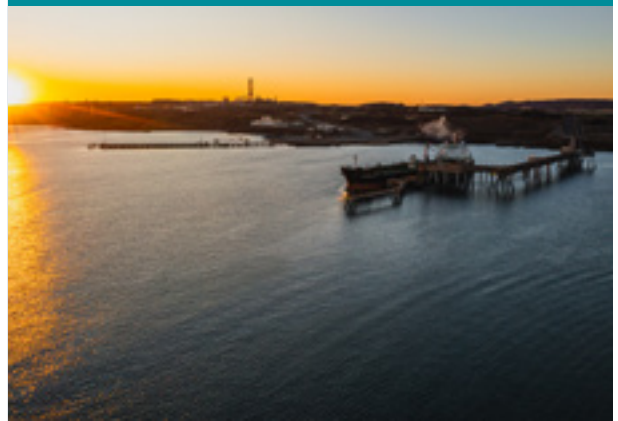


Port of Ashburton is comprised of the Ashburton Cargo Wharf (ACW), Mineral Resource’s Onslow Iron terminal, which is anticipated to ramp up to 35Mtpa, and the Wheatstone Marine Terminal (WMT). With common-user berth access and available laydown capacity, Port of Ashburton is well positioned to support emerging trades, including oil and gas decommissioning and other diversified industries.

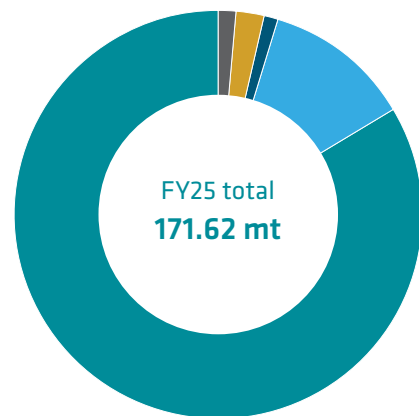


<span style="color: #008080;">■</span> Iron ore	<b>73.0% (30.0 mt)</b>
<span style="color: #00AEEF;">■</span> LNG	<b>24.3% (10.0 mt)</b>
<span style="color: #004A7C;">■</span> Condensate	<b>2.7% (1.10 mt)</b>
<span style="color: #444444;">■</span> General/containers	<b>0.0% (.01 mt)</b>

## Port of Dampier



Port of Dampier remains a major bulk export hub, with 85 per cent of trade in iron ore, followed by LNG, condensate, salt, and anhydrous ammonia. Imports include fuel and general cargo. The port supports both private and common-user operations, including the Dampier Cargo Wharf and Dampier Bulk Liquids Berth. Completion of the Dampier Bulk Handling Facility will further expand the ports capacity for multi-user and diversified trade.

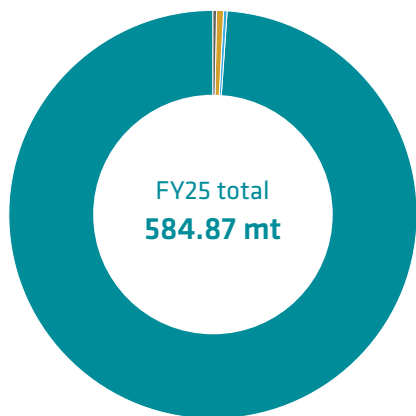


<span style="color: #008080;">■</span> Iron ore	<b>83.5% (143.22 mt)</b>
<span style="color: #00AEEF;">■</span> LNG	<b>11.7% (20.0 mt)</b>
<span style="color: #004A7C;">■</span> Condensate	<b>1.2% (2.06 mt)</b>
<span style="color: #C4A000;">■</span> Salt	<b>2.3% (4.0 mt)</b>
<span style="color: #444444;">■</span> Other	<b>1.4% (2.35 mt)</b>

### Port of Port Hedland



The world's largest bulk mineral export port, with 99 per cent of exports comprising iron ore, followed by manganese, salt, copper concentrate, and spodumene concentrate. Imports include fuel, bulk liquid chemicals, and mining consumables. Of its 21 berths, five are common-user including Utah, Port Hedland East, and two new berths at Lumsden Point that will support future trade diversification and enable clean energy industries.

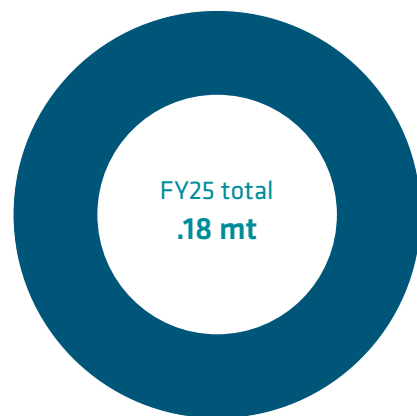


<span style="color: #008080;">■</span> Iron ore	<b>98.6% (576.61 mt)</b>
<span style="color: #00AEEF;">■</span> Fuel	<b>0.3% (1.86 mt)</b>
<span style="color: #D4AF37;">■</span> Salt	<b>0.5% (3.20 mt)</b>
<span style="color: #444444;">■</span> Other	<b>0.5% (3.20 mt)</b>

### Port of Varanus Island



Port of Varanus Island is a dedicated export hub for offshore gas fields operated by Santos, focused on condensate processing and export. Transferred to Pilbara Ports in 2021, the port is not a common-user facility and supports a single proponent.



<span style="color: #005577;">■</span> Condensate	<b>100.0% (.18 mt)</b>
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CHAPTER 2:

# UNDERSTANDING THE CONTEXT



Global trends

Government and customer priorities

Pilbara advantage

# GLOBAL TRENDS

**Pilbara Ports operates in a world undergoing profound transformation. A series of interrelated global shifts are redefining trade, infrastructure, and economic systems. These trends influence how nations plan, invest, and compete which shapes the context in which Pilbara Ports must evolve.**

## **Resource demand**

Industrialisation across Asia, Africa, and Latin America continues to drive demand for traditional exports such as iron ore. However, long-term trends highlight that the bulk commodities market is evolving with greater global focus on critical minerals such as lithium, nickel, cobalt and rare earths. Demand is being driven by decarbonisation and energy technologies such as electric vehicles, batteries, and renewable energy systems.

## **Global energy transition**

The transition to net zero greenhouse gas emissions is one of the most profound changes in the global economy and is reshaping investment activity globally. As nations reduce reliance on fossil fuels, investment is accelerating in renewable energy, critical minerals, green steel, hydrogen, and battery storage.

## **Rising regulatory and environmental expectations**

ESG expectations are intensifying globally, together with more stringent environmental regulations. Companies and government are coming under greater scrutiny to reduce their carbon footprint and enact responsible social and environmental practices in more transparent ways.

## **Technology advancements and automation**

Advancements in automation, digital twins, artificial intelligence, and predictive analytics are driving efficiency and productivity improvements across global supply chains which enables faster, safer, and more efficient operations. Adoption of these tools is crucial for global competitiveness, but also raises the need for digital resilience and cyber security.

## **Capital constraints and lead times**

Access to capital is tightening amid rising interest rates, stricter ESG investment criteria, and greater competition for funding. These factors underline the need for early stage planning, streamlined approvals, and investment ready infrastructure to capture fast moving opportunities in the face of global economic uncertainty.

## **Geopolitics and supply chain resilience**

The global push for supply chain resilience is shifting trade routes and production hubs. Nations are seeking secure and trusted trade corridors that can withstand external shocks from pandemics to geopolitical conflict.

## **Climate risk**

Growing impacts of climate change, including extreme weather events, sea level rise, and changing climate patterns, are amplifying the need for adaptive, resilient infrastructure. There is increasing pressure to integrate clear climate mitigation and adaptation measures to ensure long-term operational viability and environmental responsibility.

## GOVERNMENT POLICY SETTINGS

Pilbara Ports sits at the intersection of many state and national government policies and priorities, shaped by global trends and shifts. A clear understanding of these is essential to guide how Pilbara Ports can lead, support, and enable government aspirations.

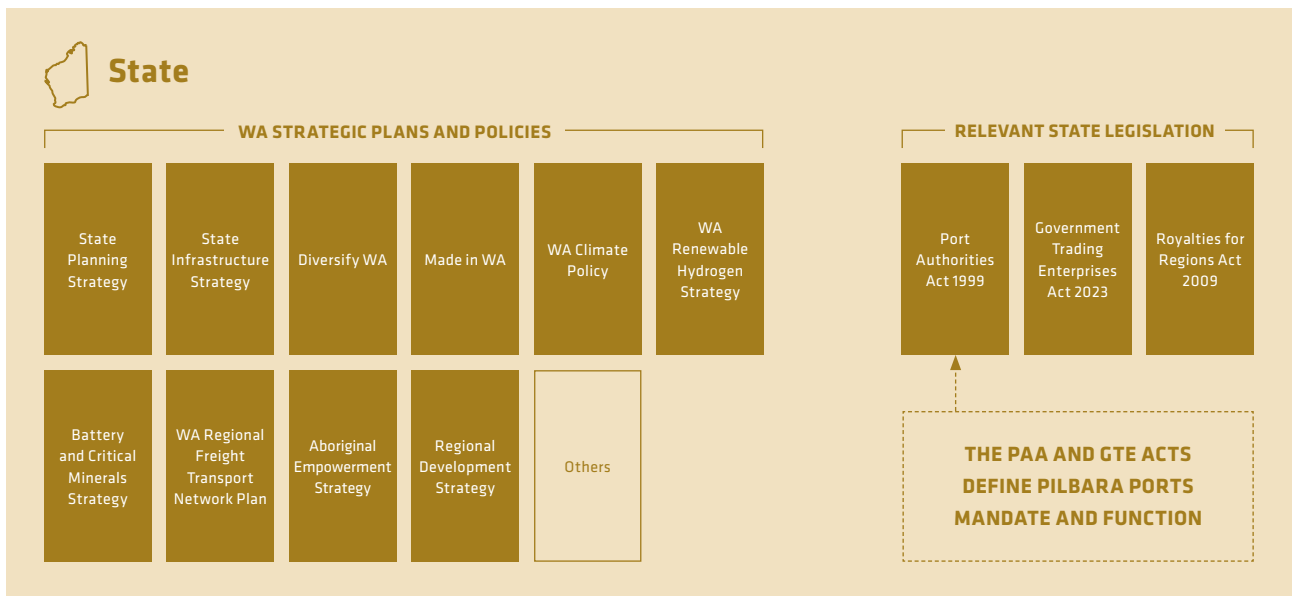
First and foremost, Pilbara Ports operates under the *Port Authorities Act 1999 (PAA 1999)* and *Government Trading Enterprise Act 2023 (GTE Act 2023)*. These acts collectively establish Pilbara Ports function, summarised as:

1. **facilitate trade** – operate the ports safely, efficiently, commercially, and securely, while planning for growth and minimising environmental impact; and
2. **advance public benefit** – support trade and commerce that delivers economic and social value to the state.

Balancing commercial discipline with public accountability is central to Pilbara Ports approach. The organisation is expected to operate with a commercial focus, generating returns to the state, while also enabling long-term economic diversification, infrastructure readiness, and regional development.



# GOVERNMENT POLICY SETTINGS



# GOVERNMENT PRIORITIES

Pilbara Ports also seeks to support other relevant government aspirations and priorities, including to:

## **Drive economic resilience, diversification, and employment opportunities**

Diversify WA, alongside Made in WA and Future Made in Australia, seek to sustain a strong, decarbonised economic and industrial future by leveraging existing strengths, including in iron ore, while diversifying investment into emerging industries. Made in WA focuses on making more in WA, versus simply exporting raw resources. Similarly, Diversify WA emphasises value adding to raw resources, and identifies priority sectors such as renewable hydrogen, critical minerals processing, oil and gas infrastructure decommissioning, naval ship building and maintenance, regional tourism, space technologies, carbon capture utilisation and storage, and food and beverage production.

## **Lead in critical minerals and battery supply chains**

The Battery and Critical Minerals Strategy positions WA at the forefront of critical minerals supply chains. The strategy focuses on building an internationally competitive battery and critical minerals industry, including upstream mining, midstream processing, and remaining open minded to downstream opportunities. This enables economic diversification, global decarbonisation, and meaningful outcomes for regional communities.

## **Accelerate decarbonisation and renewable energy generation**

The WA Climate Policy targets achieving next zero greenhouse gas emissions by 2050, supporting economy wide emissions reductions and aligning with Australia's Net Zero 2050 targets and international obligations. The latter includes the International Maritime Organisation Net Zero Framework, targeting an 80 per cent reduction in shipping emissions by 2040.

The Pilbara accounts for 40 per cent of WA's greenhouse gas emissions, with only two per cent of energy generated by renewables. The Pilbara Energy Transition Plan, together with initiatives like Powering the Regions Fund, seek to transform the region into a renewable energy powerhouse by developing common user infrastructure and renewable energy corridors that unlock large scale solar and wind generation.

## **Become a lead clean energy producer and exporter**

The National and WA Renewable Hydrogen Strategy aim to position the nation as global leaders in clean energy production and export. Priorities include accelerating clean energy industries (e.g. green hydrogen, green metals, critical minerals processing), building sovereign industrial capability, attracting private investment, and securing economic and national interest to reduce dependence on international supply and value chains. Powering the Regions Fund, Renewable Hydrogen Fund, and the Australian Renewable Energy Hub support this ambition.

## **Strengthen regional development**

Regional development strategies and plans focus on building strong, diverse, and resilient regional economies. They emphasise enabling new industries, improving essential infrastructure and services, supporting local employment, and enhancing livability to attract and retain people in the regions. Royalties for Regions plays a critical role in investing in enabling infrastructure and projects, while local frameworks, plans, and schemes provide local development guidance.

## **Support First Nations empowerment**

The Aboriginal Empowerment Strategy and the National Agreement on Closing the Gap aim to embed Aboriginal voices in decision making, and strengthen Aboriginal participation in the economy. They emphasise partnerships, co-design, and self determination to drive better outcomes in community wellbeing, land management, and economic development.

## **Integrate infrastructure planning and delivery**

The State Infrastructure Strategy and Regional Freight Network Plan outline a coordinated approach to infrastructure development. They highlight the importance of multi-user and multi-industry infrastructure, improving freight corridors, and ensuring aligned infrastructure investment across sectors such as energy, transport, water, and land use.

# CUSTOMER SIGNALS

Pilbara Ports current and emerging customers are reshaping their business and operating models in response to the rapidly evolving global, national, state, and regional context. The imperatives of commodity diversification, decarbonisation, ESG expectations, technology transformation, and supply chain resilience are no longer emerging, they are in play, and are redefining what customers need from their port partners.

## Transition to low-carbon value chains

Net zero commitments are being embedded into customers' core strategies, influencing infrastructure choices and investment decisions. This transition will increase demand for low-emissions transport corridors, clean energy access, and next-generation fuel solutions such as hydrogen and ammonia. As scope 3 emissions come into focus, the ability to decarbonise the entire logistics value chain, from mine to market, will be a key differentiator.

## Diversify beyond Pilbara iron ore

While iron ore remains core to Pilbara trade, customers are actively broadening their global commodity, value creation, and geographical portfolios. Strategic moves into higher grade iron ore, copper, lithium, potash, green hydrogen, and processing reflect the imperative to capture emerging market opportunities, while managing commodity-specific and geopolitical risk.

## Increase onshore value creation

Decarbonisation and rising demand for critical minerals are reshaping global supply chains. As a result, trade is shifting from export of raw materials to value added, refined, and processed products.

This transformation will not only change what moves through the port, but how. A growing focus on value added exports, such as direct reduced iron, lithium hydroxide, low-carbon ammonia, and hydrogen, will reshape trade flows and infrastructure needs.

Enabling this shift will require common-user infrastructure, intermodal connectivity, scalable utilities, and access to development ready industrial land. Colocation of port and processing infrastructure

will be a critical enabler for investment and market entry, particularly for new customers and emerging sectors.

## Build supply chain resilience and flexibility

Global disruptions from pandemics to climate volatility and geopolitical tensions have exposed vulnerabilities in just-in-time supply models, reshaping how customers manage risk. Customers are more carefully considering how supply chains, including port infrastructure, can adapt to changing conditions, accommodate diverse trade profiles, and maintain continuity under pressure.

## Drive innovation and productivity

To remain competitive, customers are deploying advanced technologies such as automation, remote operations, AI, and predictive analytics. These technologies are transforming how supply chains are planned and executed. As a key node in the logistics network, ports will need to keep pace enabling faster scheduling, efficient cargo handling at common user berths, and smooth integration with customer systems.

## Enhance social licence and regional outcomes

Customers recognise that future growth and long-term success depends on maintaining a social licence to operate. This means going beyond compliance tasks to deliver genuine social and environmental impact. This includes First Nations partnerships, regional job creation, and transparency on environmental and cultural matters. Ports that can help deliver these outcomes will be preferred partners.

# THE PILBARA ADVANTAGE

Pilbara Ports operates in a region of unique and enduring competitive advantage. The Pilbara combines world class natural resources with industrial scale infrastructure, renewable energy potential, and strategic geographic positioning. It is one of the few regions globally with the capacity to simultaneously support legacy bulk exports and future facing, low emissions industry.

Its foundation is its mineral endowment. The Pilbara is a global leader in the export of iron ore, LNG, salt, and condensate. It is also home to significant reserves of critical minerals including lithium, nickel, copper, and rare earths. These commodities are essential for energy transition technologies, from electric vehicles to solar panels.

**The Pilbara's advantage is not defined only by what lies in the ground, its equally shaped by the strength of its end-to-end industrial value chain.**

The region's renewable energy potential is significant. With high solar irradiance, wind resources, and vast areas of flat, developable land, the Pilbara is ideally placed to generate large scale clean energy. This energy could potentially power green iron/steel, green hydrogen, green ammonia, and battery grade processing creating vertically integrated value chains with global market appeal.

Infrastructure maturity gives the region a commercial edge. Pilbara Ports is backed by deep water berths, private rail networks, high capacity freight roads, and established industrial precincts. These assets have been designed for high throughput efficiency and can be adapted to support emerging commodities. Port lands and colocated strategic industrial areas also offer development ready tenure, shortening project lead times.

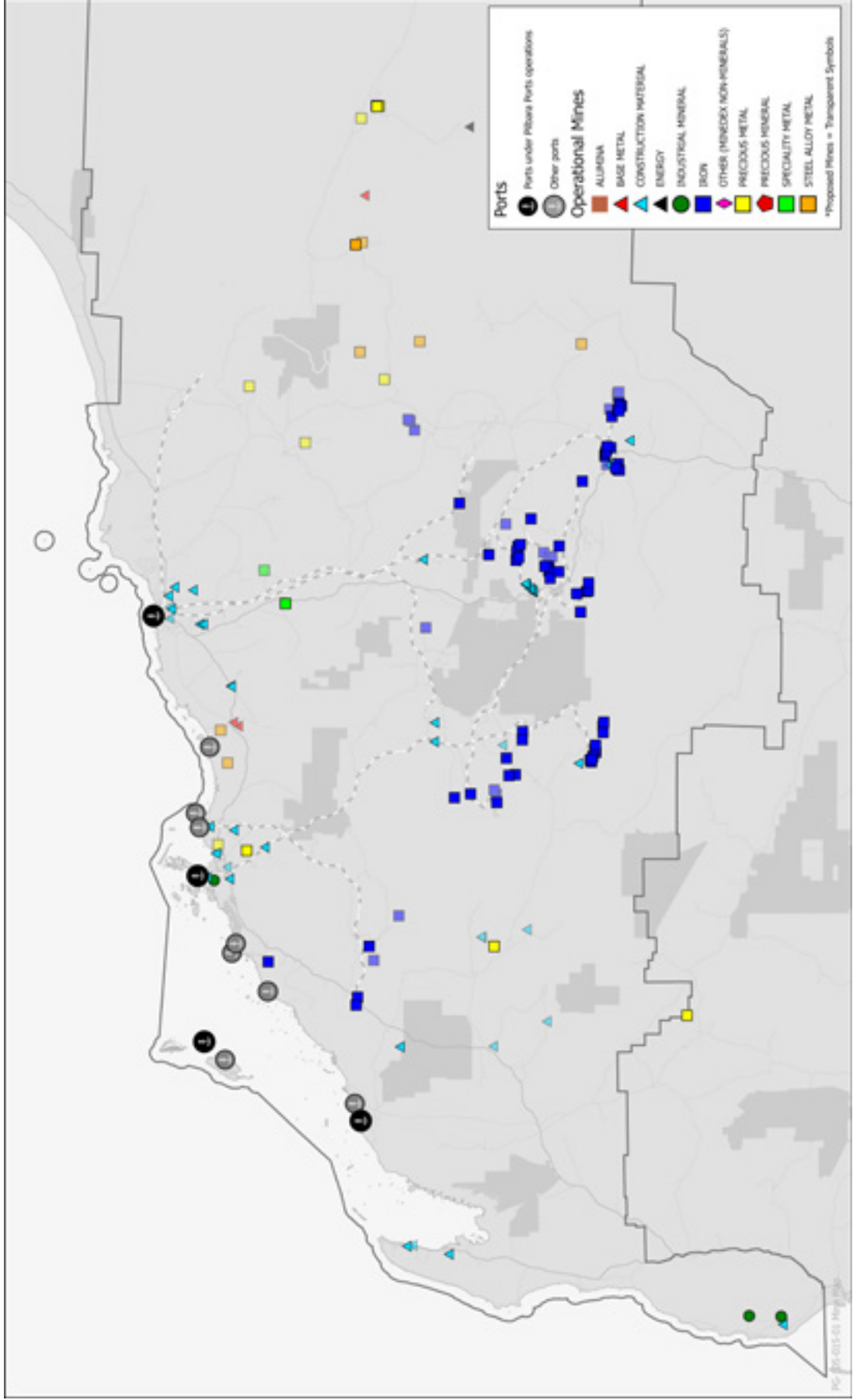
The Pilbara's workforce and operational expertise provide another layer of competitive strength. The Pilbara has pioneered remote operations, automation, and predictive maintenance. These capabilities are embedded in the culture and systems of major operators across the value chain.

- ✓ World-class resource endowment
- ✓ Prevalence of critical minerals
- ✓ Abundant renewable energy potential
- ✓ Possible integration of renewable energy and industry
- ✓ Established large scale infrastructure and operations
- ✓ Industrial scale land availability
- ✓ Culture of innovation
- ✓ Strategic location near Indo-Pacific markets
- ✓ Trusted international trade partner
- ✓ Robust and transparent regulatory systems
- ✓ Federal and State Government support
- ✓ Social licence and community trust

Geography matters. The Pilbara is located on Australia's north-west coast, providing optimal shipping access to Indo-Pacific markets including China, Japan, South Korea, India, and Southeast Asia. Time zone alignment further supports agile trade and supply chain coordination.

Finally, the Pilbara offers something increasingly rare in global supply chains: a level of certainty. Australia's transparent regulatory frameworks, ESG alignment, and global reputation for integrity make the region a reliable trading partner. In a world of rising volatility, trust and governance are strategic assets.

# PILBARA COMMODITY MAP



# PILBARA COMMODITY SUMMARY

Commodity	Key attributes	Strategic summary	Current scale	Future significance
<b>Foundational bulk commodities</b>				
Iron ore	World class hematite reserves, deep water ports, long mine life.	Pilbara supplies ~40 per cent of global seaborne iron ore. Needs beneficiation/processing to align with low emissions steel.	High	Stable
LNG and condensate	Mature LNG hubs, export ready infrastructure, long-term contracts.	Transitional energy for Asia. Significant revenue source but declining relevance post-2040.	High	Stable
Salt	Solar evaporation advantage, high purity, low cost.	Stable, low growth export for chemicals, and industrial processing.	High	Growing
<b>Transition minerals</b>				
Lithium	Tier-1 spodumene, growing mining/conversion capacity.	Key battery mineral. Pilbara is well positioned for upstream and midstream value capture.	Med	Growing
Nickel	Sulphide ore preferred for battery grade refining.	Vital for defence and electric vehicles (EV). Sulphide ores offer lower emissions and better ESG credentials.	Med	Prospective
Copper	Emerging deposits crucial to electrification.	Essential for EVs, grids, and renewables. Global supply pressures support development.	Low	Growing
Ammonia/urea	Existing production with green hydrogen potential.	Can transition to green ammonia – a clean fuel and fertiliser for domestic and export markets.	Med	Growing
<b>Emerging critical minerals</b>				
Rare earths	High prospectivity, limited current processing.	Essential for magnets, EVs, and defence. Reduces reliance on China dominated supply chains.	Low	Prospective
Cobalt	By-product potential from nickel and copper operations.	Critical for battery supply chains. Enhances value when integrated with colocated processing.	Low	Prospective
Graphite	Prospective flake graphite unexploited deposits.	Dominant battery anode material, with the Pilbara emerging as a secure source.	Low	Prospective
Silica/quartz	High purity quartz potential in Pilbara margins.	Critical for solar polar photovoltaic (PV), semiconductors, and industrial electronics.	Low	Prospective
<b>Diversifiers and niche plays</b>				
Manganese	Small deposits gaining relevance in battery chemistries.	Used in steel production and batteries. Emerging role in energy transition applications.	Low	Growing
Tantalum	Co-produced with lithium ethical sourcing opportunity.	Niche but critical for electronics and aerospace. Western markets value traceability.	Low	Prospective
Vanadium	Exploration stage; potential in magnetite formations.	Potential for longduration battery storage. Still speculative but strategic.	Low	Prospective
Gold	Under explored known deposits in the region.	Diversifies revenue and investment attraction. Lower relevance to energy transition and seaborne exports.	Low	Growing
Phosphate	Sedimentary basins with identified potential.	Fertiliser input for agriculture. Supports food security and regional export opportunities	Low	Prospective
Potash	Sulphate of potash (SOP) potential in salt basins.	Premium fertiliser with growing demand that could reduce Australia's import dependence	Low	Prospective
Titanium/zircon	Mineral sands in surrounding regions.	Used in ceramics, pigments, and aerospace. High-value exports with midstream potential.	Low	Prospective
Uranium	Fuel for nuclear energy, and nuclear submarines	Current state policy is for no new uranium mines.	Low	Prospective

# EMERGING INDUSTRIES

Commodity	Key attributes	Strategic summary	Current scale	Future significance
<b>Emerging industries</b>				
Decommissioning	Close proximity to offshore oil and gas assets approaching end-of-life.	Positions the Pilbara as a future hub for specialised industrial decommissioning services.	Low	Growing
Clean energy	High solar irradiance, wind resources, available land.	Foundational for all future low-emissions industries.	Low	Growing

**These emerging industries build on clean energy and local resource strengths. Each represents a pathway to economic diversification, emissions reduction, and new trade opportunities.**

Electric mines	Existing mining industry requires an estimated 17 terawatt per hour of clean energy annually, equivalent to eight per cent of Australia's national electricity market. Electrifying mine operations from haul trucks to processing will reduce emissions and support decarbonisation across the supply chain.			
Green hydrogen	Produced using renewable power, green hydrogen enables decarbonisation in hard-to-abate sectors such as steel making, industry, shipping, and heavy transport. It is also a building block for other low-carbon products.			
Green ammonia	Made by combining green hydrogen and nitrogen using a process powered by renewable energy, ammonia is a versatile export fuel and fertiliser feedstock, opening new trade and energy links.			
Green iron	By leveraging renewable energy, green hydrogen, and iron ore endowments, the Pilbara could support emerging green iron industries. Realising this opportunity will require innovation, investment, and targeted support for onshore green iron production.			
Critical mineral refining	Local refining of critical minerals such as lithium and nickel will enable Australia to move beyond raw exports and into the battery supply chain.			
Manganese processing	Vital for clean energy technologies and defence, processed manganese can strengthen Australia's strategic supply capabilities.			
Green urea	Low-emissions fertiliser alternative that supports decarbonised agriculture and integrates with carbon capture and green hydrogen supply.			
Renewable energy export	Over time, the Pilbara could supply clean energy directly to overseas markets via subsea cables, shipping of green fuels, or other emerging technologies			

**INSIGHT 1**

## DECARBONISATION AND THE MOVEMENT TO NET ZERO: CRITICAL MINERALS

The emergence of critical minerals has expanded the Pilbara's strategic role in global clean energy supply chains. Transitional minerals such as lithium, nickel, copper, and ammonia are becoming the foundation of technologies that support electrification, decarbonisation, and energy resilience. As supply chains diversify, emerging commodities such as rare earths, cobalt, graphite, and high purity silica are also gaining value.

The Pilbara is well placed to support both upstream extraction and midstream processing, with potential for downstream integration. What sets it apart is the ability to align resources, infrastructure, renewable energy, and operational capability.

**This enables vertically integrated, renewable-powered value chains producing products like green iron, battery grade lithium, and processed rare earths.**

This integration is rare and strategically significant. It positions the Pilbara not just as a resource exporter, but as a globally relevant hub for low-carbon, value added trade. Realising this opportunity requires collaboration across government, industry, and ports which is focused on meeting global demand also addresses expectations for sustainability, traceability, and ethical sourcing.

According to the International Energy Agency (IEA), demand for critical minerals will rise sharply to 2040, driven by growth in renewable energy, electric vehicles, and battery storage.

Lithium is seeing fast demand growth due to its role in batteries. Current supply is also growing strongly and the market is currently in surplus, which is depressing prices. Forecasts by a number of market commentators see a supply deficit developing from 2030 onwards.

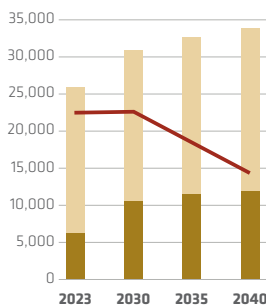
Nickel and cobalt will also experience short-term, low-cost oversupply (from Indonesia and Democratic Republic of Congo respectively), but medium-term supply deficits due to robust projected demand growth.

Copper is experiencing strong, broad-based growth. It is essential to clean energy systems and the infrastructure that connects them such as transmission lines and electric motors.

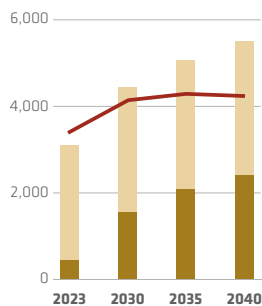
Across all four minerals, the message is clear that current and planned supply is unlikely to meet medium to long-term demand without major investment and faster development timelines.

### Possible 2040 critical minerals pathways

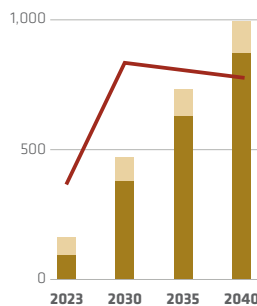
Copper supply and demand (kt)



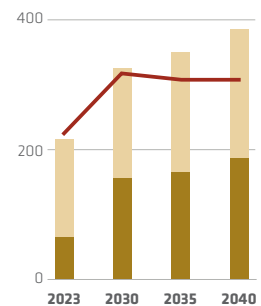
Nickel demand and supply (kt)



Lithium demand and supply (kt)



Cobalt demand and supply (kt)



Source: International Energy Agency

**INSIGHT 2**

**DECARBONISATION AND THE MOVEMENT TO NET ZERO: STEEL**

**In a net zero world the steel industry will look fundamentally different - cleaner, more regionally diverse, and technologically transformed.**

As the global steel industry moves to decarbonise, the rise of electric arc furnaces (EAF) and direct reduced iron (DRI) will shift production away from traditional blast furnaces, resulting in a step-change in emissions profiles.

These technologies require higher grade iron ore (>67 per cent iron) with low impurities. This presents both a barrier and challenge for the Pilbara. Its current iron ore exports mainly haematite fines in the 56–62 per cent iron range do not meet the feedstock requirements for low-emissions steel making technologies without significant upgrading.

To remain competitive, the region will need to increase investment in beneficiation (increasing the iron ore concentration), and potentially pelletising, and hot

briquetted iron (HBI) production. In a net zero world these processes will need to be powered by renewables and green hydrogen. Without these upgrades, it risks overexposure to markets that are slower to decarbonise.

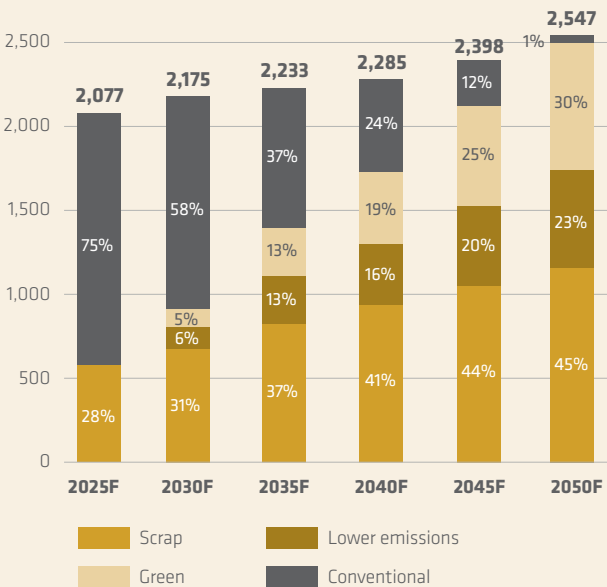
But this shift is more than technical, it's strategic. The Pilbara has the potential to transition from being one of the world's largest exporters of raw iron ore to a major producer and exporter of low-carbon steel intermediates and finished products. This would represent a step change in the region's role in the global industrial value chain.

Producing green HBI or green steel within the Pilbara opens new markets and new customers. It enables trade into jurisdictions with carbon border adjustments, ESG-linked procurement policies, and manufacturers requiring low emissions, traceable inputs. This includes infrastructure developers, automotive and appliance manufacturers, and sovereign buyers focused on net zero supply chains.

Colocating processing facilities near ports, integrated with clean energy and export infrastructure, makes this shift both technically viable and commercially compelling. It reshapes what is exported, how it is produced, and who it is sold to.

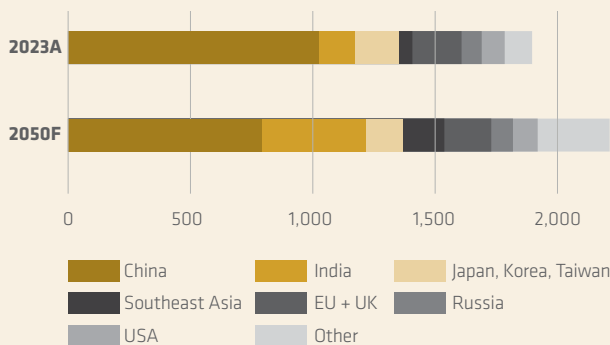
**Possible 2050 steel pathways**

2050 global steel producer projection (Mt)



Source: Mandala

2050 global steel producer projection (Mt)



Source: Wood MacKenzie

**INSIGHT 3**

**DECARBONISATION AND THE MOVEMENT TO NET ZERO: ENERGY IN THE PILBARA**

**To retain global competitiveness in a net zero world, the Pilbara has the opportunity to transition from being a resource basin to becoming a renewable powered industrial hub.**

Clean energy is no longer a peripheral issue in the Pilbara, it is foundational. It underpins the region's efforts to produce low-carbon, value added exports.

**The decarbonisation imperative**

The Pilbara accounts for around 40 per cent of WA's emissions, but generates less than two per cent of its electricity from renewables. The region's industrial energy demand, predominantly fueled by gas and diesel, will need to be replaced with an estimated 16.7 TWh of clean energy annually. This is equivalent to approximately eight per cent of Australia's national electricity market and will need to increase significantly as new industries scale.

**From dig and ship to refine and export**

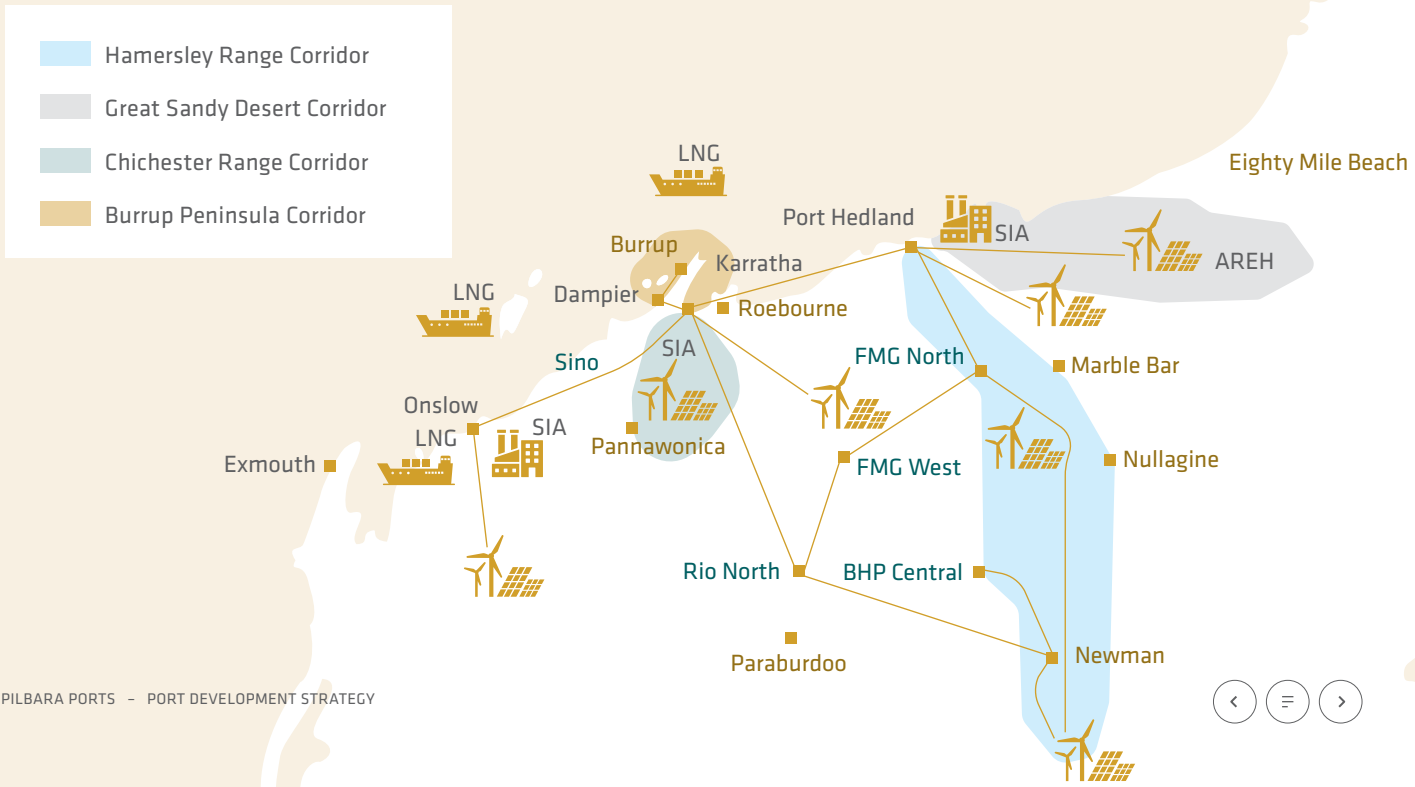
Transitioning to a clean energy economy is not just about emissions - it's about competitiveness. Without clean energy, Pilbara commodities risk being stranded in carbon intensive supply and value chains that will become increasingly unappealing and uncompetitive.

To unlock its potential, the region must transition from a fragmented energy system to a common user, industrial scale renewable energy network. This includes solar and wind generation zones, transmission corridors, storage solutions, and enabling infrastructure such as desalination and port upgrades.

Strategic coordination across the Pilbara Energy Transition Plan (PET), the expansion of the North West Interconnected System (NWIS), and emerging hydrogen projects will be critical. Electrifying the Pilbara is a terawatt challenge requiring urgency, capital, and strong policy alignment.

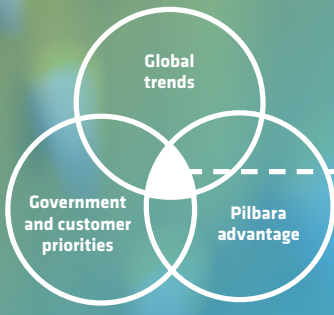
Done right, this transition will power a new era of clean exports, including processed minerals and energy supporting international markets that are actively seeking secure, low-emissions energy partnerships.

**Pilbara Energy Transition network modelling**



CHAPTER 3:

# UNLOCKING THE POSSIBILITIES



Unlocking  
the Pilbara's  
possibilities

# THE EVOLUTION OF THE PILBARA

Chapter 2 highlights that the Pilbara stands at the intersection of several powerful forces:

- Decarbonisation, rising demand for critical minerals, and growing ESG expectations that will reshape how, where, and what the world trades.
- State and national goals for economic diversification, decarbonisation, sovereign capability, and regional development. This includes diversifying upstream extraction, midstream processing, and remaining open minded to downstream manufacturing.
- A regional advantage with world class mineral reserves, large scale renewable energy potential, and strategic proximity to Indo-Pacific markets

Connecting these dots reveals the enormous opportunity for the next evolution of the Pilbara, but it also reveals several key vulnerabilities.

## The case for change

For more than two decades the ports, and the industries they have enabled, have underpinned regional and state prosperity. This success has been no accident. It reflects a system optimised for bulk commodities, built around a small number of major customers, and underpinned by largely stable trade flows. This system has delivered exceptional outcomes in operational excellence, commercial reliability, and global competitiveness.

These trades will remain critical, but global trade is changing and these shifts expose key limitations in the current system:

- **Narrow trade and customer base:** Heavy reliance on a limited set of trades and customers leaves the region vulnerable to market shifts, technology changes, and policy shocks. Broader participation and diversification is needed to build long-term resilience.
- **Inflexible infrastructure:** While optimised for scale, current port infrastructure offers limited common user capacity to support smaller players, new commodities, and diverse logistics needs.

- **Industrial integration gaps:** Emerging industries need more than berths. They need access to clean energy, water, land, and integrated logistics systems.
- **Global competition is accelerating:** Other regions are investing in ESG-aligned, future ready infrastructure, and critical mineral capabilities. Without comparable momentum, Pilbara Ports risks falling behind in relevance, investment attraction, and market leadership.

## A region with multiple possible futures

Despite the challenges ahead, the Pilbara is uniquely positioned to lead in the next chapter of global trade. Its value proposition is enduring but the future is not predetermined. What unfolds will depend on how global trends intersect with regional choices and coordinated action.

In this context, scenario planning becomes a vital tool. It helps explore the most consequential uncertainties shaping the region's outlook: the pace of global decarbonisation and the extent of the Pilbara's diversification. Where these drivers intersect, distinct futures emerge (see overleaf).

Each scenario is plausible, but not all are desirable. The aim is not to predict or select a single pathway, but to use each scenario as a strategic lens to test assumptions, monitor early signals, and guide resilient decision making.

Based on current global demand signals, government priorities, and customer expectations, the green pivot scenario stands out as the most strategically aligned. It envisions the Pilbara as a clean, connected, and competitive industrial hub spanning the full value chain from resource extraction to high-value processing, low-carbon exports and value-driven imports.

Crucially, this is not a rejection of the Pilbara's core strengths. It is a layered evolution one that preserves the region's bulk export power while building new capabilities to support value added, low emissions, and regionally integrated industries.

## INSIGHT 4

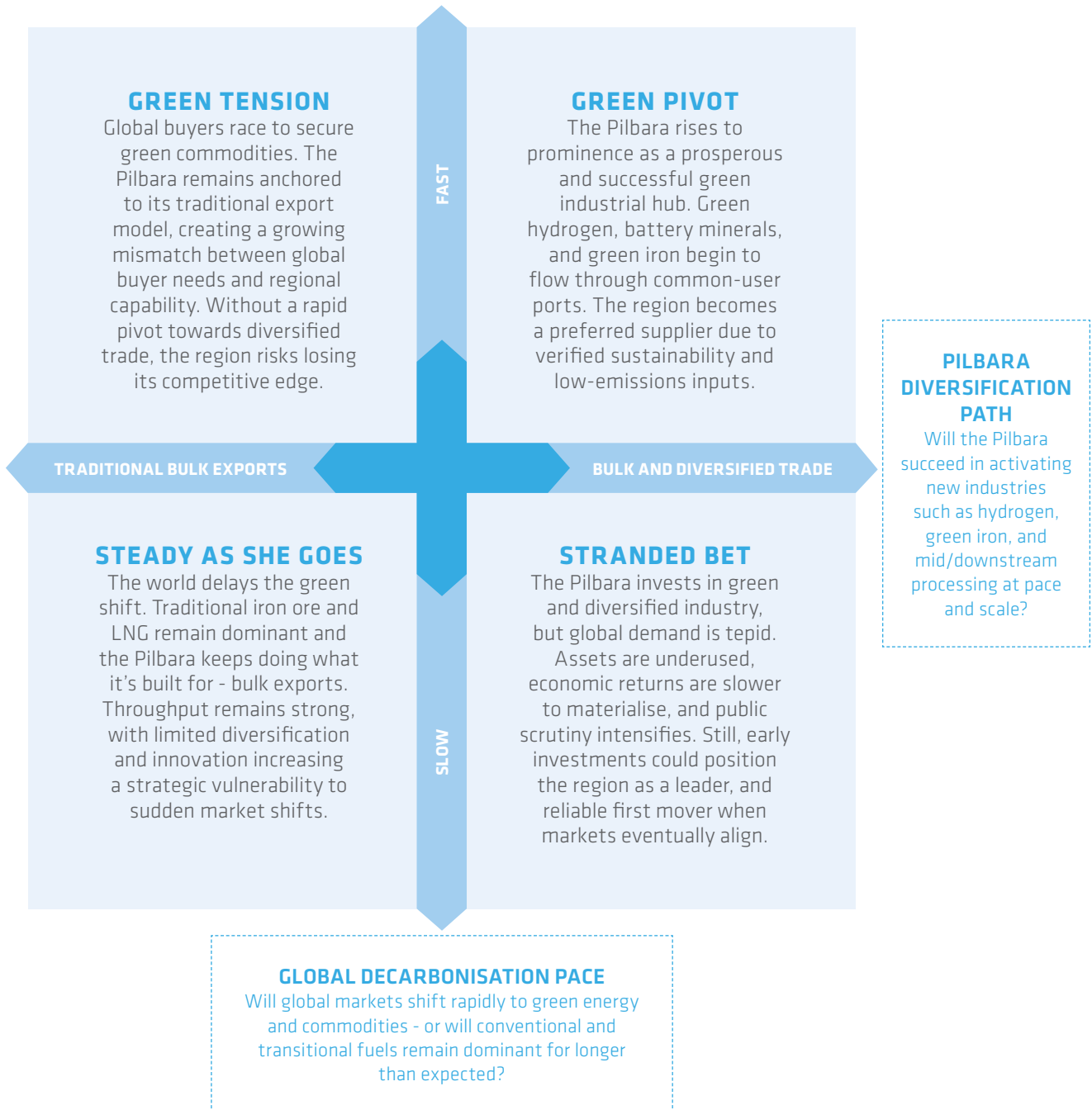
# CULTURAL HERITAGE: MURUJUGA CULTURAL LANDSCAPE

**In July 2025, the Murujuga Cultural Landscape was inscribed on the UNESCO World Heritage List, recognising its outstanding global cultural significance and more than 50,000 years of continuous care by the Ngarda-Ngarli Traditional Owners and Custodians.**

The Port of Dampier lies within the heart of this World Heritage Area, which spans nearly 1,000 square kilometres across the Burrup Peninsula, the Dampier Archipelago, and surrounding marine environments. Central to the World Heritage nomination was a commitment to coexistence—an approach that ensures Murujuga remains a place where cultural heritage, environmental values, and contemporary land uses (including port and industry) are carefully balanced through mutual respect, inclusive governance, and shared responsibility.



# SCENARIO PLANNING



# A LAYERED TRANSFORMATION

## Transformation of the region

The question is not whether the Pilbara has potential it's whether it can be unlocked at the right place, with the right infrastructure, and in time to meet global change. This requires a coordinated and time-sensitive response across government, industry, and community, both within and well beyond the port boundary.

Within the context of this PDS, five foundational shifts have been identified as critical to unlocking the Pilbara's potential:

- clean energy and water access;
- infrastructure that enables diversified trade;
- investment and industry activation at scale;
- a skilled and sustainable regional workforce; and
- deep and enduring partnerships.

The table overleaf summarises these strategic enablers and highlights key initiatives needed to activate them.

## Transformation of the Ports

Pilbara Ports is not the sole owner of these regional enablers but plays a pivotal role unlocking them. As the steward of critical infrastructure, signal to investors, and enabler of market access, the ports must not be bottlenecks but enablers of the Pilbara's next era of growth, prosperity, and long-term competitiveness.

The task is not to replace bulk exports but to retain their strength while building new capabilities to support a more complex, decarbonised, and diversified industrial trade base.

This is not a shift from one port model to another, it is a layered transformation.

## A LAYERED TRANSFORMATION OF THE PILBARA PORTS

Throughput manager for bulk exports	+	Enabler and launchpad for emerging industries
Infrastructure designed for scale, volume, and efficiency	+	Infrastructure designed for flexibility, integration, and adaptation
Port as end points of value chains	+	Ports as platforms for industrial and economic integration
Success measured by volume and utilisation	+	Success measured by resilience, enablement, and regional impact
Planning for certainty	+	Planning that embraces uncertainty and responsiveness

# REGIONAL ENABLERS

## (including and beyond the ports)

REGIONAL ENABLERS				
<p><b>Clean energy and water access</b></p> <p>A move to net zero will see traditional and emerging industries require reliable, low emissions, affordable energy. The Pilbara has high solar and wind potential, but requires utility scale infrastructure to harness them.</p>	<p><b>Infrastructure that enables diversified trade</b></p> <p>Pilbara's current infrastructure model is optimised for iron ore. New industries require flexible, common user systems that enable new commodities, emerging and smaller scale customers, and integrated value networks.</p>	<p><b>Investment and industry activation at scale</b></p> <p>Access to capital is increasingly competitive. The Pilbara can attract global investment by aligning infrastructure readiness, streamlined approvals, and policy certainty with emerging market needs.</p>	<p><b>A skilled and sustainable workforce</b></p> <p>Infrastructure alone does not build industry, people do. Future growth depends on having the right skills in the right place, at the right time, particularly given the remoteness of the Pilbara.</p>	<p><b>Deep and enduring partnerships</b></p> <p>Sustainable growth needs to be inclusive. The Pilbara's future depends on building shared trust, and meaningful collaboration with communities, government, industry, and customers.</p>

CRITICAL ENABLING PROJECTS				
<ul style="list-style-type: none"> <li>Import pathways for renewable energy components (e.g. wind turbines).</li> <li>Large scale renewable energy generation zones, connected to industry via common use transmission and storage infrastructure.</li> <li>Desalination and recycled water systems to support green energy.</li> <li>Electrification of mining and transport systems.</li> </ul>	<ul style="list-style-type: none"> <li>Targeted public investment in common-user infrastructure to unlock private investment.</li> <li>Digitally enabled supply chains with high-speed connectivity, ESG traceability, and integrated logistics.</li> <li>Climate resilient infrastructure.</li> </ul>	<ul style="list-style-type: none"> <li>Regulatory approval pathways that reduce risk and delay.</li> <li>Public-private funding models and incentives.</li> <li>Support of research and development demonstrations and scale up projects.</li> </ul>	<ul style="list-style-type: none"> <li>Attraction and retention of skilled workers.</li> <li>Regional livability including housing, healthcare, education, community amenities and services.</li> <li>Industry aligned training pipelines.</li> <li>Workforce transition pathways from legacy to future industries.</li> </ul>	<ul style="list-style-type: none"> <li>Early and meaningful First Nations engagement.</li> <li>Local benefit frameworks for jobs, procurement and equity.</li> <li>Evolve compliance based heritage management.</li> <li>Represent community voices in long-term regional planning.</li> <li>Integrated planning and delivery across agencies and sectors.</li> </ul>

CHAPTER 4:

# DESIGNING THE PATH FORWARD



# SETTING THE OVERARCHING DIRECTION

Pilbara Ports must meet two challenges at once:

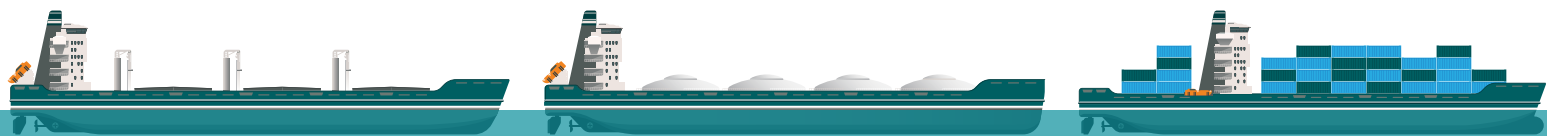
- continuing to deliver high volume bulk trades, while also preparing the port system for broader, lower emissions; and
- a more diversified industrial trade base.

This dual task demands clear direction setting and coordinated long-term strategy planning that can navigate uncertainty and adapt to change.

Ports are long lived assets and their relevance into the future depends on decisions made today.

Without clarity of purpose and clear direction, there's a risk of short-term actions locking in long-term limitations.

In the near term, the focus is clear: strengthen what works, and enable a decarbonised and diversified customer base. But the longer term ambition is larger: the Pilbara as a clean, connected, and competitive industrial hub.



## 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

# SETTING THE LONG-TERM STRATEGY

Progress requires Pilbara Ports to expand its role beyond infrastructure operator, towards economic enabler and strategic integrator. To do so, the port system must build new layers of capability in four core areas.

Enabling pillars		Core objectives	
<b>01</b>	 <b>People and culture</b>	<p>Transforming the ports will rely as much on people as it will on infrastructure. The future system will be more complex, more interconnected, and more dynamic. To meet that future with confidence, Pilbara Ports must transform how people, leadership, and systems work together to enable future ready ports.</p>	<ul style="list-style-type: none"><li>✓ <b>Build a trusted, adaptive organisation</b></li><li>✓ <b>Make smarter, faster decisions</b></li></ul>
<b>02</b>	 <b>Resilience and prosperity</b>	<p>As the Pilbara evolves, its ports must shift from being efficient gateways to agile enablers. The challenge ahead is no longer just about scale, it's about the ability to adapt quickly, support new industries, and deliver the right infrastructure, in the right place, at the right time. Future facing industries will demand responsiveness and infrastructure that can flex, pivot, or grow as needed. Building resilience means that the port systems doesn't slow the region down but helps lead the way, accelerate opportunities, and deliver long-term value for customers and communities.</p>	<ul style="list-style-type: none"><li>✓ <b>Deliver future ready port infrastructure</b></li><li>✓ <b>Integrate beyond port boundaries</b></li></ul>
<b>03</b>	 <b>Partnership</b>	<p>Ports can not succeed alone. Realising the Pilbara's next era of growth requires deep and deliberate collaboration across governments, industries, communities, and regions. Pilbara Ports must move beyond the port boundary and act as a collaborative partner helping align infrastructure, streamline decisions, and unlock long-term value that serves customers, the state, and communities.</p>	<ul style="list-style-type: none"><li>✓ <b>Enable a more diverse customer base</b></li><li>✓ <b>Strengthen partnerships with government and industry</b></li><li>✓ <b>Support vibrant, resilient Pilbara communities</b></li></ul>
<b>04</b>	 <b>Planet</b>	<p>Pilbara Ports has a key role to play in enabling low emissions trade. As the gateway for some of the world's most significant exports, the port system must actively support decarbonisation both within its operations and across the supply chains it serves. ESG is no longer a reporting obligation it is a strategic lever for competitiveness, investment attraction, and licence to operate.</p>	<ul style="list-style-type: none"><li>✓ <b>Support regional decarbonisation</b></li><li>✓ <b>Embed ESG into decision making</b></li></ul>

## 01 People and culture



### Core objectives

### Strategies

#### Build a trusted, adaptive organisation

- ✓ Build a skilled, inclusive workforce aligned to future needs.
- ✓ Foster a culture grounded in safety, excellence, teamwork, integrity and care.

#### Make smarter, faster decisions

- ✓ Build a digital backbone for planning, operations, and performance.
- ✓ Streamline internal data sharing, governance, and workflows to reduce bottlenecks and delays.
- ✓ Empower teams to make timely, risk-balanced decisions with clarity, accountability and confidence.
- ✓ Apply market intelligence and scenario planning to guide investment and capital decisions.
- ✓ Maintain robust cyber security to all core systems.

## 02 Resilience and prosperity



### Core objectives

### Strategies

#### Deliver future ready infrastructure

- ✓ Develop port infrastructure and services that evolve with industry and supply chain needs.
- ✓ Prioritise common user infrastructure that supports multiple users, commodities, and trade formats.
- ✓ Design flexible, modular, scalable, assets that can be staged, expanded, or reconfigured.
- ✓ Protect long-term optionality through strategic land use and encroachment management.

#### Integrate beyond port boundaries

- ✓ Align port development with regional infrastructure and SIAs.
- ✓ Support colocation of processing, utilities, and services to enable industrial clustering.
- ✓ Promote digital connectivity, visibility, and efficiency across the Pilbara supply chain.
- ✓ Ensure port services, operations, and infrastructure evolve together as part of an end-to-end trade platform.



## 03 Partnership

Core objectives	Strategies
<b>Enable a more diverse customer base</b>	<ul style="list-style-type: none"><li>✓ Encourage market entry through simplified development pathways and streamlined approvals.</li><li>✓ Activate new trade faster via investment ready land and flexible infrastructure design.</li><li>✓ Use blended funding models and incentives to attract long-term port infrastructure investment.</li><li>✓ Collaborate with regulators to reduce friction and improve delivery times.</li></ul>
<b>Strengthen partnerships with government and industry</b>	<ul style="list-style-type: none"><li>✓ Collaborate with government and industry to align plans and priorities.</li><li>✓ Engage early in regional planning processes to align priorities, sequencing, and capital delivery.</li><li>✓ Support planning and activation of SIAs.</li></ul>
<b>Support vibrant, resilient Pilbara communities</b>	<ul style="list-style-type: none"><li>✓ Support local and First Nations engagement and economic participation in port supply chains.</li><li>✓ Support regional workforce development and skills pathways aligned to port and industry needs.</li><li>✓ Contribute to a vibrant Pilbara region.</li><li>✓ Continue to promote and expand direct shipping services.</li><li>✓ Partner with traditional owners and custodians to support future partnership agreements.</li></ul>



## 04 Planet

Core objectives	Strategies
<b>Support regional decarbonisation</b>	<ul style="list-style-type: none"><li>✓ Support export of green fuels, battery-grade products, and low-carbon commodities.</li><li>✓ Enable clean fuel bunkering and green shore power.</li><li>✓ Reduce scope 1 and 2 port emissions in alignment with state government targets.</li><li>✓ Reduce scope 3 emissions and strengthen alignment through supply chain collaboration.</li><li>✓ Enable clean energy industries to connect efficiently into the port system.</li></ul>
<b>Embed ESG into decision making</b>	<ul style="list-style-type: none"><li>✓ Align ESG targets with state and national policy.</li><li>✓ Embed ESG considerations into planning, investment, approvals, operations, and delivery.</li><li>✓ Strengthen social licence and investment readiness through credible, transparent ESG and emissions reporting.</li></ul>

# ALIGNING CURRENT PRIORITIES

While the scale of change is considerable, the journey is already underway. Pilbara Ports is actively progressing key deliverables (some of which we've captured below) that align with this PDS - many of which support the horizon 1 direction, while laying the groundwork for horizons 2 and 3.

Deliverable	Alignment with strategy objectives								
	1	2	3	4	5	6	7	8	9
Improve tools and processes to support leadership effectiveness	✓	✓							
Facilitate a customer-focused culture across Pilbara Ports		✓	✓		✓	✓		✓	
Substantially improve visible safety and performance leadership	✓	✓							
Embed and deliver the mandatory actions and deliverables for the Reconciliation Action Plan	✓						✓		
Develop and begin executing a technology roadmap	✓	✓		✓					
Implement proactive planning and contract management of critical port services for all port facilities	✓	✓		✓					
Finalise and implement the Port Development Strategy and develop facility-specific Port Growth and Port Tenanting Strategies (e.g. Lumsden Point)		✓	✓	✓	✓	✓	✓	✓	✓
Effectively manage cyber-security risk		✓							
Develop port development planning processes for all ports		✓	✓	✓	✓	✓	✓	✓	✓
Develop robust trade forecasts and customer project pipelines across all port facilities		✓	✓		✓	✓		✓	
Implement digital tools and platforms to foster easy collaboration across the organisation	✓	✓		✓					
Embed Critical Safety Risk program	✓	✓							✓

## Strategy objectives

- 1 = Build a trusted, adaptive organisation
- 2 = Make smarter, faster decisions
- 3 = Deliver future-ready port infrastructure
- 4 = Integrate beyond port boundaries

- 5 = Enable a more diverse customer base
- 6 = Strengthen partnerships with government and industry
- 7 = Support vibrant, resilient Pilbara communities
- 8 = Support regional decarbonisation
- 9 = Embed ESG into decision making

# ALIGNING CURRENT PRIORITIES (cont'd)

Deliverable	Alignment with strategy objectives								
	1	2	3	4	5	6	7	8	9
Successfully facilitate customer projects and development			✓		✓	✓		✓	
Cause collaboration through Ports WA, Ports Australia and global ports to build capability and performance	✓	✓	✓	✓	✓	✓	✓	✓	✓
Deliver the five-year technology strategy and roadmap, and a clear approval process for new technology projects	✓	✓		✓					
Continue to safely deliver Dampier Bulk Handling Facility and Lumsden Point			✓	✓				✓	
Embed Integrated Business Planning		✓							
Implement strong safety and environment governance architecture and assurance activity on major projects	✓		✓						✓
Embed Asset Management Framework and demonstrate clear link to maintenance planning and execution		✓		✓					
Progress strategic partnerships to support customer decarbonisation and Pilbara Ports Scope 3 emissions reduction						✓		✓	✓
Progress Clean Fuels Bunkering Hub Strategy						✓	✓	✓	✓
Grow and develop biosecurity offering across the ports of Ashburton, Dampier and Port Hedland (including Lumsden Point)				✓	✓	✓	✓		
Focused planning effort on Dampier land optimisation and Ashburton development		✓	✓	✓	✓	✓	✓	✓	✓
Deliver a clear roadmap for improved access to data, analytics, and information	✓	✓		✓					
Work with Lumsden Point stakeholders to deliver a productive, efficient solution for critical mineral exports			✓	✓	✓	✓		✓	
Deliver the Utah Terminal long-term strategic plan		✓	✓	✓		✓			
Deepen and invest in our relationships with First Nations businesses and communities						✓	✓		
Approve a Utah Point decarbonisation investment plan for an 80 per cent reduction by 2030			✓			✓		✓	✓
Drive positive improvement in operational environmental management and assurance			✓				✓	✓	✓

## Strategy objectives

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# OPERATIONALISING THE STRATEGY

Pilbara Ports is already advancing the next stage of strategic delivery through progressing detailed planning instruments. These include trade growth and tenancing strategies, masterplans, and short and long-term port plans. These operationalise the PDS, translating high-level direction into spatial priorities, investment sequencing, and customer delivery frameworks.



## Trade Growth and Tenancing Strategy

Provides core principles that enable consistent decision making and customer certainty in alignment with the PDS, and in the best long-term interests of Pilbara Ports, Government, and our customers.

This strategy sets the context, areas of focus and principles for trade growth and tenancing.



## Masterplans

Comprehensive, adaptive long-term plans that focus on sustaining and expanding port capacity and infrastructure. Developed in alignment with the PDS, they integrate trade and demand scenarios, capacity constraints, land use and spatial planning, environmental and social considerations, and governance pathways. Masterplans provide a sequenced and prioritised roadmap for future growth, supported by adaptive triggers to ensure they remain relevant in the face of market, technology, and policy change.



## Port plans

Short and long-term port plans that outline each port's specific needs and growth in line with the PDS, growth and tenancing strategies, and masterplans. These plans focus on sustainable, strategic investments at each individual port and include:

- land activation plans
- real-time congestion and capacity management
- operational risk mitigation
- maintenance planning prioritisation for existing assets
- infrastructure expansion and upgrades
- strategic technology investment
- sustainability initiatives; and
- port specific trade and cargo forecasts.

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