

OUR VISION FOR A SEAMLESS

Agri-Port HUB

WITHIN THE AGRIBUSINESS
PRIORITY PRECINCT



Contents

1 The Vision

2 The Precinct

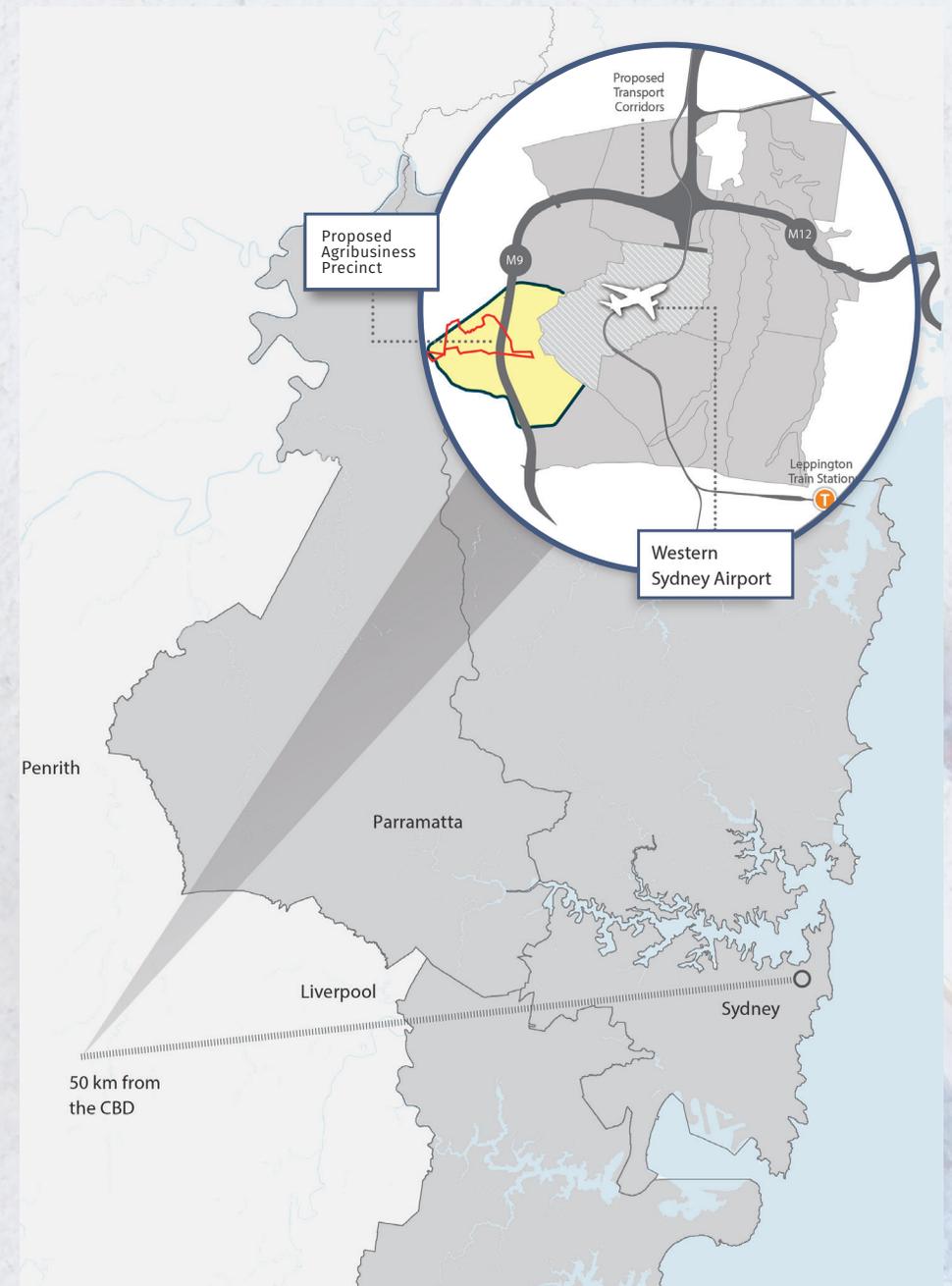
3 Delivery Framework

Executive Summary

- Nancy-Bird Walton (Western Sydney Airport, WSA) will open in 2026.
- Passenger and freight hub for Western Sydney, NSW, Australia and the Pacific.
- A greenfield-international airport within one of the fastest-growing regions in Australia: Western Sydney.
- Curfew-free and airfreight-friendly airport.
- Unrestricted and cost-effective access for a wider range of airlines and airfreight companies.
- Streamlined biosecurity certification for seamless export to our trade partners - saving time and loss of valuable shelf life.
- The WSA Aerotropolis will have A\$20 billion public infrastructure investment.
- Airport construction is underway with the first flights scheduled in just six years.
- Wide-reaching road, rail & freight rail connecting the WSA to Sydney and NSW.
- Targeted industries establishing around the Aerotropolis will support high-skilled jobs.
- Agri-Port to export NSW's and the Pacific's fine, high-value produce.
- Reach 1 billion people within 12 hours by plane.
- Demand from Asia - with 'clean and green' Australian produce they can trust.
- Australia has a top reputation for food.
- The Waterhouse Group 233Ha land is a relatively flat parcel which shares a boundary with the WSA.
- Ideally suited for the Agri-Port.

- Directly linked to the WSA freight and logistics cargo zone.
- Agri-Port to deliver from farm gate to international consumer plate within 24 hours.
- The Agri-Port will feature food processing/preparation, food logistics, cold storage, warehouse distribution and border security certification for export.
- The Waterhouse Group is collaborating with a number of potential key end-users and is looking for opportunities to help realise the export opportunity to Asia and help grow the NSW economy, creating jobs for Western Sydney.

“A greenfield site adjacent to a curfew-free international airport in Australia’s largest city is most certainly a ‘once in a generation’ opportunity that should be capitalised on right now.”



Overview

Western Sydney Airport (WSA) will become Australia's largest international airport. It will open freight and logistics services in 2025 and passenger services in 2026.

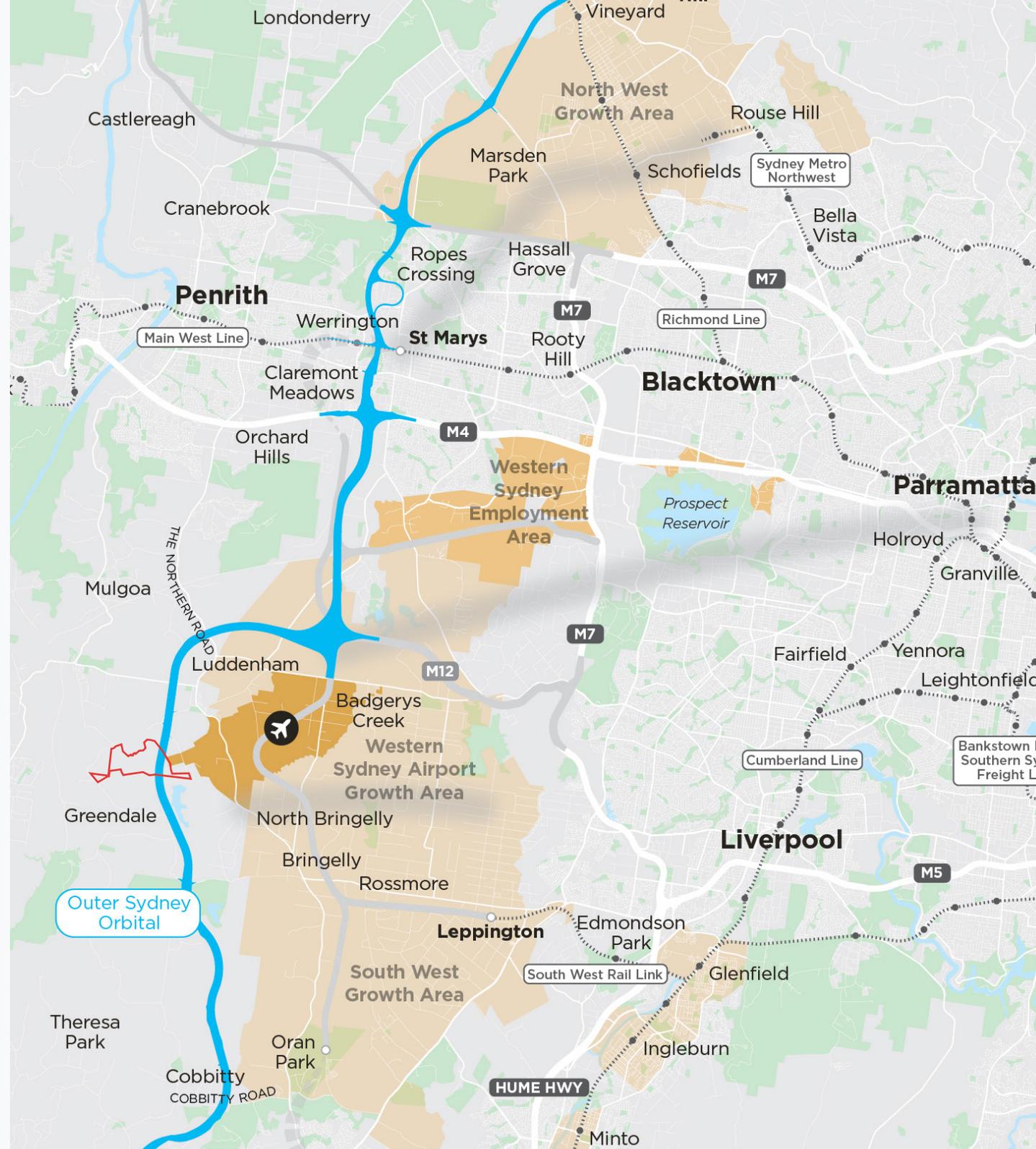
All levels of government are co-operating to develop Australia's first 21st Century city, business hub and newest and greenfield international airport within one of the fastest-growing regions in the country, Western Sydney.

A priority for government evidenced through the Western Sydney City Deal - the largest planning and investment partnership ever in Australia - a 20-year agreement to deliver significant infrastructure, lifestyle and amenity investments, and employment opportunities around the WSA. The WSA Aerotropolis will benefit from public investment of more than A\$20 billion across transport, health and education infrastructure.

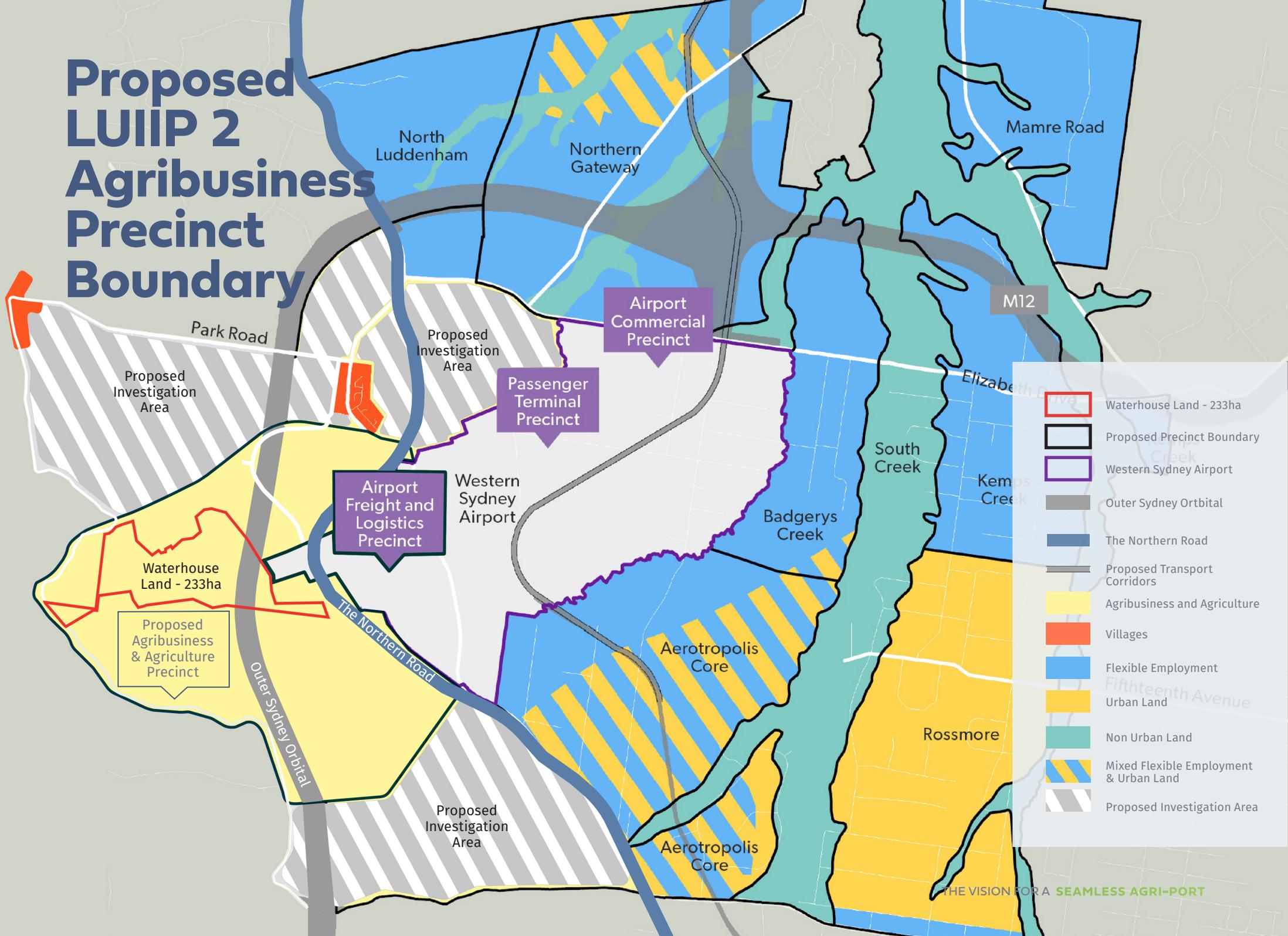
Airport construction is already underway, as wide-reaching road and rail networks strategically grow around the WSA. Industries such as aerospace and defence; advanced manufacturing; health and education are establishing around the metropolitan centre and will support high-skilled jobs.

Food and agribusiness is the most promising to take advantage of the export opportunities that a curfew-free airport will provide.

A rising middle class, especially with our neighbours in Asia Pacific, is moving from a simple diet to one that's higher in protein and nutrients - the kind of agricultural production where Australia and NSW specialises and excels. Australia's reputation in Agriculture is assessed by the OXFAM as the best in Asia Pacific and one of the best in the world.



Proposed LUIIP 2 Agribusiness Precinct Boundary



-  Waterhouse Land - 233ha
-  Proposed Precinct Boundary
-  Western Sydney Airport
-  Outer Sydney Orbital
-  The Northern Road
-  Proposed Transport Corridors
-  Agribusiness and Agriculture
-  Villages
-  Flexible Employment
-  Urban Land
-  Non Urban Land
-  Mixed Flexible Employment & Urban Land
-  Proposed Investigation Area

1

THE VISION

“With an Agri-Port linked directly to a planned freight and logistics hub, the Agribusiness Precinct has the potential to enable delivery from farm gate to international consumer plate within 24 hours.”



1 billion people living within 12 hours flight



24 hours
seamless exporting from
farm to plate



**High margin
products**
and fresh food



**Cold storage
& Logistics**
facilities pre-export



High value
High tech & intensive
food production



The site is flat contiguous land ideal for Agribusiness

The Agri-Port interlinked with Industry and the Government's strategy

One shared vision

The government has a vision to develop Australia's first Aerotropolis - a 21st Century city, business hub and Agribusiness Precinct beside the new 24/7, curfew free international airport - one of the very few greenfield airport opportunities around the world today.

A key element for the success of the new airport is the Agribusiness and Agri-Tech food production precinct. In its 'Think big, Think fresh: a fresh food precinct for Western Sydney' discussion paper, the NSW Farmers Association called for the development of a 'just-in-time food supply chain' centred on the Western Sydney Airport, to allow NSW's food producers to access premium and lucrative markets for fresh foods in Asia and the Middle East.

These markets highly value Australia's produce as 'Clean and Green' and are demanding access to high quality fresh food and willing to pay premium prices. The Agri-Port and Fresh Food Precinct (FFP) will be an integral part of the international food supply chain, receiving the high-quality fresh produce from the regions surrounding Sydney for processing, packaging and certification before being airfreighted to reach international consumer plates - within 24-72 hours of harvesting. This will guarantee premium prices for our producers and sustainable jobs for Western Sydney.

The Waterhouse Group's vision is to create an Agri-Port within the Agribusiness Priority Precinct for New South Wales - on the western boundary of WSA. NSW needs a

seamless transition between the export facility and the planes carrying the cargo which can only be provided through a direct connection between the Agribusiness precinct and WSA cargo handling area.

Anything exported by plane is either perishable, high margin or urgent - otherwise it is exported by ship. Fresh food is ideally suited to airfreight as it is perishable and the greatest value for food and produce is achieved by delivering it as quickly as possible after harvest or production. With a finite shelf-life usually measured in just days, being able to save two or more days through better transport, fast processing and streamlined clearance not only retains the high quality and premium value but also extends the shelf-life for the end destination. Further, transport logistics costs currently make up 48.5% of farm gate prices. The closer the Agri-Port is to the airport, the more costs can be reduced.

The Waterhouse Land is the ideal location for the Agri-Port and FFP within the Agribusiness Precinct to maximise the value of NSW's produce by having the closest and a seamless connection for cargo loading.

Production systems, logistics, processing, packaging and delivery to point of consumption needs to be fast, precise and also personal to minimise waste, optimise the consumer experience and drive profitable food production systems.

Seamless Export

Produce processing, certification and production of food ready for export needs to be performed in a location directly connected to the airport so as to avoid out-dated practices of repacking and re-loading onto trucks to reach the cargo facility of the airport. It is widely recognised by industry experts that a 'State of the Art' seamless facility is needed to decrease costs and logistics and so remove inefficiency and delays in the export time frame - five days to export produce can be efficiently reduced down to one. Importantly, the NSW brand promise of highest quality produce can be delivered by both minimising the risk of damage through removing multiple, unnecessary touch points and reducing the export timeframe. This will extend the shelf-life for the end retail point with reduced quality degradation from age so ensuring the highest value for the export produce.

Any fresh food to be exported will need to satisfy and comply with the necessary regulations of key export market destinations so that food processed in the FFP / Agri-Port can be pre-cleared for export via air freight with digital certification and the provision of essential 'proof of origin' required for Asia. It is proposed the Waterhouse Land would contain a single point for biosecurity and quarantine processing to ensure high quality standards, help maintain 'Brand Australia' and assist in providing smooth export protocols with key markets.



High-value food production using high-tech production methods

“The Waterhouse Land holding is large and perfectly located to be instrumental in the delivery of the Fresh Food Precinct”

The Agribusiness Priority Precinct

From farm

The Fresh Food Precinct Vision Components

- An **Agri-Port** to deliver high value premium products and fresh food to domestic and global markets with a direct connection to the Cargo End of the WSA to allow for automated and secure movement and delivery of produce via underground and/or at grade automated systems.
- **High value food production** using **high-tech methods** including protected cropping allowing controlled climate agriculture with high financial yields as their **cutting edge applied science** allows more resilience to environmental fluctuations.
- **High intensity, land-based recirculating aquaculture** provides an enormous market opportunity. Australia has a reputation for producing safe, sustainable, high-quality and high-value aquaculture products, yet with a value of only \$1.31 billion in 2015-16 it accounts for less than 1% of global production (ABARES, 2017a). The National Aquaculture Strategy aims to double the current value of Australia's aquaculture industry to \$2 billion by 2027 (Commonwealth of Australia, 2017).



High value food production using high-tech production methods including protected cropping and controlled climate agriculture with high financial yields.



High intensity land based recirculating **aquaculture** provides an enormous market opportunity.



Meat Production retention of current operating poultry & dairy production.



Agri-Tourism Retreats and accommodation for tourist as well as research & development.

To plate

- **Best food processing and packaging technology** for local and imported food.
- **Biosecurity, Quarantine and Customs facilities** to ensure that the FFP will comply with the necessary Australian Quarantine regulations and the regulations of key export market destinations, so that food processed in the FFP is immediately cleared for export, avoiding double handling of produce and increasing efficiency and export speeds.

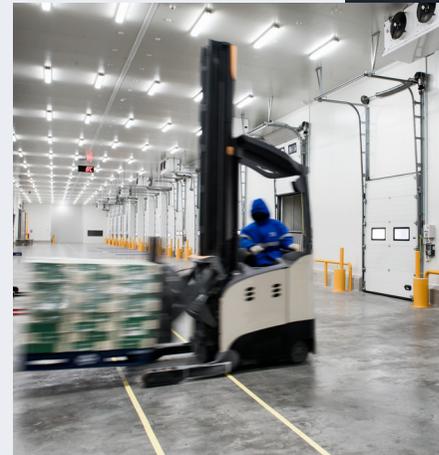
- **Complementary businesses and industry** i.e. food manufacturers, food exporters, airline caterers, freight airline partners (e.g. SATS), education institutions with R&D focused on food and agriculture applied science.
- Receive **inbound produce** from other nations in the region (e.g. Vanilla, Cocoa and Coffee beans from Tonga) for value-add processing, packaging and use locally or exporting elsewhere.
- **Cold Storage & Warehousing.**
- **Seafood and Fresh Food Production.**



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Biosecurity, Quarantine and Customs facilities to ensure that the FFP will comply with the necessary Australian Quarantine regulations and the regulations of key export market destinations.



Agri-Port to deliver high value premium products and fresh food to domestic and global markets with a direct connection to the Freight and Distribution Precinct of the WSA.



Best food processing and packaging technology for local and imported food. Receive inbound produce from NSW and other nations in the region for value-add processing, packaging and use locally or exporting elsewhere.



Growing the NSW Economy

In 2017, Australia's trade with the region grew by nearly ten per cent from 2016, reaching more than \$100 billion; this trade increase includes strong demand for nutritious, protein rich, bespoke and healthy food products. The NSW Government engaged consultants KPMG and Agrology to conduct a Western Sydney Airport Agribusiness Precinct Feasibility Study examining the opportunity for a world-leading agribusiness precinct. Importantly, the work found that with increasing demand for fresh food from both domestic and overseas markets, an Agri-Port could transform fresh food production in NSW. KPMG concluded that a 500-hectare hub could support 2,500 new direct and 12,000 indirect jobs, with up to 96,000 tonnes of additional fresh food production capacity each year at full production. This could generate \$2.8 billion in revenue over a 10-year period.

Food manufacturing is already at the centre of Western Sydney's economy. The Australian Food and Grocery Council maintains that food processing and manufacturing in the five largest Western Sydney local government areas (Blacktown, Fairfield, Liverpool, Penrith and Campbelltown) accounts for approximately 20,000 jobs within the LGAs. The development of a true Agribusiness Precinct with Agri-Port and a FFP at its core would further increase the economic and employment contribution of the food manufacturing sector in the region. Liverpool Council supports Agri-Port and a FFP in an Agribusiness precinct in the area directly west of WSA.

“To make all of this happen by the opening date of the airport – December 2026 – work needs to start now. ”

Background



The Waterhouse family has owned these significant land holdings for over five decades and is a strong supporter of opportunities through the development of Western Sydney. The Waterhouse family also has a close and four-decade long association with the Kingdom of Tonga — which is also a friend and strategic ally of Australia. Louise Waterhouse has been the Hon Consul for Tonga for 23 years. As part of her role she was involved in the establishment of the Seasonal Worker programme for Tongans to help Australian fruit growers with over 2,000 workers last year. Apart from providing vital hard-working labour to Australian farmers, this programme has significantly strengthened the Tongan economy as a direct result.

Further, Louise has been working with the Kingdom, which is a developing agricultural nation, to improve their own agricultural capabilities and export opportunities. Part of the vision with the Waterhouse Land is to connect exporters from the Pacific, such as Tonga with the Agri- Port of Western Sydney so the Tongan (and other Pacific countries') organic produce can be brought efficiently to WSA to be packaged, processed and cleared for export to other parts of the world.

The Waterhouse Group is passionate about the Agri-Port and Agribusiness opportunity at the Western Sydney Airport.

Proposed Partners

The Waterhouse Group has collaborated with a number of key groups including the NSW Farmers Federation, complementary businesses and industry, education institutions with R&D associated with food and agriculture to develop the agribusiness precinct concept.

These entities have provided endorsement of this concept and have expressed an interest in either operating or assisting in the delivery of the future plans.



NSW Farmers Federation



GPT Group



Wageningen University Netherlands



Western Sydney Business Chamber



Alibaba Group



Netherlands Consulate General



Woolworths



Harris Farm



Priva Netherlands



Lindsay Fox



Logos Property



Rabobank



Kingdom of Tonga



Regional Development Australia



The Waterhouse land is a flat, contiguous and adjacent to the Northern Road and WSA

“A greenfield site adjacent to a curfew free international airport on the doorstep of Australia’s largest city is most certainly a once in a generation opportunity that should be capitalised on”.



The Northern Road upgrade is under construction



Potential operation for an Agri-Port

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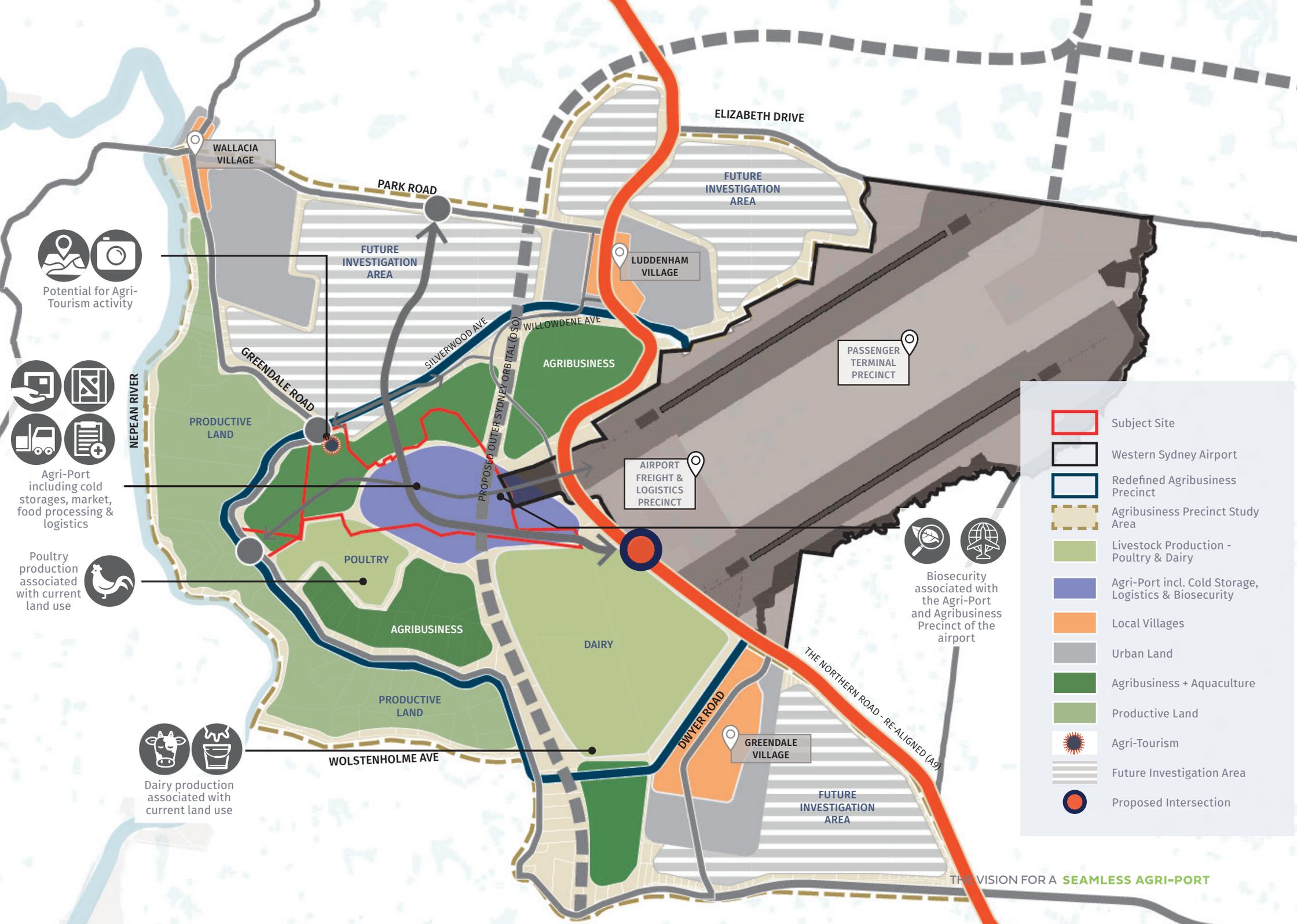
THE PRECINCT

The Agri-Port needs to border the Airport

Precinct role & function

The proposed Agribusiness Precinct is divided into the following sub precincts:

| SUB PRECINCT | LOCATION | USES |
|--|---|--|
| Biosecurity | Located adjacent to the WSA Freight and Logistics Precinct. | Provide a single point for biosecurity and quarantine processing to ensure quality standards, help maintain 'Brand Australia', enhancing smooth export protocols with key markets. |
| Agri-Port | Located to the west of Outer Sydney Orbital. It will have a seamless connection to cargo loading facilities at WSA | The Agri-Port is the main hub of the precinct. Specific uses include cold storages, market, food processing, packaging, logistics supersite and airline catering. |
| Livestock Production (Poultry & Dairy) | Located at current operating livestock production lands including Leppington Pastoral Company and Farm Pride Foods Ltd. | Maintain and enhance poultry and dairy uses operations. |
| Agribusiness | Located under flight path adjacent to Agri-Port. | Intensive production of crops including berries, tomatoes, and mushrooms in a protected environment. Greenhouses under the flightpath of the airport would have non-reflective roofs. |
| Aquaculture | Adjacent location to livestock production | Potential of Recirculating Aquaculture Production (RAS) for Fin Fish production. |
| Productive Land | Located along the flood plain of the Nepean River and on existing agricultural lands. | Maintain the operation of existing agricultural lands |
| Agri-Tourism | Along ridgeline and outside of the higher ANEF contours. | Tourism relegated uses such as: <ul style="list-style-type: none"> • Accommodation; • Hostels; • Food and Beverage; • Breweries; and • Convention centres. |
| Investigation Areas | The area located outside of the ANEF contours and adjacent to existing urban areas. | This area needs further detailed investigations to determine appropriate land uses as it characterised by: <ul style="list-style-type: none"> • Fragmented landownership • Outside the 25 ANEF noise contour |



Potential for Agri-Tourism activity



Agri-Port including cold storages, market, food processing & logistics



Poultry production associated with current land use



Dairy production associated with current land use

- Subject Site
- Western Sydney Airport
- Redefined Agribusiness Precinct
- Agribusiness Precinct Study Area
- Livestock Production - Poultry & Dairy
- Agri-Port incl. Cold Storage, Logistics & Biosecurity
- Local Villages
- Urban Land
- Agribusiness + Aquaculture
- Productive Land
- Agri-Tourism
- Future Investigation Area
- Proposed Intersection

Netherlands Case Study

The Netherlands is the second largest exporter of food in the world and is leading in Agriculture research and application. Through such innovation with healthier food grown in much shorter time-frames and at a fraction of the cost, the world will solve the pending food shortage crisis. Similarly, NSW has the opportunity to lead in Asia Pacific region and supply 1 billion people who live within 12 hours flight.

Fresh Park Venlo (FPV)

Fresh Park Venlo (FPV) in the Netherlands is Europe's Largest Fresh and Food Hub which develops and maintains functional and profitable space for fresh food companies. Its 110hectare business area includes logistics companies, suppliers, food producers and storage and packaging companies.

It links the import and export ports of Rotterdam and Antwerp and the European and International markets. The food park provides a dedicated Facility Management Services team for more than 100 companies. Suppliers procure locally or imported vegetables for processing/packaging at the park facilities, and transport to retail stores and wholesalers. FPV manages public spaces, while lessees, owners and tenants are responsible for areas within their allocated plot boundaries. FPV also offers business space to small-sized businesses and established food companies. FPV can be accessed by 152 million Europeans within a nine-hour drive. With two rail terminals within a kilometre, two airports within 100 kilometres and two ports within 200 kilometres of the business area, FPV provides access to a substantial road, waterway and rail transport network. The area also includes practice-oriented education and research institutions that specialise in food and logistics.

Agriport A7 (Noord Holland)

Agriport A7 (North Holland) is the largest greenhouse horticulture region in the Netherlands, which includes 850 hectares of land dedicated to large-scale greenhouse cultivation and 100-hectares of land dedicated to a business park. We understand the A7 has nine growers and around 420 hectares currently under production. Home to major Dutch companies and international organisations such as Shell and Microsoft.

Agriport A7's intensive horticulture activities are at a scale that encourages shared investment in energy and logistics. In large-scale greenhouses, like in data centres, management of energy costs is the key to success; hence there is a synergy between these two industries at the A7, making both more viable. The glasshouse growers generate electrical energy that generates electricity for a hyper-scale data centres (such as Microsoft). The by-product of this energy generation is heat and CO₂, which is in turn utilised by the greenhouse crops to increase production and reduce costs.

Bio-Park Terneuzen

Bio-Park Terneuzen, also in the Netherlands, is home to three horticultural production businesses. Around 70 hectares are dedicated to the production of crops such as tomatoes, eggplants and paprika. Additional sites are under development. Other businesses include industrial partners Yara Fertiliser and their subsidiary WarmCO₂. There is also a biomass powerplant and a solar power plant is under construction. Companies operating from Biopark Terneuzen actively engage in mutually beneficial long-term projects. Interconnected piping systems allow them to exchange and re-use waste products as feedstock, energy or utility supplements. For example: Cargill provides residual starch, purified water, power and compressed air to Nedalco. Yara supplies waste heat and CO₂ to the horticultural greenhouse park.

Rosendaal Energy delivers water to the recycler Heros. These kinds of shared infrastructure services require less capital upfront. All energy infrastructure is owned outside of the grower group and growers pay a fee to connect; contracted usage fees are negotiated under contract based on demand.



“The Netherlands is the second largest exporter of food in the world”



3

DELIVERY FRAMEWORK

Delivery Framework

