



Infrastructure Keynote Speech

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Arc's presence in the Central region



infrastructure

1651km of mainline track and infrastructure including numerous level crossings, signals and communications equipment



workforce

49 employees



products

grain, nickel, cobalt, passengers, intrastate and interstate freight



customers

CBH Group, Pacific National, SCT Logistics, Aurizon, TransWA, Minara Resources and Indian Pacific



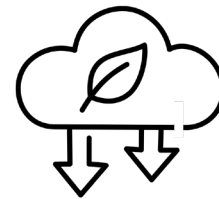
The critical role of freight rail



Value of rail

- Generates \$6.3bn for the Australian economy
- Creates 22,400 jobs across the country
- Meets 71 per cent of the national freight task
- Helps drive down emissions and increases community safety

(source: 2025 ARA Value of Rail report)



16x

less carbon
emissions



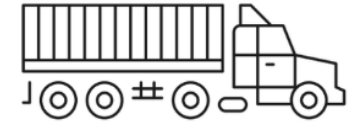
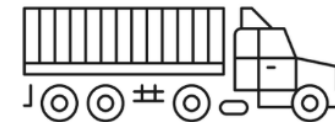
90%

less PM10 emissions per
tonne per kilometre than road

\$81

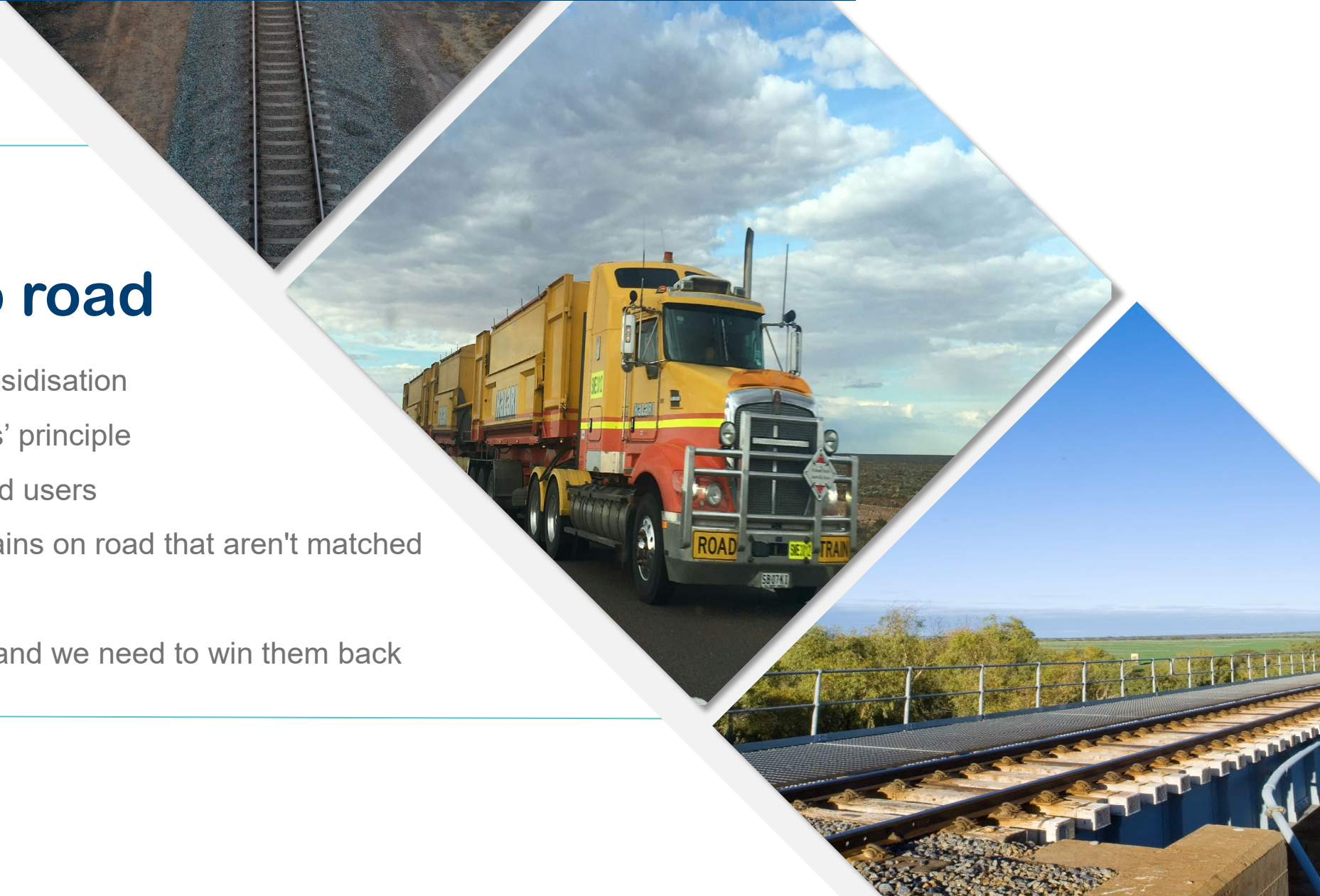
million

in community benefits from
a 1% shift to rail from road



Rail is losing modal share to road

- Road has benefited from subsidisation
- Rail operates on a 'user pays' principle
- Access cost is shared by road users
- HPVs achieve productivity gains on road that aren't matched by rail
- Rail is losing tonnes to road and we need to win them back



The need for network investment



- Significant investment is required, regardless of ownership
 - Arc has access to private capital that could help fund these upgrades
 - Shifting freight from road to rail requires investment now
- Arc has developed a network master plan
 - Investment requires long-term certainty
 - The answers are there and we're excited to work with our customers, Government and industry

Thank you



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