

Brisbane Airport

Australia



bne.com.au



Brisbane Airport (BNE) – Australia's third busiest airport

23.2
MILLION
total annual
passengers in
2017 (+2.3%)

534
AVERAGE
daily aircraft
movements in 2017

32
international
destinations

5.8
MILLION
annual international
passengers in
2017 (+6.9%)

688
AVERAGE
weekly aircraft
movements in 2017
(+7.6%)

52
domestic
destinations

17.4
MILLION
annual domestic
passengers in 2017
(+0.8%)

32
airline partners

24/7
open all hours

Current airline partners

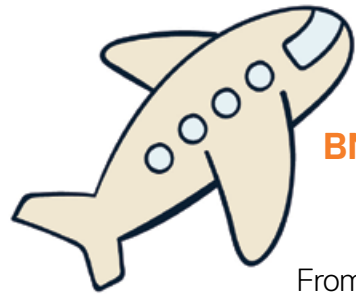


International Terminal	
Air Canada	AC
Air China	CA
Air New Zealand	NZ
Air Niugini	PX
Air Vanuatu	NF
Aircalin	SB
Cathay Pacific	CX
China Airlines	CI
China Eastern	MU
China Southern	CZ
Emirates	EK
Etihad	EY
EVA Air	BR
Fiji Airways	FJ
Hainan Airlines	HU
Hawaiian Airlines	HA
Jetstar	JQ

International Terminal	
Korean Air	KE
Malaysia Airlines	MH
Malindo Air	OD
Nauru Airlines	ON
Philippine Airlines	PR
Qantas	QF
Singapore Airlines	SQ
Solomon Airlines	IE
THAI	TG
Virgin Australia	VA

Domestic Terminal	
Alliance	QQ
Fly Corporate	FC
Jetgo	JG
Jetstar	JQ
Qantas	QF
QantasLink	QF
Regional Express	ZL
Tigerair	TT
Virgin Australia	VA

What sets BNE apart



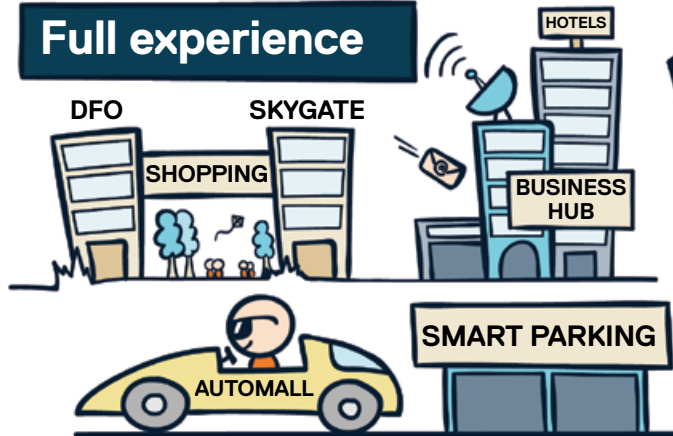
We are **24/7**
No curfew
Constraint Free

BNE's new runway

From **2020**
our flight
capacity **doubles**

We offer the...

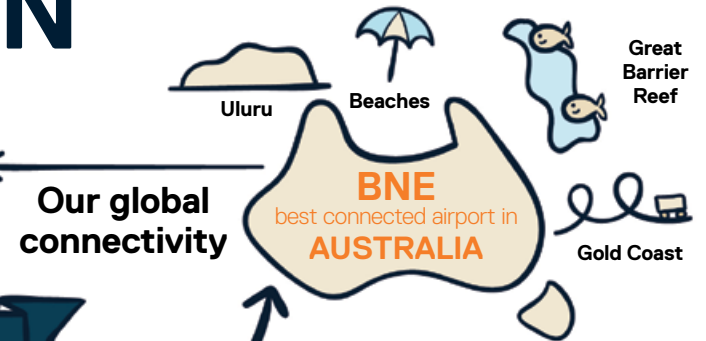
Full experience



OUR VISION



The gateway into Australia



Our global connectivity

BNE
best connected airport in
AUSTRALIA

It all begins here
BNE CITY



A legacy for
our future...

We shape BNE
We create jobs
We give back to our community

The customer experience:
Welcoming / friendly / easy
connected / safe / secure



We love BNE!

We are sustainable



Increased connectivity
Enhanced customer experiences
Airport as a business hub

Our people, talent & culture
shape our BNE Airport

We build strong partnerships



- » Airlines
- » Businesses
- » Government
- » Community
- » Tourism

We create value



- We drive efficiency:
- » We operate smart
- » We manage our assets smartly

Our technology our way of working



- » Flexible
- » Agile
- » Lean
- » Innovative

Our resilience & capability



- » We manage risks
- » Safe & secure

We have strong foundations & enablers

BNE – an award winning airport



BRISBANE AIRPORT
2016 & 2017
WINNER
THE BEST AIRPORT IN AUSTRALIA/PACIFIC



Best Airport in
Australia Pacific 2016
and 2017



#16 in World's Top
100 Airports



Best Airport Staff
in Australia/Pacific
2015 and 2017



Australasia's Leading
Airport – 2016 World
Travel Awards



#1 in ACCC Airport
Monitoring for
13 years



Australia's Best
Bathroom Facility –
2017 Awards

Fly direct between BNE and 32 International ports

North Asia

56
avg. weekly services

South East Asia

73
avg. weekly services

Middle East

28
avg. weekly services

North America

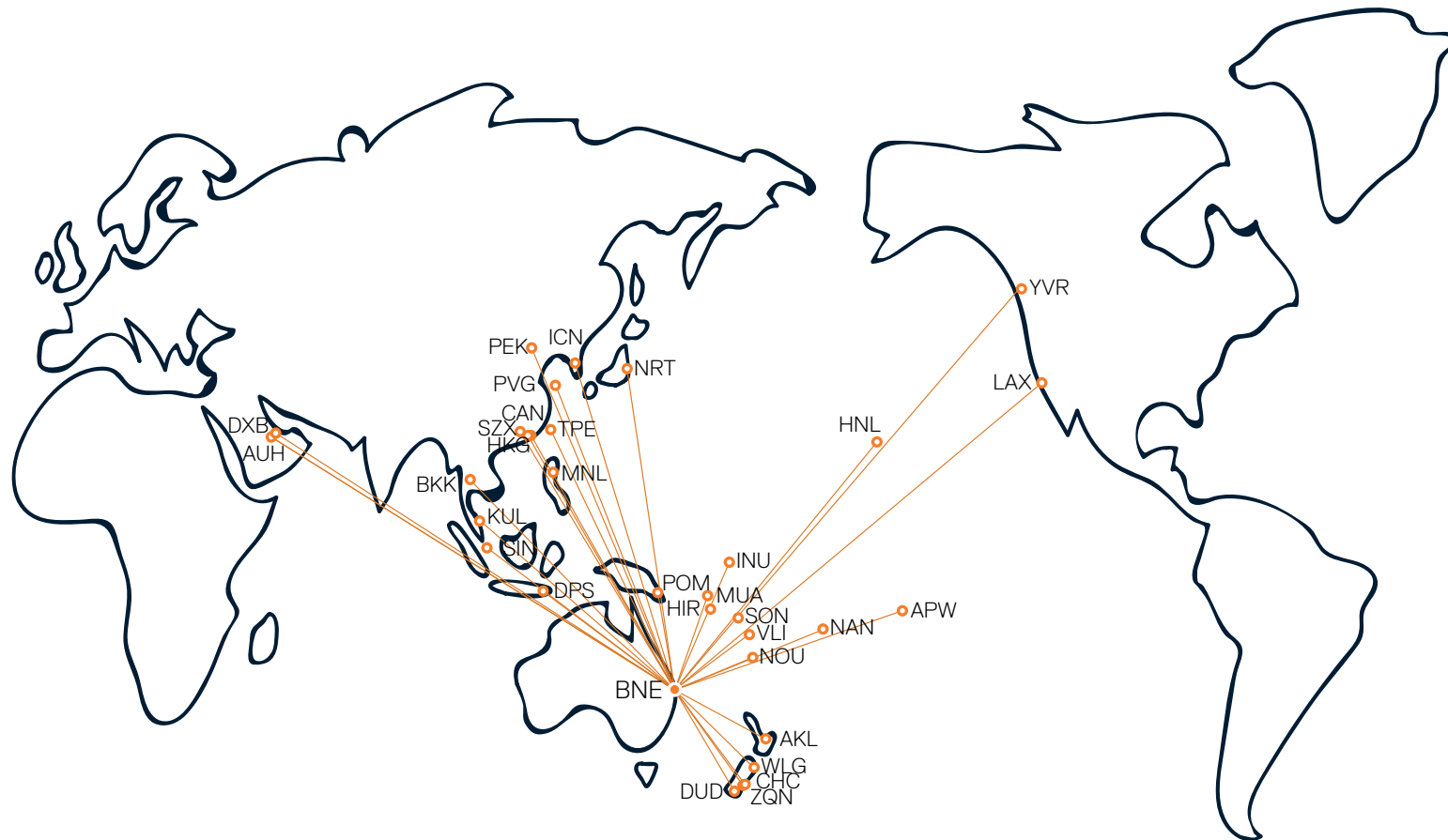
25
avg. weekly services

South Pacific

54
avg. weekly services

New Zealand

98
avg. weekly services



North Asia

Beijing (PEK)
Guangzhou (CAN)
Hong Kong (HKG)
Seoul (ICN)
Shanghai (PVG)

South-East Asia

Shenzhen (SZX)
Taipei (TPE)
Tokyo (NRT)

South-East Asia

Bangkok (BKK)
Denpasar (DPS)
Kuala Lumpur (KUL)
Manila (MNL)
Singapore (SIN)

Middle East

Abu Dhabi (AUH)
Dubai (DXB)

North America

Honolulu (HNL)
Los Angeles (LAX)
Vancouver (YVR)

South Pacific

Apia (APW)
Espiritu Santo (SON)
Honiara (HIR)
Munda (MUA)
Nadi (NAN)

Nauru (INU)
Noumea (NOU)
Port Moresby (POM)
Port Vila (VLI)

New Zealand

Auckland (AKL)
Christchurch (CHC)
Dunedin (DUD)
Queenstown (ZQN)
Wellington (WLG)

Weekly one-way international flights ex-BNE

Northern Summer 2018 (Apr–Oct)

Region	Destination	Airline	Weekly Departures	Aircraft Type	Total Seats
North Asia	Beijing	Air China	3	A332	711
	Guangzhou	China Southern	7	A333	2,002
	Hong Kong	Cathay Pacific ¹	11	A333/A350	2,964
		Qantas	7	A333	2,079
	Seoul Incheon	Korean Air	4	A333	1,104
	Shanghai	China Eastern	4	A332	936
	Shenzhen	Hainan Airlines	2	A333	444
	Taipei	China Airlines	7	A359	2,128
		EVA Air	4	A332	1,008
	Tokyo Narita	Qantas	7	A333	2,079
South East Asia	Bangkok	THAI	7	B788	1,848
	Denpasar	Jetstar	7	B788	2,345
		Virgin Australia	10	B738	1,760
	Kuala Lumpur	Malaysia Airlines	4	A333	1,160
		Malindo Air ²	7	B738	1,134
	Manila	Philippine Airlines	3	A321/A340	504
	Singapore	Qantas	7	A3323 A333	2,079
		Singapore Airlines	28	A359 / B772	5,313
Middle East	Abu Dhabi	Etihad	7	B789	2,093
	Dubai	Emirates ³	21	A380 / B777	7,805
North America	Honolulu	Hawaiian Airlines	3	A332	834
	Los Angeles	Qantas	7 - 10	B744 / B789	2,548 – 2,744
		Virgin Australia	6	B773	2,034
	Vancouver	Air Canada	7	B788	1,757

Region	Destination	Airline	Weekly Departures	Aircraft Type	Total Seats
South Pacific	Apia	Virgin Australia	1	B738	176
	Honiara	Solomon Airlines	4	A320	544
		Virgin Australia	2	B738	352
	Nadi	Fiji Airways	7	A332 / B738	1,148 – 1,257
		Virgin Australia	6 - 7	A332 / B738	1,232 – 1,335
	Nauru	Nauru Airlines	3	B733	520
	Noumea	Aircalin	2	A320	316
		Qantas	1	B738	174
	Port Moresby	Air Niugini	7	B763	1,316
		Qantas	7	B738	1,218
Virgin Australia		5	B738	880	
Port Vila	Air Vanuatu	3-4	B734 / B738	510 - 548	
	Virgin Australia	4 - 5	B738	704 - 880	
New Zealand	Auckland	Air New Zealand	17	A320/B773	4,074
		China Airlines	7	A339/A359	2,128
		Qantas	14 - 16	A333/B738	3,297 – 3,645
	Christchurch	Virgin Australia	13 - 15	B738	2,288 – 2,464
		Air New Zealand	6 - 7	A320/B773	1,008 – 1,176
Dunedin	Qantas	6 - 7	B738	1,044 – 1,218	
	Virgin Australia	7	B738	1,232	
Queenstown	Virgin Australia	3 - 4	B738	528 - 704	
	Qantas	2	B738	348	
Wellington	Virgin Australia	3 -11	B738	528 – 1,936	
	Wellington	Virgin Australia	11 - 14	B738	1,936 – 2,464

1. Four of Cathay Pacific's weekly service fly via Cairns

2. Malindo Air's flights operate via Denpasar

3. One daily Emirates service flies via Singapore

Largest domestic network in Australia

Queensland (27 ports)

Barcaldine (BCI)	Bundaberg (BDB)	Cunnamulla (CMA)	Hervey Bay (HVB)	Moranbah (MOV)	Rockhampton (ROK)	Toowoomba (WTB)
Biloela (THG)	Cairns (CNS)	Emerald (EMD)	Longreach (LRE)	Mount Isa (ISA)	Roma (RMA)	Townsville (TSV)
Blackall (BKQ)	Charleville (CTL)	Gladstone (GLT)	Mackay (MKY)	Proserpine (PPP)	St George (SGO)	Windorah (WNR)
Birdsville (BVI)	Cloncurry (CNJ)	Hamilton Island (HTI)	Miles (WLE)	Quilpie (ULP)	Thargomindah (XTG)	



New South Wales (16 ports)

Albury (ABX)	Newcastle (NTL)
Armidale (ARM)	Norfolk Island (NLK)
Coffs Harbour (CFS)	Orange (OAG)
Dubbo (DBO)	Port Macquarie (PGQ)
Inverell (IVR)	Sydney (SYD)
Lord Howe Island (LDH)	Tamworth (TMW)
Moree (MRZ)	Wagga Wagga (WGA)
Narrabri (NAA)	Wollongong (WOL)

Northern Territory

Alice Springs (ASP)
Darwin (DRW)
Ayers Rock (AYQ)

Western Australia

Perth (PER)
Port Hedland (PHE)

South Australia

Adelaide (ADL)

Tasmania

Hobart (HBA)
Launceston (LST)

Australian Capital Territory

Canberra (CBR)

Victoria

Melbourne (MEL)

Top visitor markets into BNE

2017 Calendar Year

Rank	Nationality	Arrivals	% Growth on Previous Year
1	New Zealand	457,400	2.7%
2	China (excl. SARs and Taiwan)	173,200	12.5%
3	United Kingdom (incl. Ireland)	155,800	5.1%
4	USA	86,600	6.0%
5	Japan	66,000	-0.5%
6	Taiwan	64,200	33.2%
7	India	52,900	9.7%
8	South Korea	45,100	10.7%
9	Canada	42,600	30.8%
10	France	36,000	4.9%
11	Germany	32,500	-0.1%
12	Singapore	29,500	-6.9%
13	Hong Kong (SAR of China)	27,300	6.3%
14	Papua New Guinea	24,100	6.7%
15	Philippines	17,500	10.5%
16	Malaysia	15,400	6.4%
17	Netherlands	11,600	2.5%
18	Thailand	11,500	4.3%
19	Fiji	11,000	12.7%
20	Indonesia	10,900	9.5%
Total all countries (excl. Australia)		1,524,600	6.7%

6.7%
growth to
1,524,600
foreign visitor
arrivals in 2017

Top international destinations for Australians ex-BNE

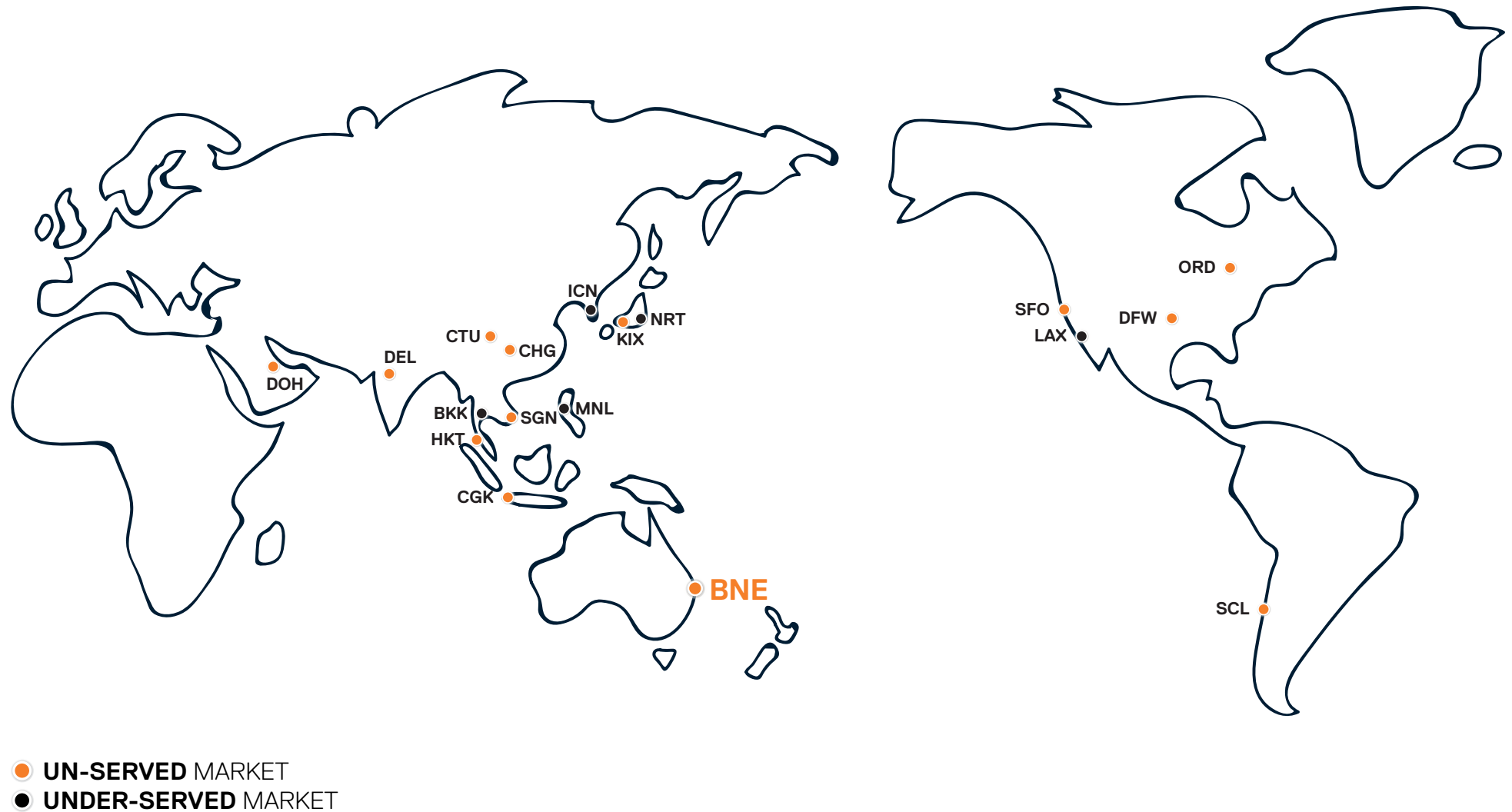
2017 Calendar Year

Rank	Country	Resident Arrivals	% Growth on Previous Year
1	New Zealand	297,700	4.6%
2	United States of America	171,400	-15.7%
3	Indonesia	125,300	13.3%
4	United Kingdom (incl. Ireland)	105,600	7.0%
5	Fiji	76,900	7.7%
6	Thailand	56,300	-4.1%
7	Canada	50,700	44.0%
8	China (excl. SARs and Taiwan)	50,100	9.1%
9	Japan	47,700	-2.8%
10	Papua New Guinea	46,700	6.3%
11	India	40,100	28.1%
12	Singapore	37,300	15.3%
13	Italy	29,900	17.6%
14	Vanuatu	28,800	9.6%
15	Hong Kong (SAR of China)	28,300	-3.5%
16	Vietnam	28,200	13.8%
17	Philippines	22,300	1.8%
18	Germany	18,500	16.4%
19	Taiwan	18,000	4.0%
20	France	17,800	-9.9%
Total all countries		1,511,800	4.2%

4.2%
growth to
1,511,800
resident arrivals
in 2017

Key un-served and under-served markets

Closest major Australian airport to North Asia & USA



BNE has a large and wealthy catchment



Brisbane

2.3 million people



Regional Catchment

1.1 million people

Includes Sunshine Coast, Gold Coast and Northern New South Wales.



Greater Catchment

1.6 million people

Includes northern cities and inland populations of Queensland such as Mackay, Townsville and Cairns.

BNE total passenger catchment

5.0

million people

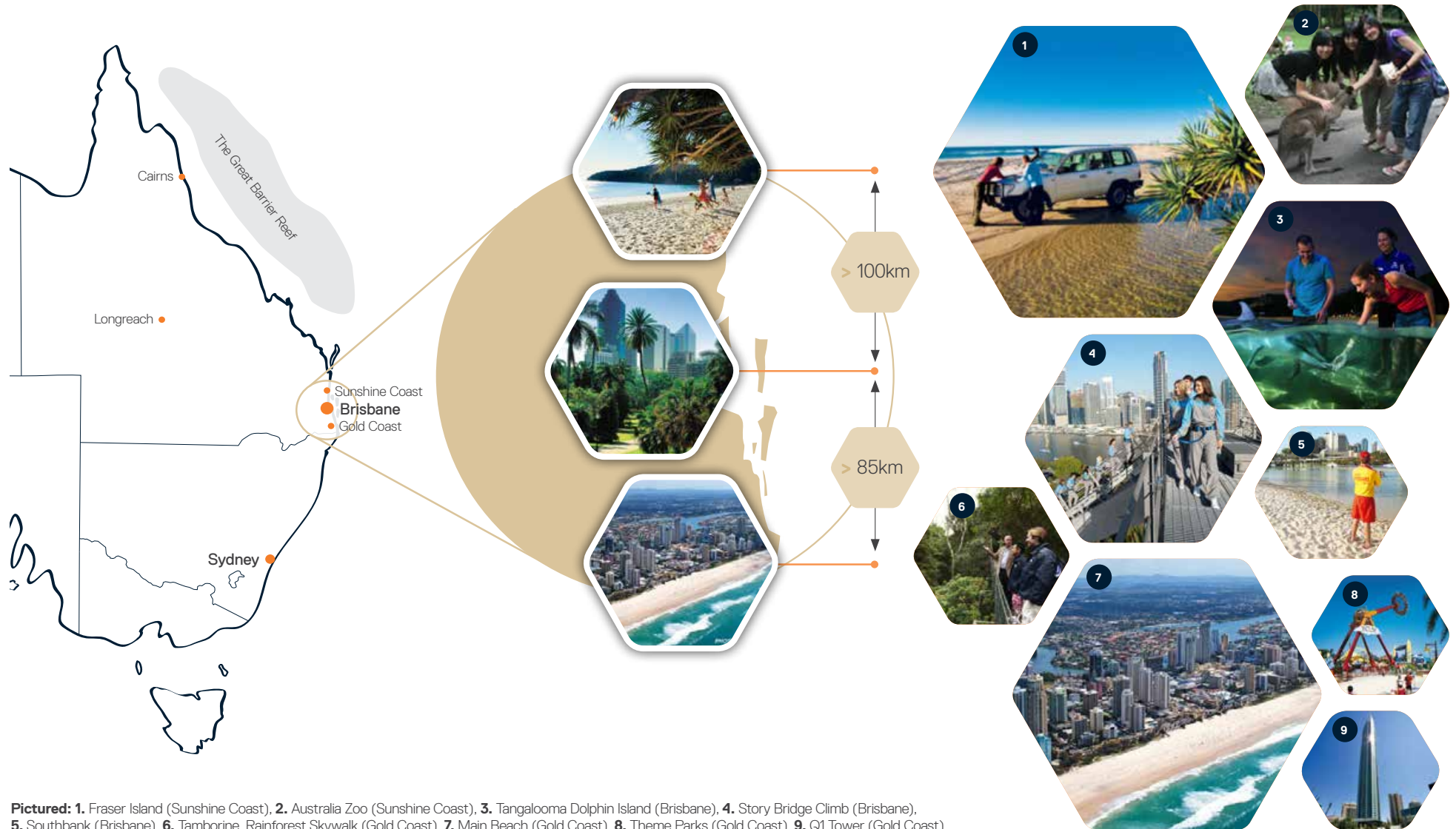
Average weekly earnings

\$A1,528

Queensland residents
as at Nov 2017

Source: Australian Bureau of Statistics (2016)

BNE is the airport of all South Queensland tourism areas



Pictured: 1. Fraser Island (Sunshine Coast), 2. Australia Zoo (Sunshine Coast), 3. Tangalooma Dolphin Island (Brisbane), 4. Story Bridge Climb (Brisbane), 5. Southbank (Brisbane), 6. Tamborine, Rainforest Skywalk (Gold Coast), 7. Main Beach (Gold Coast), 8. Theme Parks (Gold Coast), 9. Q1 Tower (Gold Coast).

Freight Opportunities



Freight Opportunities

Airfreight = big business @ BNE

10%

of all workers at Brisbane Airport are employed by logistics/supply chain organisations

11%

Growth in airfreight volumes to/from BNE in 2017

5%

Growth in exports, to 70,600 tonnes in 2017

20%

Growth in imports, to 47,400 tonnes in 2017

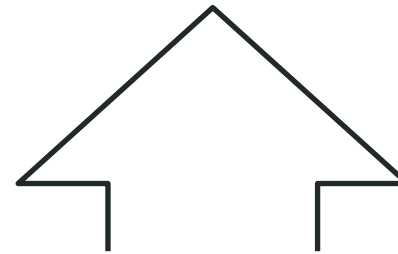
13%

BNE's share of national airfreight imports and exports

380

Destinations that BNE airfreight was transported to/from in 2017

Opportunities



Large/ fast-growing unserved markets:

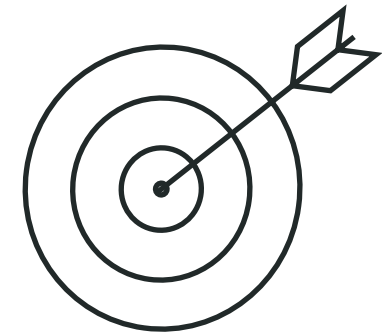
- » Chicago
- » San Francisco
- » Ho Chi Minh City
- » Jakarta
- » Doha
- » Xiamen
- » Tianjin

16,500 tonnes

per annum bypassing BNE, equating to unmet demand

Under-served markets:

- » USA
- » Middle East
- » China
- » India
- » South-East Asia



Recent flight launches have significantly grown airfreight volumes.

Japan	Canada	China
+15%	+23%	+38%

Freight Opportunities

Brisbane Airport is easily accessible from all food producing regions in Queensland; in particular those in the south-east of the state.

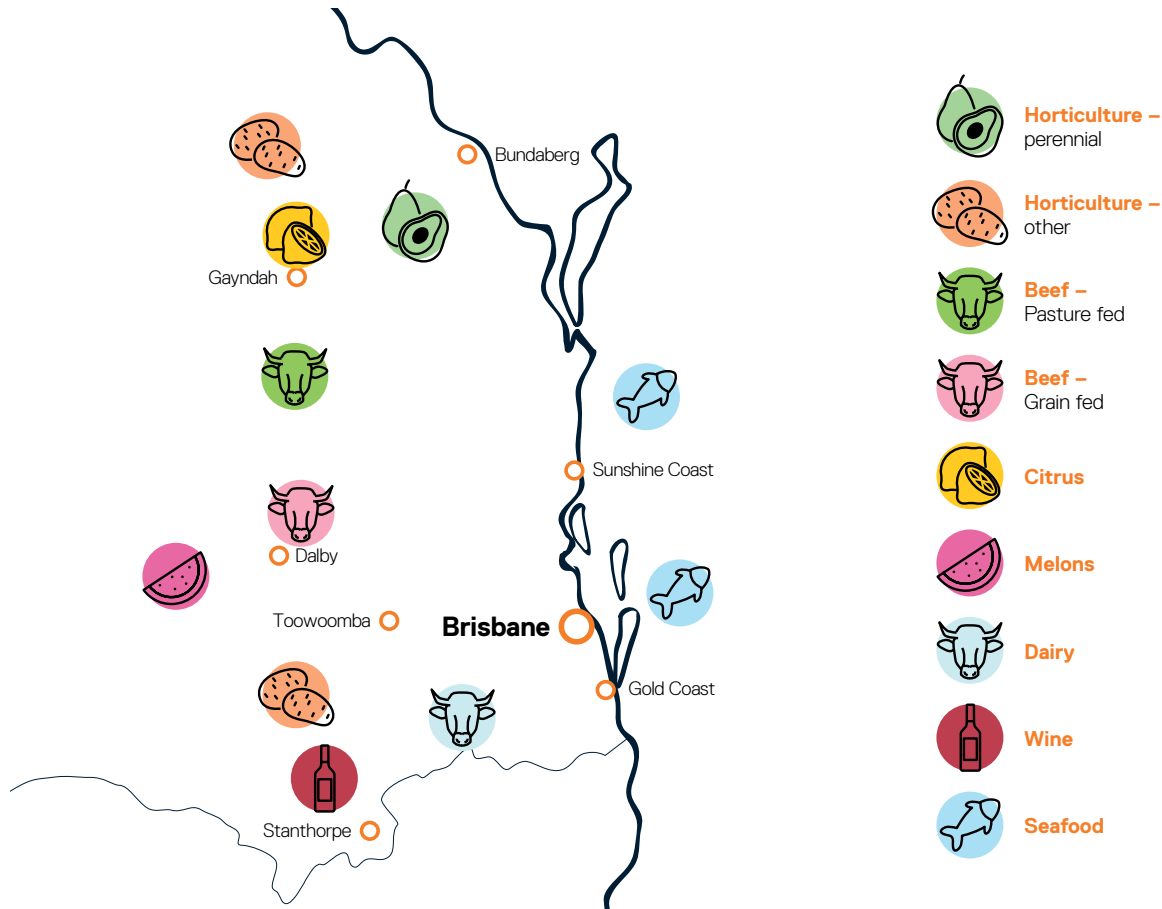
Queensland delivers:

>50% of Australia's meat production

50% of the nation's vegetables

2nd largest fruit producer

The Queensland Government aims to double the state's food production by 2040.



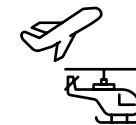
In **addition to agriculture**, there are **other growth industry sectors** in Queensland that will **deliver airfreight volumes**, including:



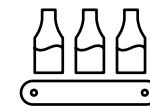
horse racing



mining



aviation & aerospace



food & beverage manufacturing

Freight Opportunities

Quality facilities and services

24/7 operations

Multi-national business tenants

including: Fedex, DHL, Hellmann, Toll Group

82,000m² apron

to accommodate freighters (up to 3x B747)

Customs and biosecurity

inspection facilities on-airport

Less congested than SYD airport

New parallel runway

(3.3km) opening in mid-2020, to complement current 3.56km runway

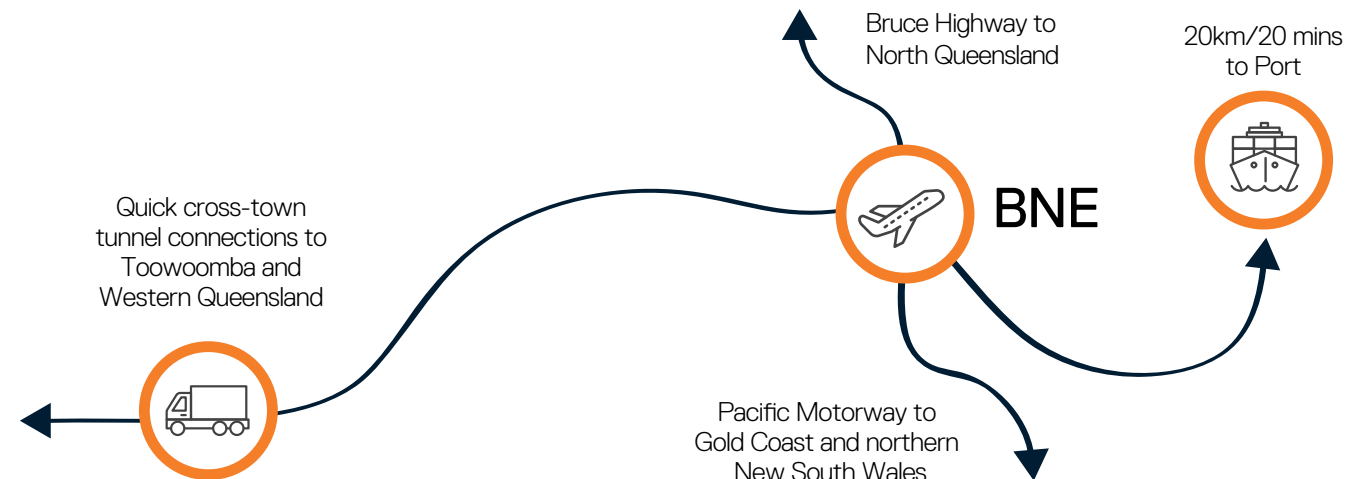
Choice of 4 on-airport cargo terminal operators

(CTOs)/handlers, some with direct airside access

BNE'S Cargo Terminal Operators provide:

- » Significant storage space
- » Temperature-controlled handling
- » Screening & X-ray (to USA-standard)
- » Explosives detection
- » Animal handling
- » Transhipment service
- » Large volume & variety of ULDs
- » And more...

Major arterial road access in all directions from BNE



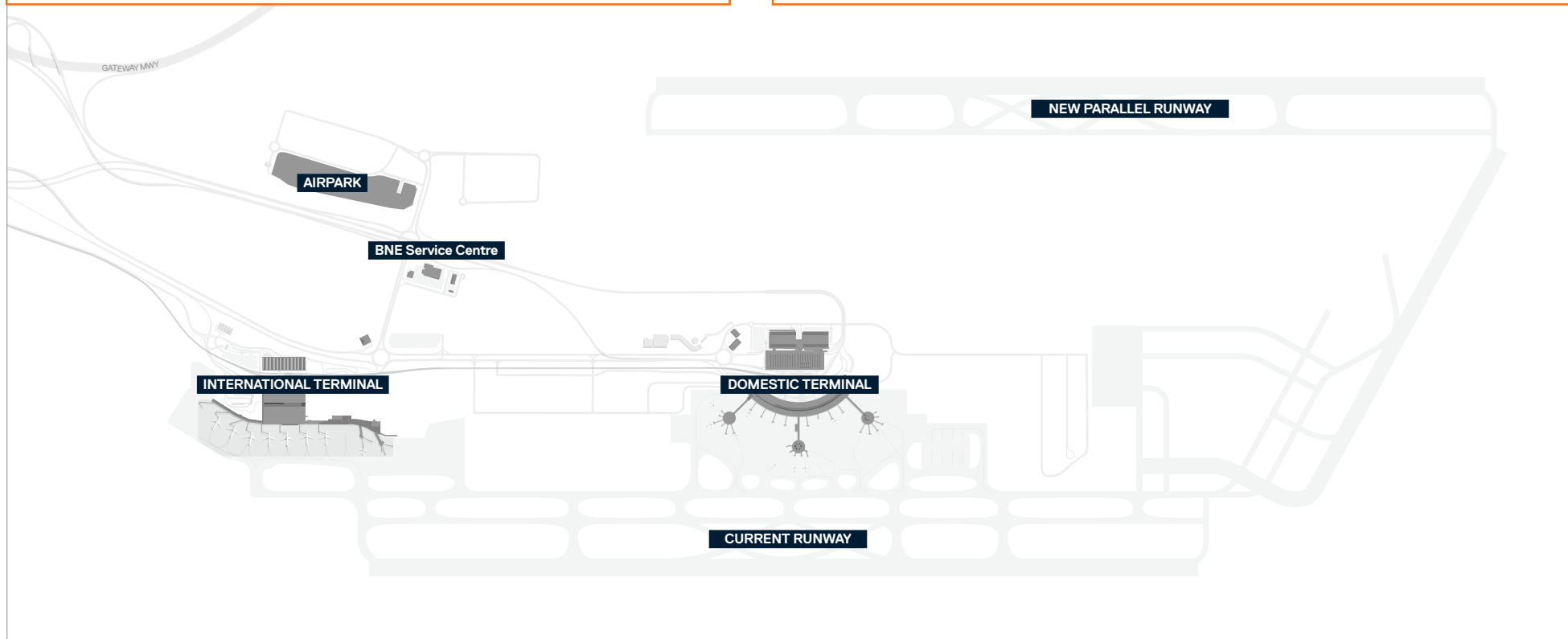
Airport Infrastructure/ Development/ Investment



Overall view of airport precinct

2 RPT terminals, 3km apart

1 major runway (3.56km by 45m),
Brisbane's new runway operational by 2020



To and from Brisbane Airport

To and from BNE

Airtrain – City to the airport in 22 minutes, meeting 95% of all flights.

Taxis – located at both the International and Domestic Terminals.

Buses – Con-x-ion meets all flights and offers a door to door service to Brisbane CBD, Gold and Sunshine Coasts.

Between terminals

Free Transfer Bus – between the Domestic and International Terminals and to Skygate Shopping Precinct.

Airtrain – 50 trains per day between the International and Domestic Terminals (\$5/person).

Brisbane's new runway

Opening in
2020

Total project cost
\$1.3billion

3.3kms long
60m wide

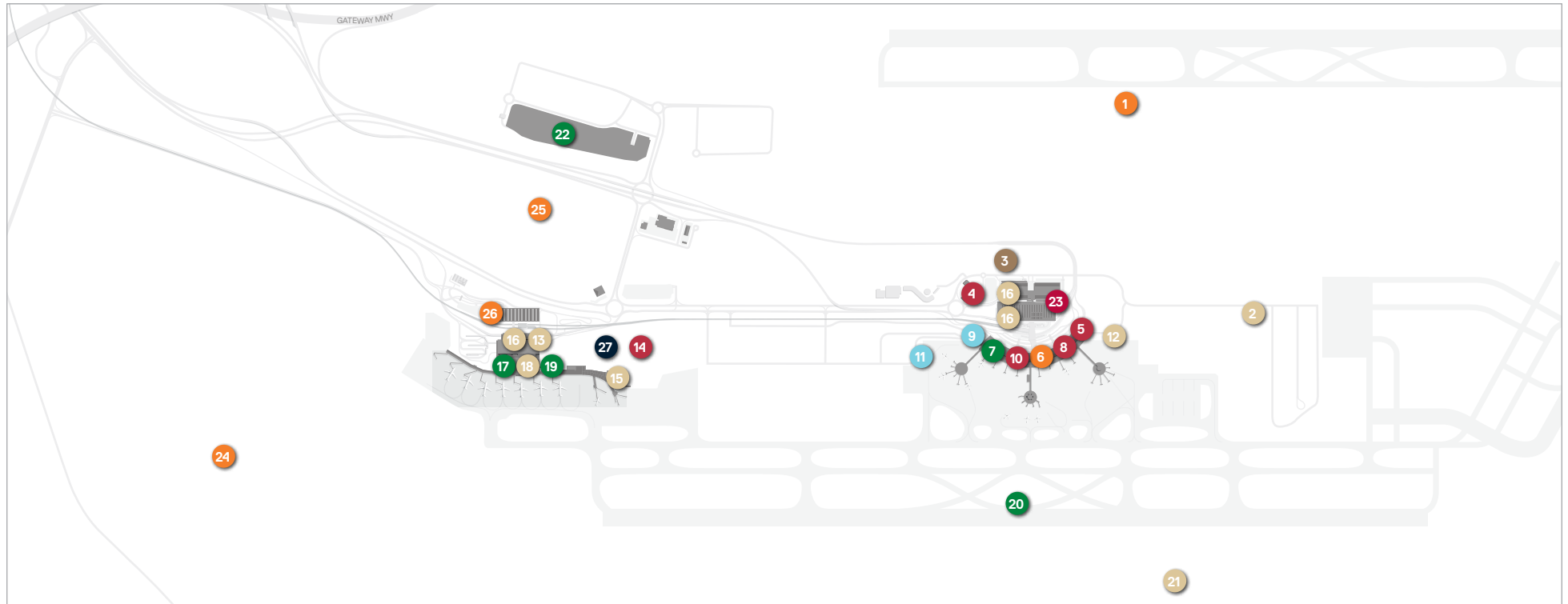
2kms west
and parallel to current runway

2700 jobs
generates from project

Upon opening, both runways will operate independently and planes will take off and land simultaneously



Brisbane Airport Major Projects



● Completed 2015
 ● Completed 2016
 ● Completed 2017
 ● Completed 2018
 ● Completed 2020
 ● Completed 2021
 ● Completed 2022

1 Brisbane's New Runway	\$1.35 billion	8 Domestic Fire Services Upgrade	\$29 million	15 International Northern Concourse Expansion	\$87 million	22 New Public Car Park	\$32 million
2 Dryandra Road Underpass	\$120 million	9 Virgin Australia Expansion and Upgrade		16 Solar Upgrade	\$11 million	23 LED Lighting Upgrade	
3 Domestic Multi-Level Car Park P3	\$100 million+	10 Domestic Baggage Handling System Upgrade	\$12 million	17 International Level 4 Airline Lounges	\$16 million	24 Airport Industrial Park	\$28 million
4 Domestic Hotels Development	\$150 million	11 Domestic Southern Apron Expansion	\$44 million	18 International Self-Service Check-Ins and Bag Drops	\$13 million	25 Auto Mall Earthworks and Civil Works	\$89 million
5 Qantas Lounge Expansion		12 Domestic Northern Apron Expansion	\$15 million	19 International ePassport Smart Gates	\$6 million	26 International Multi-Level Car Park	\$75 million+
6 Domestic Terminal Redevelopment	\$40 million	13 Inter Terminal Transfer	\$7 million	20 Runway 01/19 Overlay Works	\$35 million	27 International Northern Apron Expansion Stage 2	\$26 million
7 Domestic Retail Development	\$15 million	14 International Northern Apron Expansion	\$47 million	21 Hotel Taxiway Upgrade	\$24 million		

As of February 2018

Invested \$1.6 billion since FY12



\$45m
International Retail
Redevelopment



\$44m
Domestic Southern Apron



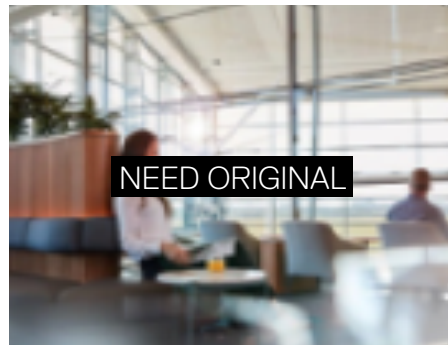
\$44m
Airpark & Staff
Car Park



\$35m
Main Runway
Overlay Upgrade



\$16m
International L4
Business Lounges



\$multi-million
Qantas Lounges Upgrade



\$multi-million
Domestic Virgin
Australia Expansion



\$15m
Domestic Retail
Redevelopment

Further \$2.2 billion between FY18-FY22



\$85m+
BNE Auto Mall
Land Development



\$75m+
New ITB ML Car Park



\$73m
ITB Northern
Concourse expansion



\$47m
ITB Northern
Apron expansion



\$44m
Domestic Terminal
Redevelopment Stage 1



\$28m
Airport Industrial Park



\$25m
Hotel Taxiway Upgrade



\$11m
Solar Upgrade

Other capital projects



Inter Terminal Transfer

More transfer check-in positions; new passenger orientation space; upgrade of existing baggage handling systems; relocation of Bus stop and taxi rank

October to March 2018



ITB self service check-in

96 new kiosks installed and operational on Rows 2, 3, 8, 9

Completed November 2016



ITB automatic bag drop

32 ABDS installed and operational on Rows 2, 3, 8, 9

Due for completion in June 2018



Hotel Taxiway Upgrade

New high strength shoulder and blast protection taxiway pavements capable of taking Code E aircraft

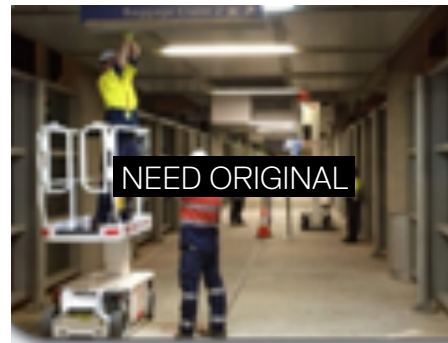
Mid 2017 to February 2017



Domestic Baggage Handling

Three new carousels; upgrade of existing belt; improved bag sortation software; extended mezzanine, gantry and canopy

Late 2016 to August 2017



Domestic Fire Services

DCUT and VA areas complete; Qantas end due for completion

November 2016 to February 2018



ITB Passenger Pick-Up & Covered walkways

New PPU area, more waiting bays, user friendly

October to March 2017



ITB Lifts Upgrade

First stage complete; second stage to start after Commonwealth Games