

Appendix C: Major Australian terminals

Table C.1 Major terminals: New South Wales³⁰³

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Banksmeadow (Sydney)	Caltex	Caltex	Caltex Mobil (minor)	Indirectly through Kurnell refinery.
Parramatta (Sydney)	Shell	Shell	Shell BP (JTA)	Indirectly via Gore Bay terminal, which connects by pipeline to Clyde refinery. Terminal is a gantry at the refinery.
Silverwater (Sydney)	Caltex/Mobil (SMP) ^a	Mobil	Caltex Mobil	Indirectly through Kurnell refinery or Vopak Botany then via pipeline.
Botany (Sydney)	Mobil	Mobil	BP (JTA)	Terminal is being closed down.
Botany (Sydney)	Vopak	Vopak	BP, Mobil, Shell and independent wholesalers (co-mingled leases)	Direct from Port Botany.
Botany (Sydney)	Terminals Pty Ltd	Terminals Pty Ltd	Independent wholesaler (lease)	Direct from Port Botany. No petrol throughput, primarily diesel.
Newcastle	BP	BP	BP Mobil (minor)	Direct from Port of Newcastle. Indirect through Sydney terminals and/or refineries.
Newcastle	Caltex	Caltex	Caltex Mobil (minor)	Indirect through Sydney terminals and/or refineries.
Newcastle	Shell	Shell	Shell Mobil (JTA)	Indirect through Sydney terminals and/or refineries.
Port Kembla	Manildra Park	Manildra Park	Manildra Park	Direct from Port Kembla. Could be used to import petrol, though currently only bunker fuel is imported.

a Sydney Metropolitan Pipeline (SMP) is a Caltex/Mobil (60/40) joint venture which owns the Silverwater terminal and the connecting pipeline to that terminal from Caltex's Banksmeadow terminal.

Table C.2 Major terminals: Northern Territory

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Darwin	Vopak	Vopak	BP, Caltex, Mobil, Shell and independent wholesaler (co-mingled leases)	Direct from Port Darwin.

303 The source for tables in this appendix is ACCC analysis based on data obtained from firms monitored through the ACCC's monitoring process. Includes companies using terminals during 2010-11.
Major terminals are defined as terminals which have a pipeline connection to a port and/or refinery.

Table C.3 Major terminals: Queensland

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Lytton (Brisbane)	Caltex	Caltex	Caltex	Indirect through Lytton refinery.
Pinkenba (Brisbane)	Shell	Shell	Shell	Direct from own port. Indirect through both Brisbane refineries.
Whinstanes (Brisbane)	BP	BP	BP Caltex (infrequent) Mobil (JTA)	Indirect through Bulwer Island refinery. Import by Mobil not allowed under current JTA.
Eagle Farm (Brisbane)	Neumann	Neumann	Neumann Independent wholesalers (hosted)	Direct from own port. Indirect through both Brisbane refineries. Deeper water port to enhance import capacity completed and due to be commissioned by end of 2011.
Bundaberg	Marstel	Marstel	Under refurbishment	Will have direct port access.
Cairns	BP	BP	BP Mobil (hosted)	Direct from port.
Cairns	Caltex	Caltex	Caltex	Direct from port.
Cairns	Shell	Shell	Shell	Direct from port.
Gladstone	BP/Shell	BP	BP Shell Caltex (infrequent)	Direct from port.
Gladstone	Caltex/Mobil	Caltex	Caltex Mobil	Direct from port.
Mackay	BP	BP	BP Mobil (hosted) Caltex (infrequent)	Direct from port.
Mackay	Caltex	Caltex	Caltex	Direct from port.
Mackay	Shell	Shell	Shell Caltex (infrequent)	Direct from port.
Port Alma	Marstel	Marstel	Independent wholesaler	Direct from port.
Townsville	BP	BP	BP Mobil (hosted)	Direct from port.
Townsville	Caltex/Shell	Shell	Caltex Shell	Direct from port.
Weipa	Rio Tinto	BP	BP	Direct from port. Serves local mines, primarily diesel throughput.

Table C.4 Major terminals: South Australia

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Birkenhead (Adelaide)	Caltex	Caltex	Caltex	Direct from port.
Birkenhead (Adelaide)	Mobil	Mobil	Mobil Caltex (infrequent) Shell (JTA)	Direct from port.
Largs North (Adelaide)	BP	BP	BP	Direct from port.
Port Lincoln	Caltex	Caltex	Caltex	Direct from port.
Port Lincoln	Shell	Shell	Shell BP and Mobil (hosted)	Direct from port.

Table C.5 Major terminals: Tasmania

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Hobart	BP	BP	BP Caltex and Mobil (hosted)	Direct from port.
Hobart	Caltex	Caltex	Caltex Shell (JTA)	Direct from port.
Bell Bay	Marstel	Marstel	Independent wholesalers (leases)	Direct from port.
Burnie	BP	BP	BP Caltex (hosted)	Direct from port.
Devonport	Shell	Shell	Shell Caltex (JTA)	Direct from port.

Table C.6 Major terminals: Victoria

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Newport (Melbourne)	Caltex	Caltex	Caltex	Direct from Holden Dock.
Newport (Melbourne)	Shell	Shell	Shell	Direct from Holden Dock.
Yarraville (Melbourne)	Mobil	Mobil	Mobil BP (JTA)	Direct from Holden Dock.
Coode Island (Melbourne)	Terminals Pty Ltd	Terminals Pty Ltd	Third party (lease)	Direct from port. No petrol throughput; has ethanol capacity.
Corio (Geelong)	Shell	Shell	Shell	Indirect through refinery. Terminal is truck gantry at Geelong refinery.
Hastings	United	United	United	Direct from port.

Table C.7 Major terminals: Western Australia

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Fremantle (Perth)	Shell/Caltex	Shell	Caltex Shell	Indirect through Kwinana refinery.
Kewdale (Perth)	BP	BP	BP Caltex (hosted)	Indirect through Kwinana refinery.
North Fremantle (Perth)	BP	BP	BP	Indirect through Kwinana refinery. Minimal petrol throughput.
Kwinana (Perth)	Coogee	Coogee	Caltex (hosted) Mobil (hosted) Ausfuel Gull (hosted)	Direct from port.
Albany	Caltex	Caltex	Caltex	Direct from port.
Broome	BP	BP	BP	Direct from port.
Broome	Shell	Shell	Shell	Direct from port.
Cape Lambert	Rio Tinto	BP	BP	Terminal is being closed down.
Dampier	Rio Tinto	BP	BP	Direct from port. Serves local mines, primarily diesel throughput.
Esperance	BP	BP	BP	Direct from port.
Esperance	Shell	Shell	Shell Caltex (hosted)	Direct from port.
Geraldton	BP	BP	BP Caltex (hosted)	Direct from port.
Geraldton	Shell	Shell	Shell	Direct from port.
Port Hedland	BP	BP	BP Caltex	Direct from port.
Port Hedland	Caltex	Caltex	Caltex	Direct from port. No petrol throughput.