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QUBE HOLDINGS LIMITED
ABN 14 149 723 053

Level 27, 45 Clarence Street
Sydney NSW 2000

Australia's Maritime Logistics System Productivity Commission

Locked Bag 2, Collins St East Melbourne, Victoria 8003

T: +61 2 9080 1900
F: +61 2 9080 1999

Via: Submitted to the Productivity Commission website portal

qube.com.au

RE: Australia's Maritime Logistics System

Dear Commissioners,

Thank you for the opportunity to submit a response to the Productivity Commission Australia's Maritime Logistics System study.

Executive Summary

Qube as the largest provider of import/export logistics services in Australia is in the unique position of operating in and observing the wider maritime logistics system over the last 16-years. Qube operates in all states and territories in both metropolitan and regional areas across Australia providing logistics services to the containerised (import, export and domestic), break bulk and dry bulk markets.

Qube welcomes this review of the maritime logistics system given the current pressure on global supply chains through Covid-19 and the ongoing impacts of the Omicron variant. The timing of the review could therefore not be better. However, it is not uncommon for the wider logistics industry to be placed under some external pressure from climatic conditions, network infrastructure shortcomings both regulatory and physical, industrial relations actions, a shortage of appropriately skilled workers and the cyclical nature of international financial and trade markets.

It is clear to Qube that there are lessons that can be learnt from the last 20-years that can be incorporated into an improved strategy to ensure the maritime logistics system is both robust and resilient while providing an efficient and productive service to the industries, customers and ultimately the Australian people. A very clear learning has been the realisation that Australia as an Island nation has a heavy reliance on the maritime logistics system (import and export activities). As such, the system needs to be protected by recognising it as an essential service supported by appropriate policy and operating frameworks to allow the efficient flow of both international and domestic trade.

Often there is a focus from Government and other industry participants on the immediate waterside infrastructure of the maritime logistics system. Although this plays a significant role, the ability and need for road, rail and other landside infrastructure to work in harmony to deliver efficient and productive maritime supply chain services is fundamentally critical to meeting existing and future demand.

The key questions Qube has sort to address in this response in broad terms are;

- The factors which contribute to productivity and efficiency within the maritime logistics system;
 - *The need for Federal, State and Local Government policy to support the private sector to provide a secure tenure and framework to ensure investment in all facets of the supply chain including transport assets, terminals, technologies which is clearly focused on improving the throughput of the waterside gateways.*

- What are the impediments to efficiency in Australian operations;
 - *There are several critical impediments. These are namely: decreased investment in critical import / export transport infrastructure by Government and a lack of aligned incentives to invest for the private sector; disruptive industrial action; a lack of consistent national supply chain regulation that harmonises rules across jurisdictions to allow for efficient interoperability across modes and supply chains; and a lack of consideration and protection for freight in planning regimes, as well as for its operating requirements with the regular imposition of limitations such as freight curfews across road and rail. .*

- What are the implications for other stakeholders and the community of inefficiencies and disruptions?
 - *The ripple effect from an inefficient and poor productivity maritime logistics network is substantial it is felt at a very real level by road transport companies, rail companies, the end consumer and other stakeholders through increased prices, interrupted and high stress work environments, lost revenues and a multitude of other financial and physiological costs.*

- What is best practice and where does it exist?
 - *It is Qube's observations that the highly productive maritime logistics networks are driven by high volumes which ensures the need for innovative technology inclusive of automation and an effective interface into a wider connected transport network.*

- How are the impediments addressed or avoided in best practice ports?
 - *It is Qube's observation that impediments are addressed and overcome through the establishment of a clear strategy with policy certainty, effective communication between all stakeholders and the marrying of technology /innovation and ongoing sustainable investment.*

As the maritime logistics system in Australia is only one small part of a global network, it is imperative that any improvements to the network are flexible and sustainable based on a clear policy that allows the private sector to invest in solutions for the medium to long-term.

Through Qube's involvement and provision of services in the maritime logistics system, it is clear that there should be one critical measure for the maritime logistics service and that is an efficient increase in volume throughput.

Qube echoes many of the responses to date from our industry peers that there is currently a real window for change and to address current deficiencies in the maritime supply chain. However, that reform needs to be meaningful and drive efficiency and productivity outcomes for the maritime logistics system and its numerous stakeholders and customers.

Please do not hesitate to contact the undersigned to discuss further.

Shane Collins

Director – Strategy & Development

Attachment 1 – Qube Submission

Introduction

Qube is Australia's largest integrated provider of import and export logistics services. Qube operates in over 135 locations across Australia, New Zealand and South East Asia with a workforce of over 7,000 employees. Qube operates in over 30 ports nationally. The majority of these port operations also interface with Qube landside logistics services e.g. road and rail transport.

Qube operates across a number of supply chains including:

- Containerised cargo;
- Mining and Resources;
- Agri;
- Energy (oil and gas, renewables);
- Roll On/ Roll Off e.g. automotive;
- Construction materials;
- Forestry;
- Food processing; and
- Manufacturing.

Qube therefore offers a unique perspective given its participation in all elements of the supply chain from ports, road and rail logistics through to warehousing and cargo handling across a range of cargo and commodity types. This provides Qube with the ability to leverage its experience from one supply chain to another where appropriate e.g. bulk and containerised.

Qube is currently comprised of two business units: The Operating Division and we also hold a 50 per cent interest in Patrick Terminals, Australia's leading container terminal operator.

The Operating Division comprises:

Qube Ports a specialist integrated port services provider, providing bulk and general handling facilities in over 40 Australian, New Zealand and South East Asian ports. Our Ports team leads the market in providing purpose designed solutions for handling containers, bulk, automotive and general cargo.

Qube Bulk provides customers with the full range of bulk material handling services including road and rail transport, stockpile management, and bulk ship loading. Qube Bulk specialises in large-scale bulk export facilities and bulk material supply chains.

Qube Logistics operates services covering road and rail transport, warehousing and distribution, container parks and related services, and intermodal logistics hubs including rail terminals and international freight forwarding.

Australian Amalgamated Terminals (AAT) is a wholly owned subsidiary of Qube and provides automotive, general cargo and break-bulk facilities in Brisbane, Port Kembla and Melbourne.

The Property business unit was responsible for the key property and investments for Qube, including the development of the 243-hectare site at Moorebank in Western Sydney, NSW. However, with the recent divestment of the warehouse trust to Logos in late 2021, Qube will operate the Moorebank Logistics Park IMEX (import/export) terminal and the interstate terminal in the precinct. The importance of the rail terminals servicing both import/export and domestic containerised volumes highlights the critical requirement for supporting landside transport infrastructure to support the maritime logistics network.

Qube strives to deliver operating efficiencies and economies of scale through:

- Investment in infrastructure, facilities, equipment and technology.
- Reduced transport costs by eliminating movements.
- Comprehensive integrated supply chain solutions through a single service provider.
- Rail and road-based solutions delivering the best modal outcome.
- Strategic locations at or near ports and other key regional and metropolitan areas.
- Collaborate and engage with stakeholders to ensure the sustainability of transport infrastructure.

The Nature of Qube Services

Qube provides integrated logistics services for a range of commodities for both imports and exports. Qube's road and rail services interface with the port segment. Qube's interface with port operators and infrastructure owners occurs with both Qube owned and/ or operated facilities and those of third parties.

The following sections provide a more detailed description of the Qube's Services for the Operating Division.

Qube Ports

Qube Ports is the pre-eminent provider of wharf-side port logistics and port management services in the Australian and New Zealand region, with a footprint in South East Asia. The principal strategy of our integrated port solution is to develop and improve the port and landside logistics capabilities for the nation's importers and exporters across a broad mix of industries and cargo commodities.

Our operations consist of on-wharf and port precinct facilities in all Australian capital city ports and both dry bulk materials and general cargo facilities in a further 24 regional port locations. Combined with cargo storage, shed operations, materials handling, heavy haul transport, warehousing and distribution operations, we are able to service our customers' needs across a broad mix of industries and critical logistics chains.

Qube Ports is committed to servicing its existing clients, as well as expanding and developing new business opportunities by extending services at existing facilities, creating new facilities by investing in infrastructure domestically, and working in partnership with our customers to build new business opportunities.

Qube Bulk

Qube Bulk capabilities include mine, road, rail, storage, port and ship services. Qube Bulk handles various bulk ores, concentrates, mineral sands, salt, coal and dangerous goods. We own and operate strategic infrastructure throughout the supply chain. Qube Bulk is independent, experienced and actively investing in bulk export chain projects. This combination provides customers with a low risk solution. Independence is particularly useful in open access facilities where there are multiple users. Where possible, we look to invest in bulk material handling systems and port facilities.

Qube Logistics & Infrastructure

Qube Logistics operates across 48 sites nationally, covering over 210 hectares. We operate transport fleets on road and rail, warehousing and distribution centres, container parks, and intermodal logistics hubs connecting ports with metropolitan and regional Australia. Our state of the art management technologies track and trace movement of goods and provide an integrated end to end solution for clients.

Qube Logistics has two corporate administrative offices in Melbourne and Sydney. Over 2,400 full time employees support these operations with qualified and experienced staff across all services offered. Services Qube Logistics' operations are Australia-wide and provide the following services: ▸

- Supply Chain Logistic;
- Transport – Containers;
- Transport – Bulk;
- Transport – Line haul;
- Transport – Palletised Freight;
- Rail Services; Intermodal Rail Terminals;
- Warehousing & Distribution;
- Freight Depots & Freight Yards;
- Project Logistics (including break bulk);
- Container Parks & Handling; ▸ Specialised Logistics;
- Container Hire & Sales;
- Customs and Quarantine Clearance; and
- International Freight Forwarding.

In addition, Qube Logistics operates International Freight Forwarding offices across Australia, New Zealand, China, India, Malaysia, Thailand and Myanmar, and covers the rest of the world via strategic agency partners.

Property

Key projects include:

Moorebank Logistics Park (MLP)

Moorebank Logistics Park is Australia's largest freight infrastructure project and links Port Botany direct to rail terminals and warehousing on a 243-hectare site. The precinct has the capacity to transport up to 1.05 million TEU (twenty foot equivalent units) a year of Import- Export freight and another 0.5 million TEU of interstate freight per year. Moorebank Logistics Park will have 850,000sqm of high specification warehousing, as well as auxiliary services including retail and service offerings.

A rail connection to the Southern Sydney Freight Line (SSFL) has been constructed which has direct access to the site, while the M5 and M7 arterial roads are only minutes away, providing a complete supply chain solution driving savings in time and costs for onsite tenants.

The MLP is the only logistics and industrial park that provides an end to end (open access) solution for our customer's supply chain. Freight travelling via rail is the most efficient and cost effective mode of container delivery.

Beveridge Intermodal Freight Rail Terminal (BIFT)

Qube has identified an opportunity to develop approximately 1,100 hectares of land located east of Beveridge, 40km north of the Melbourne CBD. The concept for the Project is to develop an intermodal freight terminal and associated precinct infrastructure, including the following key elements:

- An interstate freight terminal directly connected to Inland Rail for double stacking on the Melbourne – Brisbane corridor
- An import and export (IMEX) freight terminal
- Terminal warehousing and distribution facilities
- Bulk handling facilities
- Rail access to the key rail networks
- Road access to key road networks.

It is anticipated that the development of the Beveridge Project will result in transformed logistics and improved environmental outcomes compared to the current freight movement and supply chain operations, within the Melbourne Metropolitan area and broadly within Australia.

Service Efficiency

Maritime logistics should be considered in conjunction with the broader supply chains of which they are a component rather than in isolation. Inefficiencies and disruptions at the port can have significant knock on effects to the broader supply chains and negatively impact the Australian economy and consumers.

Factors that contribute to productivity and efficiency include (but are not limited to);

- Industrial relations
- Land transport links and services
- Automation
- Fragmented supply chains
- Regulation
- Infrastructure ownership and business models

Qube is also acutely aware of the following emerging issues in maritime logistics:

- Competition from privatised port infrastructure owners encroaching into services beyond port infrastructure provision reducing the incentive to invest and develop customer solutions as these can be appropriated by the ports
- Shipping lines encroaching into landside logistics functions and leveraging ocean freight into broader services models

Australia is an island trading nation that is a major exporter of a range of commodities including agricultural, resources and energy products. Australia is also an importer of range of consumer products and inputs and equipment for the domestic export industries and manufacturers. As such, Australia is highly reliant on its ports operating in an efficient manner, free of disruptions and able to compete efficiently in global markets. To this end, Ports should be deemed as Essential Services in Australia and unable to be subject to industrial action that has a significantly adverse effect on the economy and causes reputational damage to the nation as a global supplier and trading partner. Qube equally suggests there is a need for shipping and logistics to be classed as an “essential service” with supply chain continuity protections enshrined in law. This should not be restricted to container shipping but cover the broad scope of maritime logistics noting the majority of Australia’s exports by value are bulk commodities.

Port services providers should also not be restricted through industrial agreements in improving efficiency and productivity benefits through the advancement of the implementation of automation.

Impediments to efficiency in Australia maritime logistics system include:

- Industrial relations
- Landside logistics links and interfaces
- Landside congestion at ports
- Urban encroachment and limited expansion opportunities through the restricted supply of port and freight lands
- Misalignment of interests between port owners (particularly privatised port owners seeking to maximise returns rather than facilitating trade), port operators and shipping lines

Industrial Relations

Throughout its operations Qube operates with Enterprise Agreements made under the Fair Work Act. A list of those agreements is contained in Appendix 1.

The agreements are mostly confined to each specific location in order to reflect the circumstances of each port and focus on the local issues relevant to the business and employees in that port. In bulk stevedoring and associated supply chain operations this is particularly important because of the wide variations in the nature of operations and customer requirements.

The approach allows the employees directly affected by the agreement to be involved in the process and determine the outcome. This approach, which has been in operation with union and employee agreement for many years, avoids delays and complications that often arise in national agreement negotiations used by other maritime logistics operators.

Nevertheless, the Australian industrial relations system has presented significant challenges for Qube. Qube has found that when a major dispute arises, unions can cause significant disruption to operations through threatening and then taking protected and unprotected industrial action. As a result of the fact that the reliability of the supply chain is heavily dependent on the availability of labour at critical times, threats of action and covert disruption can have a very serious impact well beyond the direct parties.

Further, because of the significant pressure able to be applied by unions, restrictive practices are contained in most enterprise agreements applying in the industry. The main industry union, the CFMMEU, has a constant agenda of seeking common industry terms and conditions in enterprise agreements. The strong bargaining position of the union and its ability to cause significant damage to customers in particular makes the achievement of improved productivity and efficiency extremely difficult.

Qube believes that there is a case for amendments to the Fair Work Act to reflect the time sensitive nature of supply chain services and provide a ready means to resolve disputes expeditiously without disruption to operations and losses to employees and third parties.

Landside Logistics Interfaces

Maritime logistics as a component of a broader supply chain system will benefit from efficient landside logistics interfaces and networks. Currently the majority of non-bulk containerised freight is transported to and from ports by road. Bulk conversely typically has supply chains that benefit from rail connections.

The maritime logistics chain both bulk and containerised will benefit from increase rail freight share to reduce truck movements to and from ports that have adverse impacts on road congestion and transport emissions.

This inefficiency derives from inequity between landside infrastructure charges for road and rail freight with rail being charged higher track access charges in comparison to road freight. Rail freight also competes for capacity and pathing on the network with passenger services with freight having a lower priority.

Rail also faces its own unique challenges versus road with no single national productivity regulator, but rather multiple state or regionally based network regulators with different rules and regulations leading to widespread rail interoperability issues, even within the same State. The impact of long regional containerised export trains having to split and shunt at the container stevedore port terminals also severely impacts port rail window capacity at the expense of the overall supply chain. Such regional trains should be either incentivised or made to go via a metropolitan intermodal terminal for onwards transshipment via dedicated metropolitan port rail shuttle which will add significant capacity and efficiency to the overall port rail supply chain.

Such inefficiencies and disruptions to the maritime logistics system manifest themselves in a number of ways including:

- Increased costs for importers, exporters, port owners and operators, landside logistics providers and shipping lines
- Environmental impacts from ships having extended waiting and unloading times
- Delays to receiving or exporting products
- Broader economic impacts (refer to Fremantle Port case study)
- Interruptions to manufacturers due to delays in receiving components
- Reputational damage for Australia as an unreliable destination for suppliers and port operations
- Reluctance of shipping lines to services the trade due to delayed or diverted port calls that adversely impact the liner trades schedules
- Production impacts by delayed receipt of key equipment and inputs e.g. delays to receiving agricultural harvesting equipment caused by industrial actions at ports

The Port of Brisbane is an example of a best practice Australian port due to:

- A clear strategy is defined and the Ports role within it
- Development and expansion opportunities based on long term planning
- Scope for expansion for several decades
- Free of the risk of urban encroachment
- Excellent landside logistics links by road networks and on port warehousing precincts
- A recognition that standard and narrow gauge rail networks into the port need to be improved and to engage with Governments and other stakeholders to address this short-fall including a standard direct port connection to the future Inland Rail

Formalities

- Qube is committed to providing a balanced view on the maritime logistics network and is prepared to engage further with the Productivity Commission to elaborate on any of the material provided in this response.
- The key contact for Qube and its operating division(s):
 - Shane Collins
 - Director Strategy and Development
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Appendix 1 – Qube Industrial Agreements

State	Agreement Name	Union
WA	Qube Logistics (WA2) Pty Ltd and Transport Workers Union Enterprise Agreement 2019	TWU
NSW	Qube Logistics (NSW) Pty Ltd Port Botany Empty Container Park Enterprise Agreement 2013	non union
NSW	Qube Logistics - Quattro Port Kembla (NSW) (AWU)	AWU
WA	Qube Specialised Logistics Western Australia Enterprise Agreement 2015	TWU
NSW	Qube Logistics (Rail) Train Crew NSW Enterprise Agreement 2019	RTBU
WA	Qube Logistics (WA) Pty Ltd (Transport and Warehousing) Agreement 2017	TWU
NSW	Qube Logistics Minto Warehouse and Yennora sheds 5&6 and the TWU - Enterprise Agreement 2017	TWU
NSW	Qube Logistics (NSW) - Freight Station Enterprise Agreement 2017	non union
QLD	Qube Logistics (QLD) Pty Ltd (CargoLink) Enterprise Agreement 2017	MUA
NSW	Qube Logistics (NSW) – Road Transport Enterprise Agreement 2021	TWU
NSW	Qube Logistics Packtainers Enterprise Agreement 2020	UWU

State	Agreement Name	Union
NSW	Qube Logistics Western Sydney Intermodal Terminals and the TWU - Enterprise Agreement 2017	TWU
VIC	Qube Logistics (Vic) Pty Ltd Workplace Agreement 2020	TWU
WA	Qube Logistics West Australian Container Parks Enterprise Agreement 2018	TWU
QLD	Qube Logistics (QLD) Pty Ltd - Repairers and Inspectors Agreement 2017	TWU
QLD	Qube Logistics (QLD) Pty Ltd Brisbane Port Freight Terminal Enterprise Agreement 2017 - QL - Brisbane Freight Terminal/Chalmers Agreement (QLD) consolidation (TWU)	TWU
Chalmers (QLD)	Chalmers Industries Pty Ltd Queensland Enterprise Agreement 2018 - QL - Brisbane Freight Terminal/Chalmers Agreement (QLD) consolidation (TWU)	TWU
NSW	Qube Logistics Tipper Truck and TWU - Road Transport Enterprise Agreement 2017	TWU
QLD	Qube Logistics (QLD) Pty Ltd - Brisbane Empty Container Park Enterprise Agreement 2017	TWU
VIC	Qube Logistics Rail Victorian Train Crew Enterprise Agreement 2015	RTBU
SA	Qube Logistics (SA1) Pty Ltd South East Drivers and the TWU Enterprise Agreement 2017	TWU
NSW	Qube Logistics Harefield Intermodal Terminal Enterprise Agreement 2017	non union
QLD	Qube Logistics (QLD) Toowoomba Freight Terminal Container Division Enterprise Agreement 2015	TWU
QLD	Qube Specialised Logistics Queensland Enterprise Agreement 2018	TWU
VIC	Qube Specialised Logistics Victoria Enterprise Agreement 2018	TWU

State	Agreement Name	Union
SA	Qube Logistics South Australia Outer Harbor Transport and the TWU Enterprise Agreement 2018	TWU
SA	Qube Logistics SA Warehouse and the TWU Enterprise Agreement 2018	TWU
SA	QUBE LOGISTICS SA CONTAINER PARK ENTERPRISE AGREEMENT 2018	TWU
NSW	Qube Logistics Rail Maintenance Enterprise Agreement 2018	non union
QLD	Qube Logistics (QLDT1) Pty Ltd Qube Logistics Queensland Mossman Sugar Enterprise Agreement 2018	non union
SA	Qube Logistics SA1 Murray Bridge Operations Enterprise Agreement.	non union
Chalmers (VIC)	Chalmers Enterprise Agreement (Victoria) 2014	TWU
Chalmers (VIC)	CHALMERS INDUSTRIES, CONTAINER REPAIR WORKSHOP (VIC) ENTERPRISE AGREEMENT 2015-2019	AMWU
Chalmers (VIC)	Chalmers Brooklyn Enterprise Agreement (Victoria) 2016	TWU
VIC	Qube Ports Pty Ltd Port of Melbourne Enterprise Agreement 2020	MUA
VIC	Qube Ports Pty Ltd Port of Portland Enterprise Agreement 2020	MUA
NAT	Qube Energy Pty Ltd Employees National Enterprise Agreement 2015	TWU
NAT	ISO Marshalling Enterprise Bargaining Agreement 2016	MUA

State	Agreement Name	Union
VIC	Qube Ports Pty Ltd TT Line Victoria Enterprise Agreement 2016	MUA
TAS	Qube Ports Pty Ltd TT Line Tasmania Enterprise Agreement 2020	MUA
WA	Qube Ports Pty Ltd Port of Ashburton Enterprise Agreement 2018	MUA
SA	Qube Ports Pty Ltd Port of Adelaide Enterprise Agreement 2020	MUA
WA	Qube Ports Pty Ltd Port of Dampier Enterprise Agreement 2020	MUA
WA	Qube Ports Pty Ltd Port of Fremantle Enterprise Agreement 2016	MUA
QLD	Qube Ports Pty Ltd Port of Brisbane Enterprise Agreement 2020	MUA
NT	Qube Ports Pty Ltd Port of Darwin Enterprise Agreement 2020	MUA
NSW	Qube Ports Pty Ltd Port of Newcastle Enterprise Agreement 2020	MUA
NSW	Qube Ports Pty Ltd Port of Port Kembla Enterprise Agreement 2021	MUA
NSW	Qube Ports Pty Ltd Sydney Harbour Enterprise Agreement 2016	MUA

State	Agreement Name	Union
SA	Qube Ports Pty Ltd South Australian Outports Enterprise Agreement 2016	MUA
TAS	Qube Ports Pty Ltd Port of Tasmania Enterprise Agreement 2020	MUA
NAT	Qube Ports Pty Ltd National Material Handling Enterprise Agreement 2018	non union
QLD	Qube Ports Pty Ltd Brisbane Bulk and General Enterprise Agreement 2019	NUW
NAT	Qube Energy Pty Ltd National Enterprise Agreement 2019 -	non union
WA	Qube Bulk Pty Ltd Utah Point Enterprise Agreement 2017	non union
National	LCR Group Pty Ltd Transport Division 2020	non union
WA	Qube Ports Pty Ltd Port of Port Hedland Enterprise Agreement 2020	MUA
WA	Qube Ports Pty Ltd Port of Geraldton Enterprise Agreement 2020	MUA
WA	Qube Ports Pty Ltd Port of Bunbury Enterprise Agreement 2020	MUA
WA	Qube Ports Pty Ltd Port of Esperance Enterprise Agreement 2020	MUA
WA	Qube Ports Pty Ltd Port of Whylla Enterprise Agreement 2020	MUA
National	C&H ROTA Enterprise Agreement 2020	non union
National	C&H GENCON Enterprise Agreement 2020	non union
National	C&H GENMOB Enterprise Agreement 2020	non union
NSW	Giacci Bros Pty Ltd Northern District Enterprise Agreement 2020	CFMMEU
QLD	LCR Group Pty Ltd (South West Queensland) Mobile Crane Enterprise Agreement 2019	non union

State	Agreement Name	Union
QLD	LCR Group Pty Ltd (Central Queensland) Mobile Crane Enterprise Agreement 2018	non union
WA	Giacci Brothers Pty Ltd Western Australian Agreement 2018	TWU
WA	Qube Woodie Haulage Agreement 2018	non union
QLD	LCR Jellinbah / Yarrabee Haulage Projects Enterprise Agreement 2016	non union
SA	Giacci Bros Pty Ltd Prominent Hill Enterprise Agreement 2016	non union
WA	Qube Bulk Pty Ltd Port Hedland Shed Services Agreement 2016	non union
National	C&H Employee Agreement 2015	non union
WA	Qube Bulk Pty Ltd Sandfire Project Agreement 2013	non union
NAT	Australian Amalgamated Terminals Enterprise Agreement 2021	MUA