

Maritime Industry Development Plan

The Territory's global advantage

Doing business in the Territory is an investment in unmatched proximity. Connected through an international airport and deep water port, Darwin is the closest Australian capital to growing Asian markets, which comprise 65% of Australia's trade.

Vessel journey times

Distances from Darwin - National

Cairns - 1287NM @ 15 knots	3.6 days journey
Brisbane - 2090NM @ 15 knots	5.8 days journey
Perth - 2258NM @ 15 knots	6.3 days journey
Sydney - 2565NM @ 15 knots	7.1 days journey
Melbourne - 3193NM @ 15 knots	8.9 days journey
Hobart - 3229NM @ 15 knots	9.1 days journey
Adelaide - 3613NM @ 15 knots	10 days journey

Distances from Darwin - International

Jakarta - 1818NM @ 15 knots	5 days journey
Manila - 2230NM @ 15 knots	6.2 days journey
Singapore - 2359NM @ 15 knots	6.6 days journey
Beijing - 3075NM @ 15 knots	8.5 days journey
Seoul - 3248NM @ 15 knots	9 days journey
Tokyo - 3376NM @ 15 knots	9.4 days journey
Hanoi - 3415NM @ 15 knots	9.5 days journey
Mumbai - 4598NM @ 15 knots	12.8 days journey

New Delhi

Colombo



56% of the global population is in this region



Acknowledgement

The Northern Territory Government respectfully acknowledges Aboriginal and Torres Strait Islander peoples as the First Nations people of this country. We acknowledge the continuing connection to lands, waters and communities, and the evolving cultures of all our First Nations peoples. We pay our respects to all Aboriginal and Torres Strait Islander cultures, and to their leaders - past, present and emerging.

*Image: Navy vessel, Darwin Harbour, Northern Territory.
Photo credit: Department of Defence.*



Contents

Preface	7
Alignment with other strategies and initiatives	8
Introduction	9
The Plan at a glance	11
Economic and strategic context	13
Global.....	14
Regional.....	15
National.....	15
Maritime industry overview	17
Defining the maritime industry.....	18
Size of the industry.....	19
Maritime's high growth scenario.....	20
Investment underway.....	21
Sea and land rights in the Territory.....	22
Environmental sustainability.....	24
Northern Territory marine infrastructure.....	27
Ports and shipping.....	28
Strengths and opportunities.....	29
Key focus areas and strategic actions	31
Developing strategic infrastructure	32
Darwin Ship Lift Facility.....	34
Marine Industry Park.....	37
Frances Bay lock upgrades.....	39
Mandorah Marine Facility.....	39
Map of logistics hubs and key infrastructure.....	40
Australia's Northern logistics opportunity.....	41
Darwin harbour.....	42
Growing the Territory maritime industry	44
Defence.....	46
Regional Maintenance Centre.....	48
Energy and minerals.....	50
Middle Arm Sustainable Development Precinct.....	52
Fishing.....	54
Superyachts maintenance and provisioning.....	56
Developing local capability and capacity	58
Home grown capability.....	59
Workforce.....	60
Stimulating growth in the regions	62
Gove Port development.....	64
Barge infrastructure upgrades.....	68
What's next?	70
Acronyms	70



Cullen Bay Ferry Terminal, Darwin, Northern Territory.

Preface

The Territory has a long-established maritime industry, underpinned by key maritime infrastructure, the competitive advantage of our geography and the skills, knowledge and experience to support and grow the Territory's economy.

The Territory Government has developed the Maritime Industry Development Plan (MIDP), in consultation with industry, as a blueprint for sustained and diversified economic development.

In 2019-20, before the global health pandemic, \$205 billion worth of goods were exported through North Australian ports, which accounted for 62% of all goods exported out of Australia. Sustainable growth that creates new jobs, improves quality of life, and strengthens our resilience is underpinned by our ability to attract and retain investors and trading partners.

Darwin is rapidly growing as a centre for marine services and supply, supporting the operations of the Australian Defence Force and allied forces, Australian Border Force, offshore oil and gas, commercial fishing, tourism and the maritime industry.

The MIDP provides a strategic industry framework, which includes the development of the Marine Industry Park (MIP), Darwin Ship Lift Facility, Middle Arm Sustainable Development Precinct (MASDP), a holistic approach to maritime logistics throughout the Territory, and a comprehensive workforce strategy.

The Australian Government commitment of \$1.5 billion for common user marine facilities at the MASDP will attract investment in renewables and low-emission energy and fuels, advanced manufacturing and low-emissions minerals processing.

The Darwin Ship Lift Facility and MIP will become the centrepiece of the Territory's maritime industry. Once operational the facility will be a catalyst for the development of a marine maintenance and servicing industry and creation of new jobs.

The Territory Government is working closely with both industry and the Australian Government, to deliver significant increases in supply chain capacity to service growing demand. This increased demand and capacity in the supply chain will result in increased need for access to global markets.

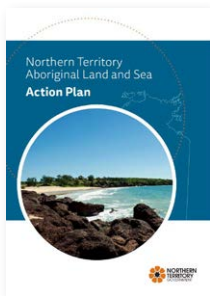
Aligned with the Northern Territory International Engagement Strategy 2022-2026, the MIDP provides the framework to grow the size, scope, capability and commercial sustainability of the Territory's maritime sector and to support Australia's development as a significant player in the global maritime industry.

Alignment with other strategies and initiatives

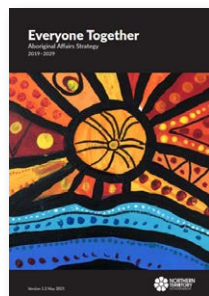
The Maritime Industry Development Plan complements, rather than duplicates, the following plans and strategies. The actions and initiatives of these documents therefore lie out of the scope of this plan.



Territory Economic Reconstruction Commission Final Report (2020)



Aboriginal Land and Sea Action Plan, Department of the Chief Minister and Cabinet



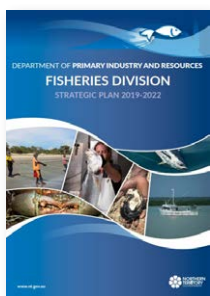
Aboriginal Affairs Strategy 2019-2029, Department of the Chief Minister and Cabinet



Territory-wide Logistics Master Plan, Department of Infrastructure, Planning and Logistics



Coastal and Marine Management Strategy 2019-2029, Department of Environment, Parks and Water Security



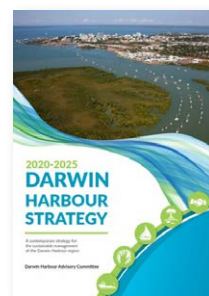
Fisheries Strategic Plan 2019-2022, Department of Industry, Tourism and Trade



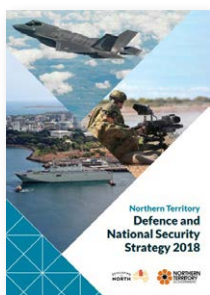
Northern Territory 10 year Infrastructure Plan 2019-2028, Department of Infrastructure, Planning and Logistics



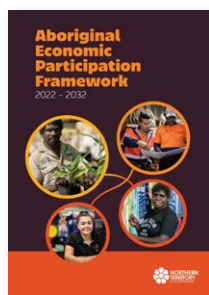
Northern Territory Infrastructure Plan and Pipeline 2023, Infrastructure NT



Darwin Harbour Strategy 2020-2025, Darwin Harbour Advisory Committee



Northern Territory Defence and National Security Strategy 2018, Department of the Chief Minister and Cabinet



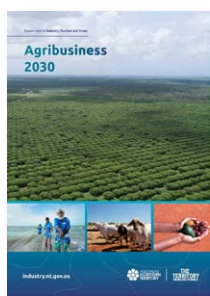
Aboriginal Economic Participation Framework 2022-2032, Department of the Chief Minister and Cabinet



Gove Peninsula Futures, Department of the Chief Minister and Cabinet



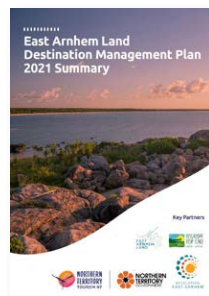
NT Cruise Strategy



Agribusiness 2030 Strategy



Greater Darwin Destination Management Plan



East Arnhem Destination Management Plan

Introduction

The Territory's maritime story starts with our rich Aboriginal heritage.

Aboriginal people have lived off the land and sea for thousands of years, travelling and fishing by canoe. The story includes a rich trading history between Aboriginal people from the Territory's northern coast, and Macassans, who sailed from what is now Sulawesi in Indonesia in search of trepang (or sea cucumber) from the early 1700s until the early 1900s.

Once Europeans settled in Australia's North from the early 1800s, they were entirely dependent on shipping connections to Asia and southern Australia to bring in people, mail and supplies. Wharves, jetties, lighthouses and barge landings supported settlement and acted as critical civilian and Defence supply posts.

From the 1930s to the present day, Darwin has been recognised as the nation's most strategic northern port, a role that is set to continue into the future.

The maritime sector provides critical services such as shipping, commercial fishing, Defence, Border Force, cruise ships, charter vessels, recreational boating, tourism and work boats.

The ability to move goods is fundamental to our quality of life and economic prosperity. But most Territorians are unaware of the significant role played by our maritime and logistics sectors.

Darwin is the primary deep-water port on the North Australian coast and the only significant servicing point between Cairns and Perth. It is a natural hub for the country's engagement in the Indo-Pacific region.

Darwin Harbour's strategic location is critical to the servicing and sustainment of the general maritime industry and visiting national and international vessels.

With links to Gove (Nhulunbuy), Alyangula (Groote Eylandt), Port Melville (Tiwi Islands) and the Bing Bong Loading/Export facility in the Gulf of Carpentaria, Darwin facilitates coastal traffic to remote regions. The city's proximity to Asia and its multimodal logistics facilities offers a gateway in Australia for transcontinental trade between the Indo-Pacific and Australia.

However, the Territory is not resting on its laurels, and multiple emerging opportunities will enhance the Territory's role in the nation's broader maritime industry. These include the proposed Marine Industry Park (MIP), the Darwin Ship Lift Facility at East Arm and the Middle Arm Sustainable Development Precinct (MASDP).

The MIP includes a shared-use hardstand and all-tide barge ramp facility, and will capitalise on Darwin's expanding onshore and offshore energy, marine services, defence industries and other maritime industries. It offers more than 100 hectares of waterfront industrial land to support marine maintenance, servicing, engineering, fabrication and logistics activities.

The adjacent Darwin Ship Lift Facility will complement the MIP. The modern ship lift is designed to provide in-water maintenance, berthing and provisioning and lift vessels out of the water so they can be dry dock

serviced, repaired or stored, including for safety during cyclones.

Across the harbour, the Middle Arm Peninsula is already home to internationally significant LNG facilities operated by INPEX and Santos. The NT Government is now master planning the MASDP, a 1,500-hectare site proposed for renewables and low-emission energy and fuels, advanced manufacturing and critical minerals processing.

The Territory's economic growth sectors, such as agribusiness, tourism, energy, minerals and manufacturing, international education and training and defence, are all enabled by strong maritime capabilities. Inland logistics hubs and the growth and diversified use of the Top End regional ports, including at the Gove deep water port, presents a unique opportunity to support regional industry growth.

Investment in the Darwin Ship Lift Facility and the MIP, will diversify our maritime capabilities as part of a broader growth agenda by the NT Government, which aims to have a sustainable and diverse \$40 billion economy, a population of 300,000 and 35,000 more jobs by 2030.

Not only does investing in maritime infrastructure unlock the potential of Darwin Harbour, it builds on the Territory's natural competitive advantages, including renewable energy sources, critical mineral reserves and proximity to international markets. It will establish the Territory as a world leader in emerging global industries.

Darwin Port.
Photo credit: Department of Industry, Tourism and Trade



The Plan at a glance: Our vision and key focus areas



Our vision

For the Northern Territory to be a leading hub for maritime service, supply and sustainment in the Indo-Pacific region.

How we'll achieve it: Our key focus areas



Developing strategic infrastructure

Investing in maintenance, freight and connectivity-related infrastructure to drive future industrial expansion.

Key outcomes include:

- master planning of Territory maritime precincts and logistics corridors to set the foundations for coordinated industry growth
- building the Darwin Ship Lift Facility to unlock new markets for marine maintenance and sustainment
- enhancing and improving supply chain efficiency and growing the Territory's role in the national logistics system



Growing the Territory's maritime industry

Working together with industry, the Australian Government and the community to sustainably grow the maritime industry.

Key outcomes include:

- attracting new investment in the Territory maritime industry
- establishing marine infrastructure at the Middle Arm Sustainable Development Precinct
- supporting the growth of industries that are key users of marine maintenance and sustainment services



Developing local capability and capacity

Ensuring Territory businesses are positioned to take advantage of an expanding maritime industry.

Key outcomes include:

- Territory businesses and small to medium enterprises (SMEs) capture a greater share of maritime service, supply and sustainment work
- business capability is mapped and a strategy to grow local businesses is developed
- the local workforce meets the needs of the Territory's future maritime industry



Stimulating growth in the regions

Developing the regional maritime industry to unlock new opportunities for regional communities.

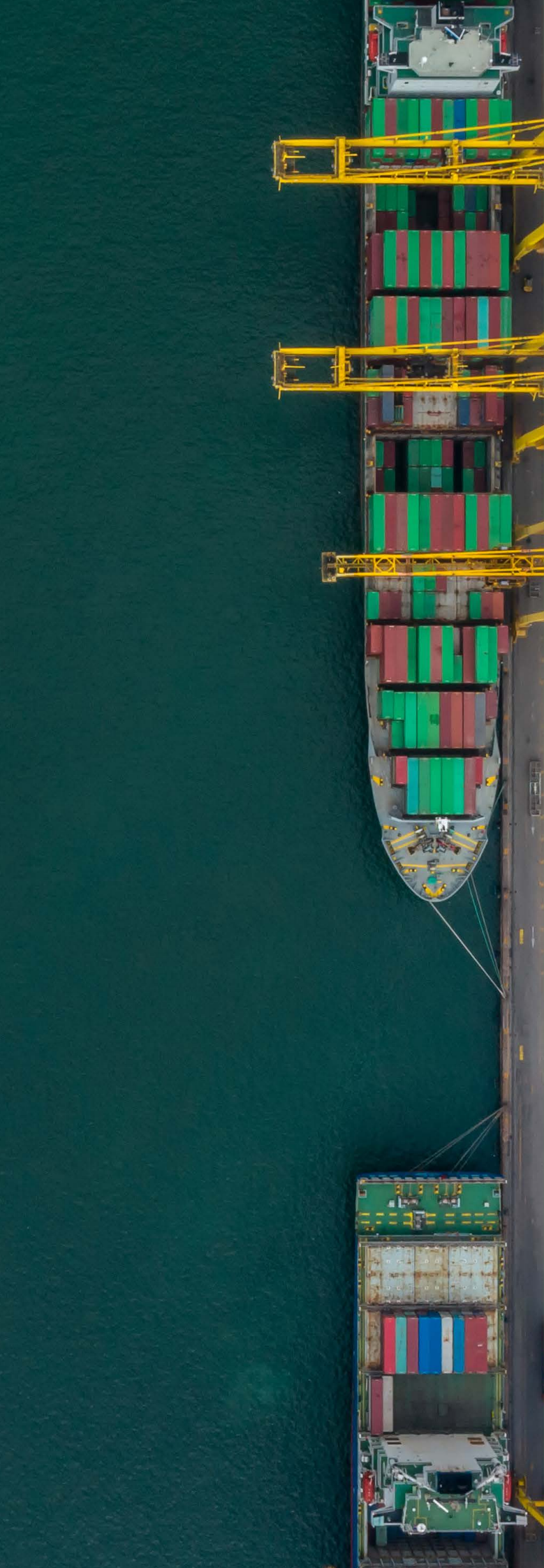
Key outcomes include:

- the development of new and expanded regional industries
- improved regional logistics hubs and connecting infrastructure

Why we're implementing The Plan

The Territory Economic Reconstruction Commission's (TERC) Final Report in 2020 identified the need for a clear and coordinated strategic blueprint to develop the maritime industry and activate the Darwin Ship Lift Facility. The industry plays a crucial role in our logistics system, as an enabler for our traditional and emerging industries, and as a maintenance and sustainment provider for Australia's national security and Defence.





Economic and strategic context



Global



Regional



National

Global

The maritime sector plays a significant role in the global economy and supports the critical supply chains the world depends on. Shipping accounts for 90% of international trade, which means the maritime sector must position itself to withstand disruption and adapt to global trends shaping the future of the industry. The most substantial changes are likely to occur as a result of technology, demography and environmental sustainability.

Digital technology is transforming the maritime sector through innovations such as artificial intelligence (AI), autonomous systems and the Internet of Things (IoT). These technologies greatly enhance operational efficiency and decision-making capabilities. The use of such technology in the maritime sector is expected to rise significantly with increased consumer demand and decreased costs. The industry must prepare for challenges, including operational disruptions and an increased risk of cyber-attacks as it turns to greater use of digital technologies.

In terms of demographic drivers, sustained population growth and urbanisation will increase demand for maritime services as well as the need for new or upgraded supporting infrastructure. Rising geopolitical tensions, increased government intervention and the risk of economic crises will affect global trade routes, supply chains and international partnerships which could significantly impact the maritime sector. The industry is facing a shortage of skilled workers and will need to address workforce development issues to ensure continued growth and sustainability of the sector.

As pressure mounts for all businesses to become more socially responsible and environmentally sustainable, the industry will face regulatory challenges and societal and investor pressure to reduce its environmental impact. Consumers, workers and society more broadly will expect meaningful action to reduce emissions and energy consumption and improve health and safety standards. This will require increased investment in cleaner fuels and technology and greater action to comply with environmental and safety regulations.

Adapting to these global trends will result in sustained growth and significant opportunities for the maritime sector, its supporting infrastructure and extensive supply chains.





Regional

Australia is positioned to play an important economic and strategic role in the Indo-Pacific. The region is a driver of the global economy, with the world's busiest international sea lanes and 9 of the 10 largest ports in the world. It is a resource rich area that includes multibillion-dollar oil and gas infrastructure supplying the energy needs of Australia and other countries.

Navies with activities in the Indo-Pacific region are embarking on significant upgrades, with many acquiring or seeking to acquire new vessels and aircraft, patrol boats, submarines, landing craft, frigates and supporting systems.

To the east, Australia has a long-held interest in the Southwest Pacific, including regional security, illegal fishing and maritime activity, and significant aid and development work.

To the west, Australia's interest in India and the Indian Ocean is growing, reflecting the growth in activity along the nation's long western shore and its strategic position connecting sea routes between Southeast and East Asia, Australia and Europe.

To the north the bulk of Australia's exports are transported through South-East Asia, which has become a geostrategic region connecting the Indian and Pacific Oceans. In particular, Singapore and Indonesia hold significant interest and opportunity for the Australian maritime industry.

Singapore has a mature and significant maritime industry and in 2024 was ranked as the top maritime capital of the world for the 11th consecutive year, as published in Menon Economics and DNV's annual publication. Singapore Port is a globally-renowned maritime hub for trade, and is one of the world's busiest ports in terms of total shipping tonnage. Singapore is known as a leading centre for shipbuilding and ship repair. A number of large ships operating in the waters of the Northern Territory are currently maintained in Singapore due to the availability of maritime infrastructure suitable for the lifting and maintenance of larger vessels.

Indonesia has more than 100 commercial ports including 11 container ports. Historically, Indonesian ports have focused on servicing the needs of their immediate local coastal industry. However, since 2014 Indonesia has invested heavily in its ports network under the direction of President Widodo. Indonesia's shipbuilding and maintenance industry is well-established, with much of its Defence fleet produced and maintained locally, including patrol vessels and landing platform docks.

National

Darwin is the only capital city in Northern Australia and a natural hub for Australia's international engagement in the Indo-Pacific region. The closest major ports and marine service centres are significant distances away in Queensland, Western Australia and Singapore.

Cairns in North Queensland has a mature maritime industry and infrastructure at Cairns Port and the dedicated Cairns Marine Precinct. Cairns Port sees more than 1,000 vessels (bulk carriers, coastal shipping, cargo ships, cruise liners, charter and recreational vessels) a year. More than 100 maritime service and supply businesses operate in the region, covering provedore, shipbuilding, refit and maritime maintenance.

Cairns is about 2,400 km or 4 to 5 days by sea from Darwin. Several shipyards support maritime sustainment to Defence, Border Force and other vessels. These include Austal, Norship and Tropical Reef Shipyard. Cairns will be home to one of 4 Regional Maintenance Centres (RMC) for Defence, along with Perth, Sydney, and Darwin.

Port Hedland is the closest major West Australian port to Darwin and is the world's largest bulk export port, moving iron ore, lithium and salt. There is a service and supply maritime industry at Dampier.

A significant broad-based maritime industry is located in the Perth region including the Australian Marine Complex (AMC) at Henderson. The AMC, and adjacent facilities, is a major precinct providing manufacturing, fabrication, assembly, maintenance and technology to the defence, marine, oil and gas, and resource industries. Henderson, which will host one of the 4 RMCs, is about 4,200 km by sea or between 6 - 10 days sailing from Darwin.



Manganese ship, Gove



Maritime industry overview

Defining the maritime industry

Size of the industry

Maritime's high growth scenario

Investment underway

Sea and land rights in the Territory

Environmental sustainability

**Northern Territory marine
infrastructure**

Ports and shipping

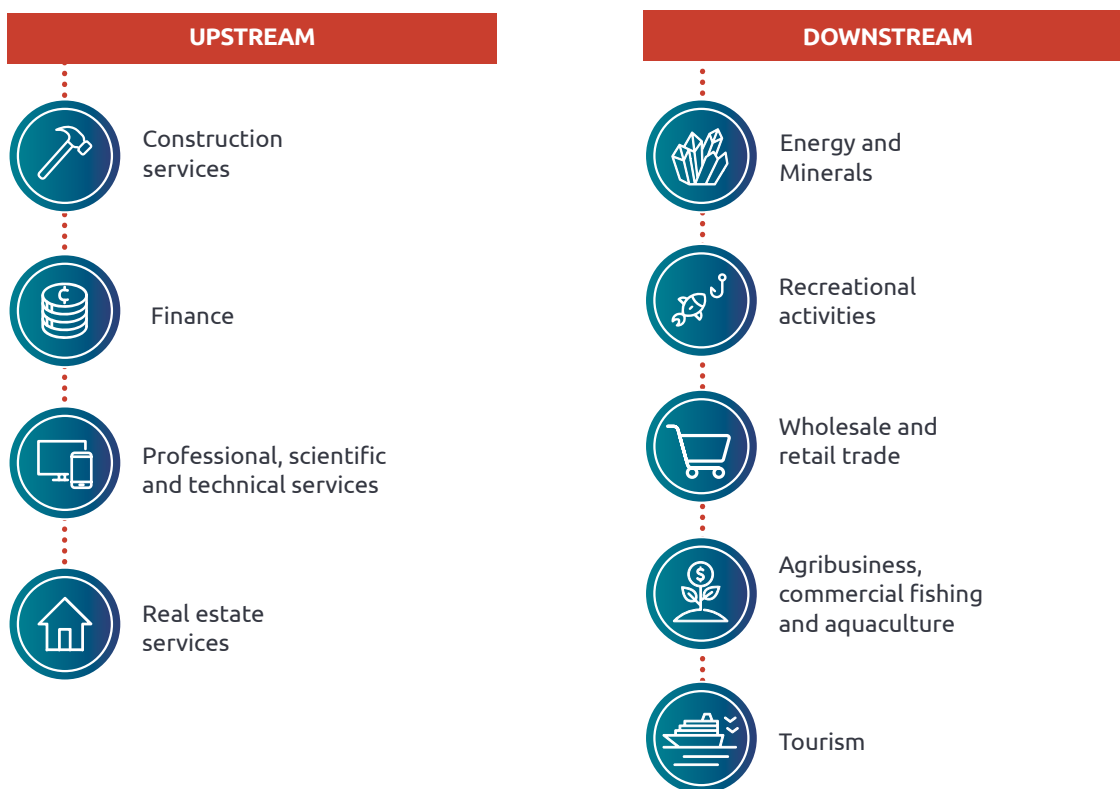
Strengths and opportunities

Defining the maritime industry

The maritime industry comprises 5 key sub-segments:



These 5 sub-segments use the following key upstream and downstream industries:



Credit: Deloitte Access Economics

Maritime upstream and downstream industries

The maritime industry relies on a range of **upstream industries** to support its operations. Based on the aggregate expenditure profile of the maritime industry, the largest sub-industry is support services. This includes, for example, stevedore services and Port of Darwin operations—both classified under the water transport support services sub-industry, each are directly dependent on the other to provide services.

Beyond this, the maritime industry, particularly water transport and water transport support services, utilises support services such as accounting, engineering and legal support in order to run their operations, as well as the support of employment, travel agency and other

administrative services to match skill gaps and connect tourists to their services. Further, the maritime industry depends on finance, auxiliary finance and insurance services.

The maritime industry enables other **downstream industries** that transport goods interstate or overseas such as agribusiness, minerals and oil and gas. Service-based industries such as tourism and recreational activities are also downstream, with the maritime industry supporting activities undertaken in water-based environments in the NT. If the maritime industry is capacity constrained, high-cost or inefficient, it affects the competitiveness of other NT industries, so it plays an important strategic role in an exporting economy like the NT.

Size of the industry

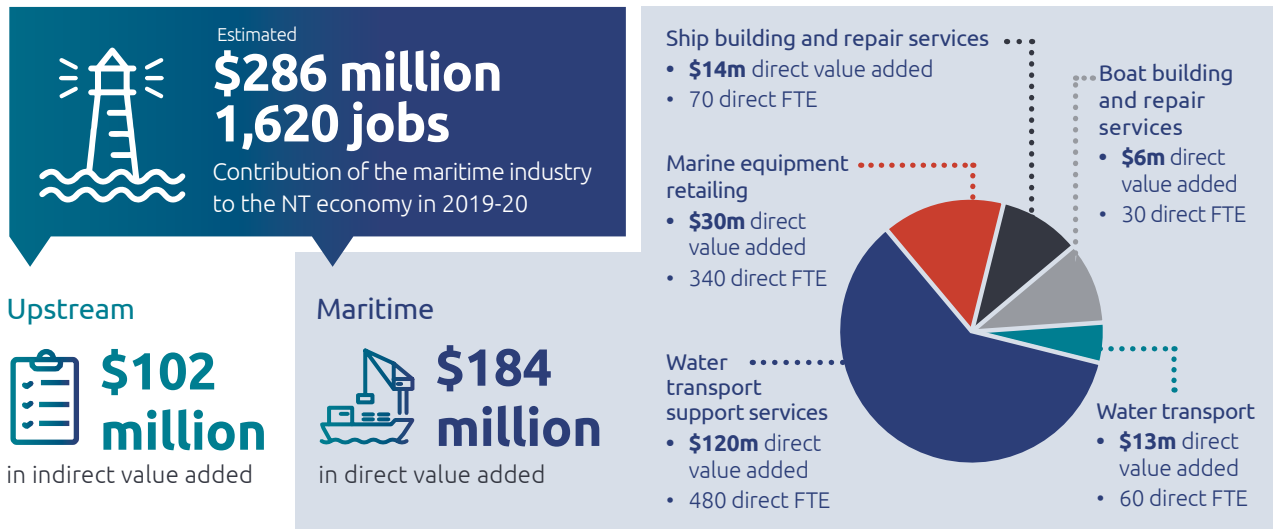
As a key facilitator of trade, growth in the NT maritime industry largely depends on growth in the industries it services, such as agribusiness, minerals, and oil and gas. This is demonstrated by the composition of export products from the Port of Darwin.

Between 2012-13 and 2020-21, most (76.8%) exports from the port were dry bulk, including raw materials such as manganese.

Over the same period, livestock represented an average of 12.2% of goods exports (an average of 391,800 head of cattle).

Prosperity in the resource sector translates to a stronger maritime industry. However, this dependence imposes a significant constraint on the growth potential of the industry, which has limited capacity to generate local demand for its services.

Current economic value and future potential



2019 - 2020 Opportunity 2030 - 2031

Maritime industry

\$184 million

Direct value added

110,000

TEUs of bulk containerised freight

980

Direct full-time employees



131k

jobs

\$26 billion

in GSP



246k

in population

Provide more harbour services as well as services to the oil and gas sector



Use additional capacity provided by the Darwin Ship Lift Facility



Increase productivity and strengthen links between NT businesses and customers



Maritime industry high growth scenario

\$347 million

Direct value added

220,000

TEUs of bulk and containerised freight per year on average between 2022 and 2030-31

1,490

Direct full-time employees





Maritime's high growth scenario

Deloitte Access Economics undertook forecasts on maritime industry growth to 2030-31. Under the baseline scenario, growth in the maritime industry is a function of a business-as-usual increase in international trade driven by growth in exporting industries. The NT maritime industry is forecast to reach a Gross Value Added (GVA) of \$283 million by 2030-31—a growth rate of 4.0% a year, significantly higher than the average NT industry growth rate of 2.4% in the baseline over the same period. This would see an estimated 1,170 additional jobs for those in the industry by 2030-31.

Under a high growth scenario, the maritime industry will receive additional income from the Darwin Ship Lift Facility. This project has the potential to catalyse investment in the Territory's maritime industry, strengthening service offerings to the defence and oil and gas sectors. The ship lift is anticipated to be operational by 2025 with the remaining works for the overall facility completed in 2025-26, and is expected to generate a net economic benefit of up to \$1.4 billion.

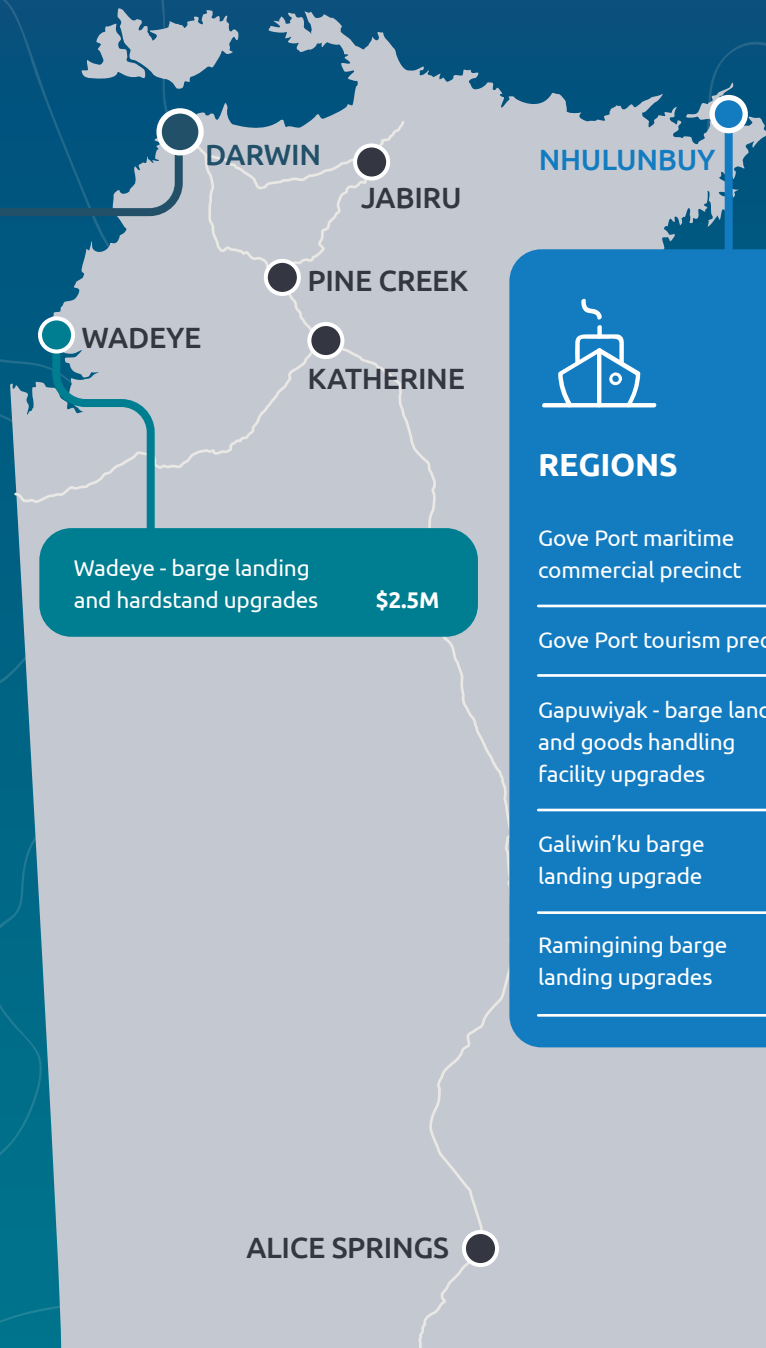
Growth in the agribusiness, minerals and oil and gas industries is expected to further increase export activity. This growth will be contingent on building international engagement and partnerships in order to strengthen trade and create new opportunities. Growing demand for agribusiness and critical minerals, as well as leveraging the NT's geographic proximity to the Indo-Pacific region, will be important. Goods exports will be 15% higher than the business-as-usual forecast to 2026. On average, this growth translates to almost a doubling of freight throughput from the 2019-20 level to 2030-31, from 110,000 Twenty-foot Equivalent Unit (TEU) to approximately 220,000 TEU.

The Darwin Ship Lift Facility and growth in exports are expected to support the maritime sector, increasing its size by 50% with an estimated GVA of \$347 million and 1,490 full-time employees by 2030-31.

Investment underway

The maritime sector is a key economic enabler of the broader Territory economy.

In recognition of its crucial role, the NT Government and its partners are investing over \$3 billion in the sector in Darwin and across the Territory.



DARWIN

Middle Arm common use infrastructure, including marine facilities **\$1.5B**

Redevelopment of Larrakeyah Defence Precinct and HMAS Coonawarra **\$520M**

Darwin Ship Lift Facility **\$515M**

Bulk fuel storage facility **\$270M**

HMAS Coonawarra infrastructure for Offshore Patrol Vessels **\$270M**

Mandorah marine facilities **\$63M**

Marine Industry Park **\$27M**

Frances Bay Mooring Basin lock upgrades **\$20M**

Stokes Hill Wharf upgrades **\$15M**

East Arm utilities upgrades **\$15M**

Dundee Beach fishing infrastructure upgrades **\$7M**

Regional Maintenance Centre North **\$150M**



REGIONS

Gove Port maritime commercial precinct **\$10M**

Gove Port tourism precinct **\$9M**

Gapuwiyak - barge landing and goods handling facility upgrades **\$2M**

Galiwin'ku barge landing upgrade **\$900,000**

Ramingining barge landing upgrades **\$900,000**

Sea and land rights in the Territory

About 48% of the Northern Territory's land mass and 80% of its coastline is Aboriginal land subject to the *Aboriginal Land Rights (Northern Territory) Act 1976*. This may increase to 92% of the coastline once outstanding land claims have been settled. Most of the remaining Crown land and waters are, or are likely to be, subject to Native Title. This means Traditional Owners are uniquely positioned to be partners in the development of opportunities for expansion of the Top End maritime industry.

In July 2008, Australia's High Court found that Aboriginal Land Trusts have the right to control access to waters overlying Aboriginal land in the intertidal zone. The case, commonly referred to as the Blue Mud Bay decision, means that access to the intertidal zone - and any water that overlies a grant of Aboriginal land including certain important and iconic rivers and creeks - for any purpose requires permission from the relevant Aboriginal Land Trust in accordance with the *Aboriginal Land Rights (Northern Territory) Act 1976*.

The NT Government is working with Land Councils, Traditional Owners, Territory industry and other stakeholders to negotiate long-term access arrangements for commercial fishing operations, recreational anglers, indigenous communities, tourism operators, and other relevant groups.

This aligns with the *NT Fisheries Act 1988* that has the objectives of both acknowledging the rights and interests of Aboriginal people, and maintaining stewardship of aquatic resources that promotes fairness, equity and access to aquatic resources by all stakeholder groups, including Aboriginal people, the commercial fishing, aquaculture and fishing tourism industries, amateur fishers, and others with an interest in the aquatic resources of the Territory.

The Northern Territory Aboriginal Investment Corporation

In December 2021, the Australian Government passed significant reforms to the *Aboriginal Land Rights (Northern Territory) Act 1976* as part of a suite of changes co-designed with Aboriginal Land Councils.

The centrepiece of the reforms was the establishment of a new, Aboriginal-controlled body called the Northern Territory Aboriginal Investment Corporation. The Corporation's aim is to drive sustainable social and economic development on the Aboriginal estate through strategic, long-term investment.

Establishment of the Northern Territory Aboriginal Investment Corporation (NTAIC) is a strong step towards unlocking the economic and social potential of Aboriginal land and sea Country. It presents an opportunity for Aboriginal and non-Aboriginal companies alike to work with the NTAIC to unlock economic development opportunities.

The NTAIC commenced in March 2023 with an initial \$500 million endowment, \$60 million a year for the first 3 years of its operation, and annual funding thereafter. The funding will come from the Aboriginal Benefits Account (ABA), which receives money from the Commonwealth as a result of royalties generated from mining on Aboriginal land



in the Territory. The Minister for Indigenous Australians approves payments from the ABA on the advice of the ABA Advisory Committee. The NT AIC will replace this system, placing funding decisions firmly in the hands of Aboriginal Territorians.

The NT Government will work with Aboriginal people, organisations and companies to ensure land and sea ownership delivers on their economic and social aspirations. For example, the NT Government launched the Aboriginal Land and Sea Action Plan in 2019 after consultation with Aboriginal Land Councils, the Australian Government and other key stakeholders. The document outlines 10 key actions to deliver this vision, many of which have implications for the marine estate.



80% of the Territory's coastline is Aboriginal owned



Establishment of the NT Aboriginal Investment Corporation



Negotiate long-term access for industry, recreational and other water users

"Establishment of the Aboriginal Investment Corporation is a strong step forward on the journey towards unlocking the economic and social potential of Aboriginal land and sea Country."

Environmental sustainability

Globally, the maritime industry is increasingly recognising and responding to the importance of environmental sustainability. As community and stakeholder expectations change, so too do regulatory and legislative requirements for the sector to manage and mitigate its environmental impact. The increased focus on sustainability will continue to shape maritime operations and generate long-term business and employment opportunities.

Environmental sustainability in the maritime sector encompasses the conservation of marine biodiversity, reduction of greenhouse gas emissions, actions towards a circular economy to minimise waste, improved energy efficiency, and the management of risk to marine ecosystems.

Managing the impact the maritime sector has on the marine environment in the NT, is critically important to the sector's growth and development.

The NT marine environment comprises some of the least disturbed and healthiest tropical waters in the world. Habitats such as river mouths, inlets, coral reefs, seagrass meadows, mangroves and sand or mud flats are important breeding, nursery and feeding areas for many species. Marine turtles, migrating whales and colonies of shorebirds, seabirds and waterbirds, as well as dolphins, dugongs, sawfish, sea snakes, seahorses, sharks and rays are all found in Territory waters.

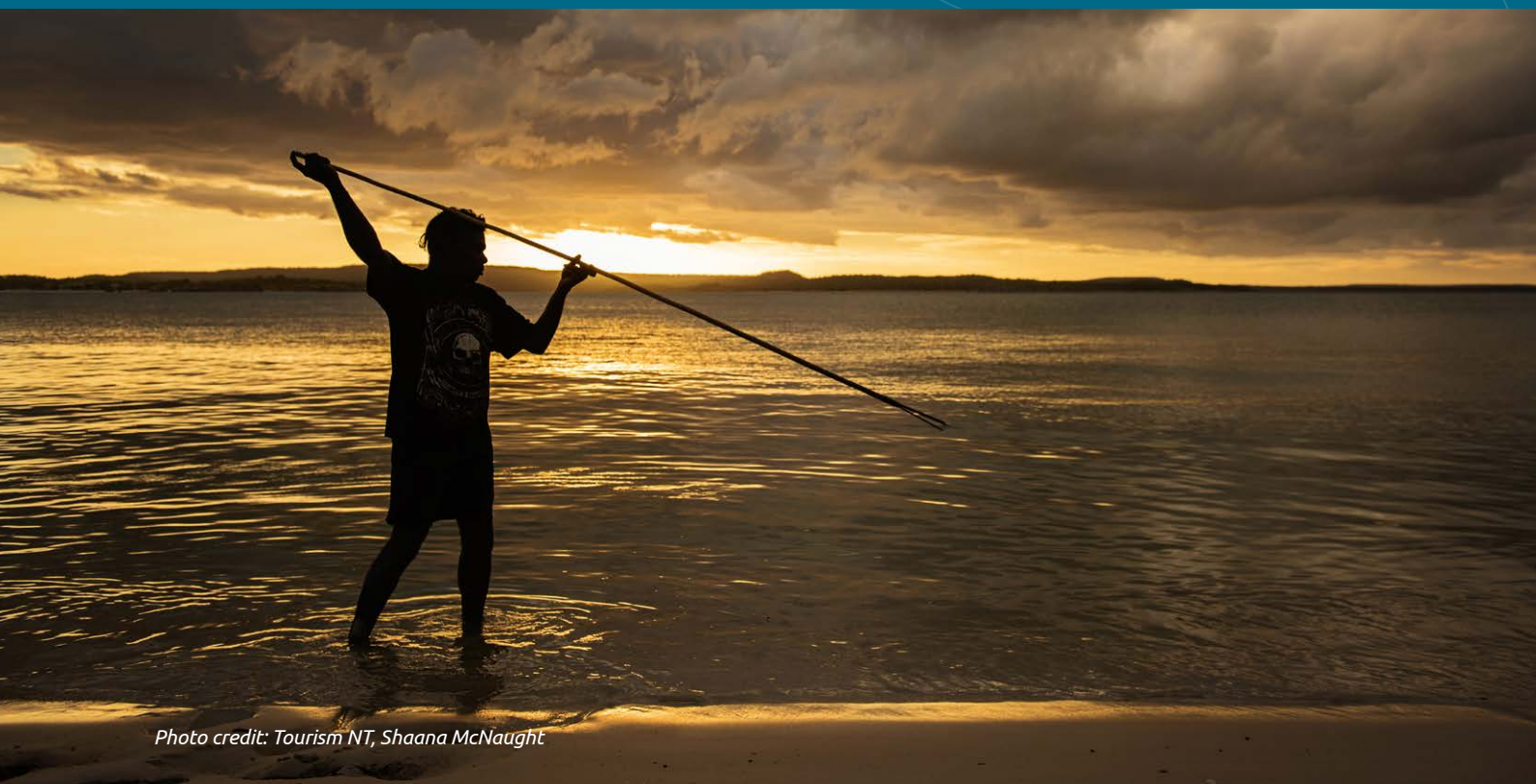


Photo credit: Tourism NT, Shaana McNaught

Coastal and marine management

The Northern Territory Government's Coastal and Marine Management Strategy 2019 – 2029 outlines a vision for managing our coasts and seas, with a series of environmental, economic and social objectives aimed at recognising the rights and interests of Aboriginal landowners, supporting the management and conservation of coastal and marine areas, helping to manage the growing demand for natural resources, and fostering a sustainable industry for the benefit of the Territory economy.

Marine parks and sanctuaries

Currently, almost 5% of NT waters are protected in marine parks, of which about 1% are in highly protected marine sanctuaries, which provides the best possible protections for marine life. The Territory's marine parks are Garig Gunak Barlu Marine Park and Limmen Bight Marine Park. The Australian Government is working to expand protected areas through its national commitment to protect 30% of lands and 30% of oceans by 2030.

Darwin Harbour water monitoring

With the majority of the Territory's population living on or nearby its shores, and passenger ships, naval vessels, trade ships, ore export and bulk liquids operating within its port, Darwin Harbour requires rigorous water quality monitoring.

Every year a Darwin Harbour Region Report Card is released, which provides a snapshot of water quality and the health of aquatic systems across the harbour and its catchment. In comparison with marine areas near other major cities, Darwin Harbour is in good condition, with water quality receiving A-grade in 2024's Report Card.

There are exceptions however, such as the Buffalo Creek estuary which is impacted by high nutrient wastewater discharge. Ongoing infrastructure and operational enhancements to improve discharge quality are being undertaken by NT Government's Power and Water Corporation.

Industrial and population growth will intensify the impact on Darwin Harbour in future years. NT Government is monitoring this long-term pressure through the Darwin Harbour Integrated Marine Monitoring and Research Program (IMMRP). Funded through Ichthys LNG environmental offsets, the 40-year program aims to enhance understanding of the Darwin Harbour environment by applying long term monitoring through a series of pilot studies, with a particular focus on mangrove habitats.

Further, the Territory Government is developing a Mangrove Conservation Strategy, due for finalisation in the 2024-25 financial year.

Low carbon fuels, innovation and technology

As sustainability commitments increase across the maritime industry, there will be increased emphasis on innovation and technology to provide greener solutions. Globally, innovation leading to alternate fuels such as liquefied natural gas (LNG), biofuels, hydrogen and ammonia is underway and technological solutions to increase efficiencies and safety are being explored and implemented by shipping and export companies.

International and national regulatory and policy changes, such as the release in 2023 International Maritime Organization Greenhouse Gas Strategy, support the shift to sustainable shipping.

The maritime sector in the NT can support a smooth and equitable transition to low carbon fuels and sustainable shipping through regulation, innovation and economic actions. It is important that future planning considers the infrastructure and land requirements necessary for the Territory maritime sector to align with the broader global energy transition currently underway.

Maritime emergency response planning

NT Government is developing a maritime emergencies program with the overall aim of building NT capacity and capability to plan and prepare for, respond to, and recover from maritime environmental emergencies, with a particular focus on marine oil spills. It is designed to meet the NT's national and international obligations including the Australian Government's National Plan for Maritime Environmental Emergencies, the International Convention for the Prevention of Pollution from Ships (MARPOL), and the International Convention on Oil Preparedness, Response and Co-operation.



Photo credit: Tourism NT

STOKES HILL WHARF

A working wharf for smaller marine industry users and cruising yachts, harbour tours and cruises.



DARWIN PORT AND EAST ARM WHARF

Operates commercial wharf facilities to import and export nationally and internationally.



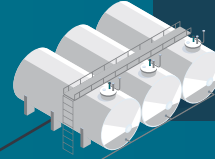
FISHERMAN'S WHARF

Darwin's hub of the commercial fishing and pearl industry.



BULK FUEL STORAGE FACILITY

Providing fuel storage and management services in support of the US Military.



FRANCES BAY MOORING BASIN (DUCK POND)

Secure, sheltered moorings for fishing vessels adjacent to supply & repair facilities.



MARINE INDUSTRY PARK

Potential to deliver over 100 hectares of waterfront industrial land to support marine maintenance.

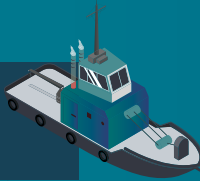


Investment underway: Lock upgrades

Investment underway: New land release

FORT HILL WHARF

Cruise and naval vessel visits and small non-cargo carrying vessels up to 350m in length.



REGIONAL MAINTENANCE CENTRE NORTH

Co-location of industry and Defence to service and maintain defence vessels.



Investment underway: Defence

Investment underway: Defence

HMAS COONAWARRA

The key Forward Operating Base for the Royal Australian Navy and Allied Partners.



DARWIN SHIP LIFT FACILITY

Common user facility will include: ship lift, wet berths, hard stand area for ship repair and maintenance works.



Investment underway: New construction

MANDORAH MARINE FACILITIES

Passenger ferry terminal and tourism precinct with boat ramp and ferry terminal.



Investment underway: Marine upgrades

MIDDLE ARM WHARF

Offloading facility to support the export of Australia's gas and critical mineral exports.



Investment underway: New construction

Larrakeyah

DARWIN CBD

East Arm

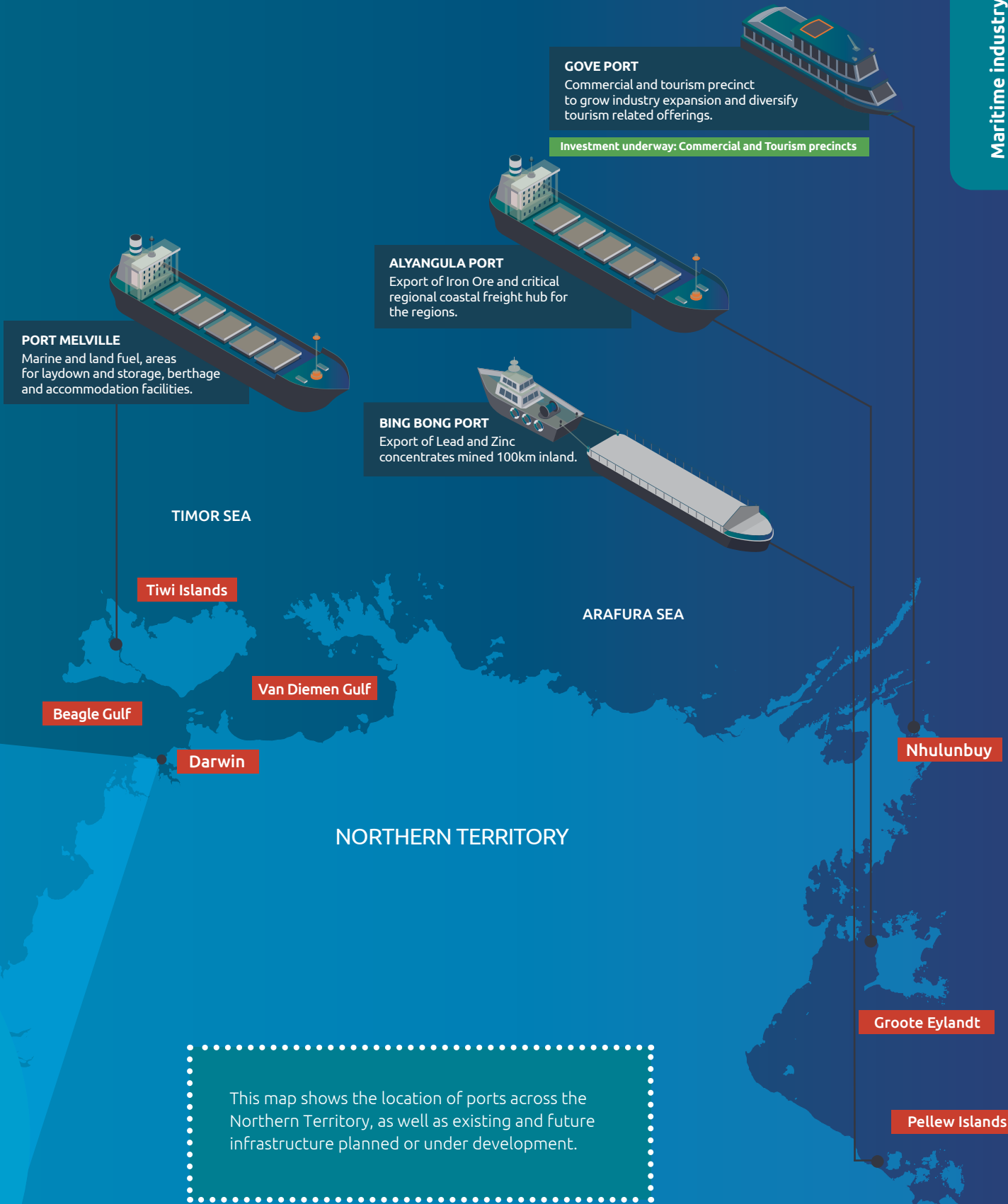
Channel Island

PALMERSTON

Cox Peninsula

Middle Arm

Northern Territory marine infrastructure





Darwin Port.
Photo credit: Department of Industry, Tourism and Trade

Ports and shipping

The Territory's 5 key ports facilitate most of the Territory's international exports and are key to the importation of essential inputs to support industry sectors and the supply of consumer goods. Ports are also an essential enabler for the cruise ship industry.

The 5 Territory ports are:

- Port of Darwin (Darwin)
- Gove Port (Nhulunbuy)
- Alyangula Port (Groote Eylandt)
- Port Melville (Tiwi Islands)
- Bing Bong Loading/Export Facility (Gulf of Carpentaria)

Darwin Port is operated by the Landbridge Group under a long-term lease from the NT Government. Port operations include passenger ships, naval vessels, general cargo, containers, motor vehicles, livestock, ore export, and bulk liquids. Darwin Port also provides pilotage and harbour control systems for Darwin Harbour.

Darwin Port's 2020 Development Plan identified the following potential opportunities:

- future expansion of the refrigerated container park from the current 190 refrigerated container (reefer) points
- planning for a future harbour support vessel facility that could serve tugs, lines, work and pilot boats
- staged expansion of the existing cruise ship facility to provide the capability to berth vessels up to 230,000 gross tons (6,600 passengers)

- purpose-built, all tides access, coastal shipping facility.

Gove Port and Alyangula Port are operated by Rio Tinto and GEMCO respectively. Their main function is ore export, however these ports also service critical regional coastal freight hubs for the East Arnhem and Gulf regions and the tourism sector.

Port Melville is operated by NT Port and Marine and is a multi-user facility supporting the local Tiwi community, as well as the oil and gas, forestry, Defence, and marine transport industries. Services include fuel supply, laydown and accommodation and marine transport.

NT Port and Marine has identified future opportunities including:



- increasing fuel storage and throughput, potentially supplying to coastal communities
- positioning for oil and gas projects by providing a maritime support base
- growing business with Defence and Border Force
- supporting freight vessels and platform support vessels.

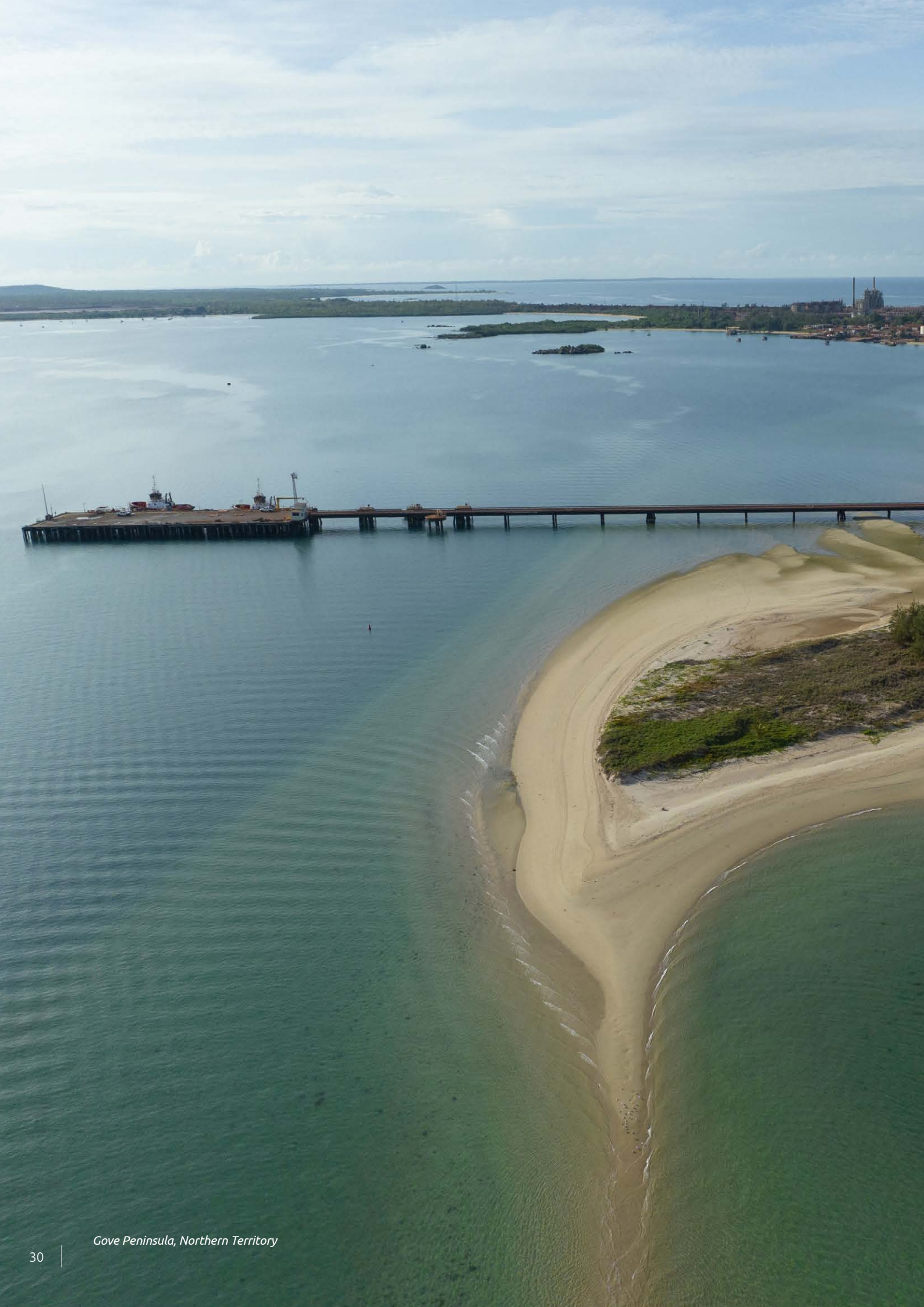
The Bing Bong Loading/Export facility is owned and operated by the McArthur River Mine to barge ore to an offshore transfer point for large export vessels.

Strengths and Opportunities

Darwin is rapidly growing as a centre for marine services and supply to support the operations of the Australian Defence Force and allied forces; Australian Border Force; offshore oil and gas industry; commercial fishing industry; tourism industry and general maritime industry.

The strengths and opportunities of the Northern Territory maritime sector are detailed in the table below:

 Strengths	 Opportunities
<ul style="list-style-type: none"> • Strategically and economically advantageous location in the Indo-Pacific for servicing the regional maritime industry • Mature and experienced maritime sector with the capability to service vessels from a variety of industries • Planned Darwin Ship Lift Facility and Marine Industry Park will catalyse industry growth and expand service provision • Projected increased Defence expenditure and demand for services by the Royal Australian Navy and Australian Border Force • Darwin holds a First Point of Entry status for international vessels • Established maritime feeder industries including defence, oil and gas, commercial fishing and tourism • Significantly increased Australian Government investment in Defence and border security • Multibillion dollar projects such as Ichthys LNG and Shell Prelude FLNG have exposed NT businesses to specialised technologies and international operating standards • Network of regional ports with capacity for greater trade volumes, industry expansion and tourism. 	<ul style="list-style-type: none"> • Growing demand for service and supply from the offshore oil and gas industries • Expanding demand for maritime services from immediate neighbours like Timor Leste • Significant potential to capture a larger share of the superyachts service and supply industry – with a key opportunity being to ensure necessary infrastructure is ready by 2030, in preparation for superyachts traffic expected as a result of the 2032 Brisbane Olympics • Potential to increase collaboration with other key maritime centres such as Perth and Cairns • Diversify supply chains to shift the emphasis away from further investment in heavily congested major centres to underutilised regional supply chains (such as Darwin Port and Darwin-Adelaide rail link) therefore capitalising on the region to contribute to the nation's productivity • Direct maritime links to Asia can address the tyranny of distance by reducing freight transit times, freight costs and create new industry opportunities including advanced manufacturing as well as exports in agribusiness and seafood • Increase cruise ship visitation and grow the porting provided industry • Potential for Darwin to become a decommissioning service centre for the Australian offshore oil and gas industry – noting the estimated future pipeline of decommissioning work in Australia valued at more than \$50 billion.





Key focus areas and strategic actions



Developing strategic
infrastructure



Growing the Territory
maritime industry



Developing local
capability and capacity



Stimulating growth in
the regions



Developing strategic infrastructure

The NT Government and its partners are investing in maintenance, freight and related infrastructure to drive future industrial expansion.

The Maritime Industry Development Plan has identified the following key actions under this focus area to achieve its vision in the short, medium and long-term. These timeframes are defined as:



Short-term



Medium-term



Long-term

	Action	Time-frame	Lead agency	What success looks like
1.1	Manage delivery of the Darwin Ship Lift Facility	Short-term	DIPL	The Darwin Ship Lift Facility and enabling infrastructure commences operation in 2025-26.
1.2	Develop the master plan for the Marine Industry Park and communicate opportunities to local, interstate and international industry	Short-term	LDC	A concept master plan for the Marine Industry Park is established.
1.3	Fund and manage delivery of the Mandorah Marine Facility	Short-term	DIPL	Mandorah Marine Facility is delivered in 2025.
1.4	Fund and manage delivery of upgrades to infrastructure at Frances Bay Mooring Basin	Completed	DIPL	Frances Bay upgrades address the needs of local industry and community stakeholders.
1.5	Establish a Darwin Harbour Development Plan and separate dredging strategy to support future growth	Short-term	DIPL	Infrastructure focused to deliver greater capacity, efficiency and transparency for harbour development along with optimal environmental, social, cultural and community outcomes.
1.6	Progress development of the Regional Logistics Hubs	Short-term	DIPL	Network of Regional Logistics Hubs established throughout the Territory.
1.7	Deepen collaboration with Darwin Port, through Port management committee meetings	Medium-term	DIPL	Areas of collaboration identified and increased.
1.8	Continue investigation for expansion of ferry infrastructure across the Darwin region	Long-term	DIPL	Long term ferry infrastructure expansion plan developed.
1.9	Develop a comprehensive transition plan for Frances Bay Mooring Basin.	Long-term	DIPL	A management strategy with clearly identified funding mechanisms that ensures the sustainable transition to a mixed-use waterfront, continuity of investments in Frances Bay and respect for its historical fishing industry role.



Photo credit: Tourism NT, Tauri Minogue

▶ Darwin Ship Lift Facility

One of the largest ship lifts in Northern Australia will be built at East Arm, Darwin.

The Darwin Ship Lift Facility will have capacity to maintain and service Defence and Australian Border Force vessels, along with commercial and private vessels, including those from the oil, gas and marine industries.

Once operational, it is expected the facility will fast track the further development of the marine maintenance and servicing industry and produce many new jobs.

The Darwin Ship Lift Facility will include:

- a 103m long, 26m wide ship lift with capacity to lift 5,500 tonne vessels
- berths and alongside wharf infrastructure to support in-water maintenance
- hard stand areas for ship repair and maintenance works
- a blast and paint building which allows vessels to be repainted in a controlled environment
- self-propelled modular transporter units that move ships around the facility once they are out of the water
- an administration building
- East Arm utilities upgrades to support the ship lift and broader Marine Industry Park development.



Investment underway: \$515M

Featured images are an artist's impression of the Darwin Ship Lift.



The ship lift will be able to lift vessels such as the new fleet of Arafura Class Offshore Patrol Vessels (OPVs) procured by Defence.

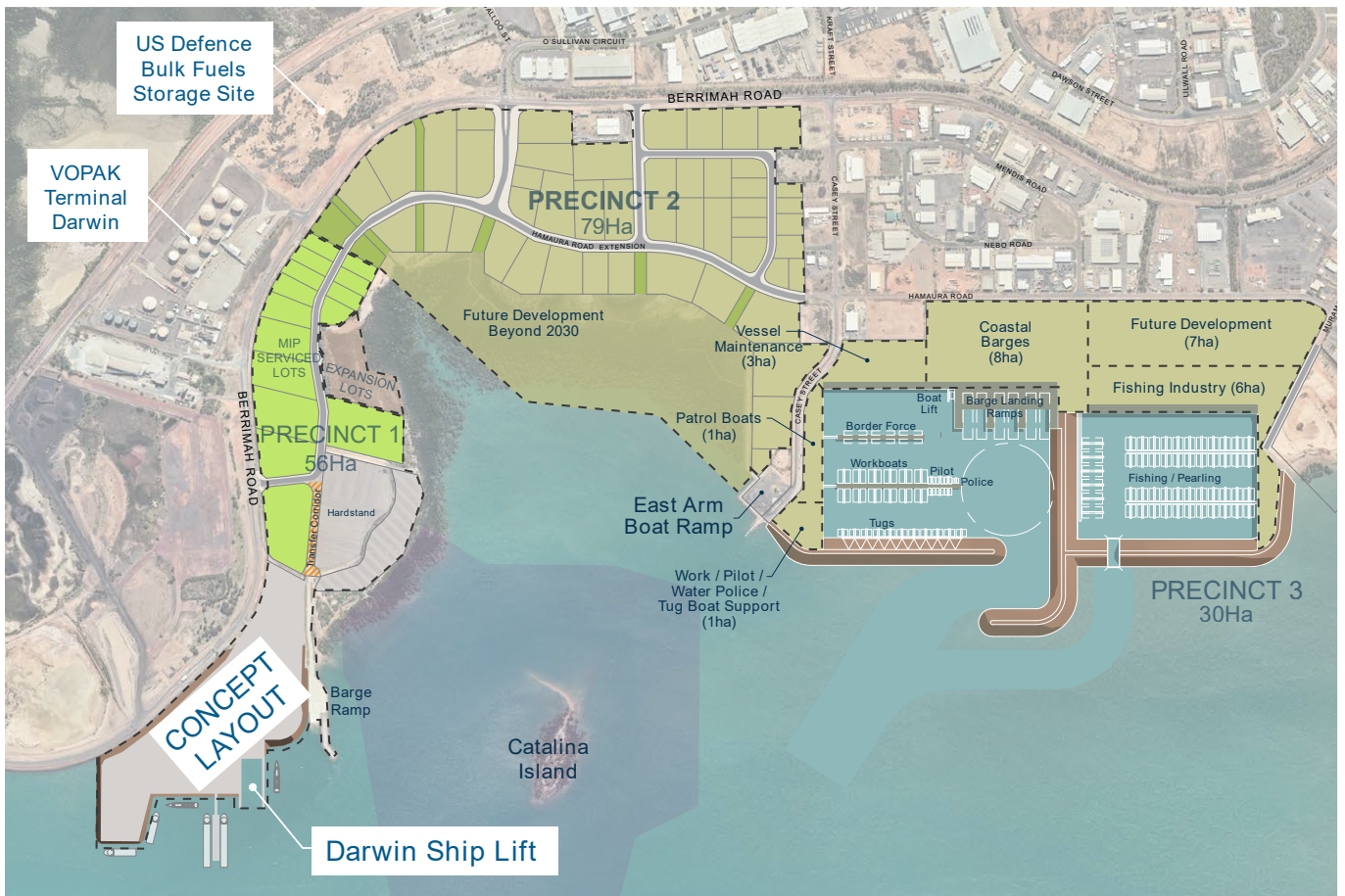
The ship lift is anticipated to be operational in 2025-26. A legislated open access regime will ensure fair and equal use for all customers, with pricing and access to be overseen by the independent Utilities Commission.

The facility will feature two separate areas. One will be privately operated and the other will be designated as a common user facility. Vessel owners will be able to choose and manage their own service and maintenance providers, which will allow multiple providers to operate concurrently at the facility.

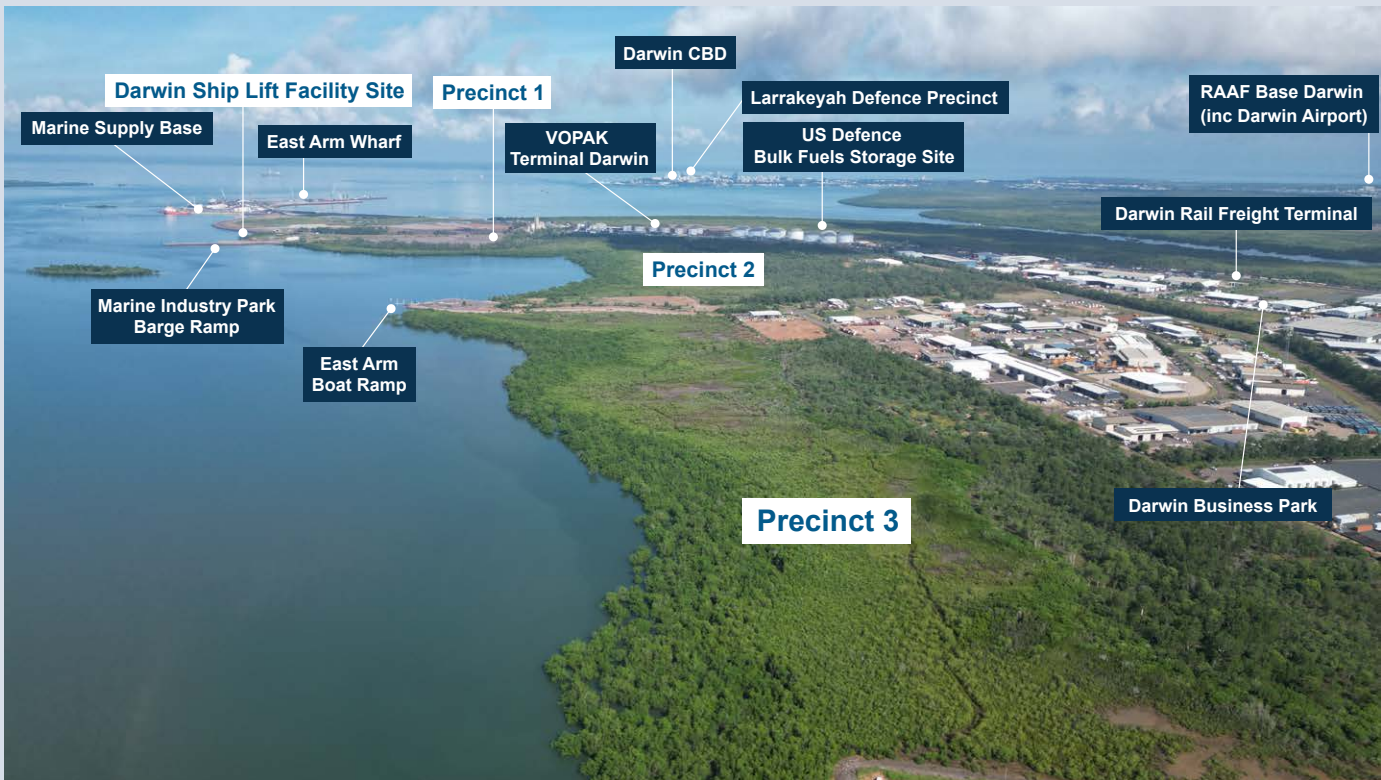
The ship lift funding includes a \$300 million concessional loan from the Northern Australian Infrastructure Facility (NAIF). The remaining funding will be provided by the NT Government.

NT Government is also committing \$15 million towards upgrading utilities into East Arm to service the ship lift as well as the future development of the Marine Industry Park.





PRELIMINARY CONCEPT PLANS SUBJECT TO CHANGE



► Marine Industry Park

The Marine Industry Park (MIP) at East Arm is being developed by the Land Development Corporation (LDC) with connections to road, rail and sea transport and other supporting infrastructure. It is 16km by road from Darwin CBD and close to East Arm Wharf and Marine Supply Base. LDC is investing \$20 to \$30 million in Precinct 1 to service and subdivide land adjoining the Darwin Ship Lift site. This investment will provide serviced land for establishment of large vessel maintenance workshops and supporting businesses to facilitate the economic activity and job creation opportunities enabled by the ship lift project.

Centrally positioned on Australia’s northern coastline within Darwin’s deep-water harbour, the MIP will be the only significant vessel servicing point between Cairns and Perth. Unlike other marine servicing hubs, the MIP has ample supporting industrial land (over 100 hectares) for marine maintenance, servicing, engineering, fabrication and logistics activities.

Existing marine facilities in the MIP include an all-tide barge ramp and 9 hectares of secured hardstand with 24 hour access for storage and fabrication activities. This provides an accredited First Point of Entry for the Port of Darwin.

Along with its strategic location, Darwin has a qualified and accredited workforce and a high level of business capability to implement cost effective marine maintenance solutions. However, local capacity may need to expand to service future demand.

Concept Master Plan

Precinct 1 is funded and designed. A tender for subdivision construction is proposed for release during the second half of 2024 with construction targeted to commence in the first half of 2025. Initial sites for marine maintenance activities are expected to be available from late 2025 in preparation for the Darwin Ship Lift Facility.

In Q2 of 2024, the LDC completed the concept master plan for the balance of the MIP (Precincts 2 and 3) including a Stage 2 business case. Marine infrastructure within Precincts 2 and 3 will be subject to future funding proposals and is not expected to progress until after 2030. Significant work remains in rationalising major cost items including rock protection and dredging, which have impacted the Stage 2 business case.

Additionally, the outcomes of the Darwin Harbour Development Plan – expected to be finalised by the Department of Infrastructure, Planning and Logistics later in 2024 – may shape this work further and inform value engineering investigations to reduce costs.

More detailed information on the Marine Industry Park can be viewed on the Land Development Corporation website.

Investment underway: \$20 to \$30 million for Precinct 1



Case study: Austal

Austal is the world's largest aluminium shipbuilder, designing, building and maintaining fully customised vessel and passenger ferries for commercial operators and various vessel types for navies, coast guards and border control forces around the globe.

Australia's first ASX-listed shipbuilder, Austal operates shipyards in Australia, the United States, the Philippines and Vietnam, with service centres located worldwide. Austal Darwin is located close to the Marine Industry Park and provides support to the Australian Border Force's Cape-class patrol boat fleet, designed and built by Austal Australia. Austal Darwin also provides on-site support to the Royal Australian Navy through facilities at HMAS Coonawarra, as well as ad-hoc service and support to visiting foreign naval ships.

At the Port of Darwin, Austal provides servicing, maintenance and repairs for commercial ships including passenger ferries, cruise liners and offshore support vessels. Austal Darwin's commitment to Northern Australia includes expansion plans aligned with the development of the new ship lift and common user facilities at the Marine Industry Park, which will further enhance the company's capabilities to support fast turnaround for investigations, fabrication, repair and maintenance.

"The ship lift in Darwin will provide world class facilities for the Territory's maritime industry. This will consist of wet berths and a hardstand, allowing the capability for complex repair and maintenance projects to be completed in Darwin supporting Defence, Australian Border Force, commercial and private vessels. The facility will support Darwin's position as a growing logistics and marine services hub for major industries within and around the Northern Territory region and will be a catalyst for further development of the marine maintenance and servicing industry in Darwin."

*Terry Fannon, Operations Manager,
Darwin – Austal Australia*



▶ Frances Bay Lock upgrades

The NT Government recently completed a significant upgrade of the Frances Bay Mooring Basin (the Duckpond) lock.

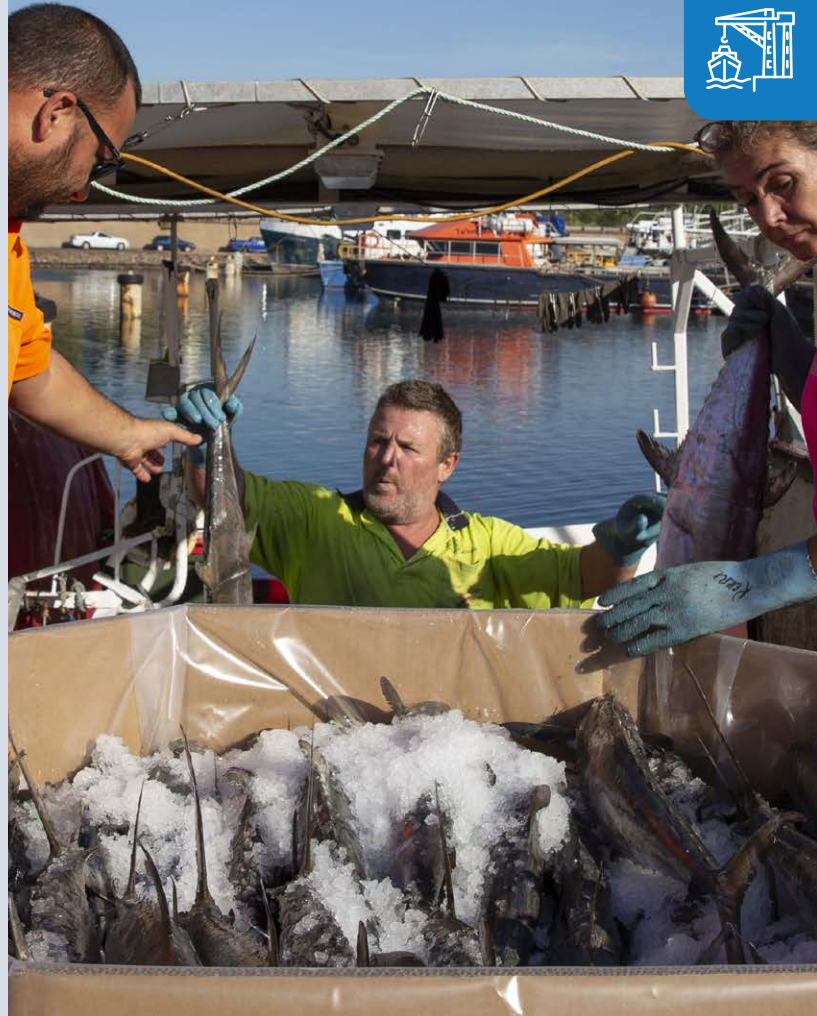
The upgrade delivered new lock doors, modernised the mechanical and electrical systems and provided increased protection to ensure longer-term sustainability, efficiency and safety.

Beneficiaries include the commercial fishing, seafood, marine maintenance and supplies and other maritime industries.

The project has seen 65 jobs created with local Territory contractor Advance Civil Engineering leading the project and local fabricator SLE Engineering building the new lock doors and other fabricated elements.

Works were being staged to manage impacts on basin and lock users, and the project was delivered ahead of schedule in early 2024.

Investment underway: \$20 million



▶ Mandorah Marine Facility

The NT Government is delivering new marine facilities to improve and maintain public transport services for residents and visitors to Mandorah, Wagait Beach and Belyuen. The masterplan for Mandorah's new marine facilities was released in November 2020 after several years of stakeholder and community consultation. The master plan will be implemented in stages.

The design and construct tender was released in October 2022 to finalise the design and build for the first stage of new marine facilities. Works to create a new public facility terminal have commenced. The NT Government expects the project to be operational in 2025.

The new facilities will improve safety for ferry users and make it easier for people with disabilities to board and alight from the ferry. The project includes a more weather-resistant dual berthing facility that can safely accommodate the ferry that operates between Darwin and Mandorah, as well as future expansion.

The new facilities will be delivered in stages to construct the key elements of the project while ensuring the project deliverables are technically sound and that the project remains on schedule and within budget.

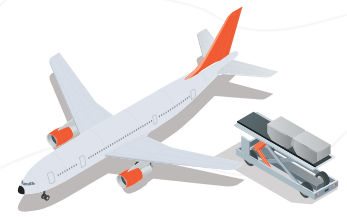
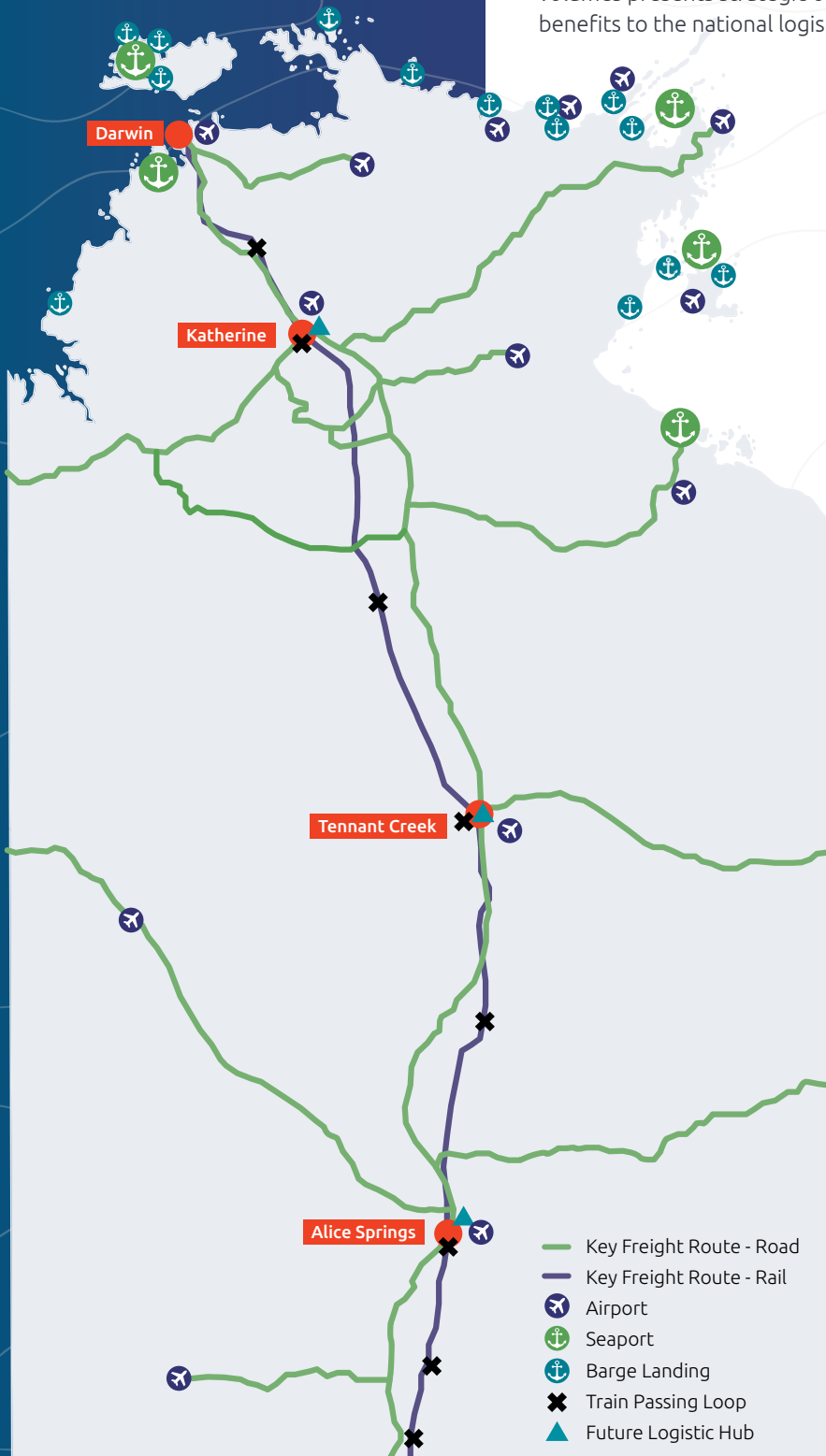
Investment underway: \$63 million

Map of logistics hubs and key infrastructure

The Northern Territory's logistics network comprises 5 ports, 14 barge landings, 70 aerodromes and a network of interstate rail and highway connections. Key among these is the AustralAsia Railway (the Adelaide to Darwin north-south rail link) and sealed road links to Queensland, Western Australia and South Australia.

Darwin International Airport and the Port of Darwin are currently the Territory's primary air and sea links to international markets. The industry transition associated with Gove and Alyangula ports, and the respective Rio Tinto and GEMCO mining closures, represents a significant opportunity for new industry to leverage existing infrastructure for future diversified regional growth. These opportunities will be supported by the progressive upgrade of the Central Arnhem Road.

The capacity of existing port infrastructure to service greater freight volumes presents strategic opportunities that could deliver significant benefits to the national logistics system.



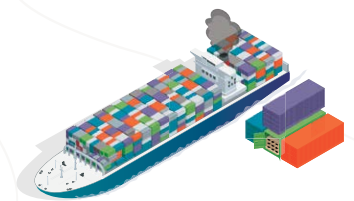
AIR FREIGHT

The Territory has a no curfew international airport and over 70 aerodromes.



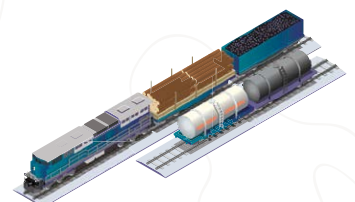
ROAD FREIGHT

Roads connect the Territory to other major cities across Australia.



SEA FREIGHT

The Territory is a significant maritime hub importing and exporting goods nationally and internationally.



RAIL FREIGHT

The rail system connects the Territory and Australia.



Australia's northern logistics opportunity

Concept

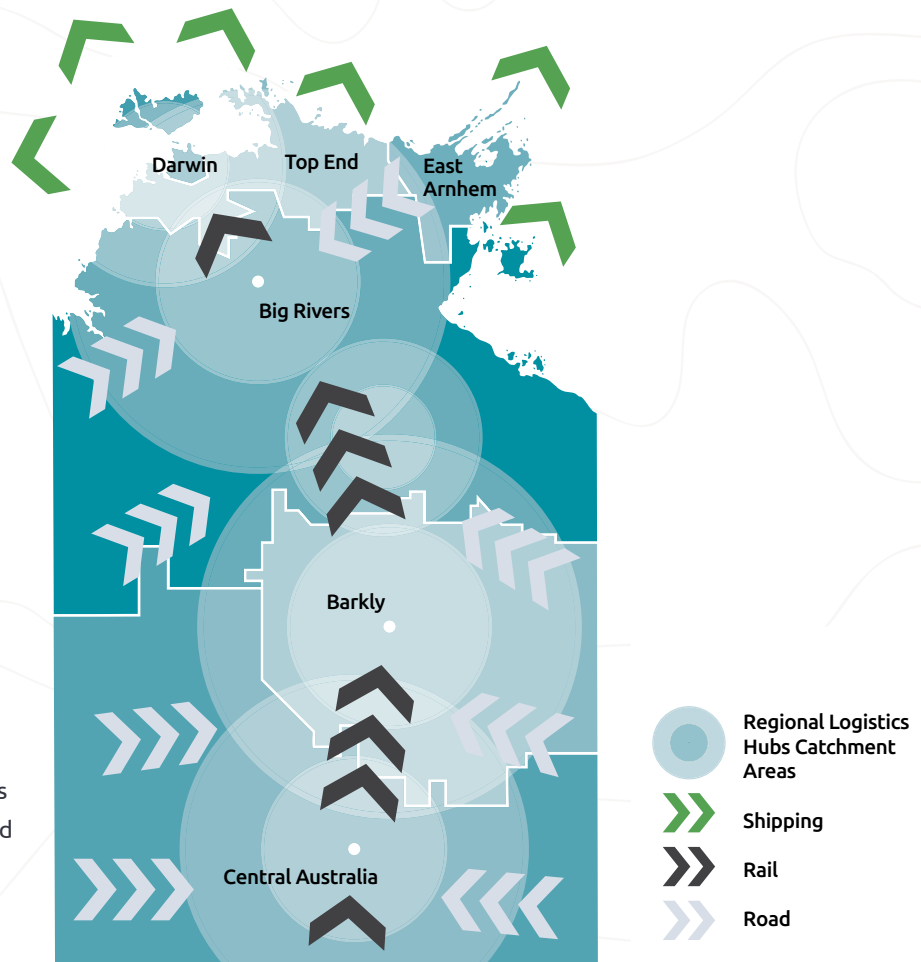
Network of Regional Logistics Hubs across the Territory

Result

- ✓ Supply chain that caters to all of NT industry (and interstate catchment)
- ✓ Maximises efficiency (reduced costs to infrastructure users and providers)
- ✓ Each hub caters to the region's key industries and opportunities
- ✓ Infrastructure needs are clarified

Note

Arrows focus on exports but represent two way trade



In 2022 the Australian Government announced an investment of \$440 million to construct a network of regional logistics hubs across key areas of the Northern Territory to unlock the region's vast resources, strengthen supply chains and boost exports.

These hubs will play an important role in the consolidation, storage and transfer of freight between rail and road, while providing connections to ports, regional networks and other capital cities.

Beyond these 3 hubs, there is focused work being undertaken to determine the opportunity for extension to the logistics network through the East Arnhem region.

Logistics and supply chains are crucial to the viability of key projects that drive the Territory's economic growth. Enhancing the Territory's logistics network will support industrial projects developing across the Northern Territory, increase supply chain capacity and efficiency, support and facilitate economic and community development, and improve environmental outcomes.

Each regional logistics hub will consider specific industry opportunities; lead to informed decisions around freight types and infrastructure requirements; and consider stakeholder, community and site considerations as well as existing infrastructure specific to that region.

Developing the Territory's logistics network has the potential to deliver significant benefits for Australia as a whole. Increased national use of the Territory's logistics networks can support:

- nation building and investment equity
- Defence and strategic considerations
- enhancement of national resilience by improving both risk mitigation and critical supply chain certainty especially for the critical minerals and energy sectors.

COVID-19 exposed national and international supply chain vulnerabilities and highlighted the need for Australia to become more resilient. These investments in the Territory's infrastructure network will address gaps, develop greater resilience, and support the case for the Territory to play a larger role in the national logistics network.



Maritime trade gateway between Australia and Asia



One of the busiest cattle export ports in the world



Deepwater port to support large vessels



► Darwin Harbour

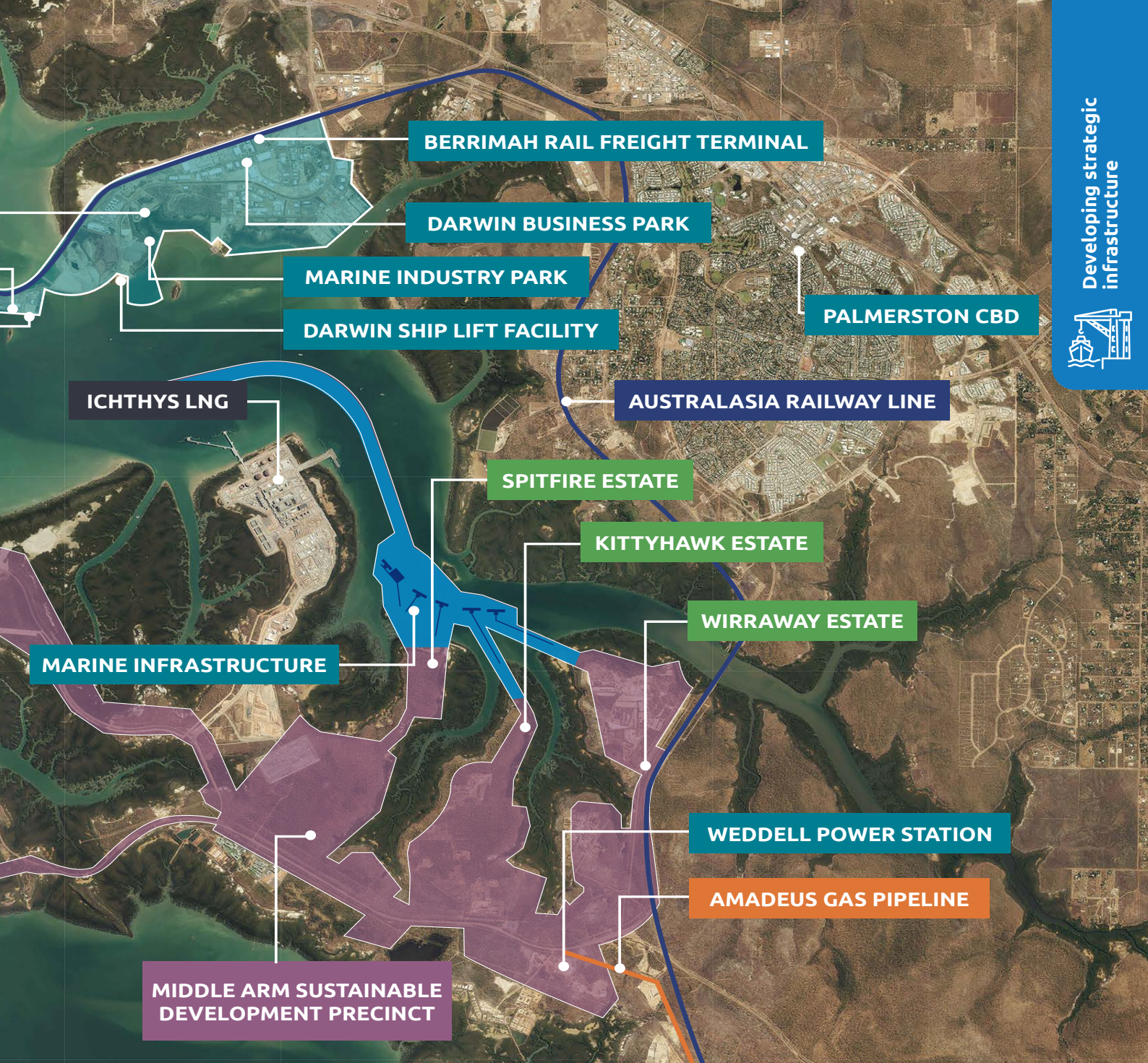
Darwin Harbour is Australia's most northern and strategically important deep-water port and a trade gateway between Australia and Asia. The harbour is approximately 5 times larger than Sydney Harbour and well-connected to Australia's domestic transport infrastructure through the national highway network, AustralAsia railway and Darwin International Airport.

Darwin Port is one of the busiest cattle export ports in the world and supports the offshore oil and gas fields in the Arafura and Timor Seas and off the coast of Western Australia. The closest Australian port to Asia, the Port of Darwin is an export hub for dry bulk goods, an import hub for motor vehicles and docks an increasing number of cruise and naval ships.

The Australian Defence Force and Border Force use East

Arm Wharf for loading and offloading vessels and to moor surveillance patrol boats. Japanese company INPEX operates onshore LNG processing facilities at Bladin Point in Darwin Harbour, processing gas from the Ichthys gas field in the Browse Basin of the Timor Sea.

In 2014, the Ichthys LNG project included dredging within Darwin Harbour to create a deeper shipping channel and berthing area for the large LNG, LPG and condensate carriers involved in the Ichthys project. Capital dredging (to create new underwater channels, berths or infrastructure) and maintenance dredging (to keep existing underwater infrastructure at an acceptable depth to allow safe access and operations) of Darwin Harbour are regulated by the NT Environmental Protection Authority and will be strategically managed into the future with a new Darwin Harbour dredging plan due for release in 2024/25.



Artist's impression only. Proposed infrastructure is subject to approvals.

Dredging operations align with leading best practice and sustainability principles to ensure the ongoing protection of the harbour and the continued operating efficiency of the port and harbour for all users including freight, cruise, military and recreational vessels.

Fort Hill Wharf is primarily used for cruise and naval vessels and non-cargo carrying vessels. The wharf includes a passenger terminal with the capacity to accommodate offshore international passenger processing facilities.

Darwin's Marine Industry Park (MIP) is a purpose-built subdivision, connecting road, rail and sea transport with supporting infrastructure, including a common-use hardstand and all-tide barge ramp. Located close to the Marine Supply Base, Darwin Business Park and East Arm Wharf, the MIP will be home to the 5,500-tonne Darwin

Ship Lift Facility, which will be completed in 2025-26.

The MIP offers investors an opportunity to capitalise on the Territory's expanding live cattle trade, minerals and resources sectors, seafood industry, marine services and Defence industries, as well as Darwin's status as the only significant Australian vessel servicing port between Cairns and Perth.

The Territory's Department of Infrastructure, Planning and Logistics (DIPL) is working on a Darwin Harbour Development Plan that will include consideration of future maritime infrastructure needs, harbour wide shipping and broader strategic use of the harbour, to provide certainty to industry.



Growing the Territory maritime industry

Darwin is positioning itself as a key vessel service, supply and sustainment hub in Northern Australia and the broader Indo-Pacific region, servicing the needs of Defence, Border Force, the energy industry, fishing fleet, tug fleet, workboats, superyacht vessels and other commercial operators. Growth in these sectors will drive demand for service, supply and sustainment services in the Territory. The Northern Territory Government will work with all stakeholders to sustainably grow the maritime industry.

The Maritime Industry Development Plan has identified the following key actions under this focus area to achieve its vision over short, medium and long term timeframes. These timeframes are defined as:



Short-term



Medium-term



Long-term

	Action	Time-frame	Lead agency	What success looks like
2.1	Work with the Australian Government to support the Regional Maintenance Centre (RMC) North and ensure the Darwin Ship Lift Facility and Marine Industry Park meet the requirements of the Royal Australian Navy (RAN) and Australian Border Force (ABF)	Short-term	DCM&C (Defence NT) – with support from across-government	Through RMC North, the RAN and ABF use the Darwin Ship Lift Facility and Marine Industry Park to enhance their maintenance and sustainment programs.
2.2	Work with the Australian Government to develop the Middle Arm Sustainable Development Precinct's marine infrastructure	Short to medium-term	DIPL	Middle Arm precinct is operational, meets the needs of industry, and complements existing marine infrastructure.
2.3	Assess the opportunity for Territory companies to grow service and supply capability for the oil and gas industry, including support for decommissioning offshore oil and gas assets	Short to medium-term	DIPL	Decommissioning opportunity quantified and pathways for participation identified.
2.4	Explore opportunities to develop local superyacht maintenance and provisioning capability to take advantage of the growing global superyacht industry	Medium-term	DITT (Facilitated Projects) - with support from DIPL	Dedicated superyacht berthing facilities are developed by 2030 to capitalise on Darwin's location and increased demand for services in the lead up to the 2032 Brisbane Olympics.
2.5	Undertake targeted tactical campaigns to promote the investment opportunity arising upon the delivery of MIDP actions	Short to medium-term	DCM&C (Investment Territory)	Tactical campaigns generate interest interstate and internationally.
2.6	Explore opportunities for autonomous surface vessel (ASV) and autonomous underwater vessel (AUV) industry development	Long-term	DCM&C (Defence NT)	Industry potential for the Territory evaluated and, if positive, investment attraction commenced.
2.7	Develop a NT Fisheries Policy	Short to medium-term	DITT, Land Councils, NT Seafood Council, Amateur Fishermen's Association of the NT	Clear statement on aquatic resource values and uses to guide management.
2.8	Implement the NT Recreational Fishing Development Plan 2023-2033	Short to long-term	DITT (Fisheries Division), Amateur Fishermen's Association of the NT & NT Recreational Fishing Advisory Committee	Clear action plan for the recreational fishing industry implemented.
2.9	Continue monitoring the water quality and ecosystem health of Darwin Harbour to support a resilient environment and sustainable economic decision making	Ongoing	DEPWS (Flora and Fauna Division)	Health of Darwin Harbour is maintained and regular water quality reports are released to the public, and a mangrove conservation strategy is developed and implemented.
2.10	Develop new NT Defence Industry Strategy	Short-term	DCM&C (Defence NT)	Local industry capability and capacity aligns with Defence requirements to deliver current and future maritime sustainment projects/programs in the NT.



Photo credit: Northern Territory Government



Larrakeyah Defence Precinct

HMAS Adelaide

Photo credit: Department of Defence.

▶ Defence

Service, supply and sustainment is crucial for the Royal Australian Navy (RAN). In 2020, the RAN announced Plan Galileo, which outlined a model of continuous sustainment involving a network of four Regional Maintenance Centres (RMCs) in Darwin, Cairns, Sydney and Perth. Darwin's RMC North will be operational in June 2024 and will play an integral role in the RAN's new sustainment program.

In 2023 the Australian Government released the National Defence Strategic Review (the DSR), outlining reform for Defence's posture and structure. The DSR has positioned the Northern Territory as central to meeting the nation's evolving security challenges of the next decade and beyond. A key message that emerged from the DSR was the importance of Defence's Northern Australian bases for Australia's regional engagement, accompanied by a recommendation to upgrade them immediately.

While the full measures to be taken as a result of the DSR are yet to become clear, it is likely that there will be an expanded naval presence in the North, with investment to support this enhanced force posture.

As a result of the DSR, the Australian Government also initiated an independent analysis of the RAN's

surface combatant fleet capability. In February 2024 the independent analysis resulted in a number of recommendations being accepted that affect the future composition of RAN's fleet, including:

- 26 major surface combatants consisting of:
 - three Hobart class air warfare destroyers with upgraded air defence and strike capabilities
 - six Hunter class frigates to boost Navy's undersea warfare and strike capabilities
 - 11 new general purpose frigates that will provide maritime and land strike, air defence and escort capabilities
 - six new Large Optionally Crewed Surface Vessels (LOSVs) that will significantly increase Navy's long-range strike capacity.
- Six remaining ANZAC class frigates gradually be decommissioned as per their planned service life.
- Six Offshore Patrol Vessels and a number of minor naval vessels including the Evolved Cape class patrol boats. These minor naval vessels will primarily operate in northern Australian waters.



Darwin CBD

The DSR also outlined plans to accelerate and expand the Australian Army's program to acquire new littoral manoeuvre capability, including medium and heavy watercraft which would require the development of support facilities in Northern Australia.

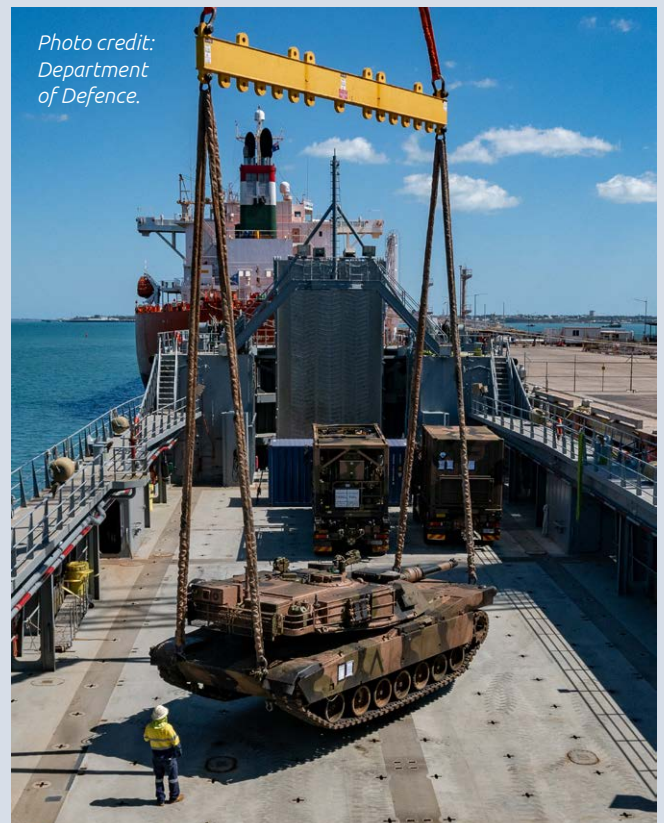
While location/s for basing have not yet been determined, Darwin would make strategic sense. It is home to the Australian Army's 1st Brigade which has received a new mandate as the Army's light-littoral combat brigade. Further to this, the Darwin Ship Lift Facility and local industry capability are expected to play an important role in facilitating maintenance and sustainment of future defence operations. Were the Army to select Darwin for the base, it would support redundancy of sustainment capability and deliver a host of defence and economic benefits.

Investment underway:

US Bulk fuel storage facility \$270 million

HMAS Coonawarra infrastructure for Offshore Patrol Vessels \$270 million

Redevelopment of Larrakeyah Defence Precinct and HMAS Coonawarra \$520 million



*Photo credit:
Department
of Defence.*



Regional Maintenance Centre

Regional Maintenance Centre North (RMC North) is being established in Darwin to support the future maritime sustainment model (FMSM) outlined under the Australian Department of Defence's Plan Galileo. RMC North commenced operation in 2024 and is one of four centres being developed at strategic ports around the country, along with RMC West (Henderson), RMC North East (Cairns), and RMC East (Sydney).

Under Defence's continuous naval shipbuilding plan, the Navy will receive a new vessel on average once a year. Plan Galileo was developed to support sustainment of the larger and more complex naval fleet that will emerge as a result, and to ensure coordinated and consistent maintenance of the naval fleet from all RMCs. This will enhance the ability of the Navy to surge from strategic locations across Australia in support of operations at home or abroad. Defence will be better positioned to respond to emerging threats and assist our regional neighbours with natural disasters and protection of maritime resources.

A key element of the Navy's model of continuous sustainment is more resilient supply chains and enhanced industry engagement. The RMCs are a key pillar of this approach. By standardising processes across shipbuilding and sustainment, and encouraging the use of common equipment and parts across platforms and classes, Defence aims to reduce duplication and drive synergies. This includes the standardisation of operating and commercial models, to make it easier for industry to do business with Defence's Capability Acquisition and Sustainment Group, which is responsible for acquisition and supply chain management. Defence is also applying incentives in contracting arrangements to facilitate fairer competition for local businesses to compete for work.

RMC North will be able to sustain multiple classes of Royal Australian Navy surface ships and is expected to inject about \$160 million into the local economy and create about 70 jobs in the region.

RMC North will be operated by the Regional Maintenance Provider (RMP), Norsta North, a joint venture between Norship Marine and Tropical Reef Shipyard, that will coordinate, program, schedule and manage the sustainment work on the Navy ships to be supported in the Indo-Pacific.

The impact of RMC North on the NT's local maritime industry is not to be underestimated.

It establishes a larger Defence presence in Darwin, as well as business and workforce growth and development opportunities for the sector. Defence and the RMP will be supported by other prime contractors, smaller local businesses and service providers comprising an integrated network for delivery of continuous naval sustainment.



Key infrastructure projects to be more competitive on a global scale.



Hub for Australia's maritime participation with the Indo-Pacific region.



Increase in demand for services.



Case study: Regional Maintenance Provider NORSTA North

The Australian Government has awarded the \$150 million, five-year Regional Maintenance Provider (RMP) contract to NORSTA North. A subsidiary of NORSTA Maritime, NORSTA North is an Australian-owned, controlled and managed team. NORSTA Maritime have been successfully delivering the RMP North East contract in Cairns since 2022.

Under the contract, Norsta North will coordinate and deliver maintenance activities for RMC North, bolstering Defence sovereign capability and industry participation in the Northern Territory. The contract is expected to create up to 37 direct and a substantial number of indirect defence industry jobs in the Territory. The RMP will have a particular focus on supporting the local maritime industry and supply chain with a stable environment, providing local SMEs greater certainty and predictability of work, along with opportunities for capability development and capacity, building to deliver resilient and agile defence services.

The RMP contract for RMC North is the last to be awarded of the four strategically located sustainment centres around Australia. RMC North will be fully operational in 2024, initially supporting the sustainment of Navy's Cape class patrol boats. The delivery of continuous sustainment in Northern Australia will ensure the Navy's growing fleet is available where and when needed. With an ability to be agile and adaptive to all of the region's maritime support requirements NORSTA North is positioned to deliver certainty and sustainability to local industry.

"We have the local community at heart and we actively engage with and support an extensive number of suppliers, many of whom are Australian SMEs. Our team collaborates with Navy every day to secure the best outcomes for the war fighter. It's a success story we are proud of and one we will build on in this new era of maritime sustainment"

- Maurie McNarn AO, Chair, NORSTA Maritime



Photo credit: Norsta North

► Energy and minerals

In 2019-20, the Northern Territory oil and gas and minerals industries contributed a combined direct value of over \$6.2 billion to the Territory economy and supported approximately 4,820 jobs in 2019-20. Both of these industries are significant users of maritime, whether it's via shipping services for export, import of capital goods, or service and supply for the offshore gas industry.

Oil and Gas: The Territory is an international oil and gas hub, with multi-billion-dollar projects in full swing and many more in planning or development. The major driver of the NT oil and gas industry is production from the onshore Amadeus Basin in Central Australia and offshore fields such as Bayu-Undan, Ichthys and Blacktip. Darwin is a globally significant LNG hub, home to the Darwin LNG and Ichthys LNG plants with 3 LNG trains in operation with a combined production capacity of 12.6 million tonnes a year. In March 2021, Santos announced its decision to proceed with the US\$3.6 billion Barossa offshore joint venture and an associated US\$600 million investment to extend the life of the Santos-operated Darwin LNG plant for around 20 years.

Recent discoveries in the onshore Beetaloo Sub-basin offer more than 25,000 square kilometres in geologically continuous unconventional shales within stacked petroleum plays, comparable to the United States' giant Marcellus Shale. Industry exploration to date indicates a 'P50 gas-in-place resource' of at least 500 trillion cubic feet in one shale layer alone in the Beetaloo Sub-basin.



Decommissioning offshore infrastructure: the \$50 billion opportunity

The Centre of Decommissioning Australia (CODA) has identified \$50 billion in decommissioning work for Australia's offshore oil and gas sector over the next 50 years, over half of which will need to start within the next decade.

CODA was established as a joint initiative between National Energy Resources Australia (NERA) and BHP Petroleum, Chevron Australia, Esso Australia, Santos, Vermillion and Woodside to deliver a transformational approach to late-life asset planning and decommissioning. In 2021, CODA transitioned to become an independent not-for-profit to provide long-term guidance and support to the emerging sector.

Quantifying the opportunity is the easy part. Unlocking it will be far more complex. Australia's offshore petroleum basins are geographically distant from each other, the type of offshore infrastructure varies significantly (requiring different approaches to decommissioning), and the assets are managed by a large number of operators. These factors add complexity to the decommissioning opportunity, which CODA is working to address through several projects to unlock opportunities, including:

- a review to understand the opportunity for local disposal and recycling pathways
- a global review of decommissioning planning and learnings
- a decommissioning innovation and technology roadmap.

The NT Government is commissioning an initial analysis (see action 2.3) to identify how this opportunity could be unlocked for the Territory and its local businesses.



Minerals: The minerals industry is a major contributor to the NT economy contributing more than 10% of Gross State Product (GSP) in 2019-20. Most of this is generated by 8 major operating mines. In recent years, the contribution of the minerals industry has been dominated by 5 key minerals: manganese, gold, zinc, lead, bauxite and uranium oxide. Manganese has consistently held the largest share in terms of production value and, in 2019-20, directly contributed \$490 million in value added and 1,050 in Full Time Equivalent (FTE) employees. Manganese has been the largest dry bulk export through the Port of Darwin, driving activity and growth in the maritime industry, while bauxite exports through Gove Port have contributed strongly to the East Arnhem region's economy over the last 50 years.

The Territory's minerals industry profile is set to change substantially in future. The closure of Ranger Uranium Mine in 2021 has ended uranium production, once the second largest mineral by share of production value. However, global demand for critical minerals is expected to increase exponentially in future, including for applications in advanced manufacturing and low-emission technologies such as solar and wind farms, electric vehicles and battery storage. The Territory, endowed with globally-significant reserves of critical minerals including cobalt, lithium, manganese, rare earths, tungsten and vanadium, is in prime position to take advantage.

Production and downstream processing of critical minerals represents value-adding opportunities, with several mines planning to process minerals in the NT. These include Arafura Resources' Nolans rare earths mine and processing plant near Aileron, TIVAN's Speewah and Mount Peake projects to produce vanadium oxides through innovative

downstream processing technology, Verdant Minerals' Ammaroo phosphate project and Avenira Limited's Wonarah project for processing of phosphate.

Renewable energy: The Northern Territory is positioning itself to be a renewable energy powerhouse by developing solar energy and green hydrogen.

In June 2022, the Northern Territory Government announced an investment of \$5 million over 4 years to develop the framework for a hydrogen industry. Key focus areas include establishing fit-for-purpose standards and regulations for the production, transport, storage and use of hydrogen. Several hydrogen projects are in development, including the Tiwi H2 Project, the Darwin H2 Hub in partnership with Total Eren, and the Green Springs Project.

Solar energy is expected to be a key input to the Territory's renewable hydrogen industry, as the NT has some of the highest solar irradiance in the world, together with available land for industrial scale solar generation. Sun Cable's Australia-Asia Power Link project, which aims to be the world's largest solar farm, high voltage transmission line and battery storage facility, is indicative of the scale of renewable energy opportunities.

Renewables, along with gas, should eventually drive down energy costs and power a downstream manufacturing industry in the Territory.

The NT and Australian Government's plan is to develop a renewables and low emissions processing and manufacturing hub at the Middle Arm Sustainable Development Precinct. This will drive industry growth and diversification.



Australia's largest
producer of
manganese



Critical minerals
exploration expenditure
increased by 29% in 2023
to \$106.7M



Near term
opportunities for
cobalt production



Australia's only
lithium mine
outside of WA



► Middle Arm Sustainable Development Precinct

A project of national significance

The Middle Arm Sustainable Development Precinct (MASDP) is located in Darwin Harbour.

The Territory Government is undertaking masterplanning of infrastructure and services, engineering and strict environmental studies at the Precinct.

It is a strategic approach to creating a 'development ready' location for investment - especially renewables and low-emission energy and fuels, advanced manufacturing and low-emissions minerals processing.

This work 'de-risks' investment by creating certainty for industries on the availability of infrastructure and services and a clear road map of the rigorous and efficient development approvals.

The peninsula is already home to the Santos Darwin LNG and the INPEX Ichthys LNG processing facilities – both companies are committed to net zero emissions for the future.

The Precinct is designed to take advantage of the Territory's natural advantages including our strategic location and our world-class solar resources. Almost all critical minerals required for the manufacturing of renewable energy components are available in the Territory.

A home for sustainable, modern and hightech industry

The Precinct is designed to attract industries that are reflective of what the Territory's future economy will look like, including:

- renewable energy for the Territory, Australia and for international markets
- critical minerals for industries that need to succeed in a transition to net-zero emissions
- low-to-zero emissions fuels and products needed for Australian supply chain security
- advanced manufacturing.

In June 2023, the Territory Government issued 'not to deal' commitments to five proponents over specific parcels of land at the precinct which includes:

- Total Eren (renewable energy)
- Fortescue Future Industries (renewable energy)
- Tivan (critical minerals and processing)
- Tamboran Resources (natural gas)
- Avenira (critical minerals and processing)

Any industry located at MASDP must meet high environmental standards and conditions, use the most up-to-date technology and ensure its processes and products align with strong sustainability and design criteria (e.g. low-to-zero emissions).

Image used as a visual representation only.



Middle Arm marine infrastructure

The Northern Territory Government is working with industry and the Australian Government to accelerate the development of the MASDP.

Middle Arm is in Darwin Harbour around 13 km from Darwin's CBD by sea, or about 40 km by road. It sits across the Elizabeth River from Palmerston and opposite East Arm Port.

The 1,500-hectare precinct will:

- capitalise on the Territory's access to natural gas and renewable energies to grow manufacturing
- focus on low emission hydrocarbons, green hydrogen, carbon capture storage, advanced manufacturing and minerals processing
- drive industry diversification, exports, job creation and population growth
- play a pivotal role in growing the NT economy.

The Australian Government is investing approximately \$1.5 billion in common use infrastructure at Middle Arm, underlining the future potential growth of the precinct. The funding will include a Module Offloading Facility, product jetties, dredging of a channel for shipping access and a hardstand area.

Middle Arm Sustainable Development Precinct (MASDP) will drive Darwin Harbour traffic and growth in the maritime industry through increased exports and demand for associated maritime services.

Investment underway: \$1.5 billion

Indicative precinct timeline



▶ Fishing

Sustainability is the primary driver of the NT Government's stewardship of NT fisheries, which depends on the health of the environment, conservation of habitats and effective control of the total catch. Management of the NT's fishing industries is based on high quality scientific indicators to ensure aquatic resources are not over-exploited.

Commercial (including Aboriginal Coastal Licences) and recreational fishing in the NT are managed under harvest strategies and contemporary management frameworks, designed to protect the Territory's fish stocks and shared to meet the requirements and expectations of recreational and commercial fishers, Traditional Owners, aquaculturalists, conservationists, seafood consumers, tourists and the broader community.

Approximately 80% of the NT's coastline is owned by Aboriginal people and they have strong cultural connections to aquatic resources, with customary fishing important in many communities. In February 2022, the Aboriginal Sea Company (ASC) was incorporated, marking a major milestone for Aboriginal Territorians. The ASC will facilitate increased participation of Aboriginal Territorians in commercial fishing and aquaculture and enable Aboriginal people to develop profitable and sustainable fishing operations.

Commercial fishing

The Territory's commercial fishing sector includes wild capture and aquaculture production, seafood processing and retail and wholesale trade. Most NT seafood is transported interstate for domestic consumption or export. The Gross Value Added (GVA) of the Territory's commercial fishing sector is \$136 million. The NT seafood industry employs 941 FTE positions in wild capture, aquaculture and associated processing.

The NT is home to a variety of aquaculture species including Barramundi, ornamental corals and fish, pearl oysters, sea cucumber, Blacklip Rock Oysters and new trials on Black Jewfish, with a Gross Value of Production (GVP) of \$53 million in 2020-21.

As of July 2023, the NT commercial fishing industry harvested over 5,450 tonnes of aquatic product a year. The industry comprised 223 commercial fishing licences and 19 aquaculture licences; 206 registered fishing vessels; and commercial activity in 14 different wild harvest fisheries. Commercial licences can be issued for up to 10 years and are able to be sold and leased.

The combined economic value of the pearling industry in Western Australia and the NT was \$80 million in 2020. The pearling industry in the NT typically uses sea freight to service their farms. About 70% of the industry's freight, including food, fuel and other consumables, is managed through Darwin.

The Australian Maritime Safety Authority requires dry-docking of commercial fishing vessels at least twice every 5 years, for maintenance. This work is generally done at the vessel's regular berth, for example, Frances Bay Mooring Basin or at a one of Darwin's lifting and dry-dock facilities.

Recreational fishing

The NT is renowned for its recreational fishing opportunities, with some of the world's most intact marine environments, rich in natural resources, biodiversity and cultural heritage. In 2015, the NT Government introduced a Million Dollar Fish tourism campaign, which is Australia's richest fishing competition, offering registered fishing enthusiasts an opportunity to win between \$10,000 to \$1 million in prize money for catching a tagged barramundi.

The NT has the highest participation rate in recreational fishing in Australia, with about 1 in 3 people participating. Recreational fishing expenditure is estimated to exceed \$100 million every year. Expenditure by anglers equates to more than \$1,500 per fisher. Recreational fishing is focused in creeks and rivers and inshore areas along the coastline, with about half of the recreational fishing effort concentrated in the wider Darwin Harbour area and almost 10% focused on the Arnhem and Gulf of Carpentaria coastlines. The main species targeted by recreational fishers in the NT are Barramundi, Golden Snapper, Black Jewfish and Spanish Mackerel with Mud Crabs another important recreational species. A large portion of fish are caught on a 'catch-and-release' basis.

About 181 Fishing Tour Operator licences are operated by 132 licensees across the NT, catering to a broad range of anglers. Fishing Tour Operators offer a range of services including catered day trips with all gear supplied, fishing stays in remote lodges and camps, fishing competitions and boat hire. The sector is an important contributor to local economies across the NT.



Frances Bay: Transition to the Marine Industry Park and urban renewal

The Frances Bay Mooring Basin, also known as the 'Duckpond,' is the centre of the Territory's commercial fishing industry, holding 91 berths for 136 vessels up to 30m long. The basin is tide-free and accessed through a 35m by 16m lock. The 200m long Fisherman's Wharf provides space for commercial and recreational vessels to take on fuel, load and unload cargo, and access power and water.

To address challenges with Frances Bay and Stokes Hill Wharf, including ageing infrastructure and strong competition for mooring access for vessels that don't use Darwin Port, the Territory Government delivered \$20 million in upgrades to the lock. The upgrade provided new lock doors, modernised the mechanical and electrical systems and increased protection to help ensure the longer-term sustainability, efficiency and safety of the facility.

The design and construct tender was awarded to Advance Civil Engineering in June 2022, and was completed in early 2024.

This will provide an improved facility for the commercial

fishing, seafood, marine maintenance and supplies and other maritime industries. Further planning and investment will be explored as part of the Darwin Harbour Development Plan for future growth and development of these sectors within Frances Bay.

The NT Government is also investing \$15 million to upgrade Stokes Hill Wharf.

The long-term vision for Frances Bay is as a mixed-use waterfront that will maintain its historic role as the home of the fishing industry, while evolving into a thriving precinct that includes residential and tourism. When (or whether) this occurs will depend largely upon the progression of a successful business case for Precincts 2 and 3 of the Marine Industry Park. Should this milestone be reached, a comprehensive transition plan would be developed in consultation with industry. The intent would be for fishing boat mooring, minor maintenance and fish processing on a smaller scale to be retained at Frances Bay while, as outlined in the Darwin City Deal, other uses incompatible with a mixed-use development would gradually relocate to the Marine Industry Park.

► Superyacht Maintenance and Provisioning

The Northern Territory has an opportunity to capture a share of the growing market for superyacht maintenance and provisioning in Australasia. In 2018, there were 263 superyachts in Australasia, an increase of more than 20% from the 218 vessels in 2015 (equating to a growth of 15 vessels a year).

Darwin does attract a number of superyachts each year (in 2018, 12 superyachts visited Darwin), and regularly receives interest and enquiries for services of yachts operating in the Indo-Pacific region. However, the average length of a superyacht is between 40 - 60m, with some spanning over 100m, and the current marina berthing capacity in Darwin does not support vessels over 25m (Cullen Bay) and 35m (Frances Bay).

Superyachts that do visit Darwin currently use commercial wharves for servicing and provisioning, such as Fort Hill or Fisherman's Wharf, however these are not optimal for their needs, not providing the level of comfort expected and potentially risking damage to their hull.

Research indicates strong future potential for superyacht visits and activity in Darwin subject to development of appropriate infrastructure. Consultation with captains of superyachts along with 'white boats' (yachts under 24m in length) who regularly visit and berth in Darwin, suggests that Darwin has a reputation for providing safe and secure marina berthing for 'white boats', a high standard of professionalism, quality marine trades and quality alcohol supplies and fine foods. Darwin offers GST-free importation of ship spares with agents offering structured and transparent processing of freight forwarding, and an international airport and world-class tourism experiences.

A recent scoping study found that the superyacht industry could contribute as much as \$145.8 million to the Territory economy by 2028, but there were a number of challenges to overcome before this could be realised.

The Department of Industry, Tourism and Trade (DITT) is assessing options to develop new superyacht infrastructure. The initial focus will be on modest infrastructure investment to facilitate gradual growth of Darwin's superyacht service and supply industry, with a view to expanding capability in time for the 2032 Olympics in Brisbane.

A Superyachts Australia economic analysis forecasts an additional 200 foreign vessels will arrive in Australia as a direct result of these Olympics, hence government and industry's focus on developing the NT's capacity to meet extra demand.



Darwin Waterfront master plan

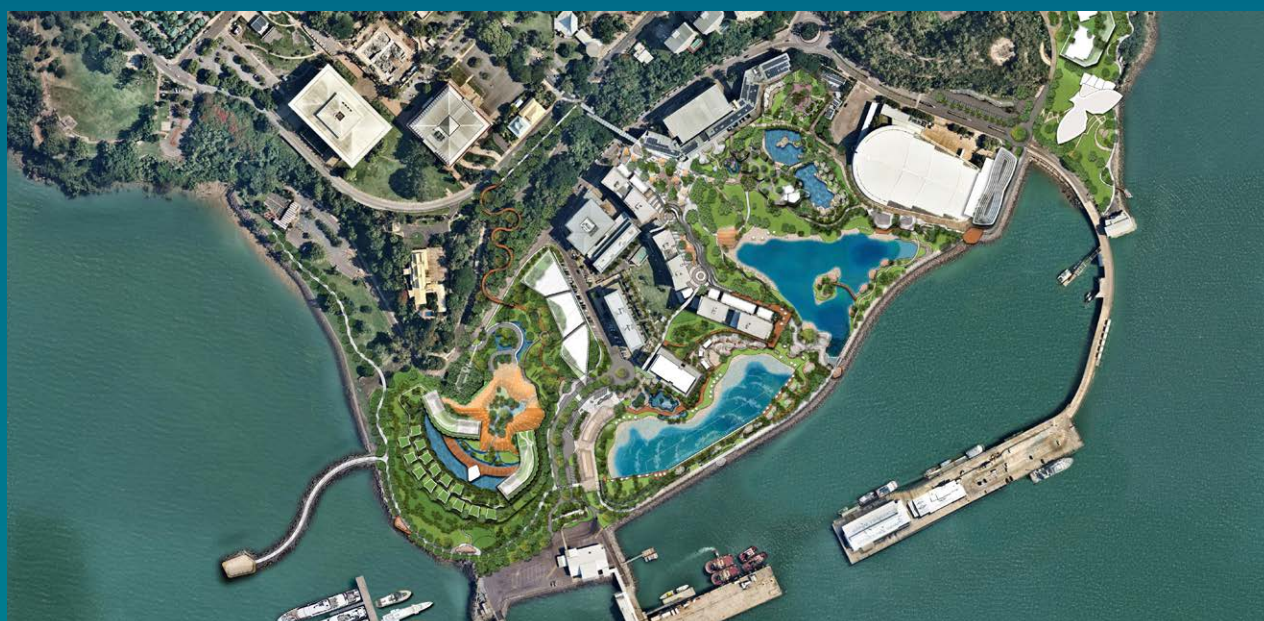
In 2022 the Darwin Waterfront Corporation (DWC) released a \$200 million development proposal for the Darwin City Waterfront.

The current precinct is a vibrant mixed-use development comprising residential apartments and tourist accommodation, commercial real estate, a convention centre, aqua park, restaurants and parkland.

The master plan expands the existing central precinct, proposing additional waterfront pools, an entry plaza and expanded lawns, a tropical lagoon, a surf facility and Convention Centre hotel. The master plan also proposes two additional precincts, northern and southern.

The northern precinct will host the Larrakia Cultural Centre, as well as a foreshore walk and residential village. In September 2022, Larrakia Development Corporation, representing Darwin's Traditional Owners, finalised an agreement with the NT Government granting land on Stokes Hill to develop the Cultural Centre.

Plans for the southern precinct include a luxury resort, botanical gardens, spa, mixed use development, adventure playground and potentially a superyacht berthing facility. DWC is proposing that the master plan be funded by extending the National City Deals Program to convert the Darwin Waterfront into a leading tourism destination in the NT and Australia.





Developing local capability and capacity

The NT Government will work with stakeholders to ensure that Territory businesses are ready to take advantage of an expanding maritime industry.

The Maritime Industry Development Plan has identified the following key actions under this focus area to achieve its vision over short, medium and long-term timeframes. These timeframes are defined as:



Short-term



Medium-term



Long-term

	Action	Time-frame	Lead agency	What success looks like
3.1	Undertake a business capability gap analysis and development strategy	Short-term	DITT (Industry Strategy)	Strategy completed and incorporated in DITT business plan.
3.2	Develop a comprehensive workforce strategy	Short-term	DITT (Industry Strategy)	Current and future industry workforce demands identified and forecasted, with a clear strategy established to address skills shortages and demands.
3.3	Work with the Australian Government to enhance competitive access for local companies to Department of Defence procurement, including maritime	Medium-term	DCM&C (Defence NT)	An increase in Territory related businesses conducting work on Royal Australian Navy, Australian Border Force vessels and visiting allied vessels, including through the Regional Maintenance Centre North.
3.4	Support industry advocacy and collaboration of the Maritime Industry Council within the NT Chamber of Commerce	Short-term	DITT (Business & Workforce)	Maritime Industry Council established as a self-sustaining and leading voice for the Territory maritime industry.
3.5	Continue to engage with training providers and other stakeholders on opportunities to deliver in-demand maritime qualifications and micro-credentials	Ongoing	DITT (Business & Workforce)	Priorities identified and acted upon to deliver in-demand training.
3.6	Increase capacity and capability of the NT to plan for and respond to marine oil spills.	Short-term	DEPWS	The Territory's oil spill response framework, capability and tools are significantly enhanced.



Home grown capability

The Territory maritime industry could double over the next 10 years as a result of catalytic investments in the Darwin Ship Lift Facility, Marine Industry Park and Middle Arm Sustainable Development Precinct. But this growth will require a capable local ecosystem of NT businesses that can support the industry's growth. Fortunately, Territory businesses big and small are ready to take on the challenge.

According to a statement of capacity released in 2024 by the NT Government and Industry Capability Network (ICN) NT, the Territory has 337 businesses, including 17 majority Aboriginal-owned businesses, to perform one or more of the 104 packages of work analysed for the maritime industry. Of the 104 packages of work, there were only 9 that were identified as having a capability gap of 2 or less businesses sitting with them, strengthening the evidence that NT businesses have the capability (but potentially lack the capacity) to meet the demands of the seafaring and onshore maritime industry.

DITT have commissioned business capability and workforce development strategies. These will identify how best to help the local maritime industry take advantage of predicted growth and maximise the proportion of new work won by local small to medium-sized businesses (SMEs).

Case study: Northtrack Machinery

Northtrack Machinery is a local mechanical services company that sees enormous opportunities for growth in the coming years.

Specialising in the marine services, defence, minerals and oil and gas sectors, Northtrack recently expanded its operations from a 5,900 m² workshop to 22,300 m². Its workforce has grown from 15 employees and 3 apprentices to 25 employees and 11 apprentices. The company expects to grow to 45 staff by the time the Darwin Ship Lift Facility comes online.

Northtrack sees potential for a common user work area with quay line access separate to but connected with the Ship Lift Facility. Northtrack would like to see this facility accommodate space for registered training organisations (RTOs), a 3D hybrid printer to support repair and maintenance works and access for Darwin-based SMEs.

.....

"Darwin's marine services and defence support industry is highly collaborative. We've been able to grow thanks to cooperation with other local industry. There's a real opportunity to build on these partnerships by developing a common user facility - separate to the Ship Lift - that can support the defence work that's coming, and provide a space for RTOs to develop the workforce."

.....

Darren Diwell, Managing Director, Northtrack Machinery





Workforce

A skilled, stable and available workforce is a critical component of economic development, but also a key challenge. Worker shortages, high wage costs and large peaks and troughs in demand for skilled workers are a by-product of the Territory's resources-driven economy. This is compounded by changing industry conditions such as the widespread adoption of technology and automation.

Maritime specific training in the NT is delivered by a number of institutions including:

Seafood and Maritime Industry Training	Australian Maritime Security Authority
Darwin Maritime Academy (Casuarina Senior College)	DMS Maritime
Charles Darwin University	ERGT Australia
Australian Maritime and Fisheries Academy	Australian Volunteer Coast Guard Association
Nhulunbuy High School	

A 2020 report by Deloitte, commissioned by the Industry Skills Advisory Council Northern Territory (ISACNT), emphasised that training institutions needed to be more adaptive and flexible to accommodate the rapid pace of technological change. Through its discussions with industry stakeholders, Deloitte identified the following:

-  demand for tradespeople and technicians with advanced qualifications
-  demand for skilled technicians and tradespeople in the NT
-  demand for investment in maritime industry advanced trade training in the NT
-  businesses cannot fulfil their workforce requirements and are reliant on fly in fly out (FIFO) workers and skilled migration.

Multiple stakeholders consulted through Deloitte's demand analysis identified opportunities in the maritime industry in Darwin, but felt that further development of local workforce capability was essential in order to capitalise on these opportunities.

In its 2017 Naval Shipbuilding Plan, the Australian Government made clear that a skilled workforce is critical to the success of the National Naval Shipbuilding Enterprise. The Naval Shipbuilding College (NSC) was established in 2018 to provide a suitably skilled and qualified Australian workforce to meet industry's needs in delivering Australia's continuous naval shipbuilding program.

The College operates a hub-and-spoke model that enables students to undertake courses through NSC-approved registered training organisations or higher education providers across Australia. Charles Darwin University (CDU) is one of these providers, having had a relationship with the College since its founding in 2018. The NT Government also has an MOU with the College.

DITT is developing a maritime workforce strategy to support the future needs of the industry, a key deliverable under the MIDP.





Case Study: Mick's Ally Fab

Mick's Ally Fab (MAF) is a local steel fabrication company. The company started in 2008 as a sole operator but has grown into a thriving enterprise with more than 20 employees and a fully-equipped 840 m² workshop in Winnellie.

The company provides fabrication services to a variety of industries including defence, oil and gas, heavy marine and commercial fishing and can provide off-site and mobile repairs.

MAF specialises in hull repairs and vessel modifications. It has become an integral part of the naval supply chain, delivering repairs to Armidale Class Patrol Boats in partnership with Thales. MAF holds both DNV Certification and ISO Accreditation, and works with aluminium and stainless steel, exotic metals, copper and nickel. MAF also offers design and 3D modelling through its in-house drafting services.

"With a huge pipeline of major projects over the next 5 to 10 years, Darwin is a land of opportunity for SMEs. To ensure we have a workforce that's prepared, we're working with schools to provide a pathway for apprentices to join our expanding team"

– Michael Carey, Founder, Mick's Ally Fab



Stimulating growth in the regions

Many of the Territory's regional and remote communities rely on the maritime industry for transportation, supply and sale of goods and services. Developing regional industry and support infrastructure will unlock new opportunities for regional communities.

The MIDP has identified the following key actions under this focus area to achieve its vision over short, medium and long-term timeframes. These timeframes are defined as:



Short-term



Medium-term



Long-term

	Action	Time-frame	Lead agency	What success looks like
4.1	Support Aboriginal Territorians to maximise the social and economic benefits from sea rights and interests	Ongoing	DCM&C	All marine related actions in the Aboriginal Land and Sea Action Plan are implemented and Aboriginal-led marine development is supported.
4.2	Advance a Gove Port Development Plan (master plan), including identifying opportunities to repurpose existing maritime infrastructure, to support the region's transition as Rio Tinto ceases its bauxite mining operations	Short-term	DIPL	Master plan developed which responds to emerging and diversified industry opportunities for East Arnhem.
4.3	Following completion of the Gove Port Development Plan, facilitate \$10 million NT Government investment and secure co-investment for marine and land side capital upgrades to commercial port facilities	Short to medium-term	DIPL and DCM&C	Industry diversification through enhanced common user infrastructure and increase local jobs and business growth.
4.4	Deliver the upgraded Gove Port Tourism Precinct in partnership with the Australian Government, Developing East Arnhem Limited and Traditional Owners	Short-term	DIPL and DCM&C	Increased cruise vessels, additional visits from private yachts and more opportunities for fishing and tourism charters. Project completion as per East Arnhem Destination Management Plan Action 10.
4.5	Complete safety works on existing Gove Port Old Public Wharf	Short-term	DIPL	Safety works on old public wharf completed in commercial precinct.
4.6	Work with the Australian Government's Department of Agriculture, Water and Environment to reinstate biosecurity first point of entry status for Melville Bay and Milner Bay for recreational and passenger vessels	Medium-term	Developing East Arnhem Limited in partnership with DCM&C	First point of entry status for Melville Bay and Milner Bay restored, facilitating increased marine traffic.
4.7	Investigate feasibility of barge landing and goods handling infrastructure in the communities of Milingimbi, Ramingining and Galiwin'ku to enable marine tourism	Ongoing	DIPL	Opportunity investigated and next steps identified.
4.8	Upgrade Wadey's barge landing and hardstand	Short-term	DIPL	All weather access improved, supporting accessibility, growth and community safety.



Stimulating growth
in the regions



Gove Port Development

With Rio Tinto's Gove Peninsula mining operations expected to close towards the end of the decade, the town of Nhulunbuy and other communities on the Gove Peninsula are preparing for a post-mining future. A key step in unlocking future growth opportunities will be the development and improvement of the Peninsula's port infrastructure to support new industry.



Gove Port, Northern Territory

Tourism precinct

The \$9 million Gonyangara (Gove Port) Tourism Precinct project will deliver infrastructure improvements to existing facilities adjacent to Gove Boat Club, to provide better facilities for recreational users, charter vessels, small cruise ships and other marine operators as well as opportunities to maximise local and Indigenous participation and support regional growth in East Arnhem.

The project is being funded by the Australian Government (through the Aboriginals Benefit Account to the Gumatj Corporation), Developing East Arnhem Limited, and the Territory Government.

Local Indigenous Business Enterprise Deltareef have completed construction of new toilet facilities, shade and seating to provide additional amenities for visitors and users. Additional works will include a new breakwater, with vehicle and pedestrian access, a new floating jetty for larger commercial and recreational vessels careening facilities that vessels can dock alongside for maintenance, and a washdown bay, car park upgrades and an entry structure. The project is expected to be completed in 2024 and will support existing operators, as well as provide opportunities for other businesses to expand into East Arnhem.

Once complete, the Gove Boat Club will manage operation of the precinct, with support and collaboration from Narrariyal Aboriginal Corporation, Gumatj Corporation, Developing East Arnhem Land and NT Government.

Investment underway: \$9 million



Commercial and industrial precinct

The Traditional Owner's Vision for the Gove Peninsula outlines an aspiration for diverse industry growth, enabled through improvements to key infrastructure including the Gove deep water port.

The existing port infrastructure and facilities and how these are adapted will be key to achieving this. The Gove Port Development Plan will set out how existing infrastructure and facilities at the Port can be improved and adapted to support various industry growth and guide the NT Government's \$10 million co-investment with private sector and other government partners.

Reflecting the underlying ownership of the land, Traditional Owners will lead decision making over how the Port is developed.

Investment underway: \$10 million

Case Study: Aboriginal Sea Company

The Aboriginal Sea Company (ASC) was established in 2022 to facilitate participation of Traditional Owners in commercial fishing and aquaculture industries. The organisation's development is a centrepiece of the Blue Mud Bay Implementation Action Plan.

The ASC is governed by a board comprising equal representation from the Northern, Tiwi and Anindilyakwa Land Councils with traditional ownership of Sea Country, as well as independent industry experts chosen by the Land Council representatives.

The ASC represents a new era of economic empowerment for Aboriginal Territorians, creating jobs and unlocking opportunities for greater participation and ownership by Traditional Owners in commercial fishing, aquaculture and other marine-related industries.

Creating employment opportunities for coastal communities will be crucial. The ASC will look to partner with registered training organisations to upskill people in preparation. While the ASC's focus is squarely on the commercial fishing industry, its remit will evolve and expand into the future.

.....
"The ASC intends to drive Aboriginal ownership and participation throughout the fishing industry value chain. It will not only provide the opportunity for more jobs, it will also enable Aboriginal people to implement profitable and sustainable fishing policies and drive greater self-determination".
.....

– Robert (Bo) Carne, CEO, Aboriginal Sea Company





Barge infrastructure upgrades

There are 14 barge landings along the NT's coastline. These barge landings are on Aboriginal land and are managed by land councils or the Office of Township Leasing.

Sustained operations of barge landings is important in the Territory as they are heavily relied upon by remote communities for food, equipment, commodities, and medical supplies. Most barge landings are on island communities with no alternate means of land transport. Coastal communities are often inaccessible by road during the wet season.

In order to maintain functionality, several barge landings are receiving infrastructure upgrades to improve all weather access to support accessibility, growth, and community safety. This investment is listed to the right.

Investment underway:

Galiwin'ku - barge landing upgrade \$900K

Gapuwiyak - barge landing and goods handling facility upgrades \$2M

Wadeye - barge landing and hardstand upgrades \$2.5M

Ramingining - \$900K to improve barge landing, and to seal the road for all weather access

Photo credit: Sea Swift



Case study: Sea Swift

Sea Swift is a regional leader in the marine transport industry, delivering shipping services throughout Northern Australia since 1987. Its fleet of purpose-designed vessels deliver vital supplies to more than 50 remote island and coastal communities and mine sites across the NT and North Queensland.

Sea Swift's services include:

- general cargo
- project and charter services
- mothershipping
- defence
- fuel
- engineering
- adventure cruises.

As one of the largest employers in North Australia with over 400 staff, Sea Swift continues to grow, forging new markets and strengthening existing ones. The company is ideally positioned to support, assist and deliver to all customers in the region, from individuals to large national and international corporations. It provides a fully integrated 'depot to door' service that incorporates the all important 'last mile' access to customers, wherever they are located across the remote north.

Sea Swift also makes a significant contribution to the employment and development of local communities, including Aboriginal and Torres Strait Islander people, and supports regional development and growth in the remote communities it serves by providing high-quality, reliable shipping services.

"Darwin is strategically positioned as Australia's gateway to Asia and vice versa, however it also offers extensive opportunities within northern Australia. The port's location in relation to Sea Swift's freight routes allows us to continue to supply vital goods and services to remote communities across the north".

– Dwayne Freeman, CEO, Sea Swift



NORTHERN TERRITORY

What's next

The NT Government will work with all stakeholders to achieve its vision and implement the actions under the MIDP.

How we'll measure success

The MIDP's key actions will be implemented across short, medium and long term timeframes. These timeframes are defined as:



Short-term



Medium-term



Long-term

The Territory Government is committed to providing public progress reports every 3 years in line with these timeframes. At each reporting period, the strategic actions will be updated and refreshed to reflect evolving industry circumstances.

NT Government departments will publicly report progress against their individual actions as work advances.

Acronyms

ABA	Aboriginal Benefits Account
ABF	Australian Border Force
AMC	Australian Marine Complex
ASC	Aboriginal Sea Company
ASV	Autonomous Surface Vessel
ASX	Australian Securities Exchange
AUV	Autonomous Underwater Vessels
CBD	Central Business District
CDU	Charles Darwin University
CEO	Chief Executive Officer
CODA	Centre of Decommissioning Australia
DCM&C	Department of the Chief Minister and Cabinet
DEPWS	Department of Environment, Parks and Water Security
DIPL	Department of Infrastructure, Planning and Logistics
DITT	Department of Industry, Tourism and Trade
DWC	Darwin Waterfront Corporation
FIFO	Fly in Fly out
FLNG	Floating Liquefied Natural Gas
FTE	Full Time Equivalent
GSCP	Global Supply Chain Program
GSP	Gross State Product
GST	Goods and Services Tax
GVA	Gross Value Added



GVP	Gross Value of Production
ICN NT	Industry Capability Network Northern Territory
ISACNT	Industry Skills Advisory Council Northern Territory
ISO	International Organization for Standardization
LNG	Liquefied Natural Gas
LPG	Liquefied Petroleum Gas
MAF	Mick's Ally Fab
MASDP	Middle Arm Sustainable Development Precinct
MIDP	Maritime Industry Development Plan
MIP	Marine Industry Park
MOF	Module Offloading Facility
MOU	Memorandum of Understanding
NAIF	Northern Australia Infrastructure Facility
NERA	National Energy Resources Australia
NT	Northern Territory
NTG	Northern Territory Government
OPV	Offshore Patrol Vessel
RAN	Royal Australian Navy
RMC	Regional Maintenance Centre
RMP	Regional Maintenance Provider
TERC	Territory Economic Reconstruction Commission
TEU	Twenty-Foot Equivalent Unit
USA	United States of America

Disclaimer

The Northern Territory of Australia, acting through the Department of Industry, Tourism and Trade, has exercised due care and skill in preparing and compiling the information and data in this publication. While all care has been taken to ensure that the information contained in this publication is true and correct at the time of publication, it is not intended to be relied on as a comprehensive representation of technical or scientific advice or used for commercial purposes. The Territory gives no warranty or assurances as to the accuracy of the information contained in the publication and accepts no direct or indirect liability for reliance on its content, including liability for negligence and for any loss, damage, injury, expense or cost incurred by any person directly or indirectly as a result of accessing, using or relying on any of the content of this publication to the maximum extent permitted by law.

Northern Territory Government

t. +61 8 8999 6882

e. industry.strategy@nt.gov.au

