

12 February 2019

## TRANSURBAN 1H19 PROPORTIONAL EBITDA UP 9.8%

### 1H19 highlights:

- 376,000 hours in average workday travel-time savings from July to December 2018<sup>1</sup>
- Average daily traffic (ADT) grew by 2.7%<sup>2</sup>
- Linkt Assist team established to help customers in hardship
- NorthConnex tunnelling complete with paving and mechanical-and-electrical work underway
- 495 Express Lanes Northern Extension project development framework agreed with VDOT
- Raised \$4.8 billion of new equity to support the WestConnex acquisition
- FY19 distribution guidance reaffirmed at 59.0 cps, growth of 5.4% over FY18
- 1H19 distribution of 29.0 cents per security (cps)
- Statutory profit of \$145 million
- Proportional toll revenue increased by 9.3% to \$1,286 million<sup>3</sup>
- Underlying cost growth of 2.7% excluding new assets. This reduces to 1.5% growth excluding foreign exchange
- Proportional earnings before interest, tax, depreciation and amortisation (EBITDA) increased by 9.8% to \$1,001 million<sup>4</sup>
- Free cash flow of \$715 million

Transurban Chief Executive Officer, Scott Charlton highlighted the company's focus on delivering its committed pipeline of projects.

"Transurban employees are working to deliver our nine committed projects safely and successfully over the next five years," Mr Charlton said.

Mr Charlton said that along with delivering the projects, Transurban would continue to focus on enhancing customer and community offerings.

Customers had benefitted from reduced and aligned fees and initiatives to help them avoid enforcement, he said.

### Key network activities

#### Sydney

- NorthConnex tunnelling complete, opening scheduled for 2020
- Linkt Trip Compare online tool launched, promoting informed customer decisions
- New M4 tunnels (M4 East) scheduled to open in Q4 FY19
- New M5 excavation complete

<sup>1</sup> Source: TomTom data (Australia and Montreal) and Regional Integrated Transportation Information System data (GWA).

<sup>2</sup> ADT includes traffic numbers for A25 and M4 prior to Transurban ownership and is shown for comparison purposes. Excluding A25 and M4, ADT increased by 2.7%.

<sup>3</sup> Excluding A25, M4 and additional M5 West ownership, toll revenue increased by 4.5%.

<sup>4</sup> Excluding A25, M4 and additional M5 West ownership, EBITDA increased by 4.4%.

Classification

Public

#### Transurban Group

Transurban International Limited  
ABN 90 121 746 825

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- WestConnex acquisition and financial close achieved with integration progressing as forecast
- Proportional toll revenue increased by 7.7% to \$513 million<sup>5</sup>
- ADT increased by 2.1% to 821,000 trips, growth seen across all assets<sup>6</sup>
- EBITDA grew by 8.2%<sup>7</sup>
- Average workday traffic increased by 1.9% and average weekend/public holiday traffic increased by 2.3%
- Car traffic increased by 2.3% and large vehicle traffic was flat, impacted by completion of tunnelling of New M4 tunnels, New M5 and NorthConnex

“In Sydney, we achieved financial close on WestConnex and the integration program is progressing on track. WestConnex, once construction is completed, will be a critical component to the broader Sydney road network and will make a significant contribution to easing congestion and improving travel times”, Mr Charlton said.

“At NorthConnex, all tunnelling works are now complete with paving and mechanical-and-electrical works underway.”

## Melbourne

- Customers are continuing to experience improved travel-times post the completion of State works on the CityLink-Tulla Widening project
- Incident-response services expanded to the West Gate Bridge with Transurban now responsible for 40km of Melbourne’s road network
- Proportional toll revenue increased by 5.6% to \$409 million inclusive of impact from fee reductions to customers
- ADT increased by 4.6% to 858,000 transactions
- EBITDA increased by 5.4%
- Average workday traffic increased by 3.9% and average weekend/public holiday traffic increased by 6.1%
- Car traffic increased by 4.0% and large vehicle traffic increased 7.2%

“Significant progress has been made on the West Gate Tunnel Project with over 3.4 million working hours now complete and delivery of the first tunnel boring machine to site. The project will generate more than 6,000 jobs through the course of construction,” Mr Charlton said.

“We are also continuing to see travel-time improvements in both directions on CityLink post completion of the CTW State works. Drivers are now experiencing travel-time savings of between 30 and 50 per cent for trips between Bulla Road and the Bolte Bridge during peak periods.”

## Brisbane

- Logan Enhancement Project progressing with new ramps open at Logan and Wembley Road interchange, improving travel-time reliability and safety
- Inner City Bypass upgrade complete with travel-time savings, reduced congestion and improved incident-response times for customers

<sup>5</sup> Excluding M4 and additional M5 West ownership, toll revenue increased by 3.0%.

<sup>6</sup> Excluding M4, ADT increased by 2.3%.

<sup>7</sup> Excluding M4 and additional M5 West ownership, EBITDA increased by 3.5%.

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- Incident-response motorcycle trial underway, providing quicker response times in periods of congestion
- All motorway lanes opened on Gateway Upgrade North from January 2019
- Proportional toll revenue increased by 1.7% to \$204 million inclusive of impact from fee reductions to customers
- ADT increased by 0.3% to 409,000 trips impacted by disruption from construction activities on Gateway Upgrade North and Logan Enhancement Project, excluding Gateway and Logan ADT increased by 4.1%
- EBITDA grew by 2.4%
- Average workday traffic increased by 0.4% and average weekend/public holiday traffic decreased by 1.4%
- Car traffic decreased by 0.7% and large vehicle traffic increased 3.7%

“In Brisbane, the completion of the Inner City Bypass Upgrade project is resulting in reduced travel-times for customers and improved incident-response,” Mr Charlton said.

“All motorway lanes are also now open on the Gateway Upgrade North project which is providing a safer more efficient journey for customers.”

“Customers in Brisbane are seeing the benefits of the work Transurban has undertaken to improve fee arrangements and processes with a significant reduction in fees charged for the half.”

## North America

- 395 Express Lanes project over 50% complete with opening expected in FY20
- Agreement reached to advance new 95 Express Lanes ramp at Opitz Boulevard to provide improved access to one of the region’s largest retail hubs
- A25 integration substantially complete with new organisational structure in place
- Financial close expected on Fredericksburg Extension in 2H19
- Proportional toll revenue grew 42.9% to \$160 million<sup>8</sup>
- ADT increased by 1.4% to 147,000 trips<sup>9</sup>
- EBITDA increased by 53.1%<sup>10</sup>
- Rolling 12-month peak direction traffic of 3,043 vehicles per hour on the A25<sup>11</sup>
- Average workday toll revenue on the 95 Express Lanes increased by 10.8% to USD373,000. The average dynamic toll price for the quarter was USD8.81
- Average workday toll revenue on the 495 Express Lanes decreased by 0.4% to USD302,000. The average dynamic toll price for the quarter was USD5.52
- A25 ADT growth of 5.8% exceeding investment case

“In North America we are advancing extensions to the Greater Washington Area Express Lanes. The recently announced 495 Northern Extension project, combined with the 395 and Fredericksburg Extension projects, will result in a faster, more seamless trip for customers along our 105-kilometre network,” Mr Charlton said.

<sup>8</sup> Excluding A25, toll revenue in AUD increased by 12.6%.

<sup>9</sup> ADT includes traffic numbers for A25 prior to Transurban ownership and is shown for comparison purposes. Excluding A25 North America ADT decreased by 0.7%.

<sup>10</sup> Excluding A25, EBITDA increased by 8.4%.

<sup>11</sup> Peak direction on the A25 means southbound in the morning peak and northbound in the evening peak.

## Distribution and DRP

A distribution totalling 29.0 cps will be paid on 15 February 2019 for the six months ended 31 December 2018. This will consist of a 28.0 cps distribution from Transurban Holding Trust and controlled entities and a 1.0 cps fully franked dividend from Transurban Holdings Limited and controlled entities.

The Distribution Reinvestment Plan (DRP) will operate for this distribution payment. For further information on distributions and the DRP, visit the Investor Centre at [transurban.com](http://transurban.com).

## Outlook

Transurban reaffirms its distribution guidance of 59.0 cps for FY19.

## Market briefing

Transurban will provide a market briefing at 9.30am (AEDT) today, 12 February 2019. The market briefing will be webcast via the Transurban website at [transurban.com](http://transurban.com).

END



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*Note: Further details are provided in the Appendices and the Investor Presentation attached to this release.*

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Appendix 1:

Statutory results

	1H18 \$M	1H19 \$M
<b>Toll revenue</b>	1,131	1,298
Construction revenue	462	777
Other revenue	31	39
<b>Total revenue</b>	<b>1,624</b>	<b>2,114</b>
Employee benefits expenses	(92)	(108)
Road operating costs	(163)	(184)
Construction costs	(462)	(777)
Transaction and integration costs	-	(17)
Corporate/other expenses	(57)	(57)
<b>Total costs</b>	<b>(774)</b>	<b>(1,143)</b>
<b>Earnings before depreciation and amortisation, net finance costs, equity accounted investments and income taxes</b>	<b>850</b>	<b>971</b>
Depreciation and amortisation	(311)	(474)
Net finance costs	(362)	(394)
Share of net profits of equity accounted investments	17	(305)
Gain on revaluation of equity accounted investment	-	228
<b>Profit before income tax</b>	<b>194</b>	<b>26</b>
Income tax benefit	137	119
<b>Profit from continuing operations</b>	<b>331</b>	<b>145</b>

Movement in profit from continuing operations as a result of:

- \$121 million increase in EBITDA
- \$163 million increase in depreciation and amortisation mainly attributable to the consolidation of M5 West from 18 September 2018 and completion of projects including CTW
- \$32 million increase in net finance costs primarily attributable to foreign exchange losses and higher drawn debt to fund the development pipeline
- \$322 million decrease in share of net profit of equity accounted investments due to \$291 million of stamp duty and integration costs on the WCX acquisition and the consolidation of M5 West from 18 September 2018 (M5 West profits prior to this date were recorded through this line item)
- \$228 million increase due to the gain recorded on the M5 West consolidation
- \$18 million lower income tax benefit mainly due to once-off impact of prior period changes in US tax legislation and US tax losses recognised in the prior period partially offset by a current period, tax benefit relating to the higher tax carrying value of Legacy Way

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**Appendix 2:**

Proportional results

	<b>1H18 \$M</b>	<b>1H19 \$M</b>	<b>% change</b>
Toll revenue	1,176	1,286	9.3%
Other revenue	28	38	38.1%
<b>Total revenue</b>	<b>1,204</b>	<b>1,324</b>	<b>10.0%</b>
<b>Total costs</b>	<b>(293)</b>	<b>(323)</b>	<b>10.5%</b>
<b>EBITDA (excluding significant items)</b>	<b>911</b>	<b>1,001</b>	<b>9.8%</b>
Significant items <sup>12</sup>	-	(308)	-
<b>EBITDA</b>	<b>911</b>	<b>693</b>	<b>(24.0%)</b>

<sup>12</sup> 1H19 significant items includes A25 acquisition and integration costs (\$6m), M5 West investment related costs (\$8m) and WCX acquisition related costs (\$294m). There were no significant items in 1H18.

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**Appendix 3:**

Proportional results by segment (excluding significant items)

1H19	Sydney	Melbourne	Brisbane	North America	Corporate and other	Total
Toll revenue (\$M)	513	409	204	160	-	1,286
Other revenue (\$M)	14	12	4	7	1	38
<b>Total revenue (\$M)</b>	<b>527</b>	<b>421</b>	<b>208</b>	<b>167</b>	<b>1</b>	<b>1,324</b>
Total costs (\$M)	(109)	(59)	(62)	(65)	(28)	(323)
<b>EBITDA (excluding significant items) (\$M)</b>	<b>418</b>	<b>362</b>	<b>146</b>	<b>102</b>	<b>(27)</b>	<b>1,001</b>
<i>Toll revenue growth</i>	7.7%	5.6%	1.7%	42.9%	-	9.3%
<i>Traffic growth</i>	2.1%	4.6%	0.3%	1.4%	-	2.7%
<i>EBITDA growth (excluding significant items)</i>	8.2%	5.4%	2.4%	53.1%	-	9.8%

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**Appendix 4:**

Reconciliation of Statutory EBITDA to Proportional EBITDA

	1H18 \$M	1H19 \$M
<b>Statutory EBITDA</b>	<b>850</b>	<b>971</b>
Less: EBITDA attributable to non-controlling interest – ED	(14)	(15)
Less: EBITDA attributable to non-controlling interest – TQ	(85)	(88)
Less: EBITDA attributable to non-controlling interest – M5 West	-	(31)
Add: NWRG proportional EBITDA	94	94
Add: M5 West proportional EBITDA	66	29
Add: WCX proportional EBITDA	-	10
Less: Significant items incurred by equity accounted assets		(291)
Add: Toll and other revenue on A25 concessional financial asset recognised as financial income	-	13
<b>Proportional EBITDA</b>	<b>911</b>	<b>693</b>

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**Appendix 5:**

Reconciliation of Statutory Cash Flow from operating activities to Free Cash

	1H18 \$M	1H19 \$M
Cash flows from operating activities	486	552
Add back transaction and integration costs related to acquisitions	-	17
Add back payments for maintenance of intangible assets	46	66
Less debt amortisation of 100% owned assets	-	(1)
Less cash flow from operating activities from consolidated non-100% owned entities	(176)	(214)
Less allowance for maintenance of intangible assets for 100% owned assets	(24)	(32)
<i>Adjust for distributions and interest received from non-100% owned entities</i>		
ED distribution	30	27
M5 West distribution and term loan note payments	80	69
TQ distribution and shareholder loan note payments	75	73
NorthWestern Roads Group distribution	65	158
<b>Free cash</b>	<b>582</b>	<b>715</b>

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**Appendix 6:**

Traffic and revenue performance<sup>13</sup>

1H19	Proportional toll revenue (AUD) % change	ADT % change
Sydney	7.7%	2.1%
Melbourne	5.6%	4.6%
Brisbane	1.7%	0.3%
North America	42.9%	1.4%

<sup>13</sup> All percentage changes are to the prior corresponding period and are calculated in AUD.

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**Appendix 7:**

Traffic and revenue data

Asset	Ownership		1H18	1H19	% change
Hills M2	100%	Total Toll Revenue (\$AUDm) (net of GST)	\$152	\$157	4.0%
		Average Daily Trips ('000)	133	137	3.4%
Lane Cove Tunnel/ MRE	100%	Total Toll Revenue (\$AUDm) (net of GST)	\$50	\$52	3.5%
		Average Daily Trips ('000)	92	94	2.9%
Cross City Tunnel	100%	Total Toll Revenue (\$AUDm) (net of GST)	\$34	\$34	0.9%
		Average Daily Trips ('000)	39	39	0.5%
M1 Eastern Distributor	75.1%	Total Toll Revenue (\$AUDm) (net of GST)	\$74	\$76	3.1%
		Average Daily Trips ('000)	59	59	0.3%
M5 West Motorway	65.38% <sup>14</sup>	Total Toll Revenue (\$AUDm) (net of GST)	\$144	\$152	5.1%
		Average Daily Trips ('000)	155	159	2.4%
Westlink M7 <sup>15</sup>	50%	Total Toll Revenue (\$AUDm) (net of GST)	\$223	\$223	0.2%
		Average Daily Trips ('000)	189	193	2.0%

<sup>14</sup> Transurban reached financial close on acquiring additional equity interests of 8.24% and 7.14% in the M5 West Motorway on 18 September 2018 and 3 December 2018 respectively, taking its total equity interest to 65.38%.

<sup>15</sup> Average tolled trip length was 12.8 kilometres for 1H19 on Westlink M7.

Asset	Ownership		1H18	1H19	% change
M4 <sup>16</sup>	25.5%	Total Toll Revenue (\$AUDm) (net of GST)	N/A	\$54	N/A
		Average Daily Trips ('000)	137	139	1.5%
CityLink	100%	Total Toll Revenue (\$AUDm) (net of GST)	\$388	\$409	5.6%
		Average Daily Transactions ('000)	820	858	4.6%
Gateway Motorway	62.5%	Total Toll Revenue (\$AUDm) (net of GST)	\$112	\$113	1.4%
		Average Daily Trips ('000)	118	118	0.4%
Logan Motorway	62.5%	Total Toll Revenue (\$AUDm) (net of GST)	\$95	\$94	(1.5%)
		Average Daily Trips ('000)	171	167	(2.5%)
AirportlinkM7	62.5%	Total Toll Revenue (\$AUDm) (net of GST)	\$61	\$63	4.0%
		Average Daily Trips ('000)	61	64	4.8%
Clem7	62.5%	Total Toll Revenue (\$AUDm) (net of GST)	\$27	\$29	5.6%
		Average Daily Trips ('000)	28	29	2.4%
Legacy Way	62.5%	Total Toll Revenue (\$AUDm) (net of GST)	\$19	\$21	10.0%
		Average Daily Trips ('000)	19	21	7.0%

<sup>16</sup> Average tolled trip length was 5.6 kilometres for 1H19 on M4. Transurban acquired M4 on 27 September 2018. Toll revenue data prior to Transurban ownership is not included. 1H18 ADT is from the tolling recommencement date of 15 August 2017 to 31 December 2017 and includes numbers prior to Transurban ownership for comparison purposes.

Asset	Ownership		1H18	1H19	% change
Go Between Bridge	62.5%	Total Toll Revenue (\$AUDm) (net of GST)	\$6	\$7	1.6%
		Average Daily Trips ('000)	11	11	(0.2%)
95 Express Lanes	100%	Total Toll Revenue (\$USDm)	\$47	\$51	10.0%
		Average Daily Trips ('000)	50	50	0.1%
495 Express Lanes	100%	Total Toll Revenue (\$USDm)	\$40	\$40	(0.3%)
		Average Daily Trips ('000)	47	46	(1.5%)
A25 <sup>17</sup>	100%	Total Toll Revenue (\$CADm)	N/A	\$32	N/A
		Average Daily Trips ('000)	48	51	5.8%

<sup>17</sup> Transurban acquired A25 on 5 June 2018. Toll revenue data prior to Transurban ownership is not included. 1H18 ADT includes numbers prior to Transurban ownership and is shown for comparison purposes.

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**Appendix 8:**

Calculation of proportional toll revenue by asset

1H19	100% (\$M)	% Transurban Ownership	Proportional Toll Revenue (\$M)
Hills M2	\$157	100.0%	\$157
Lane Cove Tunnel/MRE	\$52	100.0%	\$52
Cross City Tunnel	\$34	100.0%	\$34
M1 Eastern Distributor	\$76	75.1%	\$57
M5 West Motorway <sup>18</sup>	\$152	65.38%	\$85
Westlink M7	\$223	50.0%	\$112
M4 <sup>19</sup>	\$54	25.5%	\$14
CityLink	\$409	100.0%	\$409
Gateway Motorway	\$113	62.5%	\$71
Logan Motorway	\$94	62.5%	\$59
AirportlinkM7	\$63	62.5%	\$39
Clem7	\$29	62.5%	\$18
Legacy Way	\$21	62.5%	\$13
Go Between Bridge	\$7	62.5%	\$4
95 Express Lanes (\$USD)	\$51	100.0%	\$51
495 Express Lanes (\$USD)	\$40	100.0%	\$40
A25 (\$CAD)	\$32	100.0%	\$32

<sup>18</sup> Transurban reached financial close on acquiring additional equity interests of 8.24% and 7.14% in the M5 West Motorway on 18 September 2018 and 3 December 2018 respectively, taking its total equity interest to 65.38%. Effective ownership for 1H19 was 55.86%.

<sup>19</sup> Transurban acquired M4 on 27 September 2018. Toll revenue data prior to Transurban ownership is not included.

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