



# Landside Port Charges Index

Insights | 2022

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Our principals and staff are experienced practitioners who have worked in and advised government and private sector clients about a range of commercial and economic issues. We have expertise in the fields of transport and regulatory economics; policy development and analysis; advising on commercial arrangements between government and the private sector; as well as arrangements between companies operating within regulated environments.

Our combined public and private sector experience means that we are well placed to provide our clients with a deep understanding of both the public and private sectors and the interface between them.

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# Australian Landside Port Charges: A 5-year snapshot.

Landside port charges across Australia's five major container ports have experienced significant growth in the five years from 2018 and 2022

ACCESS CHARGES  
INDEX

**389%**

INCREASE

ANCILLARY CHARGES  
INDEX

**148%**

INCREASE

PENALTY CHARGES  
INDEX

**70%**

INCREASE

## Key insights

- On average, terminal access charges increased by 298% between 2018 and 2022. Differentiated terminal charges for imports and exports were introduced around 2020 at most ports. Between 2020 and 2022, average terminal access charges for imports increased by 35%, compared to 40% for exports.
- Although access charges have increased every year, the rate of change has been slowing. Having said that, access charges have still gone up more than twice the inflation rate in 2022.
- Relative increases in access charges at the Port of Fremantle have been higher than other ports due to recent large percentage increases in charges in 2020 and 2021.
- Empty container park access charges are also included in the index. Average access charges at empty container parks increased by 719% between 2018 and 2022.
- Relative increases in average booking fees at stevedore terminals were less pronounced than empty container park fees but increased by an 199% between 2018 and 2022 across all ports.

Port of Adelaide experienced most significant growth in penalty charges over the period compared to other ports, albeit from a low base. Apart from in 2019, the highest penalty fees have been charged by Port of Fremantle.

Growth of ancillary charges was heavily influenced by progressive increases in the number of container stevedores applying weight amendment and side loader fees between 2018 and 2022.

# What are government agencies saying about landside port charges?

State governments around Australia have been concerned about the growth of landside port charges and have largely looked to national bodies to understand whether there is a need for market intervention. Policy makers have - rightly - wanted to better understand market dynamics and how overall supply chain costs for container freight have been changing. In a competitive market, increases in prices in one part of a supply chain can be offset by reductions in another. For example, before the COVID pandemic, global shipping rates were at historically low levels, meaning that while landside charges were increasing on one hand, cargo owners were benefiting from competition between shipping lines on the other.

The Australian Competition and Consumer Commission (ACCC) has an ongoing role of monitoring prices, costs and profits of container stevedores at major container ports around Australia. Landside port charges, and in particular terminal access charges, have been a key area of focus in recent years. In its most recent Container Stevedore Monitoring Report (2021), the ACCC found that greater competition between stevedores and consolidation of the global shipping industry led to a significant fall in stevedore quayside charges. They also noted that while quayside charges and revenue have fallen, stevedores' overall costs have also increased.

The ACCC acknowledged concerns expressed by various parties in the supply chain that imposing terminal access charges on transport operators is unreasonable because shipping lines should pay for all the costs incurred by the stevedores in providing their services. The ACCC's current position is that stevedores are not making excessive returns, and that given stevedores provide landside services to transport operators, it is efficient for them to levy fees and charges on transport operators for those services (providing that they are not extreme).

More recently, terminal access charges have been considered by the Productivity Commission (PC) in its review of Australia's Maritime Logistics System - Lifting Productivity at Australia's Container Ports: between water, wharf and warehouse, draft report (2022).

In its draft report, the PC has adopted a different position to that of the ACCC, finding that "market structure and the lack of effective direct or indirect constraint on the fees charged by container terminal operators to transport operators means that the container terminal operators have substantial market power with regard to transport operators" (p.192). The PC has recommended that terminal access charges and other fixed fees for delivering or collecting containers from a terminal should be regulated so that they can only be charged to shipping lines and not to transport operators. The PC is also recommending that this should be complemented by powers that allow state and territory government regulators to monitor other, flexible fees to ensure that they are used to create efficient incentives for transport operators rather than to offset any lost revenue from fixed fees.

The PC has also made other recommendations that could have a significant impact on the container freight sector, including repealing Part X of the Competition and Consumer Act 2010 and discontinuing the exemption of shipping contracts from the unfair terms provisions in Australian Consumer Law.

If the PC's recommendations are implemented by the Australian Government, this could dramatically change landside port charges.

Watch this space - we will provide regular updates to the LCPI to help you understand how charges evolve in response to market dynamics and the actions of policy makers.



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# 2022 Landside Port Charges

## Access Charges, 2022

Port	Stevedores	Terminal Access Charge (Import Full)	Terminal Access Charge (Export Full)	Vehicle Booking System Slot Fee (Electronic)	Vehicle Booking System Slot Fee (Manual)	Direct Return of Empty Container Booking Fee (DREs)
Port Botany	Patrick	\$141.45	\$101.90	\$35.40	\$43.80	\$67.15
	DP World	\$131.60	\$105.90	\$31.00	\$38.90	\$38.00
	Hutchison	\$159.98	\$159.98	\$31.00	\$33.00	\$33.00
Port of Melbourne	Patrick	\$155.40	\$101.90	\$35.40	\$43.80	\$50.00
	DP World	\$144.70	\$105.90	\$31.00	\$38.90	\$38.00
	VICT	\$141.80	\$141.80	\$30.75	\$30.75	\$30.75
Port of Brisbane	Patrick	\$135.85	\$101.90	\$35.40	\$43.80	\$67.15
	DP World	\$128.90	\$105.90	\$31.00	\$38.90	\$38.00
	Hutchison	\$162.10	\$162.10	\$30.50	\$33.00	\$33.00
Port of Fremantle	Patrick	\$57.69	\$28.84	\$35.40	\$43.80	\$50.00
	DP World	\$45.00	\$45.00	\$33.00	\$38.90	\$36.00
Port of Adelaide	Flinders	\$112.50	\$79.50	\$23.63	\$23.63	\$23.63

## Ancillary Charges, 2022

Port	Stevedores	Weight Amendment Fee for Import Containers - Weigh and Adjustment charge	Side Loader Fee	Long Vehicle Fee
Port Botany	Patrick	\$236.95	\$64.40	\$51.55
	DP World	\$0.00	\$73.80	\$0.00
	Hutchison	\$100	\$72.00	\$0.00
Port of Melbourne	Patrick	\$236.95	\$64.40	\$0.00
	DP World	\$184.50	\$73.80	\$0.00
	VICT	\$120.00	\$67.00	\$0.00
Port of Brisbane	Patrick	\$236.95	\$64.40	\$51.55
	DP World	\$184.50	\$73.80	\$0.00
	Hutchison	\$100.00	\$60.00	\$0.00
Port of Fremantle	Patrick	\$236.95	\$64.40	\$0.00
	DP World	\$0.00	\$73.80	\$0.00
Port of Adelaide	Flinders	\$105.00	\$0.00	\$6.83

# Penalty Charges, 2022

Port	Stevedores	No Show Fee	Late Arrival/Wrong Timezone Fee
Port Botany	Patrick	\$221.50	\$100.00
	DP World	\$222.40	\$79.90
	Hutchison	\$140.00	\$68.00
Port of Melbourne	Patrick	\$221.50	\$85.00
	DP World	\$222.40	\$79.90
	VICT	\$205.00	\$79.50
Port of Brisbane	Patrick	\$221.50	\$85.00
	DP World	\$222.40	\$79.90
	Hutchison	\$140.00	\$68.00
Port of Fremantle	Patrick	\$221.50	\$85.00
	DP World	\$222.40	\$81.00
Port of Adelaide	Flinders	\$105.00	\$63.00





## Contact us.

For more information or to provide feedback on this report, please reach out to one of our LPCI team below



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