



Landside Port Charges Index

Insights | May 2023

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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: 2022–2023.

Landside port charges across Australia's five major container ports have continued to grow significantly from 2022 to 2023

ACCESS CHARGES
INDEX

18%

INCREASE

ANCILLARY CHARGES
INDEX

31%

INCREASE

PENALTY CHARGES
INDEX

32%

INCREASE

Key insights

- On average, Terminal Access Charges increased by 13% between 2022 and 2023. This was made up of an 11% increase in access charges for import containers and a 15% increase for export containers. The rate of increase has been slowing since charges were first introduced, but remains above the 7% inflation rate as of March 2023.
- On average, Late Arrival Fees charged by stevedores increased by 23% between 2022 and 2023, driving growth in the penalty charges index.
- The Port of Melbourne experienced the most significant growth in penalty charges over the period compared to other ports. This was driven by stevedores introducing new charges for weight misdeclaration and vehicle misdeclaration.
- Growth in the Access Charges Index has been highest at the Port of Adelaide. This was driven by a 30% increase in Terminal Access Charges between 2022 and 2023.

Based on latest available container throughput data, we estimate that a total of \$1.3 billion was spent on access charges in the 2021–2022 financial year.

Growth in the Ancillary Charges Index was highest at the Port of Fremantle. This was driven by the introduction of new Overweight Fees.

Insights into the 2023 Landside Port Charges Index.

What's New This Year?

We have updated our Landside Port Charges indices to reflect stevedores' revised charges for 2023.

According to the National Voluntary Guidelines for Stevedores, stevedore landside charges should not be changed any more than once a year. Updated charges were announced progressively by stevedores from late 2022, with new charges coming into effect following notification periods specified by the national guidelines.

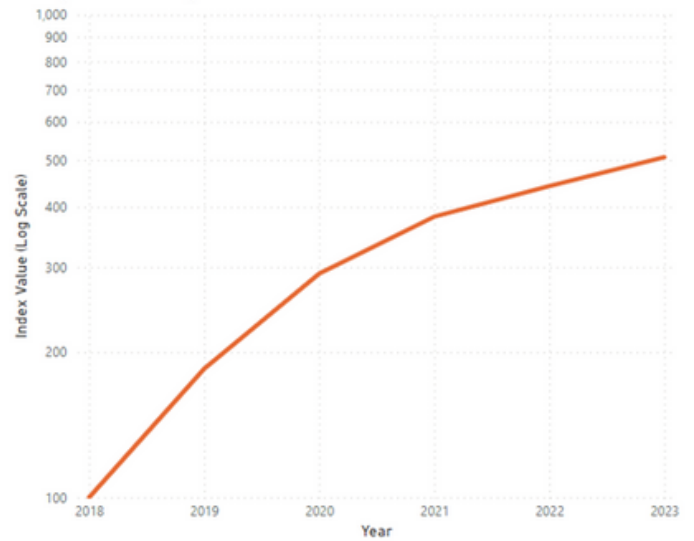
Charges have continued to increase, and stevedores have introduced various new charges. These can be seen in more detail in our interactive data visualisation dashboard. This shows our indices for access, penalty and ancillary charges, as well as 20 different individual charges for each port and stevedore from 2018 to 2023.

As well as incorporating the latest charges, we have also made some methodological improvements in our 2023 update. These include incorporating the new charges into our indices, and revisions to better reflect the true cost of accessing ports for Australian landside operators.

The Rate of Increase is Beginning to Slow Down

Whilst landside port charges are still increasing strongly, the rate of increase has slowed. The graph above right shows the increase in the access charge index, averaged across all ports. Charges increased by 101% from 2018-2019, and 18% from 2022-2023.

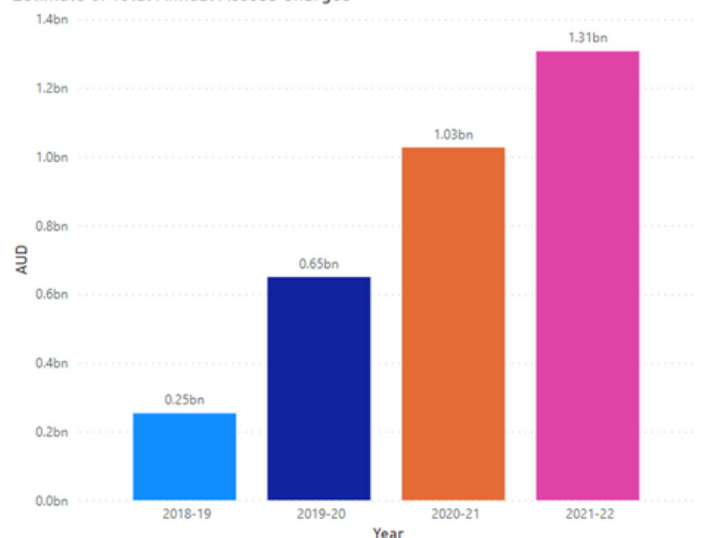
Average Access Charge Index



The Total Cost of Landside Charges Continues to Climb

We have calculated an estimate of the total port access charges paid by landside operators each year. These estimates are based on our data on container pathways and on container throughput data. Across the period of our index, total annual charges have grown considerably, now totalling over \$1.3 billion. This does not include ancillary and penalty charges also paid by landside operators.

Estimate of Total Annual Access Charges





REPAIR WITH SOFTENED STEEL ONLY

9
2



Hapag-Lloyd

REPAIR WITH SOFTENED STEEL ONLY



HLBID
4587

NET GROSS
ARE

Insights into the 2023 Landside Port Charges Index.

What are Policy Makers Saying?

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. In its most recent Container Stevedore Monitoring Report (2022), the ACCC found that supply chain disruption had continued into 2022, and this had contributed to inflation in Australia through higher prices for imported goods. The ACCC also found that there was significant scope for productivity improvements at Australian ports, which was a sentiment echoed by the Productivity Commission (PC) in their 2023 inquiry report into Australian maritime logistics. The PC's report also highlighted the potential need for regulation to remedy an inefficient level of competition in the relationship between stevedores and transport operators, given that transport operators often have little or no choice between terminal operators.

The latest Stevedore Monitoring Report also reveals that stevedores' operating profit margins have increased significantly, coinciding with the COVID-19 pandemic, and that the pandemic appears to have contributed to less intense price competition between stevedores. The ACCC has indicated that it will continue to monitor stevedores' charges and financial performance, and if profits remain elevated will consider whether any policy or regulatory responses are warranted.

Both the ACCC and PC have continued to argue for the repeal of Part X of the Competition and Consumer Act 2010.

Part X permits shipping lines to enter into agreements with each other about commercial matters such as the vessels to be used, and the quantity and kinds of cargo carried on particular trade routes. Part X allows operators to make these agreements without risk of breaching competition laws, as long as the agreements are appropriately registered.

Concern Over Container Detention Charges

Both the recent PC and ACCC reports highlight concerns among policy makers and industry around container detention charges. These are charges levied by shipping lines as a 'late return fee' if their containers are not returned on time. Concern has arisen due to reports from cargo owners and transport operators indicating these charges have become more onerous in recent years, and are being charged in circumstances that could be deemed unreasonable. Both the ACCC and PC have identified the need for regulation in this area, citing the targeting of unfair detention charge practices by the United State Federal Maritime Commission as an example. NineSquared has prepared an insights paper on container detention charges, which can be viewed at the links below.

[Access the 2023 LPCI Dashboard.](#)

[View the 2023 Methodology Paper and the Report on Container Detention Charges](#)

2023 Landside Port Charges

Access Charges, 2023

	Stevedore	Terminal Access Charge (Import Full)	Terminal Access Charge (Export Full)	Weighing Fee	Energy Surcharge	Maritime Security Levy
Port Botany	Patrick Sydney	155.2	123.2			
	DP World Sydney	143.2	115.2		5.3	
	Hutchison Sydney	173.03	173.03			
Port of Melbourne	Patrick Melbourne	170.5	136.4			
	DP World Melbourne	157.4	115.2	13.6	5.3	
	VICT Melbourne	177.48	177.48	35		15.25
Port of Brisbane	Patrick Brisbane	149.05	119.25			
	DP World Brisbane	140.2	115.2	13.6	5.3	
	Hutchison Brisbane	175	175			
Port of Fremantle	Patrick Fremantle	61.54	30.76			
	DP World Fremantle	48	48	13.6	2.5	
Port of Adelaide	Flinders Adelaide	146.5	103.5	20.5		

Access Charges, 2023

	Stevedore	Vehicle Booking System Slot Fee (Electronic)	Vehicle Booking System Slot Fee (Manual)	Stack Run In and Out Fee (Full)	Stack Run In and Out Fee (Empty)	Direct Return of Empty Container Booking Fee (DREs)
Port Botany	Patrick Sydney	38.85	48.05	13.75	13.75	85
	DP World Sydney	35.9	42.4	35.9	12.9	46
	Hutchison Sydney	35	37	35	10	35
Port of Melbourne	Patrick Melbourne	38.85	48.05	13.75	13.75	58
	DP World Melbourne	35.9	42.9	35.9	12.9	46
	VICT Melbourne	37.15	37.15		18.75	37.15
Port of Brisbane	Patrick Brisbane	38.85	48.05	13.75	13.75	78
	DP World Brisbane	35.9	42.4	35.9	12.9	46
	Hutchison Brisbane	35	37	27	21.6	35
	Patrick Fremantle	46.06	56.95	16.25	16.25	55
	DP World Fremantle	39	42	39	12.9	42
Port of Adelaide	Flinders Adelaide	38.50	38.50	38.50	38.50	70.00

Ancillary Charges, 2023

Port	Stevedores	Overweight Fee	Side Loader Fee	Long Vehicle Fee
Port Botany	Patrick		70.65	56.5
	DP World		80.4	
	Hutchison	100	77	40
Port of Melbourne	Patrick		70.65	
	DP World	201.1	80.4	
	VICT		78.95	
Port of Brisbane	Patrick		70.65	56.6
	DP World	201.1	80.4	
	Hutchison	100	65	
Port of Fremantle	Patrick		70.65	
	DP World	201.1	80.4	
Port of Adelaide	Flinders			8.50

Penalty Charges, 2023

Port	Stevedores	No Show Fee	Late Arrival/Wrong Timezone Fee	Vehicle Misdeclaration	Weight Amendment Fee
Port Botany	Patrick	100	50	274.25	259.95
	DP World	100	50	240	
	Hutchison	100	50	100	0
Port of Melbourne	Patrick	243	93.25	274.25	259.95
	DP World	289.1	103.9	240	232
	VICT	239	88.75		120
Port of Brisbane	Patrick	243	93.25	274.25	259.95
	DP World	289.1	103.9	240	
	Hutchison	150	150	100	0
Port of Fremantle	Patrick	243	93.25	274.25	259.95
	DP World	289.1	105.3	240	
Port of Adelaide	Flinders	157.7	94.5		110.25



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