



Landside Port Charges Index

Insights | 2024

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NineSquared is an economics, commercial advisory and strategy consulting firm founded in 2013. We apply economic frameworks and intelligent commercial thinking to help our clients make great, evidence-based decisions about their strategy, investments and projects.

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 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 in regulated environments.

Our 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: 2023-2024

Landside port charges across Australia's capital cities continued to grow over the last year, with most charges increasing more in 2024 compared to the previous year.

ACCESS CHARGES
INDEX

22%

INCREASE

ANCILLARY CHARGES
INDEX

26%

INCREASE

PENALTY CHARGES
INDEX

33%

INCREASE

Key insights

- On average, **terminal access charges rose 19.7% from 2023**, driven by the average 20.6% increase in import access charges and an 18.6% increase in export access charges.
- Adelaide experienced the greatest absolute increase in average Terminal Access Charges, with operators paying \$40 more on average as compared to 2023.
- **Empty container park and vehicle booking system charges** continued to increase, **rising by an average of 20.9% and 25.0%** year-over-year, respectively.
- **Access charges in Fremantle and Adelaide increased by 25%**. This was followed by Melbourne and Brisbane, which increased by 20% year-over-year.
- **Penalty charges in Adelaide increased by an average of 53%**, while **average ancillary charges in Melbourne surged by 77%**.

The three charges indices have grown by an average of 366% since 2018 when NineSquared first started tracking Landside Port charges. In the same period, consumer price index has grown by approximately 18%.

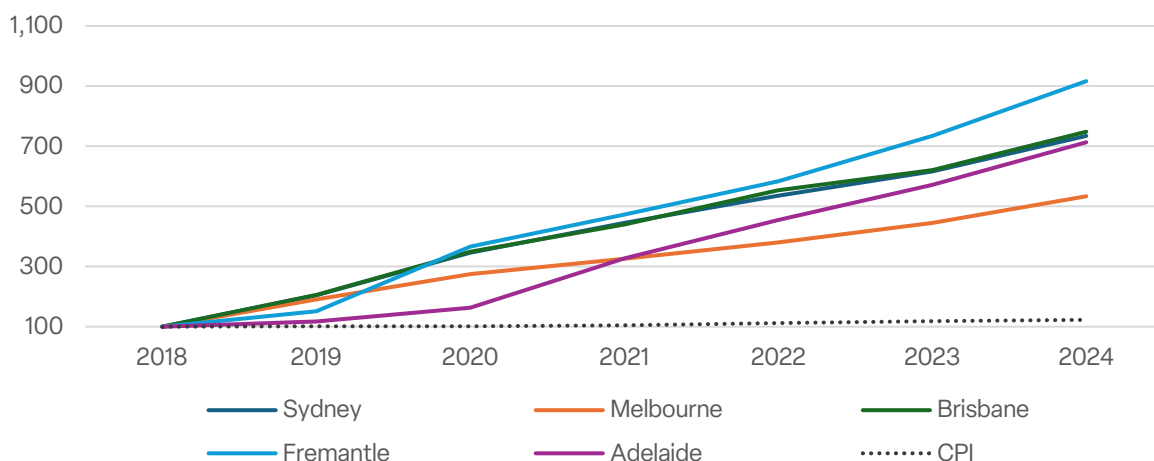
Increased landside charges do not appear to have translated to increased port productivity based on established measures. Although trade volumes have increased over the last decade, port productivity has remained largely stable.

Landside Port Charges: Recent Updates.

NineSquared has released its 2024 update to the Landside Port Charges Index to reflect price increases announced over the past year. Landside port charges across Australia’s capital cities continued to grow over the last year, with most charges increasing more in 2024 compared to the previous year.

Our main indicator, the Access Charges Index, grew by 22% from 2023-2024. A snapshot of our access charges index and a comparison of average terminal access charges by city can be seen below.

Access Charges Index by City (2018-2024)



While the magnitude of increases in access charges has been highest in Fremantle, its terminal access fees are much lower than east coast container terminals as the Western Australian Government controlled port authority has direct influence on stevedore landside pricing through terminal lease clauses.

We estimate that increases to Terminal Access Charges alone will generate additional costs of \$120 million in 2024 for Australian cargo owners, as compared to 2023.

Other landside charges have also grown substantially. Over the past year, the Ancillary and Penalty Charges indices grew by 26% and 37% respectively. Over the last year, average empty container access charges (captured in the Access Charges Index) increased by an average of 17% across Australia.

Landside Port Charges: Recent Updates.

Given the impact these increasing charges have on supply chains, they are of interest to industry and policy makers. Most countries including Australia are highly dependent on international trade for both supply of goods to consumers and generating export income for producers. Productive ports reduce transport costs, optimise supply chains and improve customer service for producers and consumers. Port and transport costs are particularly important for regional producers and impact on export competitiveness.

This year, along with an update to the LPCI, we have also released a short [discussion paper on container port productivity](#), and challenges and opportunities for improving it. The paper considers the wide range of ways that container port productivity can be measured. While Australian container ports have been successful in handling increasing trade volumes and productivity has improved over the past 30 years, over the past 10 years, productivity has been largely stable. Targeted improvements in landside productivity, such as truck backloading, could help to remove costs from supply chains that could offset increasing charges.

The current review of freight plans by the Commonwealth, Victorian and NSW governments provides an opportunity to develop a program of targeted improvements. Updates to freight policies and expansion of the National Freight Data Hub should also include a plan for addressing data gaps and developing a program to implement the data improvements recommended by various groups including the Productivity Commission. This will provide better insights into port performance and help to evaluate actions by government and industry to improve productivity.



MSC

IP
Interpool

Appendix: 2024 charges

2024 Landside Port Charges

Access Charges, 2024

Port	Stevedore	Terminal Access Charge (Import Full)	Terminal Access Charge (Export Full)	Vehicle Booking System Slot Fee (electronic)
Sydney	Patrick	190.15	133.35	44.70
	DP World	179.70	159.90	48.70
	Hutchison	196.61	183.30	42.00
Melbourne	Patrick	204.60	146.65	44.70
	DP World	190.80	175.70	48.70
	VICT	194.85	194.85	45.00
Brisbane	Patrick	186.30	128.20	44.70
	DP World	176.90	158.40	48.70
	Hutchison	199.84	184.88	45.00
Fremantle	Patrick	87.19	43.58	52.95
	DP World	50.40	50.40	58.40
Adelaide	Flinders	190.00	139.00	45.00

Access Charges, 2024 (cont.)

Port	Stevedore	Weighing Fee ¹	Energy Surcharge	Maritime Security Levy ²	Direct Return of Empty Container Booking Fee (DREs)
Sydney	Patrick				91.40
	DP World		6.04		50.20
	Hutchison				45.00
Melbourne	Patrick				62.35 ³
	DP World	14.80	6.04		50.20
	VICT	38.00		18.30	43.00
Brisbane	Patrick				83.85
	DP World	14.8.	6.04		50.20
	Hutchison				48.00
Fremantle	Patrick				59.15
	DP World	14.80	2.96		50.20
Adelaide	Flinders	22.50			83.75

¹Weighing fee refers to charges applied for weighing a container when it first accesses a stevedore's terminal and is different from overweight or weight amendment charges. This charge is also referred to as a Chain of Responsibility (WIM) charge by some stevedores.

²The Maritime Security Levy is charged by VICT to container operators on all laden containers and is applied to recover costs associated with complying with the current maritime security legislation.

³The DRE charge associated with Patrick in Melbourne refers to the booking fee for Cargolink.

Ancillary Charges, 2024

Port	Stevedore	Overweight Fee ¹	Side Loader Fee	Long Vehicle Fee
Sydney	Patrick		77.40	60.85
	DP World		88.00	
	Hutchison	100.00	85.00	50.00
Melbourne	Patrick		77.40	
	DP World	248.00	88.00	
	VICT	200.00	87.00	
Brisbane	Patrick		77.40	60.85
	DP World	248.00	88.00	
	Hutchison	100.00	75.00	45.00
Fremantle	Patrick		77.40	
	DP World	248.00	88.00	
Adelaide	Flinders			9.75

¹Overweight fee refers to charges applied to a container when it is found to be heavier than declared. This charge is different from weighing or weight amendment charges.

Penalty Charges, 2024

Port	Stevedore	No Show Fee	Late Arrival/ Wrong Timezone	Weight Amendment ¹
Sydney	Patrick	100.00	50.00	279.45
	DP World	100.00	50.00	232.00
	Hutchison	100.00	50.00	
Melbourne	Patrick	261.25	100.25	279.45
	DP World	310.80	113.20	232.00
	VICT	287.00	88.75	200.00
Brisbane	Patrick	261.25	100.25	279.45
	DP World	310.80	113.20	232.00
	Hutchison	170.00	68.00	
Fremantle	Patrick	261.25	100.25	279.45
	DP World	310.80	114.70	232.00
Adelaide	Flinders	189.00	113.50	253.50

¹Weight amendment fee refers to charges applied to a container when its weight is found to be different than declared. This charge covers the administrative cost for amending documentation and is different from weighing or overweight charges.

Penalty Charges, 2024 (cont.)

Port	Stevedore	Vehicle Misdeclaration
Sydney	Patrick	294.85
	DP World	296.00
	Hutchison	
Melbourne	Patrick	294.85
	DP World	296.00
	VICT	
Brisbane	Patrick	294.85
	DP World	296.00
	Hutchison	
Fremantle	Patrick	294.85
	DP World	296.00
Adelaide	Flinders	



Contact us.

Our team is always happy to talk.

Contact our team lead

Phil Bullock
Director
m. 0411 561 793
e. pbullock@ninesquared.com.au

Or find any of our team members contact details at

<https://ninesquared.com.au/people/>

Find out more.

Want more information about our freight expertise or just want to know about NineSquared?

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L11, 239 George Street, Brisbane QLD 4000

L9, 31 Market Street, Sydney NSW 2000

Postal Address: GPO Box 21, Brisbane QLD 4001

ABN 96 165 695 492

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