



Landside Port Charges Index

Insights | 2025

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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 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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Acknowledgements

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Australian Landside Port Charges: 2024-2025

While the New Year presents an opportunity to ‘start afresh’, challenges will continue for many businesses that rely on Australia’s container freight supply chain.

ACCESS CHARGES
INDEX

16%

INCREASE

ANCILLARY CHARGES
INDEX

7%

INCREASE

PENALTY CHARGES
INDEX

8%

INCREASE

Key insights

- On average, **terminal access charges rose 8.2% from 2024**, driven by the average 9.5% increase in import access charges.
- **Empty container park and vehicle booking system charges** continue to disproportionately increase, **rising by an average of 31.5% and 11.1%** year-over-year, respectively.
- **Sydney** experienced the biggest increase in access charges, with the **access charge index recording a 19% increase**.
- Average **penalty charges increased by 9.4% in Melbourne**, the greatest increase of the three major port cities.
- Ancillary charges at the **Port of Fremantle increased by 8.7%**. They’re now 6.5x what they were introduced at in 2019 but still less than similar charges at other major ports.

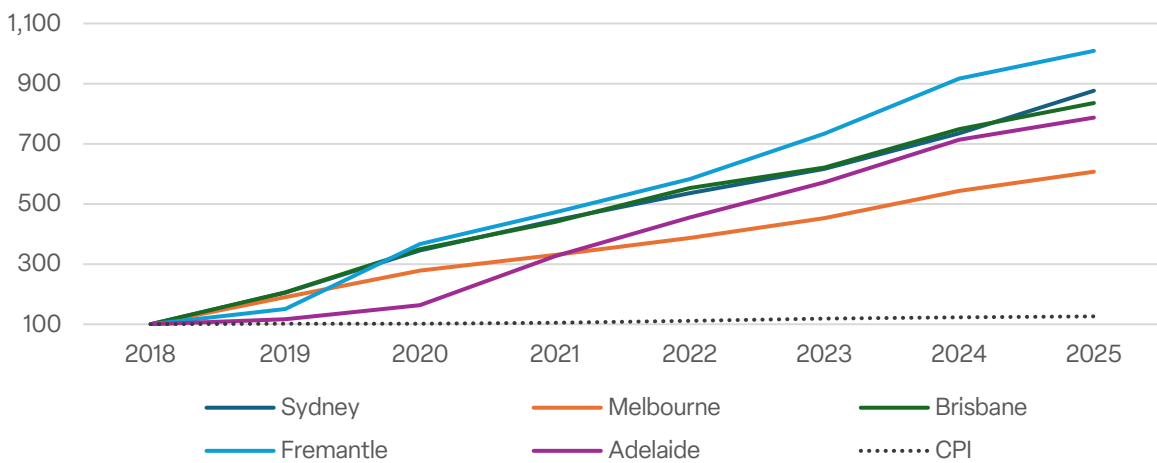
Recently, increases to landside port charges have far outpaced inflation. Access charges, the most significant, have increased an average of 792% since 2018 versus a growth of 29% experienced by CPI during the same time.

Access charges at Fremantle have increased the most in percentage terms since 2018 but are by far the lowest in absolute terms in Australia – with the next lowest being Brisbane.

Landside Port Charges: Recent Context & Regulatory Updates.

From our recent update of our Landside Port Charges Index, we found that Landside port charges across Australia’s capital cities have continued to grow, with container terminal access charges increasing by a national average of 21% over the previous year. Stevedore ancillary and penalty charges increased by 26% and 37% respectively while empty container park access charges increased by 17% across Australia.

Access Charges Index by City (2018-2025)



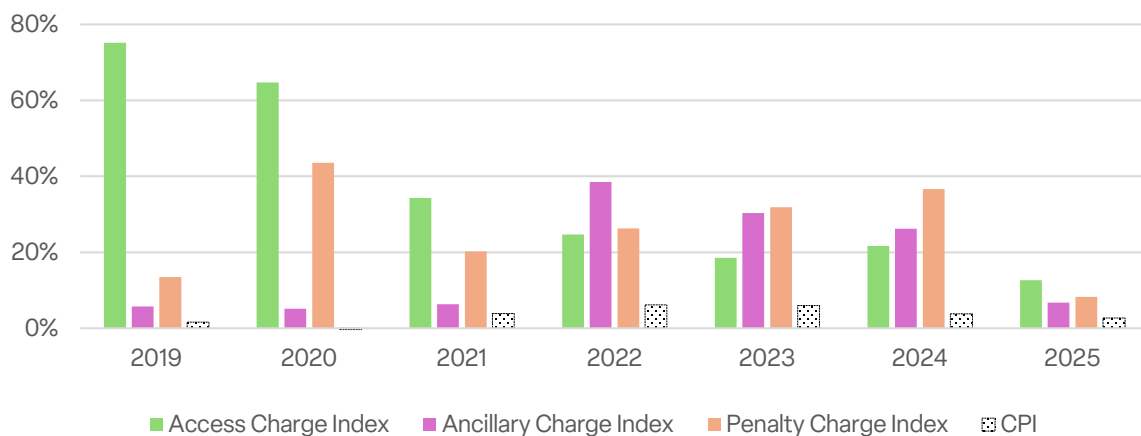
Following amendments to the Victorian Voluntary Pricing Protocol by the Victorian Department of Transport and Planning (DTP) last year, the three Victorian-based container terminals have aligned their landside pricing tariffs to commence from 1 January each year. Patrick Terminals and DP World Australia have also adopted these protocols for their terminals in Sydney, Brisbane and Fremantle.

Notices of price increases were issued by the three stevedores in late 2024, and increases came into effect on 1 January 2025. In summary, for the stevedores who have increased their charges, Terminal Access Charges have increased by an average of 9% for full imports and 6% for full exports. This growth is lower than was witnessed last year when the three stevedores increased their TAC import and export charges by 22% and 23% respectively between 2023 and 2024. Historical change in average terminal access charges can be seen in the chart above.

Landside Port Charges: Recent Context & Regulatory Updates.

Individual ancillary and penalty charges have also increased, by approximately 6% and 8% respectively. As with TACs, growth in these charges has been lower than last year when the three stevedores increased their charges by 41% and 32% respectively.

Year-Over-Year Index Increases vs CPI (2019-25)



Of the cities impacted by these initial changes in charges, Brisbane experienced the greatest increase in Terminal Access Charges (12% since last year), followed by Sydney (8%). Penalty charges increased the most in Melbourne (up 10% since last year), while ancillary charges increased by an average of approximately 7% in all cities.

Landside Port Charges: Recent Context & Regulatory Updates.

More recently, the Australian Competition and Consumer Commission (ACCC) released its [Container stevedore monitoring report](#). The report reviewed developments in the container freight supply chain in 2023-24 and includes a detailed examination of landside port charges including charges at empty container parks. The ACCC used its compulsory information-gathering powers to require stevedores to provide information and documents spanning a 7-year period. It found that there are likely market failures in the container freight supply chain which may warrant a policy or a regulatory response. Specific findings include:

- Many cargo owners have limited ability to exercise choice over the use of container stevedore terminals and empty container parks.
- There is limited competition between stevedores on landside charges.
- Stevedores have used landside charges to increase their prices and operating profits above levels that they were likely to achieve without them.
- Concerns that stevedores face few constraints on their ability to increase the amount of weight misdeclaration fees, and that these fees may create additional costs for parties that bear no responsibility for the misdeclaration container mass.
- Market participants have consistently raised strong concerns about the impact of higher landside charges on their business, and that increases in charges have not translated into improvements in landside services.

Landside Port Charges: Recent Context & Regulatory Updates.

The ACCC recommended the consideration of a policy or regulatory response to improve the efficiency of the container freight supply chain in Australia, specially:

- Measures to address the apparent market failures relating to fixed charges levied by stevedores to transport operators.
- Measures to address the apparent market failures relating to incentive-based charges levied by stevedores, including the appropriateness of stevedores' weight misdeclaration fees.
- Steps to scrutinise empty container parks to assess whether the apparent market failures relating to notification fees need to be addressed, ether via the measures identified in relation to stevedores or otherwise.

Several industry groups such as the Freight Trade Alliance, International Forwarders and Customs Brokers Association of Australia and the Container Transport Alliance Australia are now calling for governments to create a mandatory code for stevedore landside charges, overseen by an appropriate regulatory body.



MSC

IP
Interpool

Appendix: 2025 charges

2025 Landside Port Charges

Access Charges, 2025

Port	Stevedore	Terminal Access Charge (Import Full)	Terminal Access Charge (Export Full)	Vehicle Booking System Slot Fee (electronic)
Sydney	Patrick	208.20	138.25	48.05
	DP World	197.47	175.71	55.00
	Hutchison	213.57	195.39	46.50
Melbourne	Patrick	224.05	151.80	48.05
	DP World	209.67	193.80	55.00
	VICT	225.00	203.00	50
Brisbane	Patrick	225.45	137.20	48.05
	DP World	194.40	174.07	55.00
	Hutchison	213.78	196.58	49.50
Fremantle	Patrick	91.55	45.76	56.95
	DP World	52.92	52.92	71.42
Adelaide	Flinders	207.10	148.8	47.90

Access Charges, 2025 (cont.)

Port	Stevedore	Weighing Fee ¹	Energy Surcharge	Maritime Security Levy ²	Direct Return of Empty Container Booking Fee (DREs)
Sydney	Patrick				94.60
	DP World		6.65		59.70
	Hutchison				49.80
Melbourne	Patrick				64.55 ³
	DP World	16.30	6.65		59.70
	VICT	41.00		20.13	47.00
Brisbane	Patrick				86.80
	DP World	16.30	6.65		59.70
	Hutchison				52.80
Fremantle	Patrick				61.25
	DP World	16.3	3.28		62.90
Adelaide	Flinders	24.30			93.20

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, 2025

Port	Stevedore	Overweight Fee ¹	Side Loader Fee	Long Vehicle Fee
Sydney	Patrick		80.15	63.00
	DP World		96.8	
	Hutchison	100.00	92	55.00
Melbourne	Patrick		80.15	
	DP World	272.80	96.80	
	VICT	206.00	93.00	
Brisbane	Patrick		80.15	63.00
	DP World	272.80	96.8	
	Hutchison	100.00	83	50.00
Fremantle	Patrick		80.15	
	DP World	272.80	96.8	
Adelaide	Flinders			10.30

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, 2025

Port	Stevedore	No Show Fee	Late Arrival/ Wrong Timezone	Weight Amendment ¹
Sydney	Patrick	100.00	50.00	289.20
	DP World	100.00	50.00	255.20
	Hutchison	100.00	50.00	
Melbourne	Patrick	270.40	103.80	289.25
	DP World	351.20	142.43	255.20
	VICT	344.00	118.00	206.00
Brisbane	Patrick	270.40	103.80	289.25
	DP World	351.20	124.50	255.20
	Hutchison	185.00	68.00	
Fremantle	Patrick	270.40	103.80	289.25
	DP World	351.20	126.70	255.20
Adelaide	Flinders	217.40	122.60	263.60

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, 2025 (cont.)

Port	Stevedore	Vehicle Misdeclaration
Sydney	Patrick	305.20
	DP World	325.60
	Hutchison	
Melbourne	Patrick	305.20
	DP World	325.60
	VICT	
Brisbane	Patrick	305.20
	DP World	325.60
	Hutchison	
Fremantle	Patrick	305.20
	DP World	325.60
Adelaide	Flinders	



Contact us.

Our team is always happy to talk.

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