



# Landside Port & Air Cargo Terminal Charges Index

Insights | 2026

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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

NineSquared acknowledges the contribution of industry stakeholders to this report, including Container Transport Alliance Australia, the International Freight Forwarders and Customs Brokers Association of Australia, and the Freight and Trade Alliance. These organisations provided input and perspectives only and did not fund the preparation of this report.

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# Australian Landside Port Charges: 2025-2026

Over the last year, landside port charges increased by a lower rate than recent years, but still increased by more than twice the inflation rate.

ACCESS CHARGES  
INDEX

**11.4%**

INCREASE

ANCILLARY CHARGES  
INDEX

**9.1%**

INCREASE

PENALTY CHARGES  
INDEX

**11.6%**

INCREASE

## Key insights

- On average, **terminal access charges rose 10% from 2025**, driven by an average 11% increase in import access charges.
- **Vehicle booking system charges** experienced a similar increase compared to last year, **rising by an average of 11.4%** from 2025.
- **Empty container park charges** grew at a lower rate compared to last year but still **increased by an average of 12.8%** from 2025.
- **Fremantle and Melbourne** experienced the largest increase in **access charges**, recording an average increase of approx. 14.4% and 12.6%, respectively.
- Average **penalty charges increased by 23% in Brisbane**, the greatest increase of the three major port cities.
- Ancillary charges in **Adelaide have increased by 16.5% since 2025**, the highest rate of all port cities although average ancillary charges in Adelaide remain lower than the other port cities.

Landside port charges have continued to grow at rates higher than inflation. Access charges, the most significant, have increased an average of 792% since 2018 versus a growth of 29% experienced by CPI during that time.

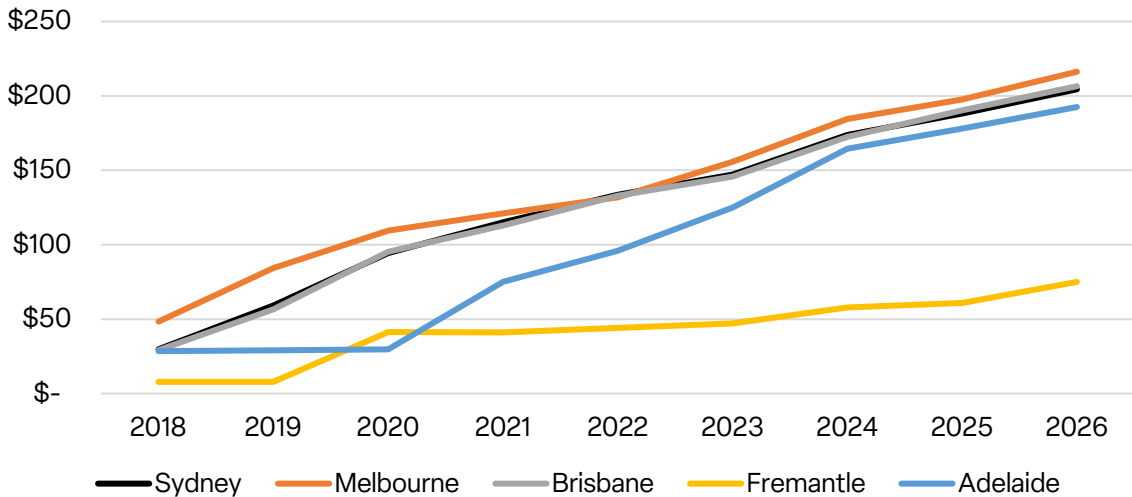
This year, 2 new penalty charges have been included in the Landside Port Charges Index:

- Laden Stack Run Extension Fee
- Laden Stack Run Shortfall Fee

# Landside Port Charges: Recent Context & Regulatory Updates.

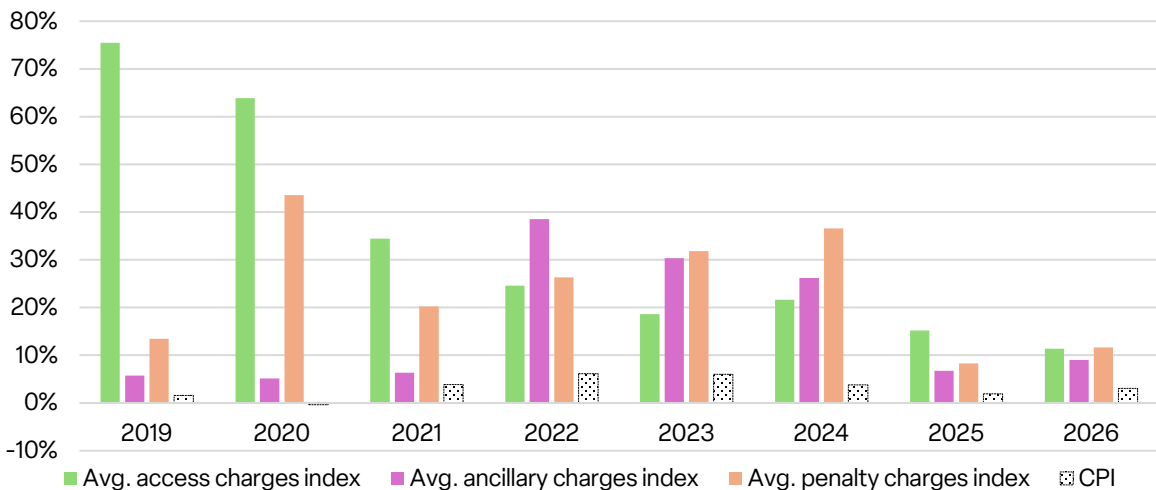
Since 2018, terminal access charges – the most significant and widely levied – have increased continuously at all major Australian ports. Charges at cities on the East Coast have followed a similar trajectory since they were initially introduced.

Avg. terminal access charges, by port city



It does, however, appear that the rate of increases to all charges is decreasing. While still significantly above inflation, 2026 index increases were all 15% or lower for the second time since 2018, with the access index experiencing the smallest y-o-y increase since 2018. In 2026, Penalty charges have experienced an uplift, driven mainly by the introduction on new Laden Stack Run Extension & Shortfall fees levied by DP World.

Year-Over-Year Index Increases vs CPI (2019-26)



# Landside Port Charges: Recent Context & Regulatory Updates.

## Timing changes from Victorian Voluntary Pricing Protocol amendments.

After the Department of Transport and Planning made changes to the Victorian Voluntary Pricing Protocol in 2024, the three Victorian-based container terminals aligned their landside pricing tariffs to commence from January 1 each year. Patrick Terminals and DP World Australia also adopted these protocols for their terminals in Sydney, Brisbane and Fremantle. This year, Flinders Adelaide Container Terminal have joined the stevedores in implementing these changes on January 1 2026.

## ACCC hardens stance on stevedores' and ECP's charge behaviour.

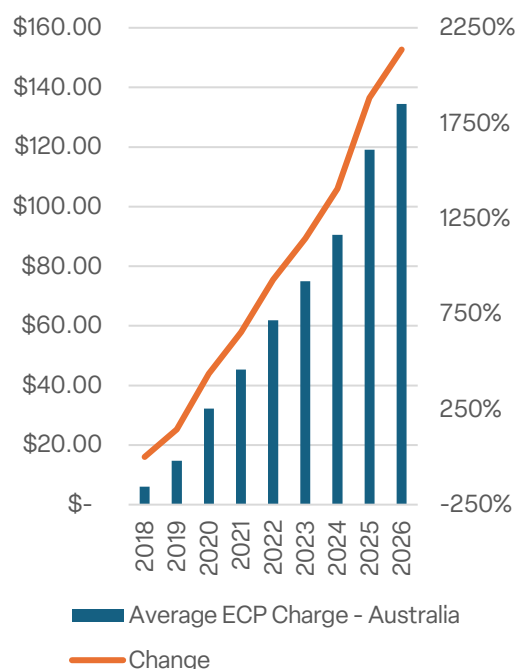
The ACCC's 2023-24 & 2024-25 container monitoring reports<sup>1</sup> found there are likely market failures in the container freight supply chain which, in their view, may warrant a policy or regulatory response. The ACCC has raised concerns with limited competition, excessive profits, limited justification of weight misdeclaration fees and the lack of service improvements. The reports have also noted that despite excess capacity at stevedore terminals, and no significant growth in volumes, prices and profits have increased significantly in recent years.

The ACCC has recommended the consideration of policy response or regulation of charges levied by stevedores and empty container parks. These recommendations are supported by key industry groups including the Container Transport Alliance Australia, International Freight Forwarders and Customs Brokers Association of Australia, Freight Trade Alliance, and Australian Peak Shippers Association.

## ACCC calls out rapidly rising empty container park notification fees, and a need for closer scrutiny.

The ACCC's 2023-24 container monitoring report<sup>1</sup> also noted that empty container parks (ECPs) have been significantly increasing notification fees across Australia. This has created a situation where ECPs charge 3 different parties 3 different sets of charges for handling the same empty container, with shipping lines, importers and exporters all paying different fees at different stages of handling the same container. The average ECP notification fee across Australia has increased from \$6.01 in 2018 to \$134.40 in 2026 (see right).

The Victorian government expanded the Victorian Voluntary Pricing Protocols to include ECPs in 2025. The National Transport Commission is now working to update the National Voluntary Guidelines for Landside Stevedore Charges in response to a request from Australian transport ministers.



# Australian Air Freight & Cargo Terminal Operators.

Despite making up <1% of global trade volumes, air freight constitutes ~33% of global trade value.<sup>2</sup>

This year, the LPCI is being expanded with the addition of the Air Cargo Terminal Charges Index. This index tracks changes to document, handling and storage fees being levied by air freight handlers at Australian airports.

## Who are Cargo Terminal Operators?

CTOs are responsible for transporting and loading loose and unitised freight within airport precincts, including on and off aircraft. They are primarily responsible for document processing, cargo handling, and cargo storage on behalf of airlines.

In Australia, there are three major CTOs: Dnata, Menzies Aviation, & Qantas Freight. All three companies operate in all major Australian airports, including Sydney, Melbourne, Brisbane, Perth, Adelaide and Darwin. Qantas is the dominant service provider at smaller and regional airports.

## Air freight in Australia

Air freight is typically used to transport high-value freight such as perishables and mail. Meat, fruit, nuts, vegetables, seafood, dairy and honey account for 46% of Australia's air exports, while machinery and electronics are the largest import categories.

Due to higher costs, limited capacity and fast turnaround time, air freight can be up to 115 times more expensive than sea freight<sup>3</sup>.

While only accounting for a small volume of the freight task, airfreight makes up a high percentage in value.

### Domestic:

Between 1984-2023, Australian domestic air freight tonne kilometres grew an average 1.8% annually to 300 million (377,700 tonnes). However, BITRE forecasts a decline in domestic volumes to 250 million tonne kilometres (358,800 tonnes) by 2050 underpinned by rising fuel and other transport costs, climate change, and long-term behavioural impacts of COVID-19<sup>4 5</sup>.

### International

Air freight experienced a strong year in 2025, with cargo demand up by 3.4% compared to 2024<sup>2</sup>. However, Australian international volumes remain below pre-Covid figures, with fruit, nuts, and fresh meat exports to the Middle East and Asia down from previous years<sup>3</sup>. Total export/import volumes are forecast to increase 0.5% annually through to 2050, rising from 966,000 tonnes to 1,136,000 tonnes<sup>5</sup>.

International air freight volumes are dominated by the major cities. The current estimated breakdown by airport is listed below.

| Airport      | International Volume (tonnes) | Percentage  |
|--------------|-------------------------------|-------------|
| Sydney       | 521,640                       | 54%         |
| Melbourne    | 251,160                       | 26%         |
| Brisbane     | 96,600                        | 10%         |
| Perth        | 67,620                        | 7%          |
| Other        | 28,980                        | 3%          |
| <b>Total</b> | <b>966,000</b>                | <b>100%</b> |

# Australian Air Freight Outlook & Estimated CTO Charge Revenues

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NineSquared tracks document processing, cargo handling, and cargo storage fees. They have risen significantly since 2018.

## Air freight outlook

Looking forward, IATA forecasts a moderate 2.6% growth globally in 2026<sup>2</sup>. This however is likely to be impacted by geopolitical issues such as the middle-east conflict taking place early in 2026. In the long-run, Airbus and Boeing jointly expect a 3-4% annual global growth rate through 2043, with a stronger 5.3% forecast in Oceania<sup>7</sup>. In 2022, BITRE projected 103% volume growth in Australia through 2050, outstripping the expected 77% road and 6% rail growth (26% total freight growth forecast)<sup>4</sup>.

A significant driving factor in the strong growth outlook is the continued rise of E-commerce, which relies on fast delivery. It is currently estimated to represent 20% of global air freight volume<sup>6</sup>.

## New Australian air freight capacity

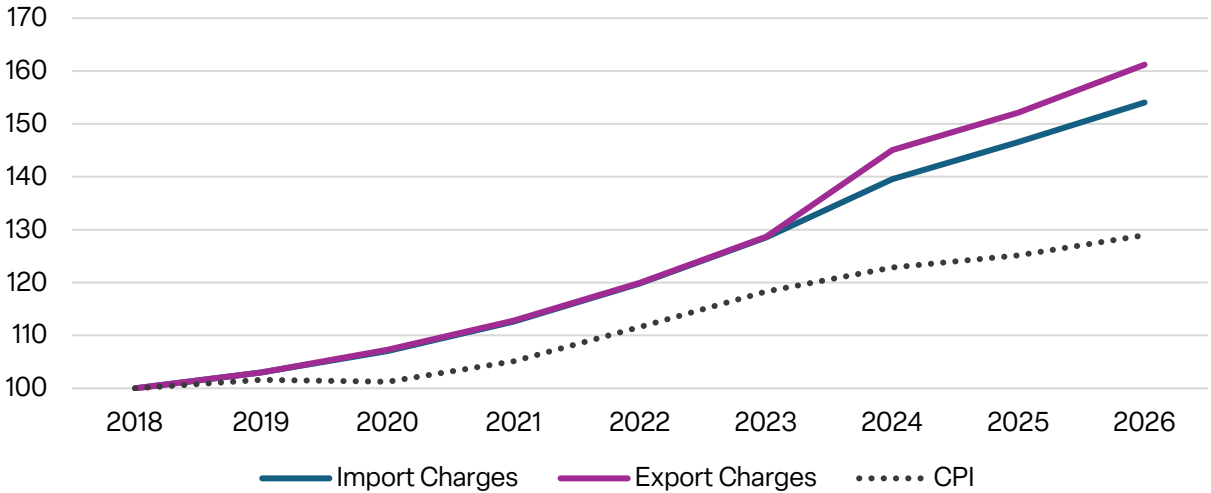
Qatar Airways currently offers 240 tonnes of freight capacity each way, each week between Doha and key Australian cities. With the addition of Virgin Australia's flights starting in June, Qatar says total cargo capacity will increase to 400 tonnes, with 129 tonnes of cargo capacity each way between Doha and Perth, 30 tonnes for Brisbane and 21 tonnes for Sydney<sup>8</sup>. Cathay Pacific are adding three weekly passenger flights between Adelaide and Hong Kong starting in November, expanding cargo capacity. They are also moving their weekly 747-8 freighter service, which carries up to 135 tonnes of cargo, from Toowoomba to Brisbane in June in an effort to streamline processes<sup>9</sup>.

The scheduled opening of Western Sydney Airport in October 2026 will also increase air freight capacity. Singapore Airlines will launch flights at the new airport from late November, taking advantage of its curfew-free status, with other carriers potentially starting services to the new aviation hub weeks earlier.<sup>10</sup>

# Australian Cargo Terminal Charges: 2018-2026 Snapshot

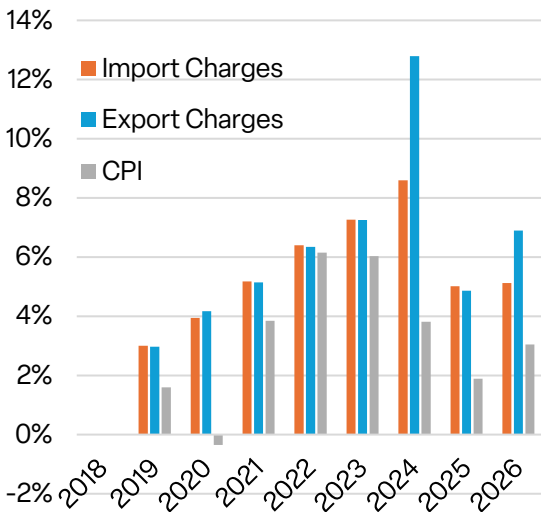
Since 2018, the air freight import charges index has risen 54%, and the export charges index by 62.7%, versus the 29% increase in CPI.

Air Freight Charges Index (2018-26)

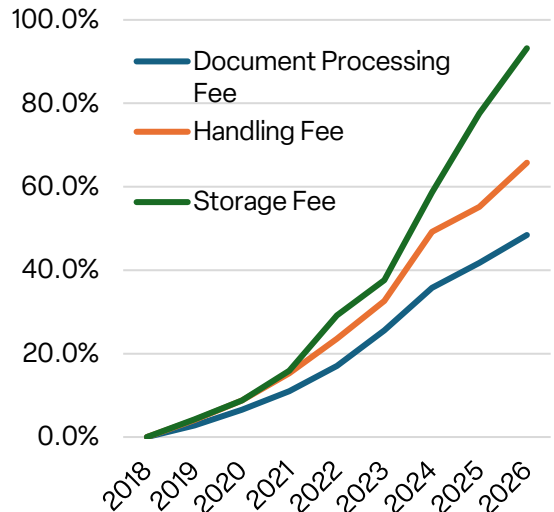


Average document processing fees are 48% higher in 2026 than they were in 2018, while minimum cargo handling fees have seen an even larger increase over the same period, of around 66%. Cargo storage fees have seen the largest increase, with the minimum charge almost doubling, including big jumps in 2024 (annual increase of 15.3%) and 2025 (annual increase of 12%).

Year-over-year changes in Air Freight Charges vs Inflation



Cumulative increase in key charges (2018-26)





# Cargo Terminal Operator Charges Index | Methodology

To construct the Cargo Terminal Operator Charges Index, an equally weighted average of the three major CTOs' (Dnata, Menzies and Qantas) indexes was taken.

To generate each CTO's index, 3 charges were included: document processing fees, terminal handling fees, and cargo storage fees. Stakeholder consultations suggested these charges were the most representative of the charges commonly levied on CTO customers.

**Document processing fees** were taken as:

- Imports: the per-AWB fee for processing and reporting of airway bill details to Australian customs
- Exports: the per-AWB fee for processing and reporting of airway bill details, assuming FWB data is pre-received.

**Terminal handling fees** for loose consigned cargo was used and taken as the higher of a) the charge on a per-kg basis for a 100kg consignment, or b) the minimum charge per-AWB.

**Storage fees** were also taken as the higher of a) the charge on a per-kg basis for a 100kg consignment, or b) the minimum charge per-AWB, and charged for an estimated 1 day beyond the free-of-charge period.

An average of the three CTO's indices was taken to calculate the total CTO Export and Import Indices, as per the below schematic and assumptions:



## Assumptions:

- All three CTOs have an equal market share.
- The average weight of a consignment is 100 kg.
- The average number of days spent in storage over the free storage period is 0.15. It is noted that storage fees are charged by full days, however stakeholder consultation suggests that consignments are rarely held in storage beyond the free-of-charge period. An assumption of 0.15 days allows for storage fees to be reflected in the index without being over-represented.

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**MSC**

**IP**  
Interpool

# Appendix: 2026 charges

# 2026 Landside Port Charges

## Access Charges, 2026

| Port      | Stevedore | Terminal Access Charge (Import Full) | Terminal Access Charge (Export Full) | Vehicle Booking System Slot Fee (electronic) |
|-----------|-----------|--------------------------------------|--------------------------------------|--|
| Sydney    | Patrick   | 224.90                               | 145.20                               | 50.45  |
|           | DP World  | 225.51                               | 187.83                               | 62.32  |
|           | Hutchison | 233.36                               | 209.64                               | 51.20  |
| Melbourne | Patrick   | 242.00                               | 159.40                               | 50.54  |
|           | DP World  | 239.44                               | 206.40                               | 62.32  |
|           | VICT      | 225.00                               | 225.00                               | 54.00  |
| Brisbane  | Patrick   | 243.50                               | 144.10                               | 50.45  |
|           | DP World  | 222.00                               | 186.08                               | 62.32  |
|           | Hutchison | 232.79                               | 210.48                               | 54.50  |
| Fremantle | Patrick   | 96.13                                | 48.05                                | 59.80  |
|           | DP World  | 77.92                                | 77.92                                | 92.70  |
| Adelaide  | Flinders  | 227.00                               | 158.00                               | 53.00  |

## Access Charges, 2026 (cont.)

| Port      | Stevedore | Weighing Fee <sup>1</sup> | Energy Surcharge | Maritime Security Levy <sup>2</sup> | Direct Return of Empty Container Booking Fee (DREs) |
|-----------|-----------|---------------------------|------------------|-------------------------------------|---|
| Sydney    | Patrick   |                           |                  |                                     | 99.35   |
|           | DP World  |                           | 7.26             |                                     | 71.28   |
|           | Hutchison |                           |                  |                                     | 55.00   |
| Melbourne | Patrick   |                           |                  |                                     | 67.80 <sup>3</sup>                                  |
|           | DP World  | 17.75                     | 7.26             |                                     | 71.28   |
|           | VICT      | 45.00                     |                  | 20.13                               | 52.00   |
| Brisbane  | Patrick   |                           |                  |                                     | 91.15   |
|           | DP World  | 17.47                     | 7.26             |                                     | 71.28   |
|           | Hutchison |                           |                  |                                     | 58.50   |
| Fremantle | Patrick   |                           |                  |                                     | 64.35   |
|           | DP World  | 17.75                     | 3.58             |                                     | 75.10   |
| Adelaide  | Flinders  | 27.00                     |                  |                                     | 103.00  |

<sup>1</sup>Weighing 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.

<sup>2</sup>The 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.

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

## Ancillary Charges, 2026

| Port      | Stevedore | Overweight Fee <sup>1</sup> | Side Loader Fee | Long Vehicle Fee |
|-----------|-----------|-----------------------------|-----------------|------------------|
| Sydney    | Patrick   |                             | 84.20           | 66.15            |
|           | DP World  |                             | 115.45          |                  |
|           | Hutchison | 100.00                      | 99.00           | 60.00            |
| Melbourne | Patrick   |                             | 84.20           |                  |
|           | DP World  | 297.08                      | 115.45          |                  |
|           | VICT      | 212.00                      | 100.00          |                  |
| Brisbane  | Patrick   |                             | 84.20           | 66.15            |
|           | DP World  | 297.08                      | 115.45          |                  |
|           | Hutchison | 100.00                      | 89.00           | 55.00            |
| Fremantle | Patrick   |                             | 84.20           |                  |
|           | DP World  | 297.08                      | 115.45          |                  |
| Adelaide  | Flinders  |                             |                 | 12.00            |

<sup>1</sup>Overweight 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, 2026

| Port      | Stevedore | No Show Fee | Late Arrival/<br>Wrong<br>Timezone | Weight<br>Amendment <sup>1</sup> |
|-----------|-----------|-------------|------------------------------------|----------------------------------|
| Sydney    | Patrick   | 100.00      | 50.00                              | 303.75                           |
|           | DP World  | 100.00      | 50.00                              | 303.18                           |
|           | Hutchison | 100.00      | 50.00                              |                                  |
| Melbourne | Patrick   | 283.95      | 109.00                             | 303.75                           |
|           | DP World  | 401.77      | 142.43                             | 303.18                           |
|           | VICT      | 396.00      | 135.00                             | 212.00                           |
| Brisbane  | Patrick   | 283.95      | 109.00                             | 303.75                           |
|           | DP World  | 401.77      | 142.43                             | 303.18                           |
|           | Hutchison | 200.00      | 68.00                              |                                  |
| Fremantle | Patrick   | 283.95      | 109.00                             | 303.75                           |
|           | DP World  | 401.77      | 144.94                             | 303.18                           |
| Adelaide  | Flinders  | 239.00      | 135.00                             | 289.00                           |

<sup>1</sup>Weight 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, 2026 (cont.)

| Port      | Stevedore | Vehicle Misdeclaration | Laden Stack Run Extension Fee | Laden Stack Run Shortfall Fee |
|-----------|-----------|------------------------|-------------------------------|-------------------------------|
| Sydney    | Patrick   | 320.50                 |                               |                               |
|           | DP World  | 386.81                 | 80.00                         | 175.00                        |
|           | Hutchison |                        |                               |                               |
| Melbourne | Patrick   | 320.50                 |                               |                               |
|           | DP World  | 386.81                 |                               |                               |
|           | VICT      |                        |                               |                               |
| Brisbane  | Patrick   | 320.50                 |                               |                               |
|           | DP World  | 386.81                 | 80.00                         | 175.00                        |
|           | Hutchison |                        |                               |                               |
| Fremantle | Patrick   | 320.50                 |                               |                               |
|           | DP World  | 386.81                 |                               |                               |
| Adelaide  | Flinders  |                        |                               |                               |

# 2026 Air Cargo Terminal Charges

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| Cargo Terminal Operator | Export/Import | Document Processing Fee | Cargo Handling Fee | Cargo Storage Fee |
|-------------------------|---------------|-------------------------|--------------------|-------------------|
| Dnata                   | Import        | 78.00                   | 78.00              | 99.00             |
|                         | Export        | 78.00                   | 26.00              | 99.00             |
| Menzies Aviation        | Import        | 78.00                   | 78.00              | 90.00             |
|                         | Export        | 78.00                   | 30.00              | 90.00             |
| Qantas Freight          | Import        | 78.00                   | 78.00              | 99.00             |
|                         | Export        | 75.00                   | 30.00              | 93.00             |



## 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](mailto:pbullock@ninesquared.com.au)

Or find any of our team members contact details at

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

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L9, 31 Market Street, Sydney NSW 2000

Postal Address: GPO Box 21, Brisbane QLD 4001

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