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2020 Port pricing variances

The impact of COVID-19 is being felt by consumers and businesses across Australia, affecting key stake holders along the logistic supply chain for both imports and exports.

Whilst there have been some modifications to the shipping charges in some ports, there has clearly been support to the industry in these difficult times by some major ports freezing or deferring shipping charges, as a measure to offer assistance to their customers, and these ports continue to support the industry during the pandemic.

The ports that have frozen their charges for 2020 or deferred increases by at least six months are: Port of Brisbane, The Port of Townsville, Mid-west Ports Geraldton, and Sydney Ports.

The Port of Melbourne increased import full wharfage on 12 June 2020 by \$9.75 per TEU to recover costs of their Port Rail Transformation Project, which was announced in January 2019.

The Port of Newcastle announced (in December 2019) an increase in the Navigation Service Fee. The announcement sought to increase the Coal Ship Navigation Service Fees by 33 per cent from 1 January 2020 to \$1.0424 per GT, unless the port user signs a 10-year deed which waives the right to object to matters within the deed and specifically accepts:

- The initial NSC rate of \$0.8121 per GT,
- The initial Wharfage rate of \$.0802 per RT,

- The annual increase of 4 per cent on both of the above, and
- An unknown additional amount attributable to PoN capital investment.

The Port of Newcastle sent letters to its stakeholders in January 2020 agreeing to provide an interim discount to its Coal Navigation Service Charge, charged with respect to all coal vessels for the period from 1 January 2020 to 31 March 2020. The Navigation Service Charge for all coal vessels during this period was \$0.8121 per GT (ex GST) and not \$1.0424 per GT, as first advised in Dec 2019.

Overall, ports have reported a standard increase in charges that are relative to previous adjustments:

- Albany recorded an average increase of 2.8 per cent, except for the Navigation Fee, which has increased by 72.1 per cent due to the removal of No 6 Berth from their tariff, and now reflecting a single Cargo Vessels Navigation Services charge of \$0.826 (GST Incl.)
- Darwin Port recorded an average increase of 1.6 per cent,
- Fremantle Port have increased their fees by 2 per cent from 1 October 2020,
- Finders (SA Ports) – Cargo Service Charge increase by 2.6 per cent, whilst navigation and pilot charges have increased by 3.6 per cent,

- MacKay Port reflects an average increase of approximately 3 per cent,
- Newcastle Port have increased wharfage by 2.9 per cent, Navigation Services 13.1 per cent. The increase in Navigation Services relates primarily to coal vessels, where a 33.5 per cent increase was recorded. Non-Coal vessels recorded an average increase of 6.34 per cent. Site Occupancy has also increased by 5.8 per cent,
- Melbourne have increased their port charges by an average of 2 per cent. In addition, the POM has increased their Port Rail Transformation infrastructure charge by 8.81 per cent. However, it is worth noting that Port Philip Sea Pilots have maintained no increase in their rates since 2018.
- Port Headland have reflected an increase to their tonnage charge by 10 per cent, which includes the Cape Size Vessel surcharge. However, Port Headland also advertise (as below):

'A discount of 50 per cent to tonnage fees will apply to bulk carriers entering the port of Port Hedland that use a PPA licensed Service Provider to bunker LNG. Vessels that take on LNG bunkers using a PPA licensed LNG Bunkering Service Provider for more than one port call shall receive a 50 per cent discount to tonnage fees applicable at the return port call. The discount will be reflected in the tonnage fees invoice for the return port call.'

Port	Service	2020	2019	2018	2017	2016
Albany	Navigation Fee	72.1%	2.3%	2.6%	0.5%	2.5%
	Berth Hire	2.8%	2.3%	2.6%	0.5%	2.4%
	Infrastructure Fee	-1.3%	1.8%	2.4%	0.0%	2.5%
	Pilotage	2.8%	2.3%	2.6%	0.5%	2.5%
	Wharfage	0.0%	1.8%	1.9%	1.6%	1.7%
	Harbour Dues (reefers)	0.0%	1.8%	1.9%	2%	20%
	Port Access Charge	0.0%	0.0%	4.0%	3.1%	3.1%
	Berth Fisherman Island	0.0%	1.8%	1.9%	1.6%	1.7%
Brisbane	Wharfage	0.0%	1.8%	1.9%	1.6%	1.7%
	Harbour Dues (reefers)	0.0%	1.8%	1.9%	2%	20%
	Port Access Charge	0.0%	0.0%	4.0%	3.1%	3.1%
	Berth Fisherman Island	0.0%	1.8%	1.9%	1.6%	1.7%
	Security Charges	0.0%	1.7%	2.3%	1.8%	1.8%
	Towage	2.8%	2.8%	2.9%	3.5%	5.0%
	Pilotage all services	2.3%	2.3%	3.5%	3.5%	3.5%
	Vessel Utility Charge	0.0%	22.5%	2.0%	1.6%	1.9%
	Transfere Bulk Liquid App. Fee	0.0%	1.8%	1.9%	1.6%	1.7%

Port	Service	2020	2019	2018	2017	2016
Darwin	Wharfage	1.6%	2.0%	1.9%	1.1%	0%
	Berthage	1.6%	2.0%	1.9%	1.1%	0%
	Pilotage	1.5%	2.0%	1.9%	1.1%	0%
	Port Dues	1.7%	1.6%	2.1%	0.8%	0%
Flinders (SA Ports)	Cargo Service Charge	2.6%	1.6%	2.5%	2.2%	1.0%
	Harbour Services Charge (base)	3.2%	3.2%	3.4%	3.3%	2.0%
	Navigation Charges	3.6%	2.8%	3.5%	3.3%	1.9%
	Pilot Charges	3.6%	3.7%	4.2%	4.1%	4.5%
Fremantle	Wharfage & Berth Hire	2.0%	2.0%	1.5%	2.5%	2.0%
	Mooring	2.0%	2.0%	5.0%	2.5%	2.0%
	Pilotage	2.0%	2.0%	5.0%	2.5%	2.0%
	Dynamic Under Keel Clearance	2.0%	2.0%	1.5%	2.5%	2.0%
	Port Improvement Fee	2.0%	2.0%	1.5%	2.5%	2.0%
Gladstone	Harbour Dues	0.0%	1.5%	1.7%	1.9%	1.7%
	Tonnage/Wharfage	1.8%	1.5%	1.7%	1.9%	1.7%
	Mooring dues	3.0%	3.0%	3.0%	3.0%	3.0%
	Security Charge	1.9%	1.4%	1.7%	1.8%	1.7%
Mackay	Ship Charges (tonnage)	2.9%	3.0%	1.5%	2.1%	3.0%
	Cargo Charges	3.1%	3.1%	2.9%	2.1%	4.2%
	Service & Security Charges	3.5%	3.5%	3.0%	2.0%	3.0%
Mid West Ports - Geraldton	Wharfage /unit	0.0%	2.0%	1.0%	3%	50%
	Ship Charges -general	0.0%	2.0%	1.0%	3%	80%
	Ship Loading	0.0%	2.0%	1.0%	3%	32%
	Berth Hire	0.0%	2.0%	1.0%	3.0%	5.0%
Newcastle	Wharfage	2.9%	2.4%	2.4%	1.9%	4.0%
	Navigation Services Coal Vessels(90k GT)	33.5%	3.4%	3.4%	1.6%	3.9%
	Navigation Services Non-Coal	6.3%	1.7%	3.4%	1.9%	3.9%
	Site Occupancy	5.8%	1.7%	3.4%	1.7%	3.9%
Melbourne	Wharfage (Containers export)	2.2%	-2.5%	-2.5%	-2.5%	-2.5%
	Wharfage (Containers import)	11.3%	1.3%	1.9%	2.1%	1.4%
	Non Containerised / General Cargo	2.2%	1.3%	1.9%	2.1%	1.3%
	Motor Vehicles	1.9%	1.6%	1.6%	2.3%	1.0%
	Dry Bulk	2.0%	1.2%	2.1%	1.9%	1.5%
	Bulk Liquid	2.3%	1.3%	1.7%	2.2%	1.4%
	Channel Fees	2.9%	0.7%	1.9%	2.1%	1.3%
	Berth Hire	2.2%	1.3%	1.9%	2.1%	1.3%
	Wharf Access	1.9%	0.9%	1.9%	2.9%	1.0%
	Towage	2.8%	2.8%	2.9%	2.4%	6.8%
	Security	2.2%	1.3%	1.9%	2.1%	1.1%
	Pilotage	0.0%	0.0%	1.4%	1.9%	1.2%
Port Botany	Import container wharfage	0.0%	4.5%	186.3%	1.9%	2.0%
	Coastal full container (inwards) wharfage	0.0%	6.8%	90.5%	1.9%	2.0%
	Transhipment container wharfage	0.0%	2.0%	2.2%	2%	155%
	Import general cargo wharfage	0.0%	4.5%	109.2%	2%	2%
	Coastal general cargo (inward) wharfage	0.0%	6.8%	79.2%	2%	2%
	Towage	2.8%	8.0%	2.9%	2.4%	7.9%
Port Hedland	Tonnage	10.1%	7.4%	22.9%	0%	0%
	Wharfage	3.0%	13.2%	12.2%	0%	0%
	Berthage	3.0%	7.5%	7.0%	0%	0%
	Temporary Storage	2.9%	7.9%	6.7%	0%	0%
Port Kembla	Wharfage non-container	0.0%	3.2%	3.0%	3.1%	2.9%
	Wharfage container	0.0%	3.0%	3.0%	3.0%	3.0%
	Site Occupancy	0.0%	3.3%	3.0%	3.0%	3.0%
	Navigation	0.0%	3.7%	3.0%	1.7%	2.1%
	Pilotage	0.0%	3.7%	4.2%	3.5%	3.5%
Portland	Port Tonnage	2.4%	1.9%	2.1%	2.0%	2.9%
	Wharfage containers	2.4%	2.7%	1.9%	2.1%	5.7%
	Berth Hire	2.4%	2.8%	2.9%	2.9%	3.0%
	Mooring	2.4%	3.9%	3.9%	3.9%	3.9%
	Pilotage	3.5%	4.9%	4.9%	5.9%	3.9%
	Towage	2.5%	2.9%	3.9%	3.9%	3.0%
Sydney	Navigation	0.0%	5.3%	4.0%	3.7%	3.5%
	Mooring	0.0%	4.0%	0.0%	3.5%	3.5%
	Site Occupancy	0.0%	3.0%	3.4%	6.6%	2.7%
	Pilotage	0.0%	3.6%	4.4%	3.2%	2.7%
Townsville	Cargo Charges	0.0%	1.8%	2.4%	2.6%	2.5%
	Project Cargo import	0.0%	1.8%	2.4%	22.4%	2.5%
	Services to Ship Charges	1.5%	1.6%	2.8%	1.0%	2.4%
	Pilotage	1.8%	2.2%	0.0%	0.0%	0.0%
	Towage (<50,000)	0.0%	3.4%	5.9%	3.0%	3.0%



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