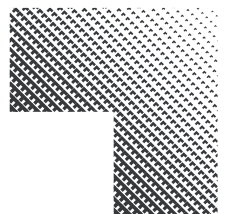




National voluntary guidelines for landside stevedore and empty container park charges



Document outline

Title	National voluntary guidelines for landside stevedore and empty container park charges
Type of report	National voluntary guidelines
Purpose	The national voluntary guidelines outline a process for communicating landside pricing changes for stevedore and empty container park operators.
Attribution	This work should be attributed as follows, Source: National Transport Commission 2026, National voluntary guidelines for landside stevedore and empty container park charges. If you have adapted, modified or transformed this work in anyway, please use the following, Source: based on National Transport Commission 2026, National voluntary guidelines for landside stevedore and empty container park charges. © National Transport Commission 2026  This work is licensed under a Creative Commons - NonCommercial-NoDerivatives 4.0 International Licence (CC BY-NCND 4.0).
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1 Overview of the guidelines

Key points

- Australia's five main containerised ports handle significant volumes of Australia's import and exports. Government has been monitoring the operations, performance and pricing in the sector for a number of years.
- The National Voluntary Guidelines for Landside Stevedore and Empty Container Park Charges outline a transparent approach for operators in changing and communicating changes to landside charges.
- The guidelines commence on 1 January 2027 and replace the former National Voluntary Guidelines for Landside Stevedore Charges (2022).

1.1 Objectives of the guidelines

The National Voluntary Guidelines for Landside Stevedore Charges were adopted by Transport Ministers in 2022. The guidelines aim to provide a clear, voluntary process for operators implementing price changes. In 2026 the guidelines were replaced by a new updated National Voluntary Guidelines for Landside Stevedore and Empty Container Park Charges (the guidelines).

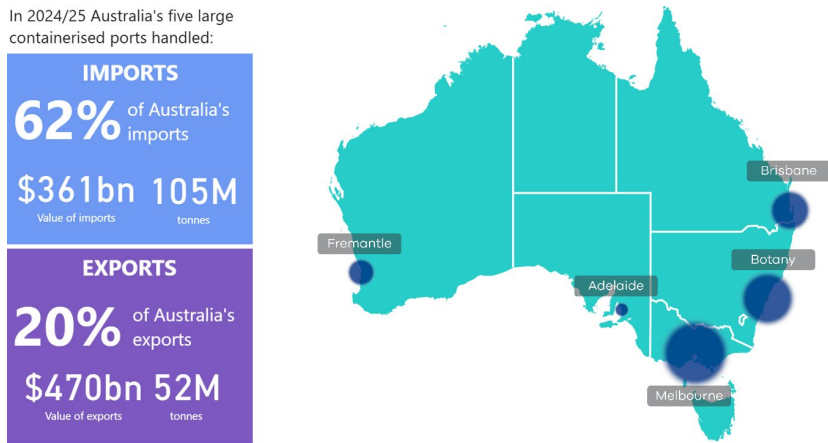
The guidelines aim to encourage transparency around pricing for stevedore and empty container park operators (operators) and stability and predictability in pricing through limiting price changes to once annually on 1 January.

1.2 Industry context

Containerised ports are of significant economic importance as they handle a majority of Australia's international trade. Figure 1 shows the trade volumes through Australia's five main containerised ports. An efficient and transparent container supply chain can deliver improved productivity outcomes.



Figure 1: Trade flows through Australia's containerised ports



Source: ABS 2025

These ports are part of a national container supply chain (the supply chain), an inherently complex network of interconnected and interdependent operators, processes, contracts, charges, and money flows. Figure 2 and Figure 3 show a conceptual level view of the container export and import supply chain.

Figure 2: High level export supply chain

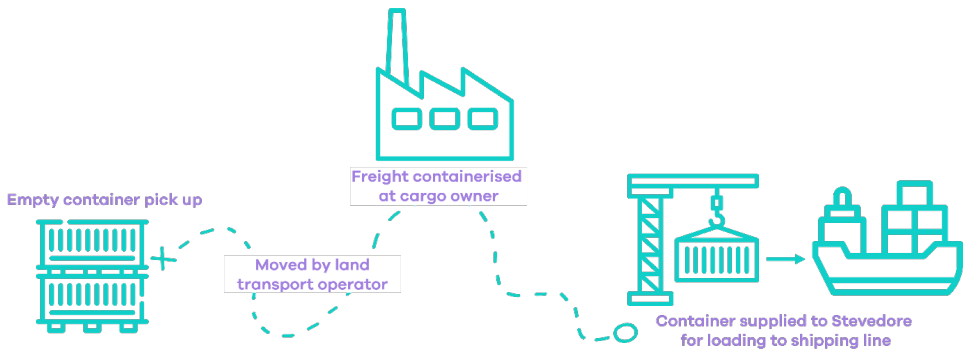
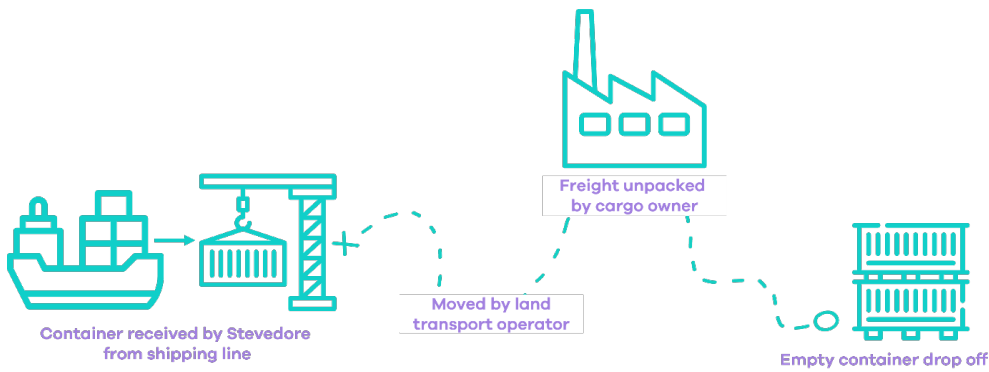


Figure 3: High level import supply chain



The number of stevedore operators in a market is limited, which means that there is limited competition. A lack of competition can result in monopolies appearing. While the empty container sector experiences a higher level of competition, the size of the market creates the potential for similar monopolistic tendencies. Conversely, land transport operators are

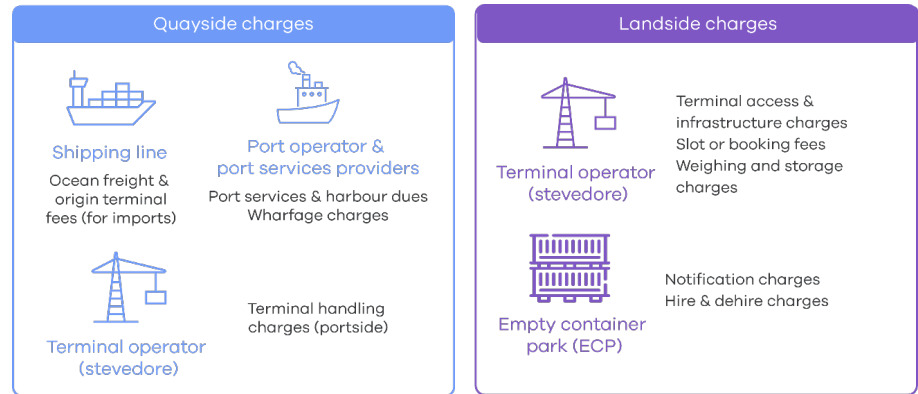


generally much less concentrated with a significant number of small to medium operators, with the largest player in the road freight transport industry¹ commanding only a 4.1 per cent market share across the industry (IBISWorld 2025).

Quayside & landside pricing

Charges in the container supply chain can be split between quayside and landside charges. Quayside charges include navigation, wharfage and other ancillary charges which are incurred before the cargo is unloaded. Landside charges are charges incurred once the cargo has been unloaded and released from inspection. Figure 4 shows a summary of common quayside and landside charges.

Figure 4: Summary of quayside & landside charges for containerised freight



1.3 Scope and application of the guidelines

Some states and territories have existing provisions in place that aim to deliver similar outcomes to those envisaged under the guidelines. To the extent that they align with any existing arrangements, the Guidelines aim to complement or build on these provisions.² Where an inconsistency occurs between state or territory’s requirements and the Guidelines, the state or territory’s requirements shall prevail. Once implemented, the Guidelines are intended to continue being administered by the relevant state or territory authority.

Application and Commencement

The guidelines apply to charges levied on transport operators by stevedores and empty container parks, including those affiliated with intermodal terminals, as defined in Schedule 1: Dictionary (‘the dictionary’). The guidelines commence operation on 1 January 2027.

¹ Road freight industry refers to the industry, which includes land transport operators who operate outside of the containerised freight supply chain.

² The Guidelines do not alter existing commercial agreements.



2 National Voluntary Guidelines for Landside Stevedore Charges

The guidelines for notifications regarding changes to charges are as follows:

1. Stevedore companies that levy charges to access their terminals have voluntarily agreed to adhere to these guidelines to enhance the communication, transparency, and predictability of charges.
2. Charges will only be changed once per annum on 1 January, or the next business day, each year (the 'Implementation Date').
3. Stevedore companies must issue a Notice of Intention (NOI, 'the notice') to the relevant transport agency ('the relevant agency') and publish the notice on their website 60 calendar days prior to the Implementation Date of change of an existing, or the introduction of a new, charge. The notice should include the following information:
 - a. Details of the price change
 - i. Proposed implementation date and date of last change
 - ii. Current and proposed prices, including percentage increase
 - b. Detailed reasoning for the price change
 - i. Description of investments and cost drivers
 - ii. Identified benefits and their beneficiaries, including service improvements
 - c. Contact details and due date for stakeholder feedback
 - d. A link to the public notice on the operator's website
4. The relevant department may also publish the notice, and/or publish a link to the notice, on its website.
5. Stevedore companies will receive feedback from the interested stakeholders on the proposed change, and where necessary, respond directly. The period for interested stakeholders to provide feedback should be no less than 21 calendar days.
6. Stevedores must issue a Final Confirmation Notice (FCN, 'the final notice') of the pricing change to the relevant department which provides a link to the final notice on its website 30 calendar days prior to the proposed implementation date of the pricing change. When the relevant department receives the final, 30-day notice from a stevedore, the relevant department may publish notices on their website. The stevedore's final 30-day notice on its website must include:
 - a. A summary of engagement themes received in consultation
 - b. Any response from the operator to feedback received
 - c. Any changes made in response to feedback received.



3 National Voluntary Guidelines for Empty Container Park Charges

The guidelines for notifications regarding changes to charges are as follows:

1. Empty container park operators that levy charges for hire and de-hire of empty containers have voluntarily agreed to adhere to this protocol to enhance the communication, transparency, and predictability of charges.
2. Charges will only be changed once per annum on 1 January, or the next business day, each year (the 'Implementation Date').
3. Empty container park operators must issue a Notice of Intention (NOI, 'the notice') to the relevant transport agency ('the relevant agency') and publish the notice on their website 60 calendar days prior to the Implementation Date of change of an existing, or the introduction of a new, charge. The notice should include the following information:
 - a. Details of price change
 - i. Date of implementation and date last changed
 - ii. Current and proposed prices, including percentage increase
 - b. Detailed reasoning for price changes
 - i. Description of investments and cost drivers
 - ii. Identified benefits and their beneficiaries, including service improvements
 - c. Contact details for feedback and timeframe for feedback
 - d. Publication of the notice on the operator's website
4. The relevant department may also publish, and/or publish a link to the notice, on its website.
5. Empty container park companies will receive feedback from interested stakeholders on the proposed change, and where necessary, respond directly. The period for interested stakeholders to provide feedback should be no less than 21 calendar days.
6. Empty container parks must issue a Final Confirmation Notice (FCN, 'the final notice') of the pricing change to the relevant agency which provides a link to the final notice on its website 30 calendar days prior to the proposed implementation date of the pricing change. The empty container park's final 30-day notice on its website must include:
 - a. A summary of engagement themes received in consultation
 - b. Any response from the empty container park to feedback received
 - c. Any changes made in response to feedback received.

Guidelines for empty container park Notification System Providers

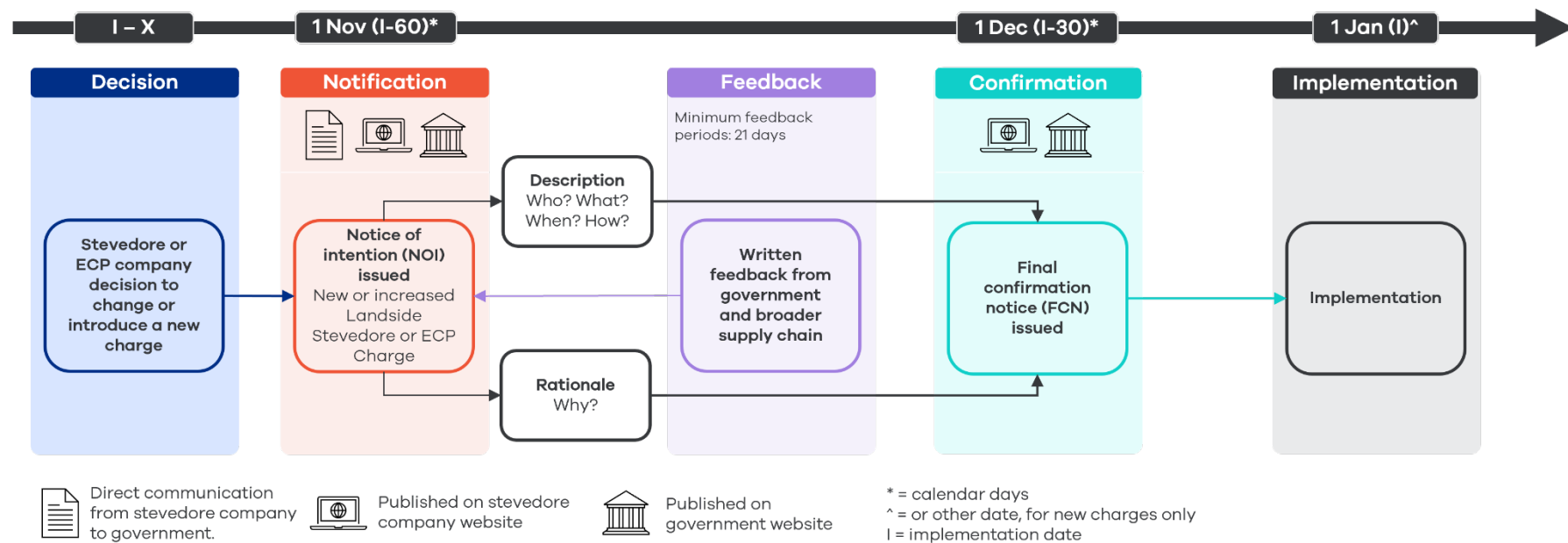
7. Empty container park Notification System Providers are requested to facilitate this National Voluntary Guidelines by:
 - a. Working with empty container park customers to provide functionality of systems in relation to price changes which encourages and/or otherwise supports minimum notification periods for price changes to industry; and
 - b. Establishing prompts within systems to alert empty container parks to consider this National Voluntary Guidelines when activating price changes.



Process flow

Figure 5: Process flow for notification of price changes for stevedore and empty container park operators

Price change communication phases:



Schedule 1: Dictionary for the National Voluntary Guidelines

Term	Definition
Implementation Date	The first (1st) of January each year, or the next business day.
Beneficiaries	The stakeholder(s) who derive value from the investment at the empty container park, including for example, transport operators, shipping lines, logistics providers, intermediaries, cargo owners, and the empty container park operator. Benefits may include increased efficiency, reduced costs, improved service levels, and enhanced operational capacity.
Container supply chain (the supply chain)	Refers to parties involved in the movement of import and export containers from the origin to destination.
Container terminal	Sea transport terminals which handle containerised cargo, providing services to shipping lines and landside customers.
Days	Refer to calendar days, unless otherwise specified.
Empty container park(s)	Includes standalone empty container park facilities and integrated facilities (e.g., within intermodal terminals or container stevedore terminals), whether ongoing or temporary in nature.
Empty container park access price change(s)	Includes adjustment(s) to existing landside charges and/or introduction of new landside charges levied on transport operators in relation to the hire and dehire of empty containers at an empty container park, and should be read as singular or multiple, as applicable.
Notification system providers	System providers for empty container park notification/booking system management e.g., Cargowise VBS, OneStop Modal.
Final Confirmation Notice (FCN, the confirmation)	A confirmation of the change outlined in the notice. The confirmation should include a statement of engagement summarising formal issues raised by affected stakeholders with the operator. Empty container parks are required to provide further information as outlined in the Guidelines.
Land transport operator (transport operators)	A transport company contracted to collect and deliver containerised cargo, full, partially filled, or empty containers, from stevedore operated terminals or empty container parks.
Notice of Intention (NOI, the notice)	A publicly communicated intention from a stevedore or empty container park operator to change an existing, or introduce a new, charge. The notice must detail the reasoning for the change, including all relevant supporting information and data.



Term	Definition
Price change	Pricing change refers to both changes to existing charges and the introduction of new charges.
Relevant agency	The state or territory nominated department or transport agency that is responsible for receiving notifications under the guidelines.
Reasoning	A detailed and transparent explanation by the stevedore or empty container park operator on: • What the change is and how it will be applied, • Why the change is being proposed, and • If the change will have an adverse effect on container supply chain productivity. The reasoning should include a description of investments & cost drivers and identified benefits and beneficiaries.
Service performance	Service performance may include, for example, truck turn time, yard capacity, truck arrival time, lifts per hour, etc., as related to the investment.
Shipping line	An organisation that coordinates the sea transportation leg of containerised cargo and can be contracted by cargo owners or intermediary logistics companies.
Stevedore operator	An organisation contracted by shipping lines to coordinate the transference of containerised cargo from and to ships.
Stevedore terminal handling charge(s) (stevedore charges)	Stevedore terminal handling charges refers to all charges payable to stevedores in connection with the operation or provision of land-based facilities and services at stevedore terminals



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