Global Pricing Comparator Study 2025/26

March 2026

Benchmarking South African port administered prices against a sample of international sea-ports

Report No.15

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Acronyms

COVID	2019 novel coronavirus
GPCS	Global Pricing Comparator Study
GT	Gross Tonnage
GRT	Gross Registered Tonnage
KPI	Key performance indicator
NPA	National Ports Authority
OECD	Organization for Economic Co-operation and Development
PCC	Port Consultative Committee
PPS	Proposed Pricing Strategy
PRSA	Ports Regulator of South Africa
STS	Ship-To-Shore
TEU	Twenty-foot Equivalent Unit
WEGO	Weighted Efficiency Gains from Operations
UNCTAD	United Nations Conference on Trade and Development
USD	United States dollar

1. Introduction and Background

The Global Pricing Comparator Study (GPCS) comprises a benchmarking of South African port prices against international ports. Benchmarking exercises are a useful way of cross-checking regulatory outcomes, and providing context for the status quo in the South African market. The GPCS has been conducted annually since 2012, and in that time has provided invaluable insight on the level and structure of South African port tariffs.

Since the 2012 report, the Regulator has been forthcoming about the benefits and limitations of the GPCS process. As stated in 2012:

> *"The process and outcomes of benchmarking port pricing is not an exact science. The global averages that we have defined in our studies do not represent what we should be charging in RSA ports. Rather, it gives us some indication of the direction that our pricing should be moving in, not the exact absolute level of pricing. It also provides us with a reasonable indication that would allow assessment of the alignment between port policy, port pricing and economic policy. The identification of pricing differentials that exist does not automatically suggest that certain industries should be charged at a globally comparable rate. It does not suggest that certain cargoes may not be charged lower or higher rates than the global averages. It does identify the size of the divergence between what is the stated overarching economic and development policy of the country and what port pricing reflects. It provides a reason to assess and shift port pricing in a direction that better reflects the global reality and actually aligns with South African economic structure, economic policy, industrial policy and economic development policy."*[1]

At its inception, the GPCS found significant anomalies in South African port pricing, which strongly supported a realignment of the National Port Authority's price differentiation strategy. Further, the GPCS serves as a benchmarking study by which South African tariffs are compared against global counterparts. Annual updates to the GPCS have been a valuable tool for tracking the performance of the Regulator in achieving this realignment and also track the competitiveness of SA port tariffs against a selected sample of ports globally. One of the uses of the GPCS is as a monitoring tool to track the implementation of the Tariff Strategy, and it is anticipated that the current report will be informative in the revision of the port Tariff Strategy, which is planned for 2026/27.

It should be noted that the Ports Regulator is considering whether or not to move the GPCS from an annual cadence, to every three years. Doing so would allow scarce regulatory resources to be allocated to research in support of the current structural reform program in ports, and would potentially allow the GPCS reports to be deepened to include more detail on the structural factors driving pricing trends in international ports. Stakeholder feedback on this proposal would be appreciated.

[1] Global Port Pricing Comparator Study – 01/04/2012 Research Summary

1.1. Research methodology

One of the consistent findings of the GPCS has been to illustrate how widely port operating models and pricing systems differ internationally. Seaport pricing structures vary significantly across jurisdictions and sometimes also within the same port or port system. Tariffs are affected by the objectives of ports (for example, cost recovery and economic development, versus shareholder returns), the ownership model, the level of inter and intra port competition, and cargo and vessel services type. In addition, as highlighted by the United Nations Conference on Trade and Development (UNCTAD), "*Pricing is a major factor in the implementation of a port's strategic plan*.[2]" The design of the tariff system is thus deeply interlinked with the port's governance model and objectives.

These differences pose significant practical challenges when conducting an international price comparison exercise. In order for the price comparison to be meaningful, the basket of services being compared must be consistent. The first step of the GCPS methodology is thus to construct a model for a typical vessel call, associated with a basket of marine charges and cargo dues (differentiated by cargo type).

The charges for sea freight service follow the National Port Authority's framework, covering light dues, vessel traffic services, pilotage, marine services, port and berth dues, and cargo dues. Prices are drawn from official port tariff schedules. Vessel benchmarking assumes a typical vessel, a defined cargo type, a standard port stay, and a consistent cargo profile. This study examines publicly available port tariff data. It is thus limited to ports which make such information publicly available. The study does not include information on users who benefit from preferential pricing arrangements. The analysis considers the total cost of a given activity, ensuring consistency, comprehensiveness, and comparability across jurisdictions at a specific point in time. Exchange rates are factored in and all tariffs are converted to the US dollar equivalent, and thus the analysis captures any exchange rate gains or losses experienced by users.

The price of this standardized vessel call can then be compared across various ports, distinguishing between four cargo types: containers, automotives, iron ore, and coal. The standardized parameters for each cargo type are shown in Annexure A.

1.1.1. Choice of comparator ports

Not all ports conduct the same type of cargo, and not all ports are equally efficient. A benchmark group of predominantly small, inefficient ports with low throughput levels would thus produce very different results than a benchmark group of only the world's largest, most efficient ports. The best benchmark group would be of ports based in similar economies to South Africa's, handling a similar volume and mix of cargo, and known to perform at high levels of efficiency. In practice however the available set of operating ports (with publicly available tariff information) does not allow for this degree of tailoring of the comparison. Thus while care was taken in the selection of the sample, the comparator countries do at times diverge in significant ways from South African ports, and interpretation of the results must take this into account.

The researchers compiled port samples using several criteria, deliberately excluding tariffs until the final stage, to ensure they did not influence the selection process. Key criteria included throughput, capacity, cargo and commodity handling capabilities, availability of public tariff information (preferably in English), and the port's

[2] https://unctad.org/system/files/official-document/sddport2_en.pdf

ability to accommodate unitary vessel sizes. In 2020/21, the sample was also extended to include a group of African container ports, to allow comparison against regional norms.

In previous years the comparison has evaluated tariffs for marine services and cargo dues separately. Moving forward, the price comparison will be based on the all-in cost of both types of tariffs, to allow better evaluation of total affordability. Thus where either marine services tariffs or cargo dues tariffs are not available (and where it could not be confirmed to a fair degree of certainty that a specific port does not charge cargo dues), that port has been excluded from the sample. Unfortunately as a result ports which charge ad valorem cargo dues, such as Dar Es Salaam, are also excluded due to difficulties in estimating applicable fees.

The resulting sample per cargo type is as follows:

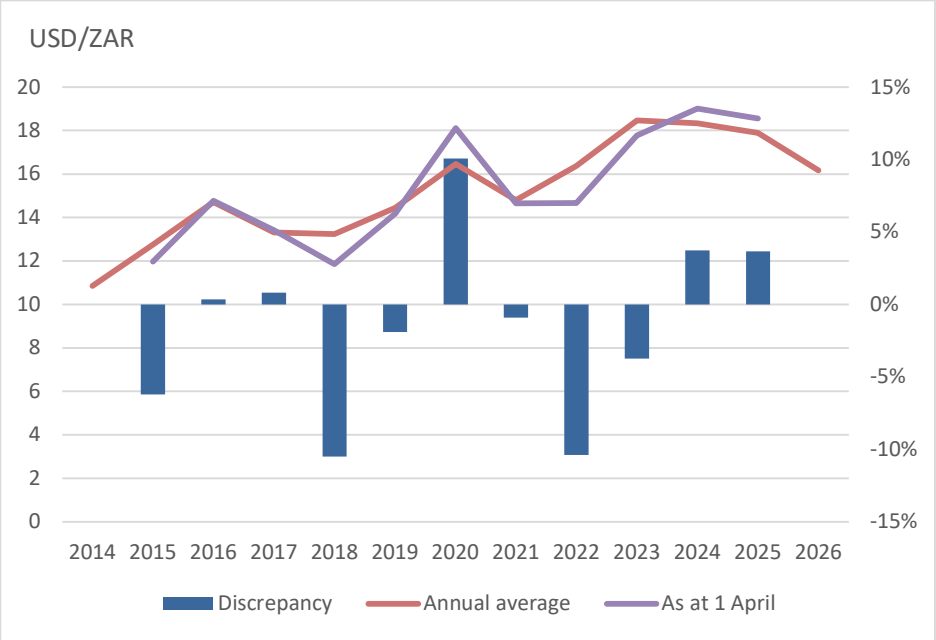
- **Containers:** an initial sample of 31 container ports was examined, of which data could be collected for 18 (including Durban and Cape Town). The benchmark vessel has a parcel size of 1,853 TEUs (including full and empty containers across deep-sea, coastwise, and transshipment categories) and an average turnaround time of 32 hours. The size of the African port sampled reduces to only three, namely Walvis Bay, Tanger Med and Mombasa, which are included in the overall sample rather than shown separately.
- **Iron Ore:** out of an initial sample of 11 ports, tariff data could be obtained for 8 (including Saldanha). Charges were calculated using a standardized vessel carrying 170,000 tons, with an average turnaround time of 47 hours.
- **Coal:** of the initial sample of 22 ports, tariff data could be captured for 14, including Richards Bay. Charges are based on a standardized vessel carrying 112,586 tons, with an average turnaround time of 32 hours.
- **Automotive Components:** of an initial sample of 20 ports, data could be recovered for 15 (including Port Elizabeth and Durban). The tariff is based on a standardized vessel carrying 11,800 tons and a 32-hour turnaround time.

All dimensions and assumptions for each cargo type, established during the development of the research methodology, are documented in Annexure A. The validity of the vessel size assumptions is then reviewed in Annexure B.

1.1.2. Exchange rate impact

The price comparison is undertaken as at 1 April in each year, using the exchange rates prevailing as at 1 April. Figure 1 below shows how these 1 April rates compare to the average annual exchange rate in each period. As can be seen, in some years there has been a discrepancy as large as 10% between the annual average exchange rate and the 1 April rate, which will have a material impact on the price comparison. In 2024 and 2025, however, the discrepancy is under 4%, with the annual average rate slightly more favourable to the rand than the 1 April rate. Use of the annual average would thus tend to improve the affordability of South African ports, but by a small margin.

Figure 1: Average annual exchange rates versus 1 April rates



Source: https://www.x-rates.com/average; own extrapolation

1.2. Research limitations

A number of considerations must be borne in mind when reviewing the pricing results. Firstly, the behavioural assumptions underpinning the pricing model are based on operating conditions at South African ports, for example as regards length of stay and size of vessel. This may distort the comparison if the operating conditions at a comparator port are very different.

Secondly, variations in port efficiency that affect duration of stay and thus impact time-based charges, for example, are not addressed, in order to avoid excessive computational complexity. The study also does not quantify the impact of disruptions in the logistics value chain, such as are associated with the problems with the condition of South Africa's road, rail, and energy systems, and excludes the broader ripple effects of these inefficiencies across the logistics network, including operational shortcomings at port terminals and their impact on overall cargo transportation costs. It should thus be borne in mind that some international ports in the sample may compensate for higher tariffs with greater efficiency in operations.

The group of tariffs included in the sample are based on the tariffs charged by the National Ports Authority. In other countries, these tariffs are frequently charged by different groups of service providers, and this adds complexity to the data collection process, particularly for the following tariff categories:

- Pilotage: pilotage is often provided by a separate pilotage association, and the billing system is frequently dependent on the length of trip and/or berth which a vessel is terminating at. In these cases the research team has attempted to identify a feasible vessel path and the correct destination terminal for the vessel type
- Tug services: again tug services are often provided by third parties, and often by the private sector. At times the tug price shown is an average across more than one service provider. In ports specialised for bulk freight, tug service providers more frequently do not publish public tariff lists. This may be due to a smaller number of more vertically integrated shippers in these bulk freight chains.
- Geographical complexities: each port has a unique lay-out, which affects the nature of services provided. For example, at some ports it may be necessary to traverse a canal and go through a lock in order to reach a berth for a specific cargo type. Efforts have been made by the research team to understand these complexities and include the relevant associated tariffs in the sample.

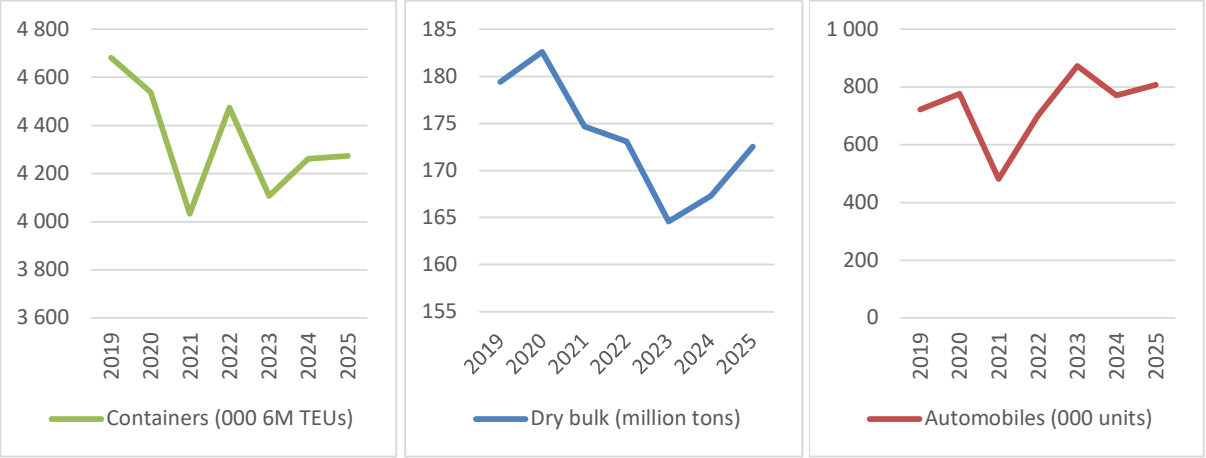
It should also be noted that, while the bulk of ports sampled revise tariffs on an annual basis, not all do so. There are ports in the sample which only update tariffs infrequently, and this seems to be a pattern that is particularly common at ports which quote USD rates (possibly because local currency depreciation against the dollar effectively allows them to increase local currency revenue over time, without undertaking tariff adjustments). There are also ports which only update parts of the tariff book, at intervals which are not always consistent. Finally, some tariff books are not available in English, and the method used to calculate tariffs by each port varies substantially, and in some cases is quite complex.

These kinds of complexities increase the difficulty of data collection, and may contribute to errors in the collected sample. While substantial effort has been put into verifying the collected data, some errors may remain, and we would encourage stakeholders to reach out to the Ports Regulator if such errors are detected. Minor data corrections and methodological refinements will be applied retrospectively as new information becomes available.

1.3. Cargo trends

Figure 2 below illustrates recent trends in volumes in South African ports. The data shown is for the year end March, and the impact of COVID in the year to end March 2021 is striking in container and automobile traffic. While automobile traffic has since recovered to past its pre-pandemic levels, container traffic recovery has been more muted.

Figure 2: Cargo volume trends



Source: NPA data, own extrapolation. Data is for year to end March

As regards dry bulk, volumes continued to decline into 2023. In the year to March 2025, iron ore and coal exports comprised almost 70% of dry bulk volumes, and this category is thus highly dependent on rail transportation. The logistics issues in the rail sector have thus been a drag on dry bulk traffic at ports. Since 2023, improvements in dry bulk logistics performance have been associated with the work of the National Logistics Crisis Committee, and the implementation of the 2023 Freight Logistics Roadmap. As the structural reforms proposed in the Roadmap continue, further improvements in rail performance are expected to continue to feed into port volumes.

Between 2024 and 2025, international shipping experienced major disruptions due to rising geopolitical tensions and shifting trade policies. Attacks in the Red Sea and heightened risks near the Strait of Hormuz forced many vessels to reroute, often taking longer paths that added several days to delivery schedules. These detours placed immense pressure on port infrastructure, especially around the Suez Canal, and triggered a period of volatile freight rates. The extended transit times led to a sharp increase in "ton-miles", a measure of cargo volume multiplied by distance travelled. In 2024, ton-miles nearly rose three times the rate of cargo volume growth. This surge also contributed to higher carbon emissions across the sector, as ships spent more time at sea.

In response to strong demand, the global container fleet grew by 9% year-over-year at the start of Q2 2025, with mid-sized vessels driving much of the growth. However, ongoing uncertainty in global trade led shipping companies to implement more "blank sailings"; the cancellation of scheduled port calls, to control costs and adapt to fluctuating demand. Freight rates for containers, dry bulk, and tankers remained high and unpredictable throughout this period. Container rates nearly reached the peaks seen during the COVID-19 pandemic in mid-2024. Although they eased later in the year, they stayed well above pre-pandemic levels. Dry bulk rates surged in 2024 due to strong demand for coal, grain, and fertilizer. However, they began to decline in 2025 as new shipping capacity entered the market.

Tanker rates also remained elevated, influenced by shifting energy trade routes and supply chain adjustments.[3] Despite global challenges affecting forecasts in some regions, container throughput in Africa is projected to grow above the global average between 2023 and 2028. [4] This growth is driven by several factors, including a 14% surge in import volumes across Sub-Saharan Africa during the first half of 2025, and significant infrastructure investments. For instance, the Durban Container Terminal Pier 2 has received new ship-to-shore (STS) cranes aimed at accelerating vessel turnaround times[5].

Volatility in US tariff regimes, beginning in 2025, also added complexity to global shipping dynamics. For developing economies, these changes may offer transshipment opportunities for selecting ports, though they also risk increasing overall shipping costs.[6] As at March 2026, the developing conflict in Iran, and the associated disruptions to shipping in the Strait of Hormuz, are likely to have a substantial impact on South African port conditions.

1.4. Pricing and efficiency

While tariff levels are typically the most important element of freight costs, the efficiency of service provision can also create significant indirect costs. The time freight spends in transit contributes to inventory holding costs, and thus longer trip times will directly affect the financial management of a firm. Delays in shipment can also cause significant bottlenecks in production, and as levels of inefficiency increase, the associated costs can become catastrophic. Perishable goods are particularly vulnerable to shipping inefficiency, and demurrage fees and surcharges may make exporting and importing unfeasible.

It is thus useful to frame the results of the GPCS in the context of the relative efficiency of South African ports. The Ports Regulator currently monitors South African port efficiency through the Weighted Efficiency Gains from Operations (WEGO) mechanism. However, in order to put the performance of South African ports in international context, we have used the World Bank Container Port Performance Index 2024. As identified by the World Bank, port efficiency has direct knock on effects for overall economic efficiency, and typically arises due to a complex interplay of factors, as follows:

> *Poorly performing ports are characterized by limited spatial and operating efficiency, maritime and landside access, oversight, and coordination among the public agencies involved, which lower predictability and reliability. The result is that instead of facilitating trade, the port increases the cost of imports and exports, reduces competitiveness, and inhibits economic growth and poverty reduction.*

In order to track port efficiency, the World Bank uses the S&P Global Port Performance Program's database. This database collects information from 10 of the largest shipping liner companies in the world, estimated to account for approximately 75-80% of global fleet capacity. Each company provides detailed information on operational

[3] https://unctad.org/publication/review-maritime-transport-2025
[4] https://www.tocevents-europe.com/content/dam/markets/mart/toc-europe/2024/speaker-presentations/regional-spotlights/Pres%20-%20Eleanor%20Hadland%20-%20Drewry.pdf
[5] https://www.transnet.net/getFile.ashx?id=6220#:~:text=Original%20equipment%20manufacturer%2C%20Liebherr%20Africa,its%20end%2Dof%2Dlifecycle.
[6] https://freightify.com/blog/ocean-freight-market-outlook

time stamps per port call, and other relevant indicators. The sample of information provided is extremely large – in 2024 alone, the database covered 247 million container moves internationally.

The focus of the World Bank sample is specifically on efficiency of container freight movements. It thus does not include many of the ports in the GPCS sample, and in particular, none of the iron ore ports are covered. Where a port specialises in a different cargo type, the measure of efficiency also is not directly relevant to that alternative cargo type, and thus the measures of efficiency for roro and coal ports should be treated with some caution.

Table 1 shows the ports which are included in both the GPCS sample and the World Bank study, segregated by cargo type. Unfortunately, Richards Bay and Saldanha Bay are not included in the World Bank study. The South African ports which are included are however ranked at the very bottom of the sample of container and roro ports. It should also be noted that the World Bank sample rates only 403 ports, and thus that Durban is the worst ranked port in the study. The World Bank does however acknowledge that significant efficiency improvements are evident in Cape Town and Ngqura in particular, and specifically mentions the establishment of the National Logistics Crisis Committee and a dedicated private sector participation unit for the sector as part of the longer term reform program.

Table 1: World Bank container index ranking 2024, GPCS sampled ports

Container		
Port	**Country**	**Rank**
Tanger-Med	Morocco	5
Kaohsiung	Taiwan	18
Singapore	Singapore	29
Johor	Malaysia	78
Colombo	Sri Lanka	80
London	UK	83
Karachi	Pakistan	99
Antwerp	Belgium	123
New York	United States	139
Rotterdam	Netherlands	197
Melbourne	Australia	265
Valencia	Spain	308
Houston	United States	335
Port Louis	Mauritius	369
Mombasa	Kenya	375
Walvis Bay	Namibia	376
Cape Town	**South Africa**	**400**
Durban	**South Africa**	**403**

Roro		
Port	**Country**	**Rank**
Mundra	India	25
Barcelona	Spain	62
Gothenburg	Sweden	63
Colombo	Sri Lanka	80
Antwerp	Belgium	123
New York	United States	139
Copenhagen	Denmark	171
Bremerhaven	Germany	173
Rotterdam	Netherlands	197
Valencia	Spain	308
Port Elizabeth	**South Africa**	**395**
Durban	**South Africa**	**403**

Coal		
Port	**Country**	**Rank**
Kaohsiung	Taiwan	18
Mundra	India	25
Jeddah	Saudi Arabia	36
Barcelona	Spain	62
London	UK	83
Taichung	Taiwan	121
Antwerp	Belgium	123
New York	United States	139
Rotterdam	Netherlands	197
Valencia	Spain	308
Bilbao	Spain	341
Brisbane	Australia	377

Source: World Bank, 2025. The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned, Washington DC: World Bank, License: Creative Commons Attribution Non-commercial CC BY-NC 3.0 IGO.

The top performing port in the container sample is an African port, Tanger Med, which is ranked fifth in the world. In roro Mundra is the top performing port, at a world rank of 25, while Kaohsiung performs better in coal, at a rank of 18. The container sample includes quite a few ports in the lower half of the world ranking, including Melbourne, Valencia, Houston, Mombasa, Port Louis and Walvis Bay. The lowest ranked non-South African port in roro is

Valencia, which is also the only non-South African roro port in the lower half of the ranking. Bilbao and Brisbane are the lowest ranking ports in coal, but again the ranking is based on performance in container shipping efficiency, and may not be directly relevant to efficiency in coal shipping at that port.

2. The Global Ports Pricing Comparison

The results of the global pricing comparison are summarised below, by cargo type. In previous years the study has separated analysis of cargo dues and marine charges, and the sample of ports used for cargo dues and marine charges has not been consistent. This has allowed a larger sample of ports to be included, but reduces the ability to evaluate the overall performance of South African ports. Going forward, therefore, the comparison will be made on an overall price basis, including cargo dues and marine charges. As a result, ports for which a full set of tariffs are not available will be excluded from the sample.

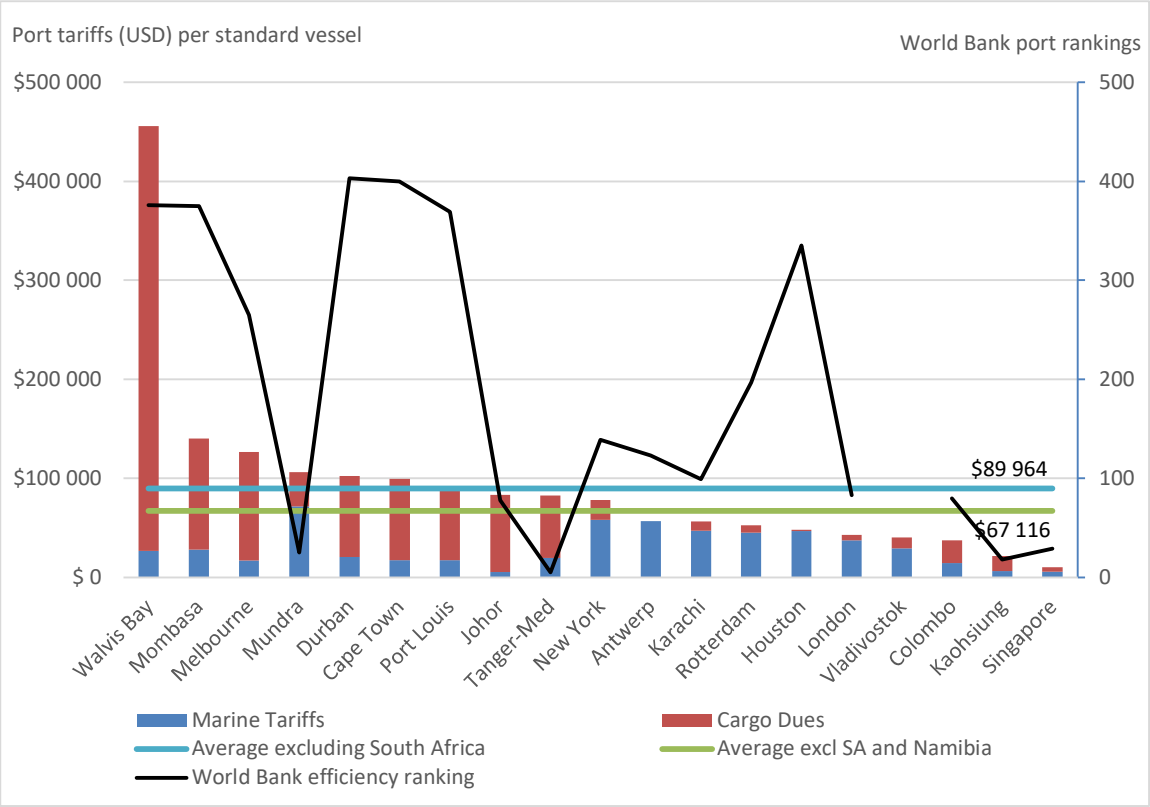
The dimensions and assumptions of the standardised unitary vessel used for each cargo type is set out in Annexure A of this report.

2.1. Container tariffs

Containerised freight is one of the most common forms of ports freight, and thus the available sample size of comparator ports is particularly large. Seven of the ports in the sample are also included in the automotive sample, and six are included in the coal sample (with four covering all three traffic types). None are included in the iron ore sample.

The figure overleaf illustrates the results of the container price comparison. The two South African ports, Durban and Cape Town, are the 5th and 6th most expensive in the sample, with total tariffs above the sample average (which excludes the South African ports). Interpreting the result is complicated by the fact that the most expensive port, Walvis Bay, is more than three times as expensive as the 2nd port. With Walvis Bay included in the sample, the average tariff per vessel call is US$ 89 964, and if Walvis Bay is excluded, the average drops to US$67 116. The lower average, excluding the outlying data point, is regarded as a better indicator of true global averages. Durban is 53% more expensive than the lower average, and Cape Town is 48% more expensive.

Figure 3: Container cargo dues and marine charges per port per standard vessel (01 April 2025)



Source: Tariffs sourced from service providers, own calculations; World Bank, 2025. The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned, Washington DC: World Bank, License: Creative Commons Attribution Non-commercial CC BY-NC 3.0 IGO .

The figure also includes the World Bank efficiency rank of each port. The South African ports in the sample have the worst efficiency ranking in the sample. On average, the more expensive ports are more likely to also be inefficient. The exceptions are Mundra, an expensive but very efficient port, and Houston, which is affordable but inefficient. Mundra is the largest private port in India, and has experienced rapid growth since being established in the late 1990s. Its high tariffs are thus possibly associated with more recent investments in port capacity. Houston's poor efficiency performance is reported to be related to congestion issues.[7]

A clear pattern is also evident as regards which ports have a larger proportion of the total tariff comprising cargo dues. This is set out in Table 2 below to enable comparison. The most expensive ports are much more likely to have a large proportion of their tariff be comprised by cargo dues (with the exception of Mundra). This is due both to a higher tariff for cargo dues at these ports, and a lower tariff for marine services, when compared to more affordable ports. Marine tariffs for the nine most expensive ports average out at $24 857, compared to $34 797 for ten least expensive ports. For cargo dues, the comparable numbers are $118 067 and $9 714. Only one port, Antwerp, does not appear to charge cargo dues.

For the sample as a whole, cargo dues comprise 65% of the tariff. The South African ports have a substantially higher proportion of cargo dues, at 80% and 83% respectively for Durban and Cape Town. While the marine service

[7] https://www.worldports.org/import-gateway-shift-pushes-houston-to-the-top-of-port-congestion-league/

charges at the South African ports are quite a bit lower than the sample average, the cargo dues total is significantly higher than the sample average.

Table 2: Proportion cargo dues versus efficiency ranking – container tariffs

	Estimated tariffs for standardised vessel call				
	Marine tariffs	**Cargo dues**	**Total**	**% cargo dues**	**World Bank 2024 efficiency ranking**
Walvis Bay	$26 712	$428 818	$455 530	94%	376
Mombasa	$27 983	$112 390	$140 373	80%	375
Melbourne	$16 967	$109 645	$126 612	87%	265
Mundra	$71 681	$34 653	$106 334	33%	25
Durban	**$20 557**	**$82 105**	**$102 662**	**80%**	403
Cape Town	**$17 270**	**$82 105**	**$99 375**	**83%**	400
Port Louis	$17 260	$71 923	$89 183	81%	369
Johor	$5 420	$78 037	$83 457	94%	78
Tanger Med	$19 859	$62 926	$82 785	76%	5
New York	$58 315	$19 951	$78 266	25%	139
Antwerp	$56 975	$0	$56 975	0%	123
Karachi	$47 296	$9 391	$56 687	17%	99
Rotterdam	$45 105	$7 387	$52 492	14%	197
Houston	$46 820	$1 273	$48 093	3%	335
London	$37 233	$5 938	$43 171	14%	83
Vladivostok	$29 335	$10 803	$40 138	27%	
Colombo	$14 553	$22 837	$37 390	61%	80
Kaohsiung	$6 640	$14 959	$21 599	69%	18
Singapore	$5 700	$4 600	$10 300	45%	29
Average excl SA	*$31 403*	*$58 561*	*$89 964*	*65%*	

Source: Tariffs sourced from service providers, own calculations; World Bank, 2025. The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned, Washington DC: World Bank, License: Creative Commons Attribution Non-commercial CC BY-NC 3.0 IGO .

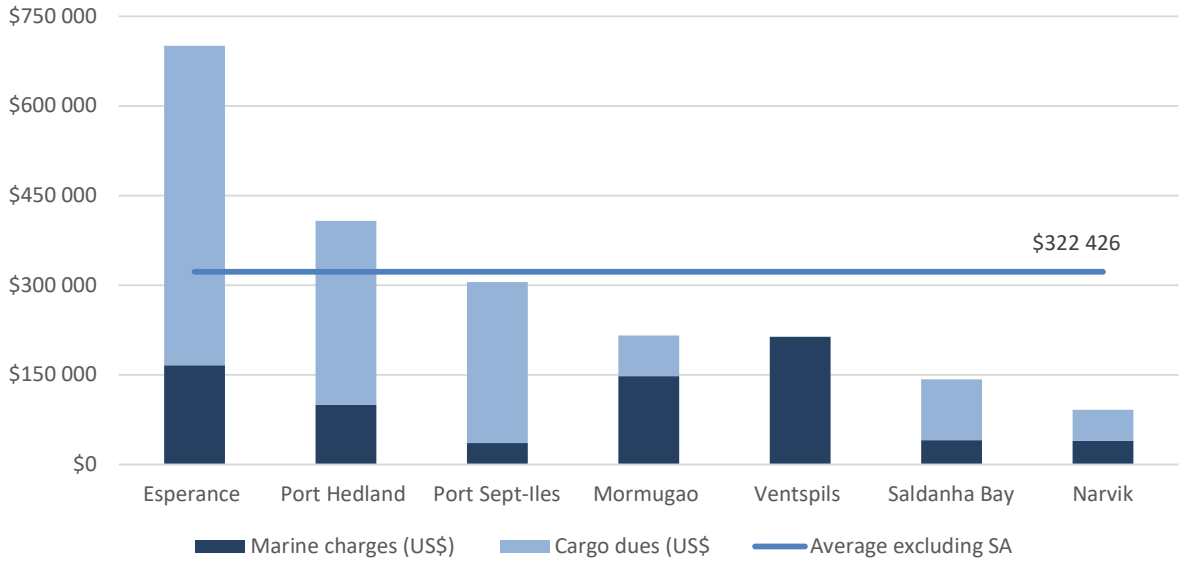
2.2. Iron ore tariffs

The sample of ports providing iron ore shipping services is the smallest of the freight types, with only seven ports included. Tug services fees could not be found for the two Australian ports in the sample, which may reflect a higher degree of vertical integration in bulk freight systems, and as a result less publicly available tariff data. It should thus be noted that the tariff estimate for the Australian ports is a systematic under-estimate.

None of the ports shown are included in the World Bank study, and thus the World Bank efficiency score is not included.

Figure 4 below shows the tariff results for iron ore. Saldanha is the second most affordable port in the sample, and its tariffs are 56% lower than the sample average (which excludes the South African port). Despite excluding tug fees, the two most expensive ports in the sample are Australian, and the only developing world comparator, Mormugao, has a tariff 33% lower than the sample average.

Figure 4: Iron ore cargo dues and marine services per port per standard vessel (01 April 2025)



Source: Tariffs sourced from service providers, own calculations

Table 3 sets out the split between marine charges and cargo dues in iron ore. Again, only one port does not charge cargo dues, in this case Ventspils. In Mormugao cargo dues are only 31% of the total tariff, but in all other ports they are well above 50% of the fee. For the sample as a whole, cargo dues are 64% of the total tariff. It is thus evident that both marine service charges and cargo dues at Saldanha Bay are significantly lower than the sample average, and that the proportion of cargo dues (72%) is somewhat higher than the sample average.

Table 3: Proportion cargo dues– iron ore

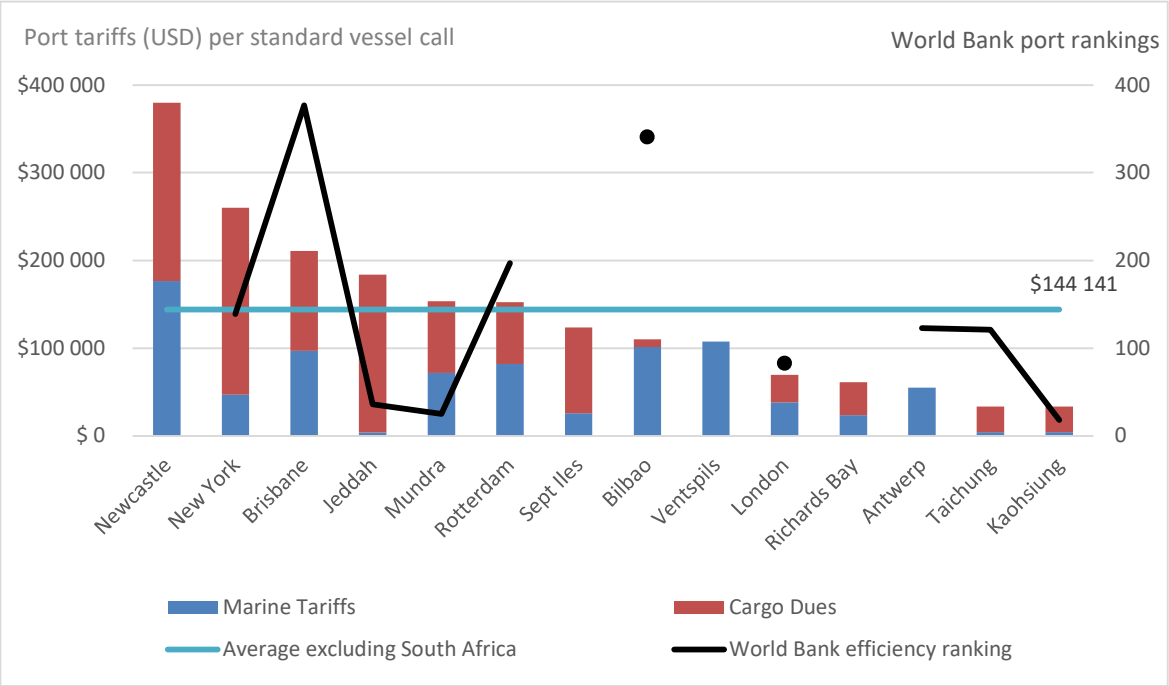
	Estimated tariffs for standardised vessel call			
Name of Port	**Marine charges (US$)**	**Cargo dues (US$**	**Total tariff**	**% cargo dues**
Esperance	$166 118	$534 613	$700 731	76%
Port Hedland	$99 215	$308 360	$407 576	76%
Port Sept-Iles	$35 775	$269 670	$305 445	88%
Mormugao	$147 858	$67 696	$215 554	31%
Ventspils	$213 531	$0	$213 531	0%
Saldanha Bay	**$40 427**	**$101 537**	**$141 964**	**72%**
Narvik	$39 472	$52 249	$91 721	57%
Average excl SA	*$116 995*	*$205 431*	*$322 426*	*64%*

Source: Tariffs sourced from service providers, own calculations

2.3. Coal tariffs

14 ports are included in the coal sample. As shown in the figure below, the average tariff for a standard vessel call in the sample (excluding South Africa) is $144 141, and Richards Bay has the fourth lowest tariff in the sample group, 57% below the average. The most expensive ports in the sample are Newcastle in Australia and New York, and the cheapest are Taichung and Kaohsiung, both in Taiwan. It is interesting to again note that both Australian ports are more expensive than the sample average, as is Mundra.

Figure 5: Coal cargo dues and marine charges per port per standard vessel (01 April 2025)



Source: Tariffs sourced from service providers, own calculations; World Bank, 2025. The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned, Washington DC: World Bank, License: Creative Commons Attribution Non-commercial CC BY-NC 3.0 IGO .

The figure also shows the World Bank efficiency ranking. However, as this ranking is based on container port efficiency, it is much less relevant as a measure of coal/bulk efficiency. There is little clear relationship evident in the graph between efficiency and tariff ranking.

Table 4 overleaf sets out the composition of the tariff between marine tariffs and cargo dues. Two ports have no cargo dues, namely Ventspils and Antwerp, both of which have total tariffs significantly below the sample average. In Bilbao, cargo dues make up only 8% of the tariff, and the overall tariff is again lower than the sample average. The ports with the highest proportion of cargo dues are Jeddah, Taichung and Kaohsiung, and while Jeddah is more expensive than the average for the sample, the Taiwanese ports are the cheapest in the sample. There is thus no clear relationship between the proportion of cargo dues and the cost ranking of the port. For the sample as a whole, cargo dues are 57% of the total average, so somewhat lower than the proportions seen in containers and iron ore. As cargo dues comprise 61% of the Richards Bay tariff, the South African tariff structure is fairly consistent with the sample as a whole, although the size of both marine charge and cargo dues in South Africa is substantially lower than the sample average.

Table 4: Proportion cargo dues versus efficiency ranking – coal

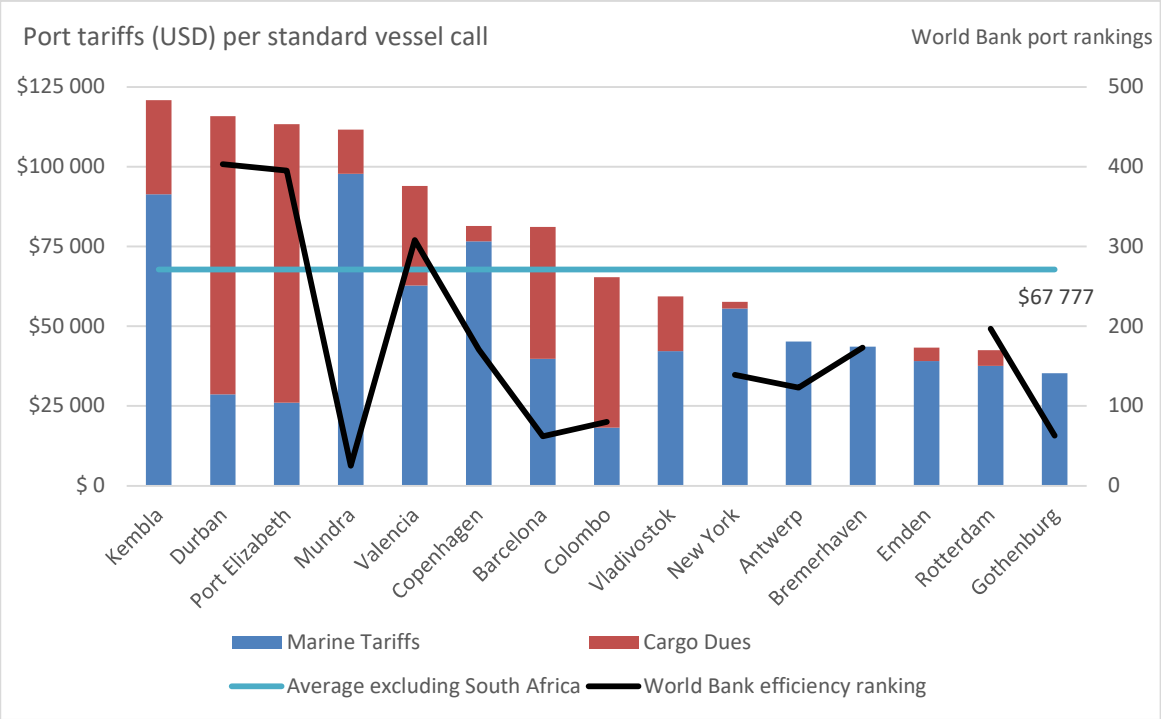
	Estimated tariffs for standardised vessel call			% Cargo dues	World Bank 2024 efficiency ranking
	Marine tariffs	Cargo dues	Total tariffs		
Newcastle	$176 596	$203 258	$379 854	54%	
New York	$47 303	$212 788	$260 090	82%	139
Brisbane	$96 872	$113 942	$210 814	54%	377
Jeddah	$3 774	$180 138	$183 912	98%	36
Mundra	$71 570	$82 197	$153 767	53%	25
Rotterdam	$82 029	$70 406	$152 435	46%	197
Sept Iles	$25 688	$97 990	$123 678	79%	
Bilbao	$101 498	$8 707	$110 205	8%	341
Ventspils	$107 466	$0	$107 466	0%	
London	$38 400	$31 112	$69 512	45%	83
Richards Bay	**$23 877**	**$37 628**	**$61 505**	**61%**	
Antwerp	$54 865	$0	$54 865	0%	123
Taichung	$4 159	$29 460	$33 619	88%	121
Kaohsiung	$4 159	$29 460	$33 619	88%	18
Average excl SA	*$62 645*	*$81 497*	*$144 141*	*57%*	

Source: Tariffs sourced from service providers, own calculations; World Bank, 2025. The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned, Washington DC: World Bank, License: Creative Commons Attribution Non-commercial CC BY-NC 3.0 IGO .

2.4. Automotive tariffs

A sample of 15 automobile ports is examined, including Durban and Port Elizabeth. As shown in the figure below, the average tariff for the sample (excluding Durban and Port Elizabeth) is US$67 777. The two South African ports are the second and third most expensive in the sample, with tariffs respectively 71% and 67% above the average. The most expensive port in the sample, Kembla, is again Australian, and Mundra is also again well above the average tariff. The five cheapest ports in the sample are all European, with two (Bremerhaven and Emden) based in Germany.

Figure 6: Automotive cargo dues and marine charges per port per standard vessel (01 April 2025)



Source: Tariffs sourced from service providers, own calculations; World Bank, 2025. The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned, Washington DC: World Bank, License: Creative Commons Attribution Non-commercial CC BY-NC 3.0 IGO.

The mechanics of automobile freight are arguably more similar to container freight than is the case for bulk minerals like coal and iron ore. The World Bank efficiency rankings are thus more likely to provide insight into ports automobile performance. As can be seen, the two South African ports have the lowest efficiency ranking of the sample, and the other low ranked port, Valencia, is also more expensive than the sample average. With the exception of Mundra, ports which achieve higher efficiency ratings do appear to be more likely to be below the average tariff, as per the pattern seen in container ports.

Table 5 overleaf shows the breakdown of the tariff in more detail. Cargo dues are a much smaller proportion of the average tariff in automobiles than in the other three freight types, at only 22% of the average tariff (excluding South Africa). Antwerp, Bremerhaven and Gothenburg do not charge cargo dues, and cargo dues at Mundra, Copenhagen, New York, Emden and Rotterdam are below 15% of the total tariff. It is not clear why this is the case, but it does put South African ports, at 75-77% cargo dues, at the highest proportion of cargo dues in the sample. This is attributable both to the higher-than-average cargo dues in South Africa, and the lower-than-average marine tariffs in South Africa.

Table 5: Proportion cargo dues versus efficiency ranking – automotive

	Estimated tariffs for standardised vessel call			% Cargo dues	World Bank 2024 efficiency ranking
	Marine Tariffs	Cargo Dues	Total tariffs		
Kembla	$91 297	$29 539	$120 837	24%	
Durban	**$28 593**	**$87 240**	**$115 833**	**75%**	403
Port Elizabeth	**$26 049**	**$87 240**	**$113 289**	**77%**	395
Mundra	$97 833	$13 793	$111 627	12%	25
Valencia	$62 706	$31 236	$93 942	33%	308
Copenhagen	$76 575	$4 759	$81 334	6%	171
Barcelona	$39 757	$41 335	$81 092	51%	62
Colombo	$18 183	$47 204	$65 387	72%	80
Vladivostok	$42 229	$17 031	$59 260	29%	
New York	$55 456	$2 208	$57 664	4%	139
Antwerp	$45 199	$0	$45 199	0%	123
Bremerhaven	$43 586	$0	$43 586	0%	173
Emden	$39 100	$4 235	$43 335	10%	
Rotterdam	$37 525	$4 997	$42 522	12%	197
Gothenburg	$35 319	$0	$35 319	0%	63
Average excl SA	*$52 674,27*	*$15 102,86*	*$67 777,13*	*22%*	

Source: Tariffs sourced from service providers, own calculations; World Bank, 2025. The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned, Washington DC: World Bank, License: Creative Commons Attribution Non-commercial CC BY-NC 3.0 IGO.

3. Conclusion

International price comparison exercises provide perspective on local tariffs, both in terms of the absolute levels and structure of tariffs. Care needs to be taken not to over-interpret the results of an international benchmarking exercise, as conditions and operating costs can vary substantially between ports. That being said, however, it still remains striking that South African ports are much more internationally competitive on tariffs for bulk mining products, than for higher value and manufactured goods, proxied by container and automobile tariffs. It is difficult to reconcile this tariff structure with, for example, the industrial policy set out in the Department of Trade, Industry and Competition's 2024 Industrial Policy & Strategy Review.

During the course of 2026/27, the Regulator will be reviewing the Tariff Strategy, and publishing a discussion document for public consultation. The Tariff Strategy is where the Regulator considers the appropriate incidence of tariffs on the various categories of port users, and among others, reviews whether there is any evidence of price discrimination and/or cross subsidisation which is not in the public interest. The results of the GPCS will continue to inform this process and help to improve the efficiency and targeting of the regulatory regime.

Annexure A: Standardised vessel call assumptions

Overarching assumptions

The following assumptions are consistent across all four freight types:

- No discounting is applied, for example for environmental considerations or frequency of calls
- The vessel uses port services during standard operating hours and complies with all port rules and regulations.
- No surcharges, waiting fees, penalties, or cancellation fees apply during the vessel call.
- Miscellaneous services (e.g., fire and emergency response, fire protection) are not used.
- Port charges for services without stipulated minimum fees — such as security, freshwater, electricity, and refuse removal — are excluded.
- The vessel operates on a scheduled liner trade basis, and is a long-distance shipper.
- Where tariff data is available from multiple service providers, average tariffs are used.
- All vessel and cargo documentation is provided in advance, per port requirements, before arrival and departure.
- Pilotage is mandatory on port entrance and exit, and no shifting between berths occurs

Container tariff assumptions

Vessel Dimensions	
Length	221 metres
Breadth	32 metres
Draft	12.2 metres
Deadweight tonnage (DWT)	41 800 tons
GT	35 800 tons
NT	14 444 tons

Standardised Ship Call Total Parcel Size = 1 853 TEUs			
		Landed	Shipped
Deepsea	Full	686	427
	Empty	71	288
Coastwise	Full	2	9
	Empty	4	8
Transhipped	Full	148	148
	Empty	30	32

Vessel Call Assumptions

- Berthing occurs on weekdays (excluding public holidays), with the vessel arriving at 08:00 and departing at 08:00 two days later; total berth time: 48 hours.
- **TEU weights are assumed as follows**:
  - Full container: 21 tons
  - Empty container: 2.5 tons
- **Tug assistance**: Two tugs for one hour are required per call, unless otherwise specified.
- **Pilotage**: One pilot for one hour is required per call, unless otherwise specified.
- For coastwise and transshipped cargoes without specific tariffs, deep-sea rates apply.
- One vessel call is assumed per port per month.
- Mooring and unmooring ropes provided by the port are used.

Automotive tariff assumptions

Standardised Ship Call	
Commodity Moved	**Cars**
Parcel Size (tons)	11 800,96
Import (tons)	8 085,32
Export (tons)	3 715
Parcel Size (Units)	1 299
Import (Units)	890
Export (Units)	409

Vessel Dimensions	
LOA	198m
Breadth	32m
Draft	8.6 m
Deadweight tonnage (DWT)	19 893 tons
GT	56 439 tons
NT	17 959 tons

Vessel Call Assumptions

- **Duration in Port**: 1 day and 8 hours (Adding to 32 hours).
- **Tug Usage**: The vessel will require two tugs for maneuvering.
- **Pilotage**: Pilotage assistance is mandatory for all port operations.
- **Cargo Type**: The study focuses exclusively on the import and export of new automotive vehicles.
- **Ownership**: All vehicles handled are associated with a single vehicle manufacturing company.
- **Vehicle Dimensions**: The average vehicle length is 4.5 meters.
- **Vessel Type**: The vessel is a dedicated car carrier.

Iron Ore tariff assumptions

Vessel Dimensions	
Length	280m
Breadth	44m
Draft	12 m
Deadweight tonnage (DWT)	180 000 tons
GT	95 000 tons
NT	N/A
Cubic dimension	147.840 cu.m
Iron Ore Parcel Size	170 000 tons

Vessel Call Assumptions

- Port Stay Duration: 1 day and 23 hours (total of 47 hours)
- Berthing Schedule: Vessel enters berth at 10:00 and departs at 09:00, 47 hours later
- Cargo Operations: Begin within 1 hour of berthing and end 1 hour before departure
- Vessel uses port equipment and two mooring/unmooring ropes
- Tug and Pilotage Requirements: Two tugs required for one hour
- Operational Frequency: One vessel call per port per month

Coal tariff assumptions

Standardised Ship Call	
Commodity Moved	**Coal**
Parcel Size (tons)	112 586

Vessel Dimensions	
LOA	225m
Breadth	32m
Draft	13,54 m
Deadweight tonnage (DWT)	75 122tons
GT	39 763 tons
NT	25 329 tons

Vessel Call Assumptions

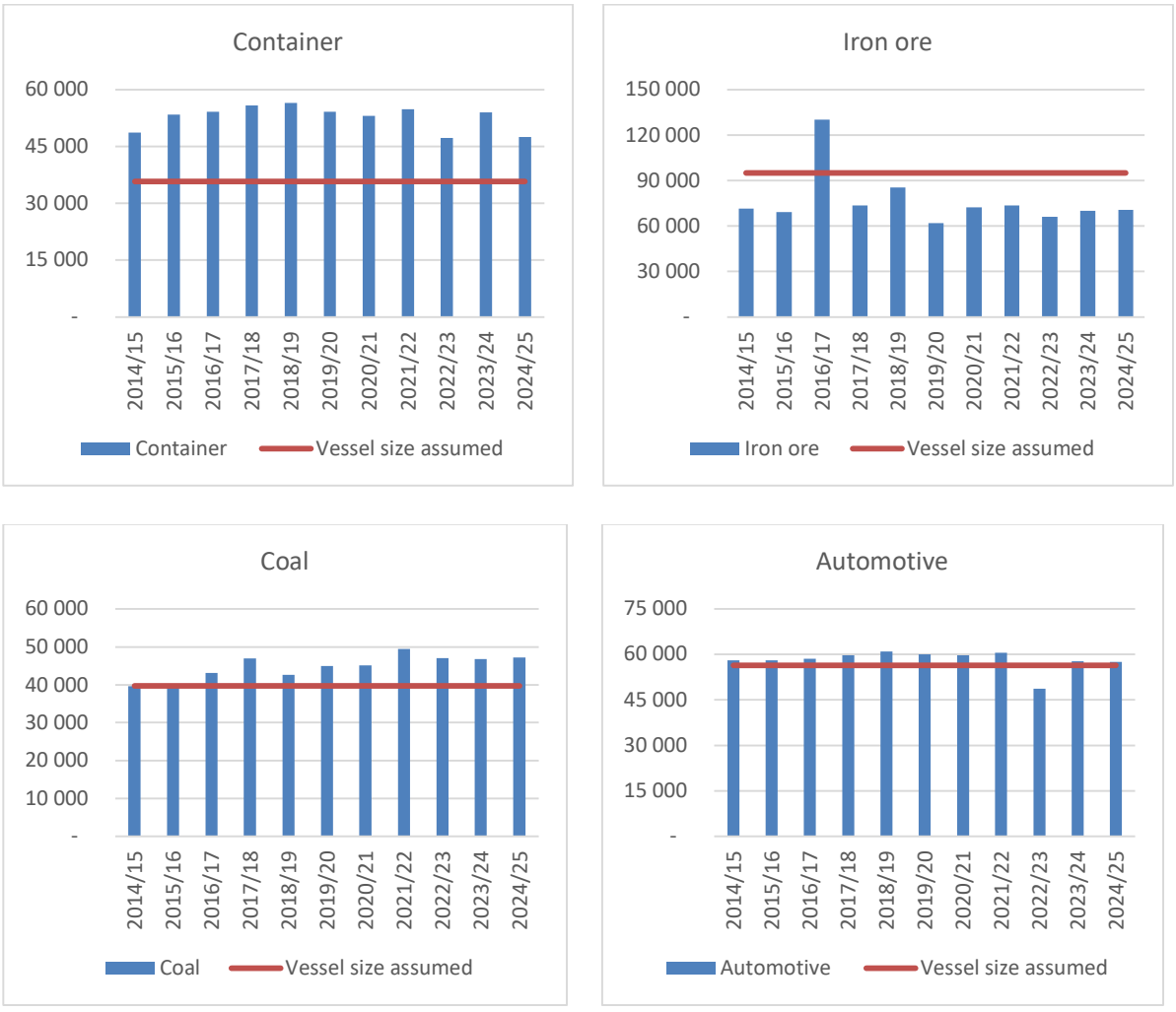
- Port Stay Duration: 1 day and 8 hours (totalling 32 hours)
- Two tugboats will be used for the vessel's manoeuvres.

Annexure B: Vessel size trends

The GPCS survey is based on a set of assumptions as regards an average vessel call, per freight type. It is thus important to continuously verify whether the parameters chosen remain valid for South African conditions. A key parameter is average vessel size, which affects both the calculation of marine and cargo dues, and impacts on the efficiency of the vessel call as a whole.

Figure 7 below shows annual average gross tonnage (GT) for vessels calling at South African ports by freight type, contrasted to the assumed vessel size in the GPCS, for the period 2014/15 to 2024/25. As can be seen, the assumed vessel size for automotive most closely matches the actual vessel sizes experienced in South African ports. Coal vessel sizes have increased somewhat over the period, and are now on average around 20% higher than the assumed standardised vessel. The largest differences are however in containers and iron ore, with container ships being consistently around 30-50% larger than assumed, and iron ore ships being around 20-30% smaller.

Figure 7: Average vessel size trends by cargo type



Source: NPA data, own extrapolation

Differences of this magnitude are large enough to affect the price comparison, and in container and iron ore in particular will need to be addressed going forward. The Regulator will thus endeavour to revise the vessel size assumptions before the next iteration of the GPCS.

The ability to attract and accommodate mega-ships to a port depends primarily on its design, specifically, the depth i.e., (berth depth, deeper and wider access channels), need stronger quays and quay walls, and larger turning basins. Other key factors include investments in maritime access, port equipment, and hinterland transport connections to remain competitive. According to the Organization for Economic Co-operation and Development (OECD), the largest container vessels now boast capacities of approximately 20,000 TEUs, with dimensions reaching 400 meters in length, 60 meters in width, and a draft of 16 meters. These mega-ships significantly influence port systems and reshape the relationship between ports and their surrounding urban environments[8]. Recognizing the growing importance of enhancing port performance and modernizing infrastructure to address climate impacts and support industry transitions, South Africa's ports are actively aligning with these global shifts. Efforts are focused on upgrading infrastructure to accommodate larger vessels and increasing trade volumes. This is being achieved through targeted investments in projects aimed at improving overall port system efficiency.

Notable initiatives include the expansion of Durban's container terminal and the development of new terminals in Cape Town and Ngqura. These upgrades are intended to increase cargo throughput and reduce vessel turnaround times. In addition, the government is working to strengthen port-rail connectivity, further boosting the efficiency of freight transport across the country.

[8] https://www.oecd.org/content/dam/oecd/en/publications/reports/2018/09/container-ship-size-and-port-relocation_a95b1892/d790ae41-en.pdf

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