

traffics HAROPA PORT continues to grow and invest

HAROPA PORT is winning additional market share in the Northern Range and improving its modal shares on the Seine axis, despite a market in downturn. In 2023, France's number 1 port intends to continue its investment and its transformation, developing the first decarbonised industrial ecosystem and continuing the structural development of its multimodal logistics corridor.

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A carbon-free industrial ecosystem under construction

With 16 % of the port's investments in 2022, ecological and energy transitions are a major focus of HAROPA PORT's strategic project, thus representing €555 million in public and private investments. They will be increased to 19 % in 2023.

Through several projects, HAROPA PORT aims to create a cutting-edge decarbonised industrial cluster on the Seine axis :

- **the ZIBaC project** led by HAROPA PORT and its three industrial-port zones, in response to the call for Low Carbon Industrial Zones projects launched by ADEME in March 2022;
- **the largest multimodal platform in Île-de-France** will soon produce green energy from bio-waste. PAPREC, a company, has been selected to design and operate the future methanisation plant to process household biowaste from the Paris area at the port of Gennevilliers;
- **a new generation of multi-energy stations** will be set up at multimodal platforms in the Paris area at Gennevilliers, Bonneuil-sur-Marne, Limay, Bruyères and Montereau;
- at the Port-Jérôme port/industrial zone **a new industrial cluster** – “Plastic Valley” – dedicated to recycling and producing latest-generation renewable plastic is currently being organised, most notably around the projects of Eastman and Futerro. The site will also see production of renewable hydrogen with Air Liquide's Normand'Hy project;
- the decision to award the Grand Canal du Havre call for projects during the 1st quarter of 2023 will confirm this orientation.

In total in 2022, €555 million in public and private investment will be used to build this carbon-free industrial ecosystem.

Strong structural development of a multimodal corridor

By merging, HAROPA PORT aims to develop a logistics corridor capable of carrying goods from around the world into the heart of France's biggest consumer catchment area. The river and rail transport of the Seine axis appearing more than ever as alternatives to the road.

In 2022, a few milestones :

- the modal shares of rail and river rose **from 12 % to 13.3 %** for containers exiting Le Havre as of end October, and at Paris Terminal SA on the river, inland waterway activity handled increased by 25 %, boosted by the launch of new river-based services (Greenmodal/Hapag Lloyd in September 2022 and Fluviofeeder/Marfret in November 2022);
- HAROPA PORT awarded the Bruyères-sur-Oise terminal to MEDLOG in order to support the implementation of MSC's investment at Port 2000. This project comprises a trimodal terminal, combining rail and river, dedicated to container services in the Greater Paris region and nearby consumer catchment areas, which should enable a million road journey to be avoided over a ten-year period;
- new strategic port infrastructure will enable development of the logistic corridor over the medium term : this is true of **PSMO (Port Seine Métropole Ouest/West Metropolitan Seine Port)** the construction work for which is to begin in 2023, and the "cat flap" project (Port 2000 direct river access). This direct river connection between the terminals of Port 2000 and Le Havre's historical port, scheduled to enter into service in 2024;
- work on Port 2000 berths 11 and 12** (adding an extra 700m of quay span to the existing 3,500m) **will be completed** where port infrastructure is concerned and delivered to the operator in 2023 to enable the latter to carry out its own work as required for use of the future terminal. At the same time, HAROPA PORT continues to foster innovation and work towards tomorrow's urban river logistics, as exemplified by IKEA, which has been making deliveries to its Paris customers by river and electric vehicle since last December, other projects are underway :
 - in October 2022, the cities of Le Havre, Rouen, Paris, in conjunction with HAROPA PORT, selected 21 submissions in response to the first call for declarations of interest for the development of decarbonised urban river logistics at 32 locations along the Seine axis;
 - On 6 January 2023, following a call for Austerlitz project proposals, HAROPA PORT's management board selected SOGARIS for the development of a sustainable urban logistics operation that also encourages a mix of site uses and integration of urban ports into the capital city environment.

+ 2 % for maritime traffic

In 2022 maritime traffic stood at 85.1Mt, an increase of 2 % on the back of an exceptional trading year for cereals and a rise in liquid bulk flows.

Container traffic remains at the record level achieved in the previous year, registering throughput of 3.1m TEU, **surpassing the symbolic figure of 3m TEU.**

HAROPA PORT is consolidating its position in an uncertain economic environment. HAROPA's market share has progressed in a context marked by a general downturn in container traffic at the Northern Range ports.

Liquid bulk ended the year up 5% (40.1Mt) buoyed by an expansion in crude oil traffic (+23% at 18.8Mt) thanks to the operation at full capacity of the two Seine Axis refineries despite the international context requiring changes in product sourcing.

Dry bulk saw growth of 3% (at 14.2Mt), boosted by a grain trading year up by 12% (8.6Mt). The conflict in Ukraine generated not only additional demand, but also demand from countries rarely served in recent years, especially in the second half of 2022, when 5Mt was shipped, a record for this part of the year. Traffic in aggregates was down by 4 % due to the current situation of certain major construction projects on the Seine Axis, these having entered phases that require less construction work.

Ro-ro traffic fell back by 11% (265,000 vehicles). Adapting to a volatile market, the port switched from an export-led market to one dominated by imports, which required an overhaul of its parking areas.

Cruises stayed on a positive heading with 171 port calls and 301,000 passengers but did not return to their 2019 level. Cruise programming for 2023 points to a level close to benchmark years before the Covid crisis, when there were over 220 port calls and more than 450,000 passengers.



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