



Annual report 2023

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▼ Container ship manoeuvring
at Fos-sur-Mer

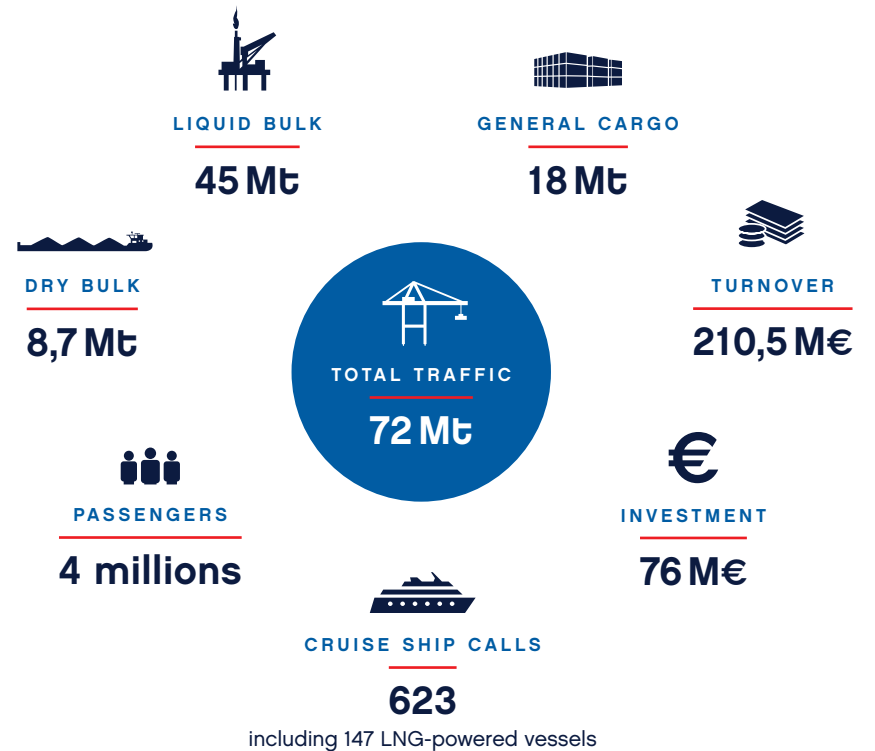


1 Performance indicators

1st port

- River-sea Facility in the Mediterranean
- French port in the Mediterranean
- French cruise port
- French port for LNG

2023 in figures



▼ Arrival of the future Provence Grand
Large floating offshore wind turbine
components at the Gloria quay in Port
Saint-Louis-du-Rhône



Traffic summary

In a difficult context, the Port of Marseille Fos recorded overall traffic of 72 million tonnes, for more than 9,000 calls.

General cargo saw a 12% fall in volume and has declined across all segments. Dry bulk fell by 24% due to the stoppage of one of ArcelorMittal's blast furnaces and a decline in European demand for steel. Bulk liquids remained stable compared to the previous year, driven by the momentum of crude imports.

The number of passengers in 2023 exceeded 4 million, representing a growth of 36% for the year. Taken as a whole, cruise ship activity progressed considerably (+76%) with more than 2.5 million passengers. It must be noted that the Port received 626 calls (53 more than in 2022), 147 of which were LNG-fuelled vessels, thus contributing to the engagements signed by cruise line operators during the Blue Maritime Summit in October 2022.

Turnover, ground handling revenues and investments

In 2023, the Port of Marseille Fos generated €210.5 million in turnover, an annual growth of 10%, thanks to the signature of new contracts and excellent results in passenger traffic.

In 2023, the Port invested around €76 million in its facilities, a 27% increase on 2022 investments (€60 million).

Port development was boosted by an investment of €46 million, with a focus on environmental aspects and the implementation of projects for sustainable development:

- ▶ €31.6 million were allocated to projects linked to environmental transition and activity decarbonation, thus exceeding the initial budget of €26.9 million (+18%).
- ▶ Among these projects, €18.3 million were allocated to the modal shift of goods (Graveleau and Mourepiane projects); €8.8 million to electric shore-to-ship power supply; €2.5 million to careening water treatment and €2 million to the greening of the vehicle fleet.
- ▶ In addition, €10.7 million were invested in the development of maritime activities, including €8.3 million in Cap Janet.
- ▶ At the same time, €3.4 million were allocated to studies for future projects, in particular the DEOS project for offshore wind turbines and the Phare project.
- ▶ Lastly, €30 million were invested in the modernisation of port facilities.

▼ In January 2023, A Galeotta joined Corsica Linea's fleet, providing the Marseilles Fos basins its first LNG-powered ferry



2 The year's highlights

JANUARY

THE ENVIRONMENTAL TRANSITION OF THE INDUSTRIAL ACTIVITY GOT UNDER WAY WITH THE LAUNCH OF THE SYRIUS PROGRAMME

► In Marseille, Corsica Linea inaugurated A Galeotta, the ninth vessel in its fleet, fuelled by liquefied natural gas (LNG). The ceremony was held in the presence of Clément Beaune, Deputy Minister for Transport.

► The SYRIUS programme won the 'Low Carbon Industrial Zones' call for projects (France 2030), led by the PIICTO association and its partners. With the engagement of 4 industrial companies and a 9-million-euro budget, the SYRIUS programme will enable some thirty engineering and feasibility studies co-funded by the French State and regional businesses to define a path to decarbonation. The most relevant projects to implement may obtain additional funding in a second phase.

► From 23 to 26 January 2022, the Port hosted a delegation from the Port of Beirut Administration Board, with a view to providing support to the latter for rebuilding and development.

FEBRUARY

WORKS TO THE PASSENGER WALKWAYS AT THE NEW CAP JANET INTERNATIONAL TERMINAL

► As part of the work to develop the new Cap Janet international ferry terminal, the mobile footbridge installed on the Quai de la Major in 2009 has been moved by sea to the Cap Janet sector.

MARCH

BOOSTING RENEWABLE AND SOLAR POWER PRODUCTION WITH THE CARBON PROJECT

► CARBON announced the location of its first giga-plant for solar products in Fos-sur-Mer, thus contributing to decarbonation and European energy sovereignty.

► The Port of Marseille Fos obtained a score of 93/100 on the professional gender equality index.

APRIL

THE PRODUCTION OF OFFSHORE WIND POWER BECAME A REALITY FOR OUR REGION WITH THE PROVENCE GRAND LARGE WIND FARM

► The components for the future Provence Grand Large offshore floating wind turbines arrived at Gloria Quay in Port-Saint-Louis-du-Rhône.

► MSC Mediterranean Shipping Company relaunched its weekly 'Dragon' service between Asia and the Mediterranean.

▼ From la Gare de la Major and for the first time in the Port, the President of the Republic, Emmanuel Macron, reiterated his commitment by making the Marseille Fos Port Authority an example in terms of decarbonization



MAY

THE PORT AND ITS ACTIVITY IN THE BROADEST SENSE GENERATE 42,600 JOBS ON A REGIONAL SCALE

► INSEE published a survey in partnership with the Port and the Union Maritime et Fluviale (Maritime and River Union). The survey revealed that the Marseille Fos industrial-port cluster now represents some 42,600 salaried jobs, i.e., 7.9% of non-agricultural goods jobs in the Bouches-du-Rhône area.

► As part of the Nature Festival, the Port of Marseille Fos launched its first audio tour of the former Relai salt marshes, a natural area managed and preserved by the Port thanks to a team of eco-wardens.

JUNE

A NATIONAL DRIVE TO MAKE THE PORT OF MARSEILLE FOS A MODEL FOR DECARBONATION

► During its General Assembly, the Union Maritime et Fluviale Marseille-Fos (Maritime and River Union - UMF) elected Jakob Sidénus, Managing Director of the Seayard container terminal, as its new chairman for a 2-year term.

► Minister for Transport Clément Beaune visited the Port of Marseille Fos and announced the winning consortium of the call for projects for the summer operation on the southern part of the digue du Large.

► On 24 and 25 June, the Port's open days attracted large crowds eager to visit the port facilities in Marseille and Fos by boat.

► On 26 June, the French President spoke from La Major ferry port and reiterated his wish to make the port a model for decarbonation.

JULY - AUGUST

THE SOUTHERN PART OF THE DIGUE DU LARGE REOPENS TO THE PUBLIC, WITH A FESTIVE PROGRAMME FROM JULY TO SEPTEMBER

► On 12 July, the Minister for Transport, Clément Beaune, joined the Commandant of the Port of Marseille Fos for the last special dinner of the season on the Large dyke, also in the company of Tony Estanguet, President of the 2024 Olympic and Paralympic Games.

► The summer of 2023 began with an event for the inhabitants of Marseille on the digue du Large (seawall). The transfer of international ferries to Cap Janet enabled the reopening of the southern section of the Large dyke to the public, with a diverse programme of activities.

► The Port of Marseille Fos teamed up with the non-profit group Institut Ecocitoyen pour la Connaissance des Pollutions (IECP- Eco-citizen Institute for Pollution Awareness) to create the Gulf of Fos Observatory.

► Cap Janet, the new international passenger ferry terminal received delivery of its first two shore-to-ship power substations (CENAO).

► On 1 August, Philippe Affre officially took up the position of Commandant of the Grand Port Maritime de Marseille (Port of Marseille Fos), succeeding Amaury de Maupeou.

► Following the assembly and launch from the Port's Gloria Quay of the three Provence Grand Large wind turbine floaters, the first offshore turbine was assembled. These three wind turbines, measuring 174 metres in height, will be located 17km from the coastline and should produce a total of 25MW, i.e., the average annual consumption of 45,000 inhabitants.

▼ CMA CGM's 23,000 TEU container ship Palais Royal made a royal appearance on Marseille's harbours before heading to Fos for its commercial operations and LNG bunkering. What a symbol!



SEPTEMBER

START OF THE PRELIMINARY CONSULTATION ON THE CARBON PROJECT

- The consultation phase prior to the CARBON project took place in September 2023. This meeting signalled the first step of the project to locate a mega-plant for solar panels in the port area, thus contributing to re-industrialisation and European energy sovereignty.
- In September, the former sanitary post, a heritage building located in the old port, became a third place devoted to the sea, thanks to the efforts of the non-profit organisation Marseille Capitale de la Mer. Open to the general public, this venue will host numerous events linked to the maritime world.

OCTOBER

A NEW ENERGY SECTOR DROPPED ANCHOR IN THE WESTERN PORT AREA WITH THE COMPLETION OF THE PROVENCE GRAND LARGE WIND FARM

- Less than a month after the first launch from the Port of Marseille Fos, two other wind turbines were towed out to sea and successfully anchored at a depth of one hundred metres. Commissioning of the pilot farm is scheduled for early 2024, following tests to the facility.
- From 19 to 21 October, the Port opened the doors of Hangar Jo to welcome the second edition of the city festival Extrem'City, organised by the non-profit group Va Jouer Dehors! ('Go Play Outside!'). The event, designed to reflect on the city of the future, included encounters, debates and shows for the general public.

NOVEMBER

SIGNING OF A PARTNERSHIP AGREEMENT WITH THE PORT OF SHANGHAI

- On 7 November 2023, the ports of Marseille Fos and Shanghai sign a new cooperation agreement.
- The Port Training Institute organised a seminar to welcome its 2023/2024 work-study students, and offered tours of the port docks, along with workshops on port matters.

DECEMBER

GRAVITYH began its consultation, thus launching this project to produce low-carbon reduced iron

- The impressive LNG-fuelled, 23,000-TEU container ship CMA CGM Palais Royal made a spectacular appearance in the Bay of Marseille on 14 December 2023, before heading to Fos-sur-Mer for trade operations at the EUROFOS terminal and refuelling with the bunkering vessel Gas Vitality.
- At the end of December, GravityHy, a new project linked to the decarbonisation of the steel industry in the industrial port zone of Fos-sur-Mer, passed the stage of the first public consultation meeting. This new facility in the port area involves an investment of 2.2 billion euros to build a low-carbon steel production plant. Work is scheduled to start in 2025, with a target start date of 2027. ■



3 Major projects

► Projects for the Eastern docks

The Port is planning a city-port project for its Eastern docks, thanks to a development strategy to enhance and preserve these facilities while maintaining their urban, industrial and trade vocations.

PHARE PROJECT: REHABILITATION OF HALL JO AND NEW PORT HEADQUARTERS

Aims

- Enable public access to the sea
- Enhance the port area
- Open new Port headquarters

Description

- Demolition of the existing headquarters, rehabilitation of Hall JO and building of approximately 28,000m² in ground surface, including 8,500m² for the new headquarters.
- Redevelopment of dockside areas in keeping with trade operations.

Schedule

- Delivery of Port headquarters: 2028
- Public space enhancement: 2030

Investment

Around €107 million: the total cost of the operation, including operating works, maintenance and services throughout the duration, in the framework of a private-public partnership.

MODERNISATION OF CAREENING WATER TREATMENT

Aims

- Implement collection and treatment systems for careening waters discharged during ship repairs in the nine dry docks of the port's Eastern docks

Description

For the nine docks in question, separation of clean and careening waters thanks to infrastructures located at the bottom of the docks and transfer of these waters to treatment units installed on the dock embankments.

Schedule

- Start of works in 2022
- Works to end in 2025

Investment

€17 million

▼ In 2023, the Port has continued to roll out the structural CENAQ (Ship to Shore Electrical Connection) project with the addition of new jib connections



SHORE-TO-SHIP POWER CONNECTIONS (CENAQ - ZERO SMOKE SCALES)

Aims

- Implement the 'Green Port' strategy and contribute to the decarbonation of maritime transport.
- The goal is to reduce polluting emissions (SOx, NOx and particles) as well as greenhouse gases (CO₂).

Description

- Strengthening of the port dock power network in Marseille.
- Creation of new power supply points in the port terminals.
- Creation of solar power stations.

Schedule

- Equipping of the stations on Corse Quay completed (4 quayside stations).
- Equipping of stations on the International & Cruise quay: mid 2023 to late 2025.

To date, 4 quayside stations have been installed at the international terminal.

- Equipping of J4, non-massified sector and 3rd cruise vessel from 2025 to 2028.

Investment

Phase 1: €77.4 million

Phase 2: €88 million

MOUREPIANE RAIL PROJECT REHABILITATION OF CANET FACILITIES

Aims

- Maintain and meet the city's essential need for rail logistics further to the closure of Canet train station and accommodate long trains combining maritime and continental freight.
- Enable a growth in destinations and regularity to enhance the attractiveness of the rail offer.
- Boost the modal shift and reduce lorry traffic in the city centre.

Investment

Works project further to an initial ongoing operation at Med Europe terminal and the St André network for €25 million. Re-commissioning of branch connections to the national rail network by SNCF Réseau. Re-development of the Mourepiane network by the Port with the creation of five 850-metre railways and a return rail for electric locomotives.

Reinforcement work to the St André network completed (a non-electrified 850-metre railway) and the MedEurope Terminal network (i.e., two additional 420-metre railways).

Schedule

- Public consultation launched in 2022
- Delivery scheduled for 2026

Investment

€21.6 million after an initial works phase amounting to €25 million

▼ The offshore wind energy industry is taking root on the western side of the port



► Projects for the Western docks

To the west of the port area lie rare land opportunities, an ideal geographical location and state-of-the-art infrastructures. These assets make the Port a strategic tool capable of addressing the needs of French and European industrial and energy sovereignty.

DEVELOPMENTS TO THE CENTRAL BREAKWATER SECTOR

Aims

- Develop the road and maritime network, in addition to fluid network facilities
- Develop new technologies and boost the attractiveness of the area
- Promote industrial innovation and energy transition

Description

Road and rail developments to accommodate new energy sectors, i.e., green hydrogen and bio-fuels on the central breakwater of the Western docks. The project consists in developing a 130 ha-site devoted to housing new industrial sectors linked to innovation and energy transition.

This includes projects for the location of the following industries:

- Carbon: Giga-plant for the production of solar products
- H₂V: Production of low-carbon hydrogen and e-methanol
- NEOCARB: E-fuel for aeronautics and maritime transport
- Gravity: Production of low-carbon steel

All these port development projects amount to a total investment of around €11 billion, including €2 million in public funding and the creation of 10,000 direct jobs.

Schedule

Works phased between 2025 and 2030

Investment

Approximately €275 million (studies ongoing)

THE DEOS PROJECT FOR THE DEVELOPMENT OF OFFSHORE WIND FARMS

Aims

Enable the roll-out of the offshore wind turbine sector while avoiding conflict of use and operating in synergy with other port activities and terminals.

Description

Execution of infrastructure works, dredging, generic soil enhancement and periodical reinforcement.

Private operators will be entrusted with specific works related to the processes, superstructures, networks and tooling required for this activity.

Schedule

Studies ongoing: sizing, programme, cost, feasibility and schedule. The project will be executed in the framework of public funding for infrastructure and private funding for superstructures and tooling.

Start of works: 2025

Investment

Estimated at €550 million



FOS 3XL, EXTENSION TO THE NORTH OF GRAVELEAU

Aims

- Avail of the necessary facilities to accommodate the growth in miscellaneous goods traffic by offering new possibilities for the simultaneous intake of several 'large' vessels to the north.
- Develop the river modal shift by optimizing barge handling.

Description

Extension of the length of the quay in the '3XL' area, and expansion of available surface for goods storage and handling (containers and/or cars).

Schedule

Studies ongoing: sizing, programme, cost, feasibility and schedule. The project will be executed in the framework of public funding for infrastructure and private funding for superstructures and tooling.

Start of works: 2025

Investment

Estimated at €220 million for the Port

REDEVELOPMENT OF RAIL SERVICES - GRAVELEAU BREAKWATER

Aims

- Increase the Graveleau sector's intake, sorting and expedition capacities
- Develop connections to the terminal handling networks
- Avoid rail section/wagon coupling manoeuvres between the two container terminals

Description

Creation of the point linking the back networks of 2XL handlers, i.e., Seayard and Ports synergy / Eurofos. Creation of a direct exit to port and national rail networks for Seayard, and relocation and extension of the Ports synergy network.

Schedule

Project ongoing, delivery planned in 2027

Investment

€34.4 million

▼ Marseille Fos,
1st french cruise port



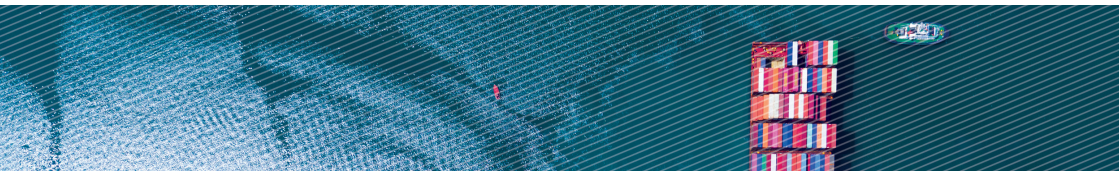
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