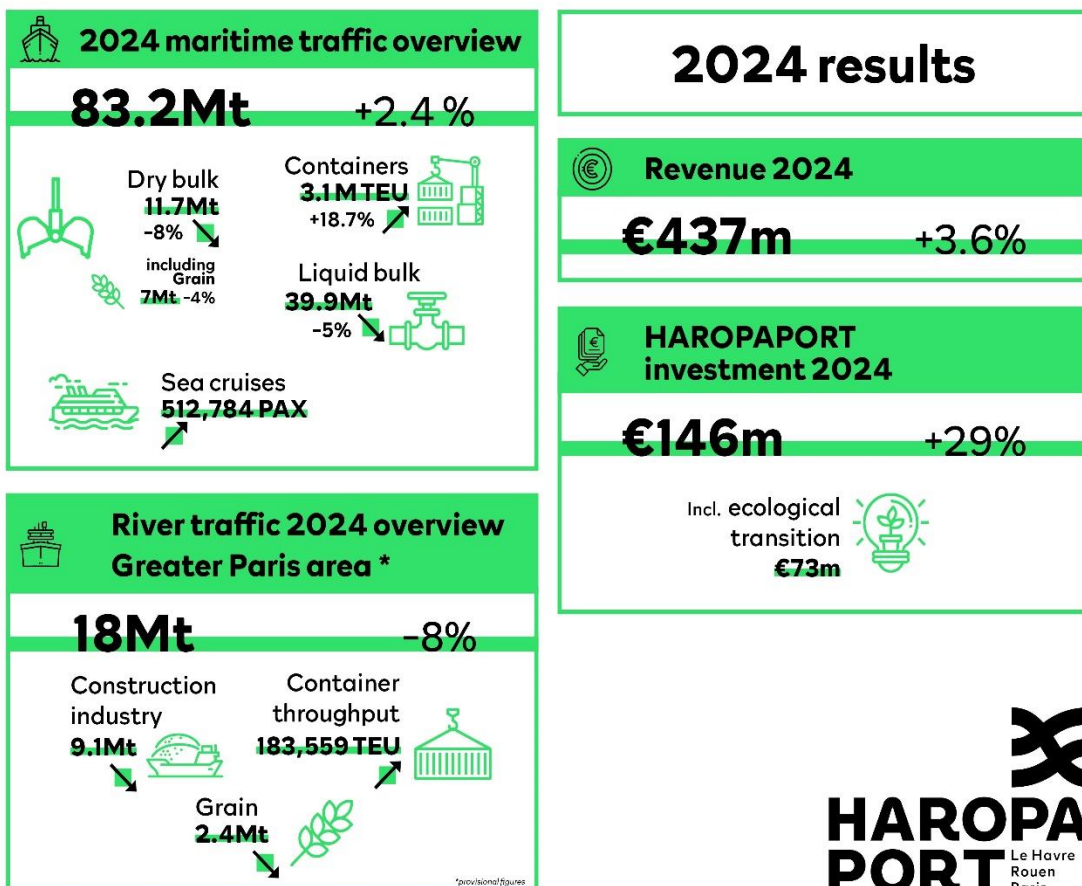




Le Havre, Rouen, Paris
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HAROPA PORT: 2024 RESULTS

A new model for traffic growth and rising numbers of new industrial operations



Against a complicated economic and geopolitical backdrop for French and European ports, HAROPA PORT stood apart, registering an increase in maritime traffic of 2.4% in 2024, at 83.19Mt, thereby expanding its Northern Range market share. In this context, France's leading port complex has turned in a good financial result, announcing revenue of €435m, up by 3.5%. Consolidation of the green corridor continued with the historic addition of several new decarbonised industrial projects along the Seine Axis. Alongside this, the pace of multimodality development was stepped up in the Seine Valley. 2024 provided confirmation of the port's ongoing development model, encompassing logistics and industry. In 2025, the development strategy based around decarbonisation will be accelerated with the continuation of major projects driven by HAROPA PORT, among them the commencement of construction for the direct river to port channel (*la chatière*) in Le Havre, the initial work on the PSMO (Port Seine Métropole Ouest) river-based platform and new industrial operations announced following the completion of calls for project proposals issued in 2024.

Maritime traffic up by 2.4%

In 2024, HAROPA PORT's maritime traffic totalled 83.19Mt of goods, up by 2.4% from 2023.

- **1-A: container traffic: +18.7% - the fastest growth in the Northern Range**

Flows of maritime containers registered a significant increase of 18.7%, exceeding the historical high of 3m TEU, at 3.1m TEU. Transhipment saw historic growth of 56% compared with the previous year, thus registering its highest level in five years. This increase is all the more remarkable for the fact that it comes in the context of plateauing traffic across the Northern Range. HAROPA PORT therefore stands out with the fastest growth in container traffic of any port in the Northern Range. This dynamic in container traffic is also illustrated by a robust level of inland flows (+7%), as well as by the rise in numbers of ship calls at Le Havre, despite the events in the Red Sea.

A feature of the container sector in 2025 will be the addition in Port 2000 of seven new TiL MSC gantry cranes, following on from the arrival of the first two on 11 November 2024. This latest-generation equipment – these are the world's biggest gantry cranes to date – will be used in Port 2000 by TNMSC (Terminal de Normandie) and TPO (Terminal Porte Océane). They will be valuable assets for enhanced productivity and competitiveness in the port of Le Havre and for HAROPA PORT more generally. Via its subsidiary TiL, the MSC line is in this way completing the first phase of its scheduled investment in Le Havre, investment amounting to some €900 million.

Liquid bulk traffic stood at a total of 39.97Mt in 2024, falling back by 5.1%, a figure that includes 19.4Mt of crude oil (down 1.5%) and 15.3Mt of refined products (down 6.3%). These lower figures relate essentially to technical incidents affecting the production of local refineries, in addition to variation in refined product storage levels.

Dry bulk traffic registered a fall of 7.5%, with traffic totalling 11.75Mt. This decline features a parallel fall in both grain and aggregates. At 7.08Mt, grain volumes saw a 4% decrease compared with 2023 due to the poor weather conditions that led to a sharp reduction in volumes during the 2024-2025 season (most notably, a near-25% decline in soft wheat). Fortunately, stored grain from the very good 2023-2024 harvest was exported during the first half of 2024, which mitigated the negative consequences for exports of the mediocre 2024-2025 season.

After a year of decline in 2023, **ro-ro traffic** bounced back by 5.6% and a throughput of over 272,563 vehicles at Le Havre ro-ro terminal in a challenging market environment characterised by falling sales

of new thermal and electric cars in France. HAROPA PORT stands out due to its ability to offer the operators concerned available real estate in a situation in which little is on offer in European ports where there are major levels of requirement for storage space.

1-B : Modal shift continues to progress along the Seine Axis as a whole

In a downward-trending context for bulk river traffic (-8%, with traffic totalling 18Mt, impacted by the contraction in the construction sector and the poor grain season), river container traffic turned in an excellent year with over 220k TEU carried to and from Le Havre.

This growth was particularly significant at Gennevilliers, which handled 11% more TEU. This historic record testifies to the dynamism of container traffic along the Seine Axis.

Container rail transport also reached a record level and is likely to stabilise around 120,000 TEU carried by train to and from the hinterland. This figure reflects significant growth driven by the creation of new direct services to and from maritime terminals, most notably linking to Tours and Clermont Ferrand, in addition to a strengthening of services to Lyon and Bordeaux.

The start of work on the river/port access channel (*la chatière*) holds much promise for the future. Notification of the procurement of construction work from the TERELIAN/DEME group launched the first work on site, most notably the pyrotechnic survey programme. The 1,800m-long embankment will make a direct link possible between Port 2000 docks and the Seine basin. This flagship project is essential for the decarbonisation of logistics chains in that it will make the transportation of containers by river to and from Le Havre more reliable and increase their numbers. It is scheduled to come into operation in 2027.

Alongside the above, HAROPA PORT is continuing to develop multimodal facilities. One example is Bruyères-sur-Oise (*département 95*), where MSC's logistics subsidiary, MEDLOG, has carried out its first container loading/unloading operation at its new Paris area multimodal platform. This inland terminal is part of the roll-out of MSC's investment in Le Havre, the aim being to expand its container flows. By connecting the Paris area with Le Havre's hinterland, MEDLOG is helping organise the green logistics corridor promoted by HAROPA PORT.

In 2024, HAROPA PORT pursued its development of the Bornes&Eau network to supply electricity and water to river craft. Last year, 36 terminals were installed, thanks to hard work by the teams in the regional offices. The deployment of these facilities is receiving joint funding from the European Union through the Connecting Europe Facility, in addition to partial funding from the Greater Paris administration (CPER). In 2025, the installation programme for additional terminals will go forward, once again in partnership with the French Waterways Authority (VNF), leading to a total of 83 new supply terminals for freight, giving a grand total of 93 terminals for freight craft and 18 for cruise vessels.

Investment up by 29%: the green industry port

In 2024, the port continued to invest in developing its activities, in promoting modal shift and the ecological and digital transition, as well as in the upkeep of its facilities and core assets. All in all, the port committed €146m in the fiscal year just ended.

- **2-A Real estate: a tool for sustainable reindustrialisation**

HAROPA PORT is using its stock of real estate as a tool for sustainable reindustrialisation of the Seine Axis. In accordance with the ZAN (*Zéro artificialisation nette / Zero net land artificialisation*) legislation, HAROPA PORT is offering the possibility of developing 456 hectares in Normandy and 30 hectares in the Greater Paris area for setting up projects of national and/or European importance. By also reusing land that is already artificialised, seeking to reconstruct the port on its own land, HAROPA PORT could place 700 to 800 hectares of land on the market over the period to 2030. In 2024, more than 60 hectares have been allocated in this way to projects, most notably in the West A29 area. Just under 75 hectares are currently on offer and will be allocated in 2025.

- **2-B: Major industrial announcements**

Among the successes of the past year, HAROPA PORT can point to projects for major new industrial operations, on the “West A29” site in particular. This area is in fact destined to host three major industrial projects involving the energy transition, projects driven by the companies LIVISTA, AIR PRODUCTS and QAIR for a total investment of €2.6bn and almost 2,200 direct and indirect jobs in the region. This has only been possible thanks to innovations in real estate engineering aimed at allowing three mutually complementary businesses to cohabit at the same location. This approach takes account of the increasing scarcity of land, of soil conservation and also of the requirements of energy transition. The projects are expected to generate almost one million tonnes of maritime traffic each year, plus 500,000 tonnes of river traffic. The efforts to put in place this major industrial programme led to the creation of a complex dedicated to the energy transition involving a total of €2.6bn investment and nearly 2,200 direct and indirect jobs in the region.

Among other “turnkey” sites, HAROPA PORT has an area of land totalling approximately 24.5 hectares located in the northwest of Le Havre’s port industrial zone and east of the A29 artery. HAROPA PORT is planning to facilitate the creation of one or more new operations of industrial nature on this site – known as “East A29” – as part of the ongoing energy and ecological transition. The bids selected will be announced during 2025.

In Rouen, HAROPA PORT has called for project proposals for the creation of a new activity in what is Western Europe’s leading grain port. The space available covers almost 7.6 hectares, and has the advantage of a premier quayside location on the Elie Peninsula. The site is notably situated at the dockside (*Bassin aux bois / Wood dock*) adjacent to the Rouen-Quevilly Extension quay. It offers the possibility of using not only river but also rail transport.

- **2-C PSMO: Europe’s biggest river facility construction project**

The year just ended saw the launch of what is the biggest river port construction programme in Europe at the present time.

Located on the Achères plain in the Yvelines *département*, PSMO (*Port Seine-Métropole Ouest / West Metropolitan Seine Port*) is a planned multimodal platform notably destined to host activities linked to the building and civil engineering sector. This major project reflects the strategic goal of rebalancing the logistics platforms to the west of Paris and supporting the economic development of the Greater Paris area. Its budget calls for total investment of €122m.

The ecological transition port serving its region

In addition seeking to decarbonise the Seine Axis by introducing green industrial operations, HAROPA PORT has undertaken numerous programmes as part of the ecological transition. In terms of investment, this has meant earmarking €76m for the ecological transition, which represents 50% of total investment

- **3-A : Quayside electrification**

In 2025, HAROPA PORT will continue its work to install landside power connections for supply to cruise ships. The RENAQ programme – (*Raccordement Électrique des Navires A Quai / Quayside ship electrical supply*) – is fully aligned with European regulations and HAROPA’s targets for completion of quayside electrification by 2030.

Alongside this, quayside electrification at Port 2000 is currently being considered, the aim being to determine the optimal sizing for requirements and to find technical solutions for the constraints to be overcome: number of vessels to be supplied simultaneously, quay length, the need for flexible siting of connection points, availability of electrical supply networks, among others.

As a complement to this, the port is also supporting the greening of the maritime fleet by enhancing the value of the Environmental Ship Index (ESI), a scheme to reward the most virtuous ships in terms of their emissions – with a funding envelope of €250,000 for vessels with ESI scores between 50 and 64 and an envelope of €1m for those scoring higher than 64, as part of its tariff policy for 2025.

About HAROPA PORT

The ports of Le Havre, Rouen and Paris form the Seine Axis Major River and Maritime Port. As the fourth largest Northern European port, HAROPA PORT has connections to every continent based on an international maritime offering in the very first rank, reaching over 660 ports. It serves a vast hinterland centred on the Seine Valley and the Paris region, which together form France's biggest consumer catchment area. From Le Havre to Paris, the port complex can point to 2.5m sq. m. of logistics warehousing currently in operation. Today, HAROPA PORT provides a transport and logistics system capable of proposing holistic, end-to-end and decarbonised service offerings. It generates annual maritime and river traffic of over 102 million tonnes and representing around 160,000 jobs.

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