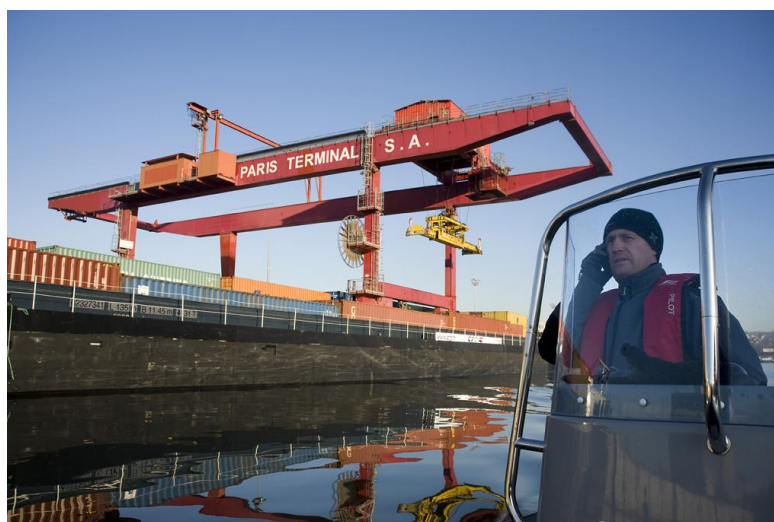


January 30<sup>th</sup>, 2013

## HAROPA results in 2012 and prospects for 2013



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## After 2012, a construction year,

## HAROPA is armed for traffic growth in 2013

A year ago, the three ports of the Seine river artery – Ports de Paris, Grand Port Maritime de Rouen, Grand Port Maritime du Havre – were presenting their grouping within HAROPA - Havre-ROuen-PARis or Harbours of Paris. This grouping is now operational, especially in the fields of development, sales and marketing.

Obviously, the first year of joint work has been marked by a hard economic situation. However, despite a dull market, HAROPA develops the position it takes in strategic business units (containers, automobile, chemistry, logistics, agri-food, cruising), especially on export, owing to reasserted customers' confidence.

On historic markets, the conjunction between hard markets (especially a fairly average year for cereals after record years) and the re-structuring of energy trades (decrease in crude oil traffic) bring about a significant drop in HAROPA overall trades (-9%).

### **Benoît Mélonio,**

**HAROPA Delegate Executive Director:**

"2012 has been a year of hard work to build HAROPA, a mixed year as regards traffic, with historic trades which have suffered. But the prospects are now interesting: we are actually at the end of the change of model for ports, historic trades have reached a low point and start to recover while new trades let us expect a significant rise of our overall traffic. In other respects, the alliance developed by HAROPA inspires our competitors."

In 2013, HAROPA, armed with good fundamentals, has the ambition to experience significant traffic growth, with a quick rise on strategic segments, particularly containers and cereals. The recent decision made by MSC, the 2<sup>nd</sup> world biggest container shipping company, to add three services as from now on, that is 350,000 TEU, in Le Havre, proves this new dynamic move.

In 2012, the main stakeholders of the maritime and port shipping world have positively welcomed the innovative approach of HAROPA and the three ports. Proof of it, is the exceptional series of trophies awarded to HAROPA in 2012 up to the beginning of the year 2013:

- Best Seaport in Europe for HAROPA-Le Havre ;
- CALA trophy (China Automotive Logistics Association) for Le Havre ro-ro terminal;
- Best world port for dry bulks at the IBJ Awards in Hamburg for HAROPA's grouping;
- Port of the year at the Shortsea and intermodality prizes for HAROPA's grouping;
- King of the Supply Chain Trophy for RORO MAX project (HAROPA-Port of Le Havre ro-ro terminal).



## CONTAINERS: growth to Africa, reception of sea giant vessels



In a dull market environment, HAROPA proposes an exceptional service offer, which outlines very positive future prospects:

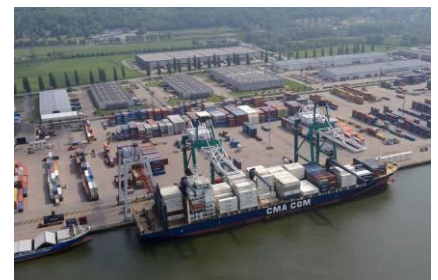
- full range of services, with more than 40 shipping lines available;
- the only port complex in Northern Europe with Rotterdam to be chosen by all shipowners working with very large vessels (over 10,000 TEU);
- 55% of the shipping lines selected Le Havre as the first inbound port or the last outbound port on the Asian trade.

This increase in the range of services offered is the direct consequence of the major structural efforts made for 18 months:

- the port reform made it possible to reach a reliability level equivalent to that of the best European ports and about 20 % productivity gains, as witnessed by shipowners themselves;
- the creation of HAROPA made it possible to pool the assets of the three ports on the river Seine artery, and to facilitate the creation of sustainable and competitive services, from one end to the other end of the transport chain.

The progress can be noted in the following facts:

- good performance of container trades (+ 4%) within a stable North-European market, showing a slight **rise in market shares**;
- **significant gains in market shares on export, especially in agri-food (+ 11%) and to the American continent**;
- **high growth on North to South connections** (+ 15 % for example for the exports to Africa);
- strengthening of the logistics hubs of HAROPA since 18 months, with more than 15 company setting-ups, especially those of SDV, FedEx, Danone Baby Nutrition, SD'Log, Dachser, Capgel, Panalpina, Nichirei, Daher, Slaur Sardet;





- coming-on-stream of the river city logistics in Paris with Franprix and Vert chez Vous trades ;



- excellent reception by the shipowners during the HAROPA trip to Asia;
- The Italian-Swiss MSC shipping company plans a significant business growth in 2013, with already a first phase of 350,000 additional TEU scheduled (weekly feeders to Great Britain, Ireland and the French Atlantic Coast), which will provide real dynamics for employment.



## Automotive trade: traffic resistance and ro-ro terminal under development



HAROPA trades withstood well a very hard European automotive market in 2012, at the lowest level for 17 years. The RORO MAX continuous improvement scheme bears fruit and is supported by the professionals: the Le Havre roll-on/roll-off terminal is still extended to reach 100 ha in early 2013, against 70 ha two years ago.

The two French biggest centres for spare parts, respectively managed by Renault (Grand-Couronne) and Peugeot (Le Havre), are located along the Seine artery and were strengthened in 2012.

**Hervé Cornède,**  
**HAROPA Commercial and marketing Director:**

"HAROPA is first of all a transport system dedicated to national, European and world customers. Our vocation is to meet their expectations by offering them a package of solutions under the form of an end-to-end global offer, from the maritime services, to the networks, passing via the customs offer, and even the estate offer. This combination of services provides importers-exporters, shipowners, logisticians and freight forwarders a high-performance growth lever. Our strength relies upon the efficiency of a single shop displayed in all the ports and terminals along the river Seine artery."

## LIQUID BULKS

### Crude oil: 2 upgraded refineries

The context, and especially the provisional business stoppage of Petroplus over the first months of the year 2012, explains the significant traffic drop. But the prospects are rather positive in 2013 for HAROPA, the gateway for crude oil supply of France, owing to the adjustment to the market of Total refinery in Gonfreville-l'Orcher and ExxonMobil refinery in Port-Jérôme/Notre-Dame-de-Gravenchon, which rely upon petro-chemical platforms.

### Refined products: adaptation to the market

The provisional business stoppage of Petroplus and the upgrading work carried out in the refineries have brought about a significant drop in the exports of refined products in 2012. The partial re-organisation of Total and Exxon sites towards the French market should confirm this trend in the long term. The investments made on that occasion make it possible to raise HAROPA's competitiveness in a significant way on bunkering, an important component of port attractiveness.

### Miscellaneous liquid bulks: a good year and many projects

The sector of chemistry, experiencing strong industrial growth along the Seine artery, represents a major asset for HAROPA, and the investments underway by LBC Sogestrol (M€ 245 over 8 years) and those publicized by Odfjell (one of the world leaders in chemicals transport and storage, from M€ 110 to 150, final decision to be taken in spring 2013 for the construction in Le Havre of a 200,000 m<sup>3</sup> site), will make it possible to significantly improve the HAROPA supply of shipping services and storage, thus forming interesting growth prospects.

Among the projects and developments concerning miscellaneous liquid bulks:

- Total Lub in Rouen developed a waterway berth for the reception of small ships for specific engine oils, to put additives and carry out conditioning before logistics groupage in Grand-Quevilly, for export;
- Sofiprotéol-Diester Industrie (Biodiesel, oils) and Téréos (ethanol) are developing ;
- GPN adapted its ammonia berth for the reception of larger ships and more cargoes;
- Rubis Terminal carries on its diversification policy in terms of specific chemical products;
- construction of ecoMotion – the first factory in France for biofuels of animal origin – which will be operational in 2014;
- Osilub – a factory for the reprocessing of used oils – came on stream. € 55 million were invested including 35 % financed by local companies, the recycling rate is due to reach 75% ;
- Eco-Huile also processes used oils near Rouen (with a collection of 100,000 tonnes annually and a rising recycling percentage owing to technical progress) ;
- Norgal invests in a new 50,000 m<sup>3</sup> butane tank, in order to meet the growing demand by petrochemical industry;
- Care doubled its storage capacity for hazardous cargo.



## DRY BULKS

### Dry bulks: better prospects in 2013

2012 was a fairly average year for grain which impacts bulk traffic. But 2013 prospects are positive, boosted by dynamic exports of cereals since the beginning of the year.

### Coal: steady traffic

Coal traffic is fairly steady in 2012, despite the technical stoppage of several units of the thermal stations. Long-term prospects remain on the fall in France for this trade unit, contrary to the European global market. Good performance of the market of industrial coal (boiler rooms, industries).

### Aggregates: a growing seaborne market

High growth of maritime trades is still expected in the coming years, owing to the joint effect of a rising demand (building of the housing of the Great Paris) and working-out of the alluvial deposit resources in the Paris area.

HAROPA-Rouen records the promising coming-on-stream of the SPS (CEMEX/GSM) marine aggregate terminal in Saint-Jean-de-Folleville.

Another positive element, the M€ 80 investment project of 'Lafarge Ciments' (cement factory) to upgrade its plant in Saint-Vigor-d'Ymonville.



### Cereals: recovery expected in 2013

After a year 2012 with mixed results, far from the record trades recorded in 2010 and 2011, HAROPA expects a good first half-year 2013, as the export of grain has significantly resumed. Owing to all bulk and containerized cereal offer, HAROPA now offers customers a range of incomparable services in Europe.

Grain operators carry on improving and developing their terminals in Rouen, like Sénalia (in diversification with processing dry fertilizers in Rouen in partnership with the American group, Koch, and also the storage of cocoa beans), who invests more than M€ 40 over five years in its facilities.

**Olivier Ferrand,**  
**HAROPA Development Director:**

"During the first fortnight of the year, we loaded 460,000 tonnes of cereals, especially by exporting to new destinations like Mexico and Turkey, and 4 million tonnes can be expected for the second part of the grain season. In addition, we underwent in 2012 Petroplus ups and downs, but other industrial plants appeared: they account for the trades of tomorrow and the jobs of the day after tomorrow."





## Renewable energies: in the Le Havre Industrial and Port Zone (ZIP)

The « ZIP » in Le Havre adapts to the changes experienced by the energy market and fosters the welcome of renewable energies including the offshore windmill project (M€ 380 investments): building of a plant for the manufacturing of windmill blades and a site for windmill assembly. The ambition is to position Le Havre on the French market as a potential platform of windmill production, assembly, trials and maintenance and to meet the requirements of the British market.



## WATERWAY: the rise continues

HAROPA waterway traffic is slightly on the rise in 2012, + 3%.

The container traffic carries on increasing (+ 1 % in tonnage, + 6% in units in 2012. In 2013, the coming-on-stream of new services (to Nogent-sur-Seine with Soufflet Group, or to Bruyères-sur-Oise since décembre 2012) and the continuous improvement of the service level, should foster the rapid development of these trades.



The environment and recycling sector is also on the rise, especially for building materials waste. On the contrary, building materials are on the fall.



From left to right:  
Hervé Cornède, Benoît Mélonio  
and Olivier Ferrand

## RAILWAY: several positive trends

The railway mode remains stable at a level of about 10,000 trains over the year 2012 for all three ports. Global dynamics for rail freight in France and the great difficulties of traffic through the national rail network, related to the absolutely necessary upgrading work, do not enable this mode to bring a contribution to the growth of consolidated modes. Container traffic thus remains at a rather low level accounting for 5% of market share, with 100,000 TEU.

HAROPA reaffirms the strategic importance of this mode for the development of its hinterland, especially, for container trades, in order to serve the regions beyond the Paris area. Several positive trends are set up from now on so that rail mode could recover business growth at the service of port development:

- coming-on-stream of the multimodal terminal in Le Havre in the second half year of 2014;
- resumption of activity for the railway service from Gisors to Serqueux in 2013, owing to the work co-financed by the State, the Upper-Normandy Regional Council and RFF;
- support of the upgrading file of this alternative route for rail freight in the Seine valley, a decisive stake to get enough capacity in high-quality time-intervals between trains for the rail freight of both Normandy ports;
- significant presence of all rail operators in the three ports, thus marking their strong belief about the traffic potential represented by HAROPA;
- high cooperation with RFF in order to favour the improvement of the offer of time intervals between trains.

## SEA CRUISE: new record for HAROPA



HAROPA once more beats its record on a growth market in Europe and in the world, thus exceeding for the first time 250,000 passengers and 150 calls over the year (Le Havre, Honfleur-Rouen) owing to the exceptional offer of the Seine artery, combining a unique territory and state-of-the-art port equipment.

Considering that the average cost of a passenger call amounts to around € 90, we can estimate to more than M€ 20 the receipt brought every year to our areas.

In 2013, the growth of this segment should continue, with already the first quadruple call scheduled in Le Havre and strengthened partnerships with cruising lines.



## KEY FIGURES FOR THE YEAR 2012

### SEABORNE TRAFFIC

In Kilo-Tonnes		2011	2012	Trend
LIQUID BULKS		53 545	<b>47 182</b>	-12%
	<i>Including crude oil</i>	27 459	<b>22 466</b>	-18%
	<i>including refined products</i>	20 650	<b>19 339</b>	-6%
DRY BULKS		14 147	<b>11 327</b>	-20%
	<i>including cereals</i>	7 524	<b>5 450</b>	-28%
CONTAINERS		22 683	<b>23 728</b>	5%
MISCELLANEOUS (conventional, roll-on/roll-off...)		3 569	<b>3 253</b>	-9%
<b>TOTAL</b>		93 944	<b>85 490</b>	<b>-9%</b>

		2011	2012	Trend
In number	Cruise vessel passengers	234 048	<b>248 974</b>	6%
In kilo-TEU	CONTAINERS	2 346	<b>2 434</b>	4%

### WATERWAY TRAFFIC IN THE PORTS OF THE SEINE ARTERY

in Kilo-Tonnes		2011	2012	Trend
	BULKS	26 560	<b>27 251</b>	3%
	CONTAINERS	4 050	<b>4 095</b>	1%
	MISCELLANEOUS	838	<b>907</b>	8%
	<b>TOTAL</b>	31 447	<b>32 254</b>	<b>3%</b>

		2011	2012	Trend
In kilo-TEU	CONTAINERS	425	<b>450</b>	6%

### HAROPA in figures

- 5<sup>th</sup> rank among major North-European ports
- Top French container port
- Top logistics hub in France
- Top French port for energy supply and petrochemistry
- Top European port for grain export
- Top world port for export of wine and spirits
- Top French port for import-export of new vehicles
- World top inland port for waterway tourism