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2019 will without doubt have been a landmark year for port projects related to the energy, ecological and digital transitions. The stated aim of Marseille Fos to become a green port at the service of the blue economy is coming to fruition. Projects promising new solutions for the environment have materialized: for example, Vasco2, Jupiter 1000. Others have been deployed, such as shore-to-ship power and the French Smart Port in Med territorial initiative, which encourages the emergence of digital projects linked to the maritime economy. 2019 saw the first Smart Port day take place, an event that brought together in July all the partners in the process for the signing of the Le French Smart Port in Med agreement and designated the 7 start-ups winners of the Smart Port Challenge #1.

2019 was a good year for the Port of Marseille Fos, which maintains its position as French leader with a global traffic of 79 Mt of cargo and more than 3 million passengers.

All traffic is growing except for the dry bulk segment. In 2019, France's leading port will stand out above all for its performance in the new vehicle sector, now making it a major player in the Mediterranean. Container activity, for its part, broke a new record, with 1.5 million TEUs.

Once again this year, the port establishment's real estate continued to develop at a brisk pace notably in the logistics sector.

◀ Container ship
in Fos-sur-Mer

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Events in 2019



▲ Under construction, the new passenger terminal at Cap Janet

January • February • March

■ At the beginning of January, the winner of the call for projects for the conversion of Hall J1 was chosen at the end of an 18-month process. The consortium of ADIM Immobilier Provence - Vinci Construction France - Caisse des Dépôts Group, in association with the architects Reichen & Robert (Paris), was chosen to breathe new life into this emblematic building illustrating Marseille's port heritage.

■ The ports of Marseille Fos and Strasbourg signed a partnership agreement to strengthen the north-south corridor hinterland.

■ Marseille Fos paved the way for the concept of a maritime data hub by announcing the completion in 2020 of its submarine cable landing infrastructure, which will contribute to making Marseille a major international digital access hub.

■ The Port and Aix-Marseille University strengthened their cooperation by signing a Med Sea and Port Training partnership agreement

that prepares for tomorrow's jobs in the maritime and port sectors.

■ The organizers of the Smartport Challenge - the Port of Marseille Fos, the Marseille Provence Chamber of Commerce, Aix-Marseille University, with the support of the Bouches-du-Rhône Prefecture, the South Provence-Alpes-Côte d'Azur Region and the Aix-Marseille Provence Metropole - unveiled the 7 competition winners, tackling their challenge and presented their innovations on 4 July 2019.

■ At the board meeting on 7 March 2019, Via Marseille Fos, the association for the promotion of the port community (founded by the CCIMP, the Port and the Union Maritime et Fluviale (UMF), joined by MGI and Provence Promotion) appointed Philippe Zichert as its president.



▲ The port supports the digital transition in the maritime sector thanks to the territorial Smartport approach

April • May • June

■ The Port of Marseille Fos renewed its governance structure. Jean-Marc Forneri was re-elected as Chairman of the Supervisory Board, and Hervé Martel was appointed Chairman of the Management Board.

■ The ADEO Group, the world no. 3 in DIY, decoration and home improvements, officially announced its new continental logistics platform in the Port of Marseille Fos.

■ Already operational on Corsica ferry docks, shore-to-ship power connection developments have been continuing on all the Marseille harbours for international ferry docks, for ship repair between now and 2022, and for cruise liner docks between 2022 and 2024. The Port of Marseille Fos announced a two phase €20 million investment to improve air quality in Marseille.

■ Tuesday 25 June in Marseille, the Port of Marseille Fos brought together nearly 200 people: maritime transport stakeholders, inter-

national experts, public decision-makers, and numerous port authorities including representatives of the 24 member ports of the MEDPorts Association around a central question: "How are the MED ports tackling the environmental challenge?"

■ In June 2019, Hervé Martel, Chairman of the Management Board of the Port of Marseille Fos, presented an ESI Award to 12 shipping lines (container ships and cruise liners) to reward them for having exceeded the air emissions standards. They will benefit from a discount on their port fees during stop-overs.



▲ Ministers Elisabeth Borne and Jean-Baptiste Djebbari visiting the port as part of the "zero smoke stopover" plan for the Région Sud Provence- Côte d'Azur

July • August • September

■ The Smartport day took place on 4 July at the J1 to close the Smartport Challenge and presented proofs of concept (POC), i.e. the completion of the seven challenges. The start-up Searoutes, paired with the Port, designed a CO₂ emissions eco-calculator, named Shift by Searoutes. The innovative aspect of this tool lies in its ability to calculate the environmental footprint of vessels' itineraries based on their position history. From the itinerary, the solution makes it possible to identify the best port of entry. Once ashore, Shift by Searoutes also suggests the best mode of transport - rail, river or road - to reduce greenhouse gas emissions as far as possible. A pilot version of the prototype is now officially being tested in three ports: Marseille, Antwerp and Rotterdam.

■ The dialogue between the Port and its local residents stepped up in Marseille with the public enquiry in September 2019 to look at the application for planning permission for the Cap Janet international passenger terminal project. With AVITEM* and the Vivapolis network, the

Port also jointly organized an information morning focusing on the city - port relationship in the Mediterranean. And finally the City - Port Dialogue, a continuous consultation process involving local residents, businesses and institutional and associative partners on the coast of the eastern Port of Marseille Fos harbours, engaged in a series of workshops in autumn 2019. These workshops, open to civil society, focused on the themes of living conditions, public health, land and access to the sea, as well as on rail modal shift projects in the city.

■ To mark the launch of the "zero emissions stopover" plan drawn up by the South - Provence Alpes-Côtes d'Azur Region, the Port welcomed the Minister of Ecological and Solidarity Transition Elisabeth Borne and her Secretary of State for Transport Jean-Baptiste Djebbari during an official visit to present the shore-to-ship power supply programme, the objective of which is to equip 100% of the quays.

*AVITEM: Agence des Villes et Territoires Méditerranéens Durables



▲ The words of the artist Alexander Périgot at the Digue du large breakwater

October • November • December

■ During the Blue Maritime Summit, organized by the Club de la Croisière Marseille Provence in October 2019, the Port of Marseille Fos and the shipping companies with the greatest presence in Marseille signed the Blue Charter thereby undertaking to comply with rules that go well beyond national and international regulations to improve air quality in Marseille. It concerns the commitment to join and use the shore-to-ship power supply project on all passenger quays, and also encourage scheduling calls by LNG-powered ships, by contributing to the development of a refuelling sector from the LNG terminals in Fos.

■ The construction of the Anse du Portier eco-district in Monaco will have generated some great synergies and new activities for the Port. After the concrete caissons manufactured by Bouygues TP on the Digue du Large (seawall) and the aggregates from local quarries transported by ship from Fos, nearly 320 million metric tons of coarse sand was transported from the Marseille harbours to Monaco. From October to December 2019, the Port handled dry bulk traffic

equivalent to eight months of its annual volume.

■ The MSC Aliya was officially inaugurated in Fos by the MSC company at the Seayard terminal in Fos-sur-Mer.

■ In collaboration with the association MJ1, and with the exceptional support of the company Marfret, on the Digue du Large the Port welcomed a monumental installation made from containers by the artist Alexandre Périgot. The installation, visible from afar, was aimed at a wide public: Marseille residents, passengers and tourists.

■ Industry is the leading employer in the Marseille Fos industrial-port cluster*, which is why the Port of Marseille Fos partnered the second national edition of Usine Extraordinaire, an event which took place on the J4 esplanade and on the port's quays in November 2019. The three-day event brought together nearly 20,000 people, mainly schoolchildren, who were able to discover the industry of tomorrow and the Marseille harbours of France's leading port. ■

*Source: Insee

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The year's key challenges



◀ 20 million euros will be devoted to the electrical connection of quayside ships by 2024

Major projects

CAP JANET PASSENGER TERMINAL

The new Cap Janet ferry terminal in Marseille is an emblematic project for the activities of the Port of Marseille Fos' eastern harbours. A new milestone was reached in 2019 with the public enquiry held between September and October, which ended with a positive verdict from the enquiry commissioner. The announcement of a shore-to-ship power supply on the Cap Janet docks was a contributing factor in the favourable outcome of the consultation process. Work will begin after the 2020 summer season with a view to going into service in 2022.

RAILWAY WORKS ON THE EASTERN HARBOURS

The Port has embarked on an ambitious program to restructure rail access for the eastern harbours in conjunction with institutional partners: the State, Region, Department, Métropole, Euroméditerranée and SNCF-Réseau. The program aims to bring together the rail freight facilities - today divided between the Port and Le Canet - into the Port by 2023.

CREATION OF SUBMARINE CABLE LANDING INFRASTRUCTURE

In 2019, the Port of Marseille Fos began work on the new submarine cable landing infrastructure, which will provide a reliable and convenient ready-to-use interface for cables arriving in Marseille from all over the world in order to meet the increasing volumes and diversity of content being exchanged. The Port will deliver the first phase of this dedicated infrastructure, capable of accommodating up to six cables, during 2020. The cost of the work will be almost €2,640k.

EXTENSION OF FOS 2XL QUAYS

The contract to build 240 linear metres of quay between the two container terminals in the Port's western harbours continued throughout 2019 and will be completed in 2020. These quays are designed to accommodate the largest container gantry cranes over 70m high with a load descent of up to 150t/m, thus increasing the length of quay available in Darse 2 for container traffic to 2,500 linear metres.

DEVELOPMENT WORK IN THE LA FEUILLANE LOGISTICS ZONE

The continued marketing of the La Feuillane logistics platforms has made it possible to finalize the program to develop road services and ensure a double entry into the area with access closer to the container terminals. Road development work, including rainwater drainage for the area, was carried out as part of a €5 million contract, excluding tax, which was completed in 2019.

Real estate development

The Port's real estate assets consist of more than 400 buildings, warehouses, offices, piers, quays and natural areas in particular. Management of the Port's real estate assets is reflected operationally by the commercial, legal and financial support of more than 400 companies (about a hundred in the eastern harbours and about 300 in the western harbours) and close to 200 individuals or associations located on the Port territory (the vast majority in the western harbours). In 2019, there are in the order of 1000 contracts in place and the revenues associated with this mission amount to €39.37 million excluding tax, an increase of 5% on the previous year. On the eastern harbours, revenues of €10.70 million excluding tax were up by 4.31%. On the western harbours, revenues were €28.67 million, up 5.25%.

Industrial and logistics development

LOGISTICS PROJECTS

Located in the south of the French logistics corridor (Lille - Paris - Lyon - Marseille), the regional territory has established itself as a key entry point for the European market. Thus over the period of the 2014-2018 strategic project, 118 hectares of land were marketed in the industrial port area (La Feuillane and Distriport).

La Feuillane area

The Adeo Group, the world's number 3 in DIY, decoration and home improvement, has made its choice of Marseille Fos as the gateway for its southern European traffic official. Its first 36,000m² building, operated by Geodis, was delivered at the end of 2019. Work on the second 90,000m² building is scheduled to begin in 2020, eventually employing around 200 people and generating more than 10,000TEU/year.

The competitive bidding procedure for 3 plots of land covering a total of 50 ha in the north of the sector has entered the active phase of negotiations with 3 projects and should lead to formalizing 3 construction leases with 3 different applicants during 2020, with a total of 225,000m² floor space dedicated to this rapidly expanding sector.

Distriport area

The Port Authority sold lot A8 to Mediaco (14 ha) and lot A7 to Wlfe (14 ha) at the end of 2019.

The sale agreement linking the Port to Virtuo for lots A5 & A6 should come to fruition by the end of the first half of 2020.

The last available Distriport lot (lot B7) was sold in 2019. Following a call for projects, two companies applied to develop warehousing for cold logistics. In the end, the company APRC was selected to develop a 16,000m² temperature-controlled warehouse.

In total, approximately 216,000 m² of floor space will be marketed.

INDUSTRIAL PROJECTS

A number of new installations and developments have also been successfully completed over the past year.

The French group AXENS chose the Port's western harbours to set up a new silica gel manufacturing plant for catalytic converters. The location within the Kem One site enables industrial synergies to be created with the host site. The project will eventually extend over 4 ha and represents an investment of around €40 million with the creation of some one hundred jobs. Commissioning is scheduled for 2022.

The plasterboard manufacturing plant, DRUM, has obtained all its administrative authorizations. The future site is located in the SITMAT zone in Caban Sud on an area covering about 6 ha. The investment is estimated at €45 million. Maritime traffic is expected to be around 300,000 metric tons per year.

The site chosen on the Marseille Fos port territory by the Chinese industrialist Quechen was the subject of preventive archaeological excavations carried out by INRAP in October 2019. Biodiversity inventories were also completed at the same time, but did not reveal any issues that could jeopardize the execution of the project on the plot in question. The entire project involves an investment of €100 million, will create 130 direct jobs and generate 400,000 metric tons of freight annually. ■



▲ River barge in the Rhône canal in Fos

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Developing the multimodal offer

Today, more than 15 companies and massified land transport operators serve the Port of Marseille Fos hinterland through its terminals and industrial port area.

Maritime traffic: massified modes on the rise

In 2019, the modal shift reached a record level for container freight. The 20% threshold for massified modes (rail and river) was crossed for the first time (21%); and volumes were up 26% on 2018.

Rail was up 9.8% (in TEUs), while even more promisingly river transport was up 34.4%. Road fell to its lowest level since 2002, and by the end of 2019 will account for just under 79% of container transport. This is a first: it has decreased both in terms of modal share and in terms of the number of TEUs transported. This is thanks in particular to the new Fos-Vergèze

(Gard) railway line, which made it possible to eliminate 30,000 trucks on the road in 2019.

Q4 2019 was adversely affected by social movements linked to pension reform and by bad weather in the south-west (rail traffic interrupted in October/November).

The Medlinkport momentum intensified on the Mediterranean-Rhône-Saône corridor and multimodality continued to consolidate its position: the association now has around forty members with the arrival of 10 new members (permanent and partners), and 26 service providers are now Medlink Safe accredited (including shipping companies).

River sector

During 2019, river transport recorded overall good growth of 2.9 million metric tons, i.e. 15% up on 2018. All types of traffic rose: container, general cargo, dry bulk, liquid bulk; with a special mention for dry bulk and in particular cereals from the Rhone-Saône corridor with an increase of 30% (boosted by the positive recovery in cereal exports to Algeria and Italy from Fos).

The efforts of the river consultation led by the Port of Marseille Fos have borne fruit for river container traffic. It increased 10% in 2019 on 2018.

This positive performance puts an end to three consecutive years of falling volumes. Today, the cooperation between handling and barge operators is efficient, calls are filled better and barge calls are better anticipated thanks to the trading area.

Rail sector

The rail transport share for containers was up 4 points in 2019, approaching 15%, with an increase in volume of more than 43% in Fos. The Périer shuttle, between Vergèze and the Fos container terminals, managed to provide a regular daily service.

The rail transport services offered by the five combined transport operators present in Marseille and Fos, particularly in the western harbours, have been strengthened, with an improvement in the services to/from Bordeaux, Chalon-sur-Saône, Dourges and Paris at national level and to/from Ludwigshafen (Germany) and Zeebrugge (Belgium) at international level.

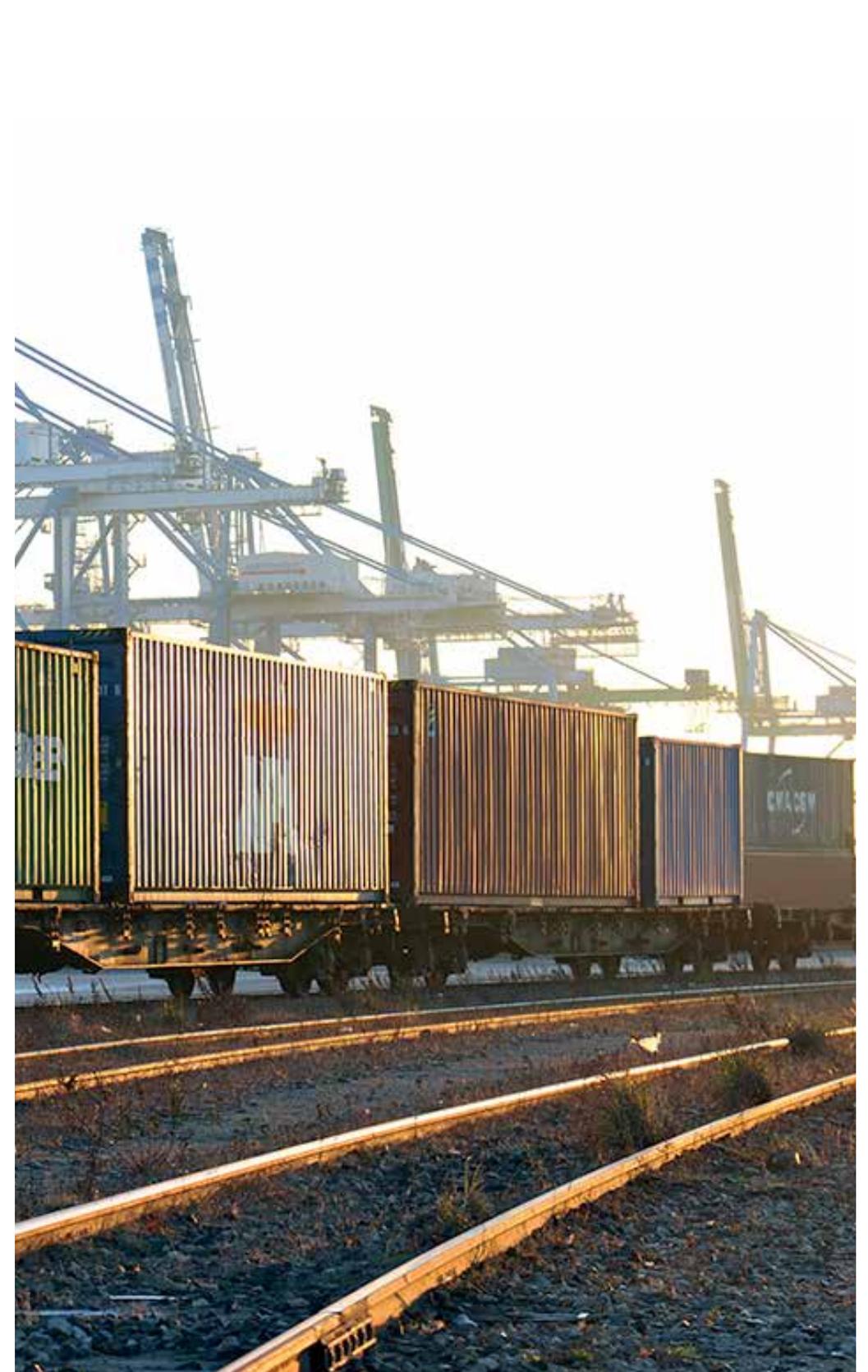
Thanks to the new site coordinator in Graveleau, in place since 2018, operations have been optimized and the shuttle service has improved.

Marseille Fos and the Autonomous Port of Strasbourg signed a partnership agreement in 2018 aimed at developing rail exchanges, interport cooperation, commercial promotion, and research and innovation.

The Port has been relying on rail and river transport for many years to modernize and optimize its infrastructures and the rail network in both harbours. It invested €1 million in 2019 with this in mind and a further investment of €1 million will be made during 2020.

The Fos-Graveleau connection project, accompanying the container terminals junction, includes a commitment of €22 million with an operation in several phases and commissioning by 2023. ■

▶
The modal shift in favor
of railway increased by
34.4% in 2019



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Sustainable development and energy transition



▲ Marseille Fos Nature wardens

Marseille Fos, a pioneering port in the energy mix

SHORE-TO-SHIP POWER FOR ALL PASSENGER QUAYS BY 2024

In June 2019, the Supervisory Board approved a major passenger quay electrification programme with an initial investment of €20 million. The project is supported by all stakeholders, from local authorities to local residents and from environmental protection groups to ship owners. The Cenaq program is part of the Regional Council's "zero emissions stopover" plan. In order to meet the mid-2024 deadline, work on connecting to the ENEDIS network is already under way.

MARSEILLE FOS, FUTURE LNG HUB

2019 was an important year for LNG at the Port of Marseille Fos with the first LNG calls at the cruise terminal, confirmation of the continuation of activity at the Elengy terminal in Fos Tonkin beyond 2028 by Engie, and Total's announcement of the construction of an LNG bunkering barge to supply the five CMA CGM LNG-powered 15,000 TEU container ships that are scheduled to arrive in Fos from 2021 onwards. Within the next two years, Marseille Fos will have a world-class LNG offering in the Mediterranean.

Management of natural spaces

In 2019, in addition to the routine management of the 3ha agri-environmental belt, the management of natural spaces was marked by some important actions: inventories and initial work on the Médicyn project; the permanent enclosure to protect the dwarf tern nesting site on the Flèche de la Gracieuse produced remarkable results; drafting the new 2019/2023 management plan, and completion of the inventories required for the Natural Heritage Master Plan.

An air quality improvement program

ZERO EMISSIONS STOPOVER PLAN AND THE BLUE CHARTER

Deployment of the "zero emissions stopover" plan for Marseille initiated by the Port of Marseille-Fos, the Club de la Croisière Marseille-Provence and the Provence-Alpes-Côte d'Azur Region and the signature of the "Blue Charter" for the cruise sector. The plan is based on commitments to good environmental practices made by all the cruise lines in Marseille.

SCIPPER PROGRAM

The Port has collaborated with AtmoSud and AMU in the Scipper research program (project H2020) to capture the chemical signature of ships so that their actual contributions to air pollution can be determined.

ENVIRONMENTAL SHIP INDEX (ESI)

The Port has also pursued its air quality incentives for the most virtuous ships in relation to their emissions through the ESI scheme, which rewards around a dozen shipping companies every year.

A port building green solutions

CAREENING WATER

At the end of 2019, the Port launched a call for tenders for the construction of equipment to treat the water from careening operations. The Port of Marseille Fos has decided to allocate €12 million, 40% of which will be financed by the French water agency, to equip the dry docks with a system for treating water from careening operations. It is a water separation system that collects the polluted water and treats it by decanting and filtration before it is discharged back into the sea. The system is a first in the Mediterranean. Work is sche-



▲ The Jupiter 1000 project, settled in the Piicto platform

ded to start at the end of 2020 and will last about 5 years. This development will reduce discharges into the sea and contribute to the objective of improving water quality in the Bay of Marseille.

VASCO 2

After 3½ years of experiments on several sites (Arcelor, Kem One, Solamat Merex), the Vasco2 project concluded very positively by demonstrating the feasibility of flue gas bioremediation using microalgae. This success allows us to seriously consider the continuation of the program in order to strengthen the emerging microalgae sector in the Fos industrial port area.

PRODUCTION OF BIO-SOURCED PLASTICS

2019 saw the implementation of the Eranova industrial demonstrator on 1.2ha in Les Tellines. This demonstrator aims to produce bio-sourced plastics from beached macro-algae - in partnership with six industrial and economic stakeholders - and has raised 5.4 million euros of private investments within

the port area. In the long term the industrial outlook foresees the production of over 10,000 metric tons per annum for export worldwide by containers.

JUPITER 1000

Jupiter 1000, based on the Piicto platform in the Fos industrial port area, is the first power to gas demonstrator connected to the gas distribution network in France. This innovative technology consists of converting surplus renewable electricity into gas (hydrogen and synthetic methane) for injection and storage in existing networks. Jupiter 1000, led by GRT Gaz, produced the first hydrogen molecules in the summer of 2019. This production, based on renewable energy from CNR's wind turbines in Fos, is the realization of the first goal in this emblematic energy transition project. ■



5 Port traffic results

▲ Container terminals in Fos

2019 at a glance

In 2019, the Port of Marseille recorded 9,917 ship calls, 6,275 in the western harbours and 3,642 in the eastern harbours. It handled 79 million metric tons of cargo and 3 million passengers, and invested €60 million to maintain and develop its territory.

The general cargo segment still has good momentum. Container activity is doing well (up 51,900TEUs at the end of December), driven by the increase in transshipments. Container growth can be seen in both the Marseille and Fos harbours. Breakbulk, which is strongly linked to ArcelorMittal's activities, posted a good result (up 7%). Breakbulk activity as a whole was up 4% at the end of the year.

The large bulk sector was slowed down in 2019: on one hand, imports of coal and wood for the Meyreuil power station fell sharply and on the other hand, the ALTEO plant in Gardanne struggled with a drop in activity from the summer. Steel activity continued to be adversely affected. Only small bulk cargo saw an upturn (up 3%), with in particular loading aggregates for the Monaco backfill

site (334KT in total). However, the trend was strong in cereals, with activity up 34%.

The crude oils and oil products sector, still ahead by 3% at the end of November, ended 2019 with a lacklustre performance. Total crude oil imports were stable. Total LNG traffic grew by 5%, with a volume of nearly 6MT. 41.8 million metric tons of crude oils and oil products transited through Fos.

Bulk chemical and food traffic was on an upward trend in the last few months of the year with an additional 386KT of traffic. Biofuels (up 22%) contributed to this good result, with a volume in excess of 235KT.

In 2019, the new vehicle market posted good results (up 23% in the second half of 2019 vs. 2018). In Marseille and Fos, the Port succeeded in attracting the three major players in the automobile sector to its facilities.

The cruise market was very dynamic with growth of 8%. The regular lines sector is stable, with North African destinations (up 7%) compensating for the 5% drop in traffic to Corsica. ■

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Performance indicators 2019



▲ Marseille Fos is France leading cruise port

1st port IN FRENCH CRUISES

FRANCE'S LEADING CRUISE PORT & IN THE TOP 5 MEDITERRANEAN PORTS



2nd port IN THE MEDITERRANEAN



LIQUID BULK

45,6 MT
+1%



DRY BULK

12,7 MT
+15%

TOTAL TRAFFIC
2019

79 MT



GENERAL CARGO

20,6 MT
+2%



PASSENGERS

3,1 Mpax
+5%

€
TURNOVER

169,5 M€
+3%



INVESTISSEMENT

60 M€

ENVIRONMENT
INNOVATION



3 000 ha
IN THE AGRI-ENVIRONMENTAL BELTS MANAGED BY A TEAM OF ECO-GUARDS



60 M€
INVESTMENTS MADE FOR THE ELECTRIFICATION OF ALL PASSENGER DOCKS IN 2024



1 400
NUMBER OF STOPOVERS CONNECTED BY 2024 INCLUDING 200 CRUISE STOPOVERS, I.E. NEARLY 50% OF STOPOVERS IN MARSEILLE



SHIP
REPAIRS

119
DRY-DOCKED VESSELS
+16%

149

VESSELS OPERATED AFLOAT
+12%

SHIP
STOPOVERS



9 917
STOPOVERS/YEAR



500 WORLD PORTS SERVED
IN **160** COUNTRIES

MODAL
SHIFT



RAIL
+34,4%



RIVER
+9,8%



TERRITORIALE
INTEGRATION

41 500
JOBS (INDIRECTS INCLUDED)

867

CUSTOMERS

35

INDUSTRIAL COMPANIES
ESTABLISHED



450

PEOPLE INVOLVED
IN THE ONGOING PROCESS
OF CONSULTATION



SMARTPORT

7

CHALLENGES LAUNCHED
AND START-UPS INVESTED

11

PROJECTS APPROVED



LOGISTICS
LOCATIONS

3 Mm2

OF WAREHOUSING:
IKEA, MATTTEL,
MAISONS DU MONDE



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