



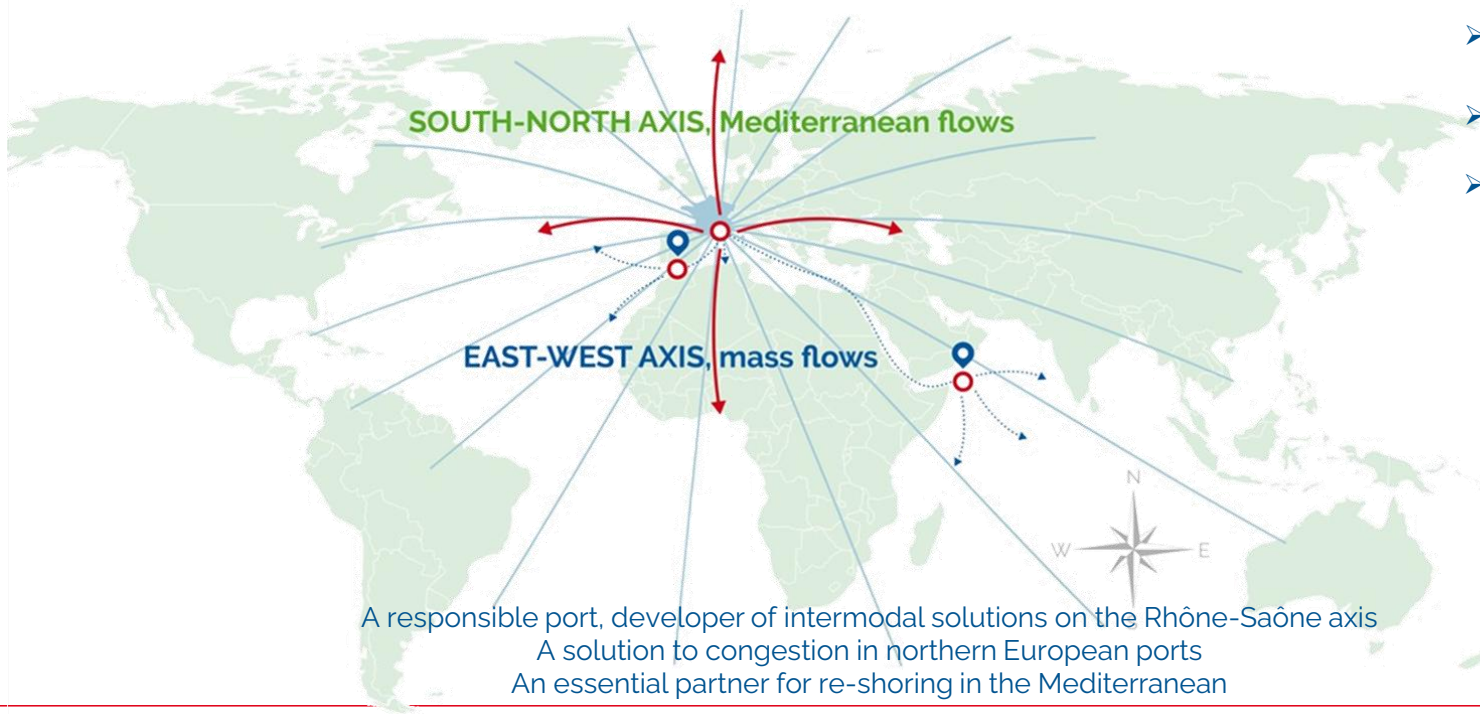
PORT of MARSEILLE FOS

Southern European Hub



A port at the heart of global trade

160 countries | 500 ports



- 70.5MT of traffic of which 41 MT of fossil energy
- 8000 calls / year
- The only Mediterranean port to offer a **complete intermodal connection** to the Northern European market



Port of Marseille, a dense hinterland

Connected to Northern-Europe through multi-modality



- 12 rail operators
- 190 combined services
- 19 destinations



connections to numerous multimodal platforms along the **Mediterranean-Rhône-Saône axis**

- 3 combined transport operators
- 1024 shuttle calls

An exceptional playground

10,400 Ha spread over 2 dedicated harbours

2nd concentration in
SEVESO sites in France



42 600

emplois salariés

(dont 1 050 dans le secteur public)

1 570

établissements



sous cluster maritime et portuaire

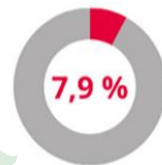
44 % des emplois salariés



sous cluster non-maritime

(industrie - services support - transport terrestre)

56 % des emplois salariés



des emplois salariés
marchands non agricoles
des Bouches-du-Rhône

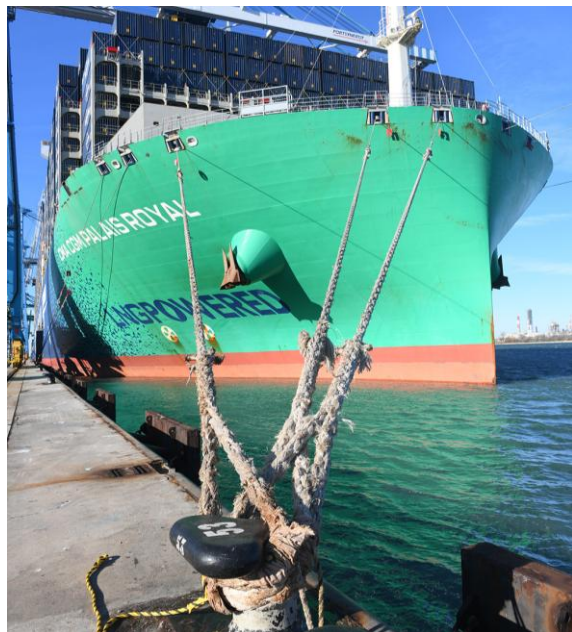
Western harbour

An extraordinary scale



Marseille Fos – Multipurpose port

70 MT | 10,400 hectares



Containers & reefers | breakbulk | Roro & cars | solid bulk | liquid bulk | logistics | industry | Digital | Ship Repair | passengers

- 1st French port in Med
- France's leading port in international trade
- A driver of the French economy
- A leader in the energy transition
- The European leader in shore power since 2017 and LNG ship bunkering



TEUS
1,4 M



Ro-Ro
218,000



Vehicles
209,500



Liquid bulk
45 MT



Dry bulk
6.5 MT



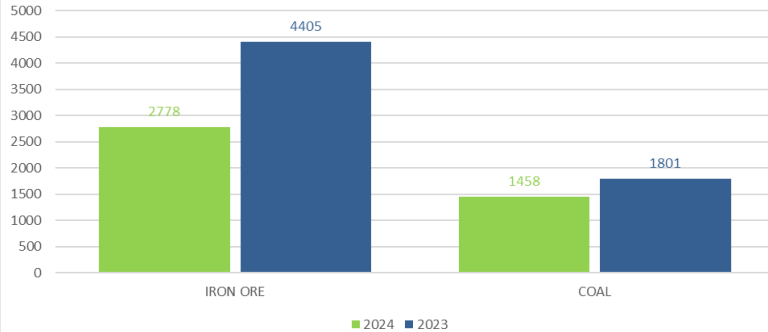
Passengers
4 MPax

Bulk Traffic (Kt)

Total East and West bulk traffic in 2024 : 6.5Mt

Total bulk traffic in the western harbor in 2023 : 5.8Mt

Western Harbour Breakbulk Traffic

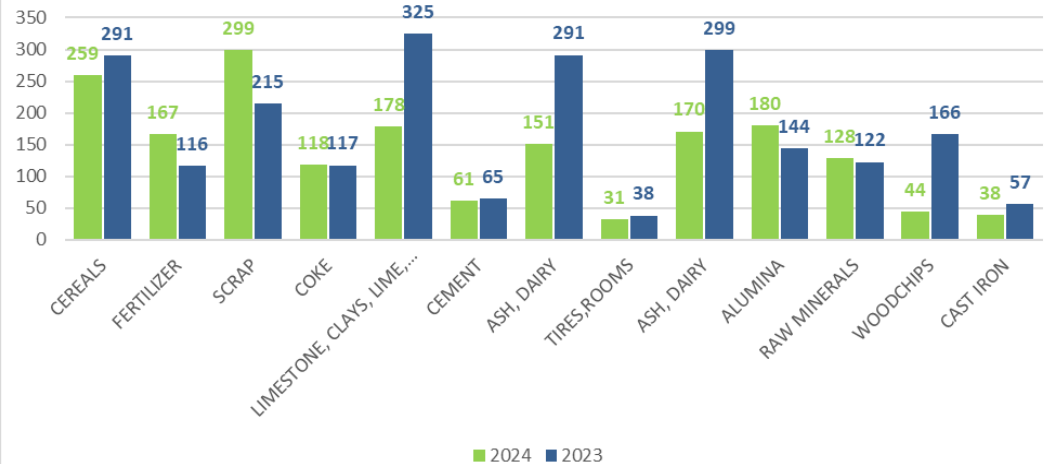



[Link to Arcelormittal](#)

Other industrials



Western Harbour Breakbulk Traffic





PORT of MARSEILLE FOS

The Bulk Terminals

Western harbour: 4 Bulk terminals

Terminal Minéralier de Fos/ HES

- Draft: 12.5 – 16.70 m
- Length : 850 m
- Import & export of cement, clinker, ores, coal, coke, biomass
- Rail and river connections



Terminal d' Arcelormittal Darse 1 / HES

- Draft : 19,5 m
- Length : 640 m
- Import of Iron ores, coal
- Rail and river connections



Terminal Céréaliier Gloria et Tellines / S.E.P.T

- Draft : 7,2 - 10 m
- Length : 260-380 m
- Import & export of cereals, fertilizers, peat, and products from organic farming.
- Rail and river connections



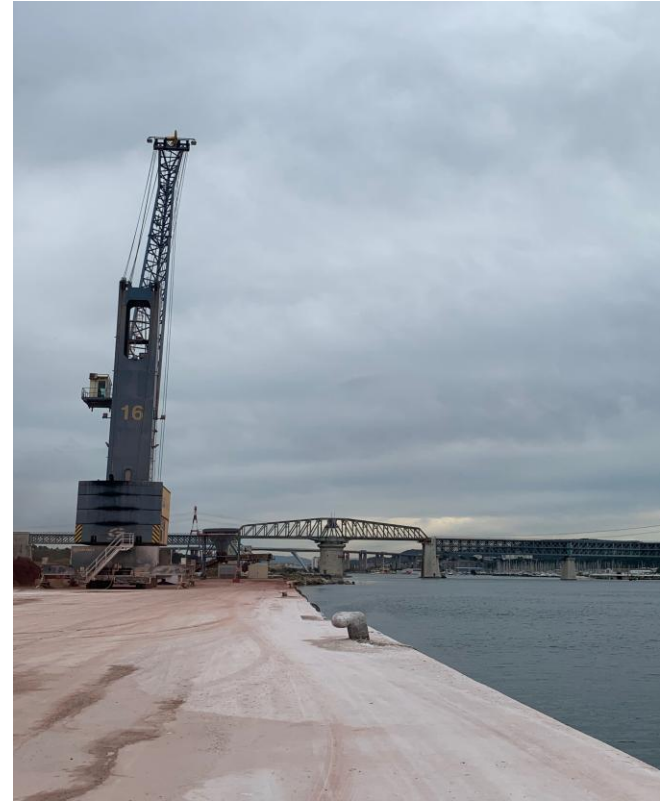
Terminal de Caronte / SEA INVEST

- Draft : 8.6 m
- Length : 650 m
- Import & export of ores, fertilizers, alumina, clinker, and all types of bulk materials.
- River connections

The port goes west : the historical bulk terminal

Caronte, the 1st

- Built in 1921, the Caronte bulk terminal is dedicated to coal importation for steam locomotives of the PLM company.
- Starts operating in 1927, quay is extended in 1932 and once again in 1960.
- But coal is long gone !
- Scraps, cement, minerals...and a river connection.



Strategic Context and Inception in the 1960's

A star is born...

- The Fos industrial-port zone was created from scratch as part of France's national spatial planning policy led by **DATAR** (Delegation for Territorial Planning and Regional Action) in **1963** with the ambition to establish a **"Southern Europort"** in the Gulf of Fos to counterbalance the dominance of **northern range ports**.
- Although driven by a strategic national vision, the project relied heavily on **local government support**, aligning with the expectations of regional economic industrials (steel factory, oil refinery, alumina plant...). These stakeholders supported the **westward expansion** of Marseille's port basins and the **Lavera oil terminals**, especially as ship sizes were rapidly increasing.



The Port Industrial Zone

Fos Terminal : “rise & fall” of the coal and bauxite traffics

- The historical coal traffic was around 8 Mt.

It mainly supplied Italy's power plants, including Civitavecchia (via transshipment, as it is the only deep-water port in the Mediterranean) and Gardanne (which has been converted to biomass). Other users, such as cement manufacturers, accounted for the remaining consumption for clinker production.

But coal is gone !

- With a historical traffic of 2.5 Mt, bauxite was the second most handled product at this terminal, supported by a nearly 1 Mt alumina silo supplying the Pechiney plant in Gardanne.

Bauxite flow ended in 2021 after industrial process changes at Alteo plant.



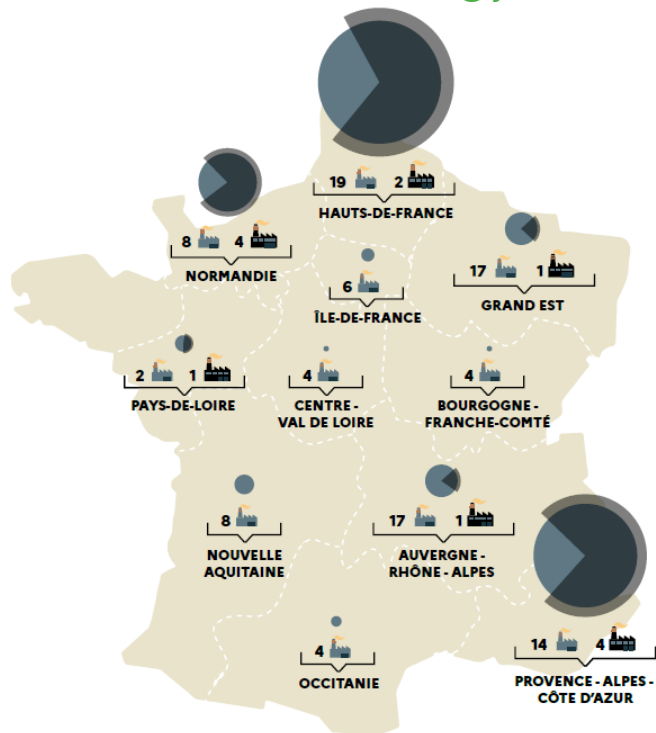


PORT of MARSEILLE FOS

Decarbonization : A field of new opportunities

A port with a 20th-century heritage

An industrial and energy hub based on fossil fuels



Volume total (MtCO₂)



Nombre de sites



Secteur des sites émetteurs

- Sidérurgie
- Aluminium
- Ciment et autres
- Raffineries
- Chimie (sans ammoniac)
- Ammoniac
- IAA
- Chaleur
- Autre (Verre, céramiques...)



PROVENCE-ALPES
CÔTES D'AZUR

A port with a 20th-century heritage

4 pathways to net zero

EVOLUTION DES ÉMISSIONS FOSSILES DE LA ZONE – NOUVELLES ACTIVITÉS INCLUSES

[2019-2050] Mt CO_{2eq} fossile / an; scope 1+2

Emissions fossiles réduites ou transformées en émissions biogéniques

LÉGENDE



Baisse d'activité



Leviers de décarbonation

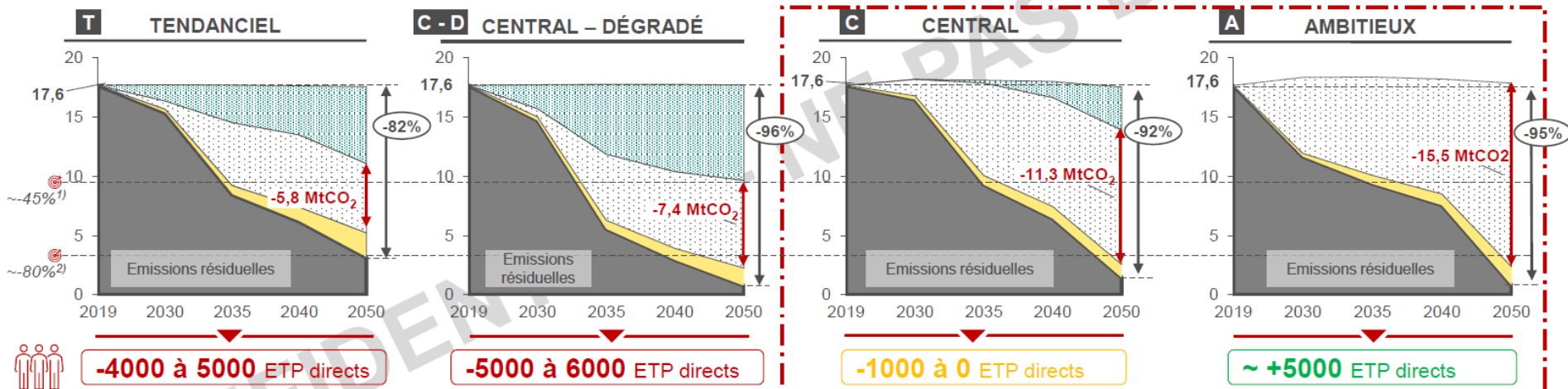


Gain décarbonation réseaux



Emissions résiduelles

-XX MtCO₂



A port at the heart of the energy transition

Renewed industrial & energy sovereignty

Industrial hub : hosting new industries

Hub for new energies :

H₂,
NH₃
biomass,
bio & efuels

Bunkering hub with biofuels & LNG



Industrial hub : new industrial developments

ELYSE – NEOCARB

OBJECTIVE:

- Develop a bio and e-fuel production platform

INVESTMENTS: €1.5 billion

JOBS: 150 direct

MARCEGAGLIA

OBJECTIVE:

- Producing 2MT/year of "green" steel using low-carbon H₂

INVESTMENTS: €2.2 billion

JOBS: 500

GRAVITHY

OBJECTIVE:

- Producing 2MT/year of "green" steel using low-carbon H₂

INVESTMENTS: €2.2 billion

JOBS: 500

CARBON

OBJECTIVE:

- Develop a European low-carbon photovoltaic panel manufacturing industry.

INVESTMENTS: €1 billion

JOBS: 3000

H4 MRS-FOS

OBJECTIVE:

- To set up an H₂ bc production unit (300MW) and an electro-fuel production unit

INVESTMENTS: €1.5 billion

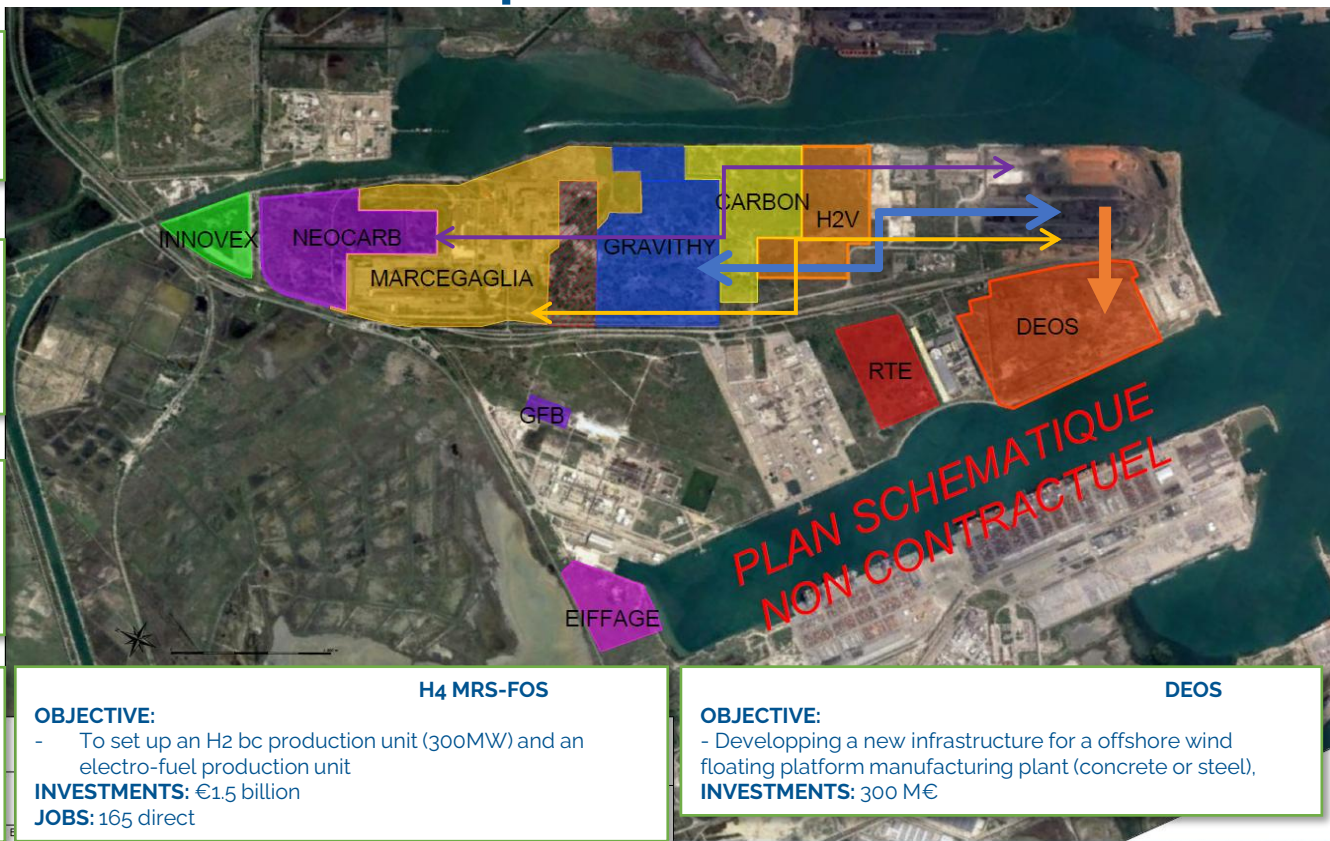
JOBS: 165 direct

DEOS

OBJECTIVE:

- Developing a new infrastructure for a offshore wind floating platform manufacturing plant (concrete or steel),

INVESTMENTS: 300 M€



The market shift for the bulk terminals

Traffics mutation

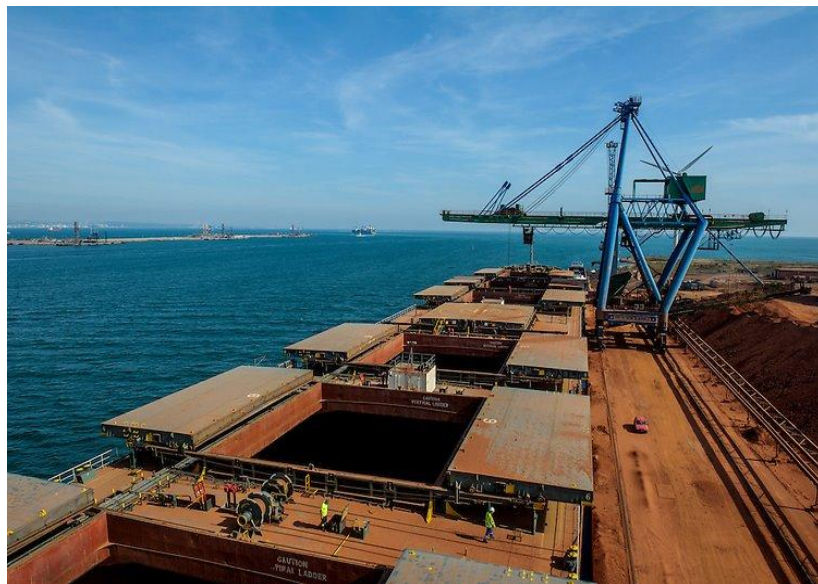
The nature of cargo flows is evolving : where once there were massive imports of just two key products, we now see a diversification into multiple types of goods. Overseas import/export but also hinterland waterway exchanges .

Products diversification

The terminal is now handling a broader range of cargo types, reflecting the ongoing transformation of the industrial landscape:

- Construction : aggregates, gypsum, clay
- Steel : iron ore, scraps, HBI
- Energy : woodchips, CSR, tyres
- Plastics

all linked to emerging decarbonized sectors and evolving production and recycling practices.





PORT of MARSEILLE FOS