



Ports of Normandy, 29 February 2024

## PRESS RELEASE

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### *Review 2023 - Outlook 2024*

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Ports of Normandy\* is one of the operational arms of the local authorities that fund it with the aim of increasing the economic potential of their territories. The tonnages and traffic figures you will find below are but a snapshot of a policy designed to boost development at a local level generally, not just at the ports. *"The French national statistics institute, INSEE, carried out an objective assessment of the momentum created by the policy. The results showed that the different activities on Ports of Normandy's three sites have created almost 9,000 jobs and generated €600m of wealth since 2019. Ports of Normandy will continue to pursue its mission through its €160m multi-annual investment plan (PPI) for 2024/2026 covering all three of its ports."* declared Hervé Morin, President of the Normandy Regional Council and of Ports of Normandy.

**REVIEW 2023: new records set for passenger traffic, while intra-EU freight traffic contracts**

#### **1. BUSINESS**

Calls: 3,214 (stable)

Passengers: 1,901 517 (+ 9%)

Tonnage: 6,348 477 T (- 9.7%)

2023 was marked by a notable rebound in the passenger business alongside a significant drop in freight traffic. This fall affected all three of Ports of Normandy's ports and concerned both cross-Channel and conventional traffic. The level of activity fell back to roughly that of 2019. As for the continued growth in passenger traffic, it also concerned all three Ports of Normandy ports, in terms of the United Kingdom and Ireland ferry lines as well as the cruise business.

**Cross-Channel passengers: a new record for crossings to Ireland out of Ports of Normandy!**

The cross-Channel lines saw a 9% increase, although with variations between the markets.

The lines to the United Kingdom operating out of Ports of Normandy saw growth of 6%. More precisely, growth was 1.5% at Cherbourg (226,024 pax), 8% at Ouistreham (742,915 pax) and

5.2% at Dieppe (391,379 pax). Only the route to Guernsey saw a fall of 23.41% with 13,985 pax.

As for the lines to Ireland operating out of Cherbourg, they were almost 20% up. With this new increase, Cherbourg has exceeded the 2019 benchmark, setting a record for this destination with 325,566 passengers. Although all the companies operating out of Cherbourg have contributed to this excellent result with increased passenger numbers, it was the arrival of the Stena Vision in reinforcement of the Stena Horizon at the end of June that gave the traffic its biggest boost by providing extra passenger capacity.

Ireland now accounts for 60% of Cherbourg's ferry traffic. The wide range of companies and routes and the quality of the offer with recent or renovated ships explain the vibrancy of Cherbourg's ferry business.

Although the Irish market can be expected to keep growing thanks to the year-round offer put in place by the ferry companies (the Stena Vision and the Stena Horizon for Stena Line, the E-flexer Salamanca or the Santona for Brittany Ferries, the WB Yeats and the Oscar Wilde for Irish Ferries), the outlook for the UK market is more uncertain due to economic factors specific to that country. In addition, the Entry/Exit System intended to strengthen border controls on entering the Schengen Area is expected to be introduced in autumn 2024. This is a source of some worry due to the new complexities it will generate and the negative impact it could have on the management of port calls, customer experience and operating costs.

### **Cruises: more passengers than ever!**

This was the other pleasant surprise in 2023. This business grew 13.5% with as expected the number of calls dropping by nearly 23% (-16 calls). With 215,633 passengers, a new record was set for Ports of Normandy in 2023.



Port of Caen-Ouistreham – Dumont Durville © Biplan-S. Leroy

Cherbourg is clearly the key player in this burgeoning business, accounting for 212,328 of those passengers. Even so, it is worth noting that Caen saw a 72% increase in its cruise traffic over the year (3,305 passengers). The return to high cruise ship occupancy rates is the main factor behind this growth, but comprehensive efforts over the last few years to improve the tourism offer and particular care paid to the quality of the reception at both Cherbourg and Caen have also contributed.

2024 is therefore set to be another good year with 70 cruise ships expected to call at Caen and Cherbourg.

### Cross-Channel freight: trade with the continent contracts

On aggregate at the end of October 2023, the cross-Channel traffic at Ports of Normandy, in terms of HGV numbers, was down 7.3% (194,325 HGVs).

More precisely, traffic on the United Kingdom routes fell respectively by 7% at Ouistreham (78,385 HGVs), 4.5% at Cherbourg (6,792 HGVs) and 11.5% at Dieppe (26,916 HGVs).



Ports of Normandy is suffering the consequences of Brexit, which has led to a structural fall in trade between the United Kingdom and the European Union (overall the market recorded a further fall of about 2% in 2023), and of overcapacity on the Strait which has led to fierce competition to the detriment of the Western lines.

Freight traffic with Ireland also saw a downturn of 6.5% (82,232 HGVs). This fall is explained by the development of other lines between Ireland and the

Continent, which are intensifying the competition, and also by a contraction in intra-European trade, which is limiting the traffic to and from Ireland.

### Conventional freight: record numbers of calls in Cherbourg

The development of MRE activities and especially the variation in the weight of the items linked to this industry passing through our ports shows how the "tonnage" indicator needs to be kept in perspective. If we look only at tonnage, conventional freight traffic is down almost 25% (round -350,000 T) at Cherbourg for example, whereas in fact the Port is seeing a record number of calls (215 conventional vessels). The fall is explained mainly by the fact that the installation phase of the foundation protection system at the Fécamp wind farm is coming to an end, while the record number of calls is overwhelmingly linked to the logistics of the Courseulles and Fécamp offshore wind farms.



### **Construction: -50% with 371,912 T**

The construction sector has seen a significant drop in activity, linked to a 380,000 T fall in imports/exports of marine and land-based aggregates.

On the one hand, the "marine gravel" activity at Dieppe saw an 18.5% drop (round -70,000 T) in 2023, but the drop was more significant at Cherbourg (round -310,000 T), as it was heavily involved in handling materials for the scour protection of the Fécamp wind farm foundations in 2022. That work was completed at the end of 2022.

The other segments of the construction sector, slag (+0.8%) and timber (+41%), saw business increase at Caen-Ouistreham (+10,000 T).

### **Other traffic: +46% with 291,621 T**

This growth is essentially being driven by the offshore wind turbine traffic for the Fécamp wind farm, for which the port of Cherbourg receives imports of tower sections, blades and nacelles and then ships out towers assembled with their nacelles and blades, as well as by a new scrap metal operation on the Quais de Blainville at the port of Caen-Ouistreham.

- Offshore wind turbine: 122,144 T (+690%)
- Scrap metal: 50,576 T (+1,350%)
- Parcels: 14,504 T (+1,760%)



A fall in traffic of various materials such as attapulgitite (down to 35,101 T, i.e. -24%), biomass (no traffic), shredded tyres (down to 13,870 T, i.e. -22%) and clinker (down to 8,842 T, i.e. -80%) at Caen-Ouistreham, and also the reduction in the wind turbine traffic at Dieppe (down 38.7% to 16,088 T) are holding back the overall growth of "Other traffic".

Agri-food is down 13.07% to 396,057 T. It is the 85,000 tonne fall in cereal exports

(Caen-Ouistreham) that has tipped this indicator into the red. However, all the other components in the agri-food activity are growing:

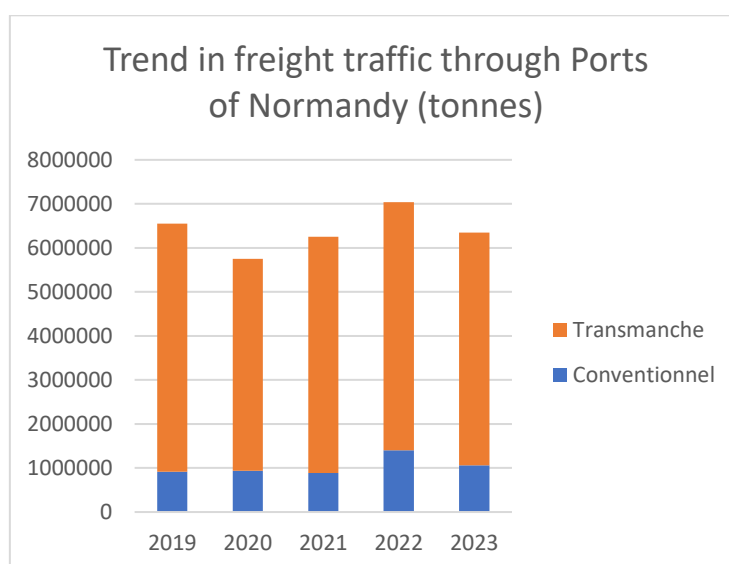
- Fertiliser imports +47.3% (Caen-Ouistreham)
- Molasses imports +2.2%
- Animal feed imports +40% (Caen-Ouistreham)
- Protein crop imports for Olatein at Dieppe +16%

The amount of hazardous materials (explosives and nuclear) handled at Cherbourg fell 47.4% to 3,014 T.

The outlook for 2024 includes:

- Continued momentum of the offshore wind farm activity at Cherbourg with a busy year that will see the completion of the Fécamp wind farm at the same time as work gets underway on the Courseulles and Dieppe-Le Tréport wind farms.
- Continued diversification at Caen-Ouistreham, with in particular the possibility of petroleum traffic activity starting up in autumn 2024.
- At Dieppe, the beginning of the work on the Dieppe-Le Tréport wind farm and the early work on the Penly EPR should start to generate port traffic.

Chart showing the traffic over 5 years, with subcategory Cross-Channel/conventional



## 2. FISHING

If the fish landed for sale at the Cherbourg and Dieppe fish markets is added to that landed at the Ouistreham landing point, the total fish tonnage for 2023 amounted to 13,284 T, down 4.4% (i.e. -616 T) on the previous year. This fall is explained by reduced landings at Cherbourg and Dieppe, whilst those at Ouistreham rose. This overall fall, albeit a measured one, illustrates the difficulties encountered by the industry at national level in 2023.

At Cherbourg, the tonnage for 2023 stood at 5,090 T (-13.8%), with sales revenues at €14,236,617 (-15.5%), namely an average sale price of €2.80/kg (vs €2.86/kg 2022). The five main species sold at the Cherbourg fish market in 2023 were scallops (20%), cuttlefish (10%), smooth-hound sharks (9%), whiting (8%) and spotted dogfish (6%).

Several factors account for the contraction of the fishing activity at Cherbourg:

- The main one was the loss of 2 deep-sea vessels under the Brexit individual support plan, which obviously limited catches. However, this fall in fish landings was partly made up for by larger catches by the other deep-sea vessels.

- A higher number of days' technical downtime than in 2022
- A fishermen's strike to protest against an unfavourable working environment (marine protected areas, challenges to the representative bodies, cost of fishing gear, high diesel prices, etc.)



Port of Dieppe ©Biplan - S.Leroy

- A high number of coastal vessels out of action over the summer

At Dieppe, the 2023 tonnage reached 5,561 T, down 1.24%, for sales revenues of €18,178,621 (-1.1%), i.e. an average sale price of €3.27/kg (virtually unchanged compared to 2022). The fall is due to lower fish landings (round -200 T), whereas scallop catches were up again (round +100 T).

Landings at Ouistreham rose considerably again, to reach 2,633 T (+11.3%).



Port of Caen-Ouistreham - Quai Charcot © Eric Destable

The outlook for 2024 for all three ports depends to a large extent on the quality of the king scallop beds. As for the quantity of fish sold at the Dieppe auction market, this will be an indicator to monitor.

The 2024 Outlook for Cherbourg includes two challenges

- Maintaining the deep-sea fleet at 5 vessels
- A need to develop additional activities: positioning on the *pétoncle*

(smaller scallop), receiving foreign vessels (Belgian/Dutch), reopening of the Port of Dielette to receive Channel Island vessels (shellfish, line fish), development of services (fish tank rental, handling, cold storage, etc.) to make up for the loss of business due to the withdrawal of the two deep-sea vessels.

Fears for the sector in 2024

- The reduced European catch limits for whiting in the Western English Channel
- The restarting of Brexit negotiations that could reduce the fisheries in the UK even further.

#### 4. BOAT REPAIRS

With 317 dry dockings in 2023, Ports of Normandy recorded a 7% drop in this activity, which should be reconsidered in light of the continuous growth seen in 2021 and 2022 (+12.5%). The trends are different, however, at Cherbourg and Dieppe.

The port of Dieppe saw a 17.6% drop in this activity with 131 handling operations in 2023 (vs 159 2022), whereas the port of Cherbourg saw a new increase to 186 handling operations (+2%), which can be linked to the industrial dynamics of the Grand Large Yachting group based

in Cherbourg and Ports of Normandy's new, more integrated service offering on the service yard. It is the Travelift that is driving the increase in business at Cherbourg, with 176 handling operations.



#### Challenges for 2024

- To extend the service yard with the creation of three extra berths for trawlers allowing better separation of the activities
- To finalise the creation of a toilet block, locker rooms and a refectory for the staff working at the service yard
- To install badge-operated utility terminals (electricity and water)
- To secure the service yard by fencing off the site and installing a gate

#### 2023 TRAFFIC FIGURES IN BRIEF

- Cross-channel: +9% pax / -6% in tonnage / -7.3% HGVs
- Conventional: -24.27% in tonnage
- Cruise: 54 calls, 215,633 pax
- Fishing:
  - Cherbourg: -13.8% in tonnage
  - Dieppe: -1.24% in tonnage
- Ship repairs (movements):
  - +2% at Cherbourg
  - -17.61 % at Dieppe

#### OUTLOOK FOR 2024

##### To reinforce our position as cross-Channel leader west of the Strait

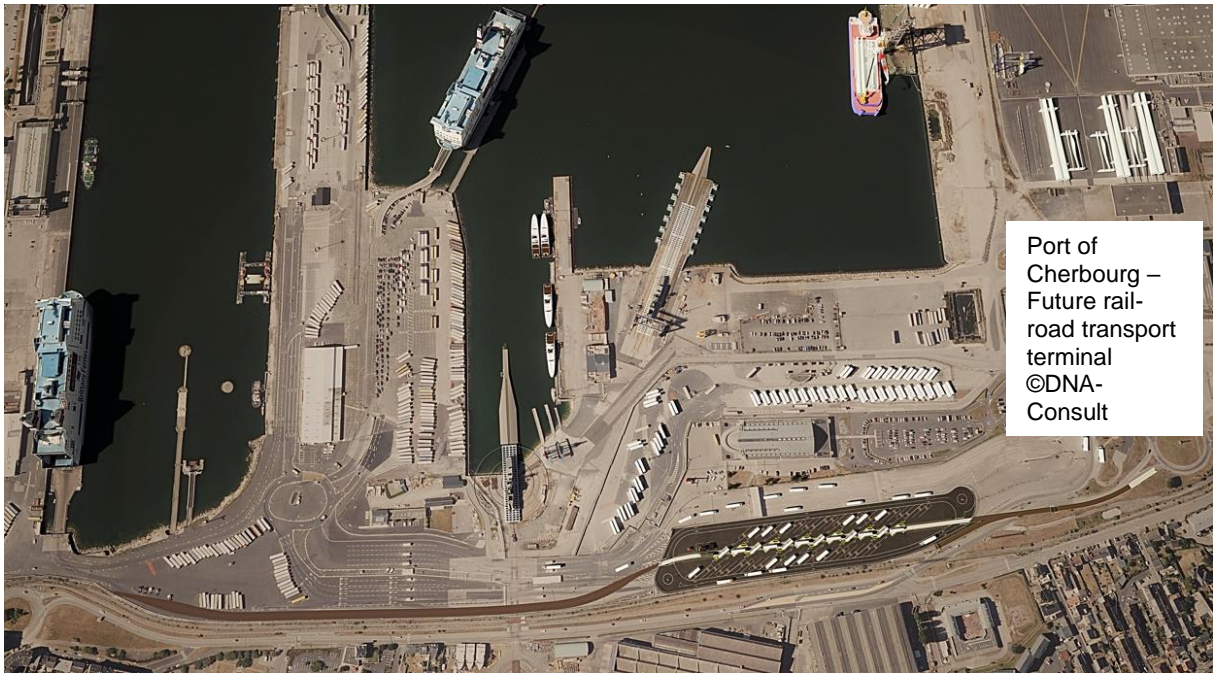
#### EES

Now the provisional phase preparing its three cross-Channel terminals for Brexit is over, Ports of Normandy and its port operators will continue with other developments. The aim is to maintain a free and secure flow of traffic and offer passengers a high quality service in spite of the constraints due to Brexit and the EES Regulation.

#### Rail-road transport terminal

At Cherbourg, 2024 will be marked by the rail-road transport terminal project. Work began at the end of 2023 and will be completed around this summer. For the record, the construction of this terminal will benefit from European funding under the Connecting Europe Facility (CEF). The budget is €12m and funded by Normandy Regional Council, Manche Council, the Communauté d'agglomération du Cotentin and the European Union.





### **Onshore power supply**

The technical studies (detailed for each of our three ports) relating to the installation of onshore power facilities at the ferry and cruise ship berths are just beginning. More precisely, the plan is to connect up the cruise terminal at Cherbourg and the Ouistreham cross-Channel ferry terminal. We will also be continuing discussions with our operators and ferry companies to decide on a suitable business model for this transition. The aim is start work on the facilities in 2025. The overall budget for the three ports is €36m.

### **Cross-Channel terminal works**

The work to improve ferry berth 4 at Cherbourg will soon be finished, with the installation of an extra mooring pile. The budget is €2m.

At Dieppe, work continues on the extension of the cross-Channel ferry terminal: environmental assessment, consolidation of its economic viability and initial technical studies. Depending on how fast the project moves forward, the public consultation stage could begin this year, when we are in a position to present a finalised project on which the public can express an opinion. In 2024 the soil surveys and the legal and economic studies will be conducted. The budget is €1.5m. Note that 50% of the funding for the studies for this project is being provided by the CEF.

Also at Dieppe, €2.3m will be invested to extend the old cross-Channel railway station building, in order to relocate the offices of the operator of the Dieppe-Newhaven line.

Finally, at the Port of Caen-Ouistreham, we are looking into the possibility of extending the cross-Channel ferry terminal. The timetable for this project depends on that of the implementation of the EES Regulation. It could involve moving our workshops as well those belonging to Phares et Balises (Lighthouses and Beacons Office).

### **To become one of the key players in the development of MREs in France**

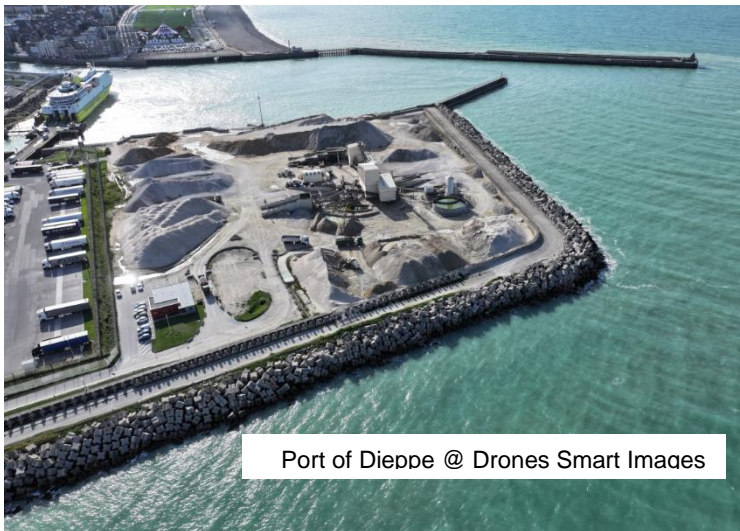
The strong impetus given to this sector by Ports of Normandy will continue in 2024 in three areas:



- Start-up of the work to prepare the seabed at the Courseulles site in the 1st quarter of 2024
- Start-up of the "foundations" activity for the Tréport wind farm in spring 2024
- Continuation of the inter-array cable protection activity for the Asso Subsea wind farms in the English Channel

At the Port of Dieppe, Ports of Normandy will be continuing the work on the future maintenance base for the Dieppe-Le Tréport wind farm. The first works should get underway in autumn 2024. This base will be situated in the outer harbour, to the north of Gaston Lalitte quay. It comprises:

- 850 m<sup>2</sup> of open air storage
- 900 m<sup>2</sup> of offices
- 1,000 m<sup>2</sup> of sheds
- a car park for about fifty vehicles
- a pontoon which can accommodate three 30-metre vessels and a fuel pontoon



Port of Dieppe @ Drones Smart Images

€6.6m have been allocated to this project, including €125K for project management, €125K for scheduling surveys (disturbance, geotechnical, topographical) and €260K for environmental surveys.

Also at Dieppe, there are plans to adapt the infrastructure to allow the positioning of pontoons for CTVs (Quai de la Cale, or even Quai de la Somme).

## To create jobs and generate added value for our region

### Pleasure traffic

A new page will be opening up for pleasure traffic in 2024:

- Start-up of 2 public service delegations: pleasure boating and sailing at Caen-Ouistreham and pleasure boating at Cherbourg.
- At Caen, the Bassin St Pierre has not been dredged for decades. The state of the bottom of the dock is compromising the boating activity and port calls by racing boats. The dredging operation should be able to go ahead by the end of 2024 subject to the approval of the plans by the State authorities. The budget is €3m, co-funded by Ports of Normandy and the City.

### Boat building and repairs

At Cherbourg, Ports of Normandy plans to continue a whole series of works over 2024 to improve the service yard (€800K) which is already proving a great success:

- Creation of toilets, a locker room and a refectory
- Extension of the service yard to the South with the creation of three extra berths for trawlers to allow better separation of the activities

- Installation of badge-operated utility terminals (electricity and water)
- Securing of the yard by closing off the site (gate and fencing) and, eventually, installation of CCTV

### **Fishing**

At Cherbourg, pontoon 6 in the outer port will be rebuilt, at a cost of €450K.

At Dieppe, a fuel pontoon is being studied for construction in 2025.

### **Value creation from real estate assets**

Ports of Normandy is looking into the possibilities for creating value from its real estate assets, whilst ensuring that they generate extra port business:

- The Croix Morel business park, developed by the SHEMA, should be delivered by mid-2025. It is intended to serve businesses that support the port's activities, especially in the logistics sector.
- Rehabilitation of buildings:
  - MIM premises at Dieppe: €1m over 2023 and 2024
  - La Carpente building (Nautisub) at Dieppe: €400K
  - Sale of a plot previously occupied by Thompson Recyclage and various plots on the Zone Industrielle des Mielles

### **Maintaining infrastructure**

Ports of Normandy is looking into the possibilities for creating value from its real estate assets, whilst ensuring that they generate extra port business:

- Colombelles bridge: an essential link between the East and West of the Caen conurbation, it is used by 18,000 vehicles a day, of which 7% are HGVs. Breakdowns are a constant problem, causing major traffic disruption. It will therefore be replaced with a new bridge. This will be the main link between the new La Presqu'île Hérouvillaise residential and commercial development and the "old" town. It will be able to accommodate all the various users (pedestrians, cyclists, drivers) in complete safety while ensuring the proper management of ships using the canal. Work is due to begin in the second quarter of 2024, once the administrative examination of the project is complete. The budget for the operation is €20m.
- Montalivet dam: more studies will have to be done since, so far, findings have only given rise to a plan that cannot be financed.

- Ouistreham West lock: the continuous geometrical measurements of the lock have shown that a second phase of works is necessary. Extensive civil engineering work is required on the mole head before the lock gates can be replaced. The budget is €7.2m.



- Colbert bridge in Dieppe:

listed as a historic monument in 2020, Colbert bridge is undergoing a complete restoration. In 2024 €9.5m, out of a total budget of €19.6m, is due to spent on surface



stripping and the initial restoration work. A pedestrian bridge has been installed to minimise the inconvenience to the public over the 15-month period when the bridge is closed to traffic. The bridge has been moved to a site well away from the town centre to speed up the work and limit the noise nuisance.

- The Hangar d’Afrique building at Dieppe will be demolished. This shed is dilapidated and is uselessly occupying land, when land is scarce in Dieppe. The studies will begin shortly. The budget is €3m.
- The Cherbourg swing bridge: all the bridge's electrical and control equipment will be renovated in 2024. The budget is €280,000



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**ABOUT PORTS OF NORMANDY \***

*Owner and administrator of the ports of Caen-Ouistreham, Cherbourg, and Dieppe, Ports of Normandy represents: 6,000 direct and indirect jobs (INSEE study 2016)/ €420m invested in Normandy since its creation in 2007 / 100 ha dedicated to Marines Renewable Energies, a maintenance base in Caen-Ouistreham, and 2 future bases to come / 2 million cross-Channel passengers per year / 7 million tonnes of cargo per year / Close to 60 cruise ship visits per year and more than 150,000 cruise passengers / 3,200 marina berths, a dry stack marina, 33,600 overnight stays / 1/3 of all fisheries landings in Normandy / a full range of ship repairservices*

*Ports of Normandy, an alliance between Normandy Council, the Departments of Calvados, Manche and Seine-Maritime, and the urban areas of Caen-la-Mer, Le Cotentin and Dieppe-Maritime, serving economic development in the region. Learn more about Ports of Normandy at [portsdenormandie.fr](http://portsdenormandie.fr)*

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