

## Towards a Diversification of Port Traffic

**The total traffic volume at Nantes – Saint Nazaire Port amounts to 26.4 million tonnes in 2014. The contrasting developments in energy-related throughput, as characterized by the progression of crude oil and the decrease in coal traffic, mask the growth recorded for grain and cereals, cement and bulk recycled product cargo.**

Crude oil imports returned to growth in 2014 (+ 9.6 %) following a previous year marked by the maintenance turnaround at Total's Donges refinery. The petroleum group is planning on making significant investments in 2015 in order to upgrade its industrial facilities.

The overall traffic level for liquefied natural gas stabilized at 1.3 million tonnes (MT). For nearly five years now, international trade exchanges have been impacted by North American shale gas production and by the increased demand from Asia, which have served to reduce the volumes passing through Elengy's Montoir de Bretagne LNG terminal by three quarters.

Coal imports are down 34.5 %. Mild temperatures notably resulted in restricted demand for supplies of fuel to EDF's thermal power station at Cordemais.

### **The Efforts to Diversify are Bearing Fruit**

Grain and cereals traffic amounts to 1.4 MT, progressing by 5.6 %. The wheat harvest in Greater Western France was both abundant and of good quality. Exports were driven by the strong demand from North Africa and the emergence of outbound consignments to China.

The diversification of dry bulk cargo for the building and civil engineering and general industrial sectors is ongoing. The total volume is in excess of one million tonnes, rising by 3.7 %. Ciments Kercim's cement factory at Montoir de Bretagne handled 58 000 tonnes of imported clinker, a 37 % increase compared to 2013. Recycled scrap metal traffic progresses by 5.4 % and represents a volume of 409 000 tonnes. Processed at the Derichebourg and GDE plants, the consignments of scrap metal were mainly exported to Turkey, Spain and Morocco.

Following on from a previous year characterized by a strong increase in volumes, cattle feed traffic stabilized at 1.9 MT. With 45 % market share, Nantes – Saint Nazaire remains France's leading port for the importation of the ingredients used in the manufacture of cattle feed.

Marine sand traffic decreased by 22 %, owing to the economic difficulties in the building and civil engineering sector. This downturn is also a consequence of the transfer, during the year, of the sand terminal previously located at the base of the Pont de Saint Nazaire Bridge to a site upstream of the Montoir de Bretagne multi-bulk terminal. The new facility is due to be commissioned in February 2015.

In decreasing by 26.3 %, the ro-ro traffic volume is impacted by the suspension of operations on the Montoir–Gijón maritime motorway. And yet this result masks bright prospects going forward. Launched in 2013 and currently handling consignments of Airbus aircraft sections out of the Mediterranean Basin and exports of Dacia vehicles from Morocco, the Milk Run Med scheduled service is developing fast. There should also soon be a ramping up of operations on the long-established Montoir–Vigo link as the Suardiaz shipping line extends its service offer at the end of January with the introduction of a third weekly rotation.

Container traffic amounts to 177 000 TEUs. The decrease in imports in terms of tonnage (- 7.4 %) is linked to the national economic downturn, while exports showed stronger resistance (- 3.4 %). Since the summer of 2014, the MSC shipping line has included Montoir de Bretagne in its service between Northern and Southern Europe. Three vessels provide a weekly call at Montoir out of Antwerp and Le Havre and serving the transshipment ports of Valencia (Spain) and Sines (Portugal). In addition, the CMA CGM shipping line has chosen to make changes to its services between Europe and Africa and to deploy larger-capacity vessels. This reorganization offers shippers in Greater Western France more extensive connections to ports in Africa.