

Annual report 2023/2024

FIGHTING SOCIAL DUMPING

FLEET DECARBONISATION

CRISIS IN THE RED SEA

SOCIAL PROMOTION

COMPETITIVITY OF FRENCH SHIPS

DEVELOPING MARINE RENEWABLE
ENERGIES

MAINTAINING AND IMPROVING
SOCIAL DIALOGUE



CONTENT

P. 3
2023: a year in pictures

P. 6
Staying the course for seafarers and the planet!

Interview with Édouard Louis-Dreyfus, Chairman of Armateurs de France, and Jean-Philippe Casanova, Managing Director

P. 12
"Let's make 2024 a year for our seafarers and French jobs."

Editorial by Éric Banel, Director General for Maritime Affairs, Fisheries and Aquaculture

P. 13
Bourbon awarded the Blue Charter Trophy

P. 14
2023: a year in figures

P. 15
The team at Armateurs de France

P. 16
2023: a year in actions

P. 18
434 ships under the french flag

P. 19
The members of Armateurs de France

We would like to thank our member companies and our partners for their valuable contributions.

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2023: A YEAR IN PICTURES



4 APRIL

Armateurs de France annual dinner

At its annual gala evening at Pavillon Gabriel, Jean-Emmanuel Sauvée handed over the wheel of Armateurs de France to Édouard Louis-Dreyfus. The maritime industry decarbonisation roadmap was also officially presented to the Government, represented by Hervé Berville, then Minister of State for Marine Affairs, attached to the Prime Minister, and Clément Beaune, then Minister Delegate to the Minister of Ecological Transition and Territorial Cohesion, responsible for transport. The evening's keynote speaker, Jean-Yves Le Drian, also reminded the audience of the importance of the maritime sector, in a speech warmly appreciated by the community.



1-2 JUNE

Wind for Goods

Organised by Nantes Saint-Nazaire Développement in partnership with the association Wind Ship and supported by Armateurs de France, the Wind for Goods event provided an opportunity to discover the practical progress being made in various sail-based innovations. The two days also fostered exchanges on major challenges, while providing a platform for stakeholders to share their experiences.



8 JUNE

Electric vehicle and battery shipping workshop and safety and security committee

Armateurs de France organised its safety and security committee meeting in Paris, followed by a workshop on the technical, regulatory and training issues relating to the safe transportation of electric vehicles and batteries by sea.

19 JULY

6th Cross Channel Meetings

The theme of these *Rencontres du Transmanche* was “Blue France and the regions faced with social dumping on Cross-Channel routes”. They were held under the patronage of the French Maritime Cluster and Armateurs de France, at the initiative of the French cross-Channel operators, who presented the three cross-Channel regional chairmen with a comprehensive overview of the consequences of social dumping on the cross-Channel, in the presence of DG AMPA¹.



28 NOVEMBER

Presentation of Blue Charter Trophy at the Assises de l'économie de la mer

At the 18th edition of the *Assises de l'économie de la mer*, Armateurs de France presented the Blue Charter Trophy to Bourbon for its CASSIOPÉE programme (data collection and analysis for operational security, performance and energy efficiency). A special award was also presented to DG AMPA.



17 OCTOBER

Green Marine Europe reveal

The names of the GME-certified shipowners were revealed in Bilbao, Spain, at the end of a day of debates dedicated to the industry's environmental transition aboard the *Galicia*, a ship owned by certified shipowner Brittany Ferries. In all, 14 European shipowners were recertified, and eight received certification for the first time.



29 NOVEMBER

Signature of social promotion agreement at the Assises de l'économie de la mer

On the second day of the *Assises de l'économie de la mer* conference, a historic agreement on social promotion was signed by Armateurs de France, the Minister of State for Marine Affairs, trade union representatives of merchant seafarers and OPCO Mobilités. The conclusion of this agreement is the culmination of several months of successful consultation, and is welcomed by all stakeholders.



13 NOVEMBER

Offshore wind energy business day

The French maritime services and works and offshore wind energy industries met under the aegis of DG AMPA and DGEC². With a single goal in mind: to accelerate the development of the French maritime services and works sector! During the meeting, RTE joined the inter-industry dynamic by signing a letter of intent with Armateurs de France, France Renouvelables and the *Syndicat des Énergies Renouvelables* (Renewable energy association).



14 DECEMBER

French Navy - Armateurs de France meeting in Paris

The annual meeting between the French Navy and Armateurs de France, held at the Musée National de la Marine, explored the topical issues of maritime security and naval cooperation. Guest speaker Yannick Chenevard MP also presented the results of his work on redefining the strategic fleet mechanism.



1 Directorate General of Maritime Affairs, Fisheries and Aquaculture
2 Directorate General for Energy and Climate

STAYING THE COURSE FOR SEAFARERS AND THE PLANET!

A wave of unprecedented challenges is on the horizon. Armateurs de France is on the bridge to anticipate, secure and facilitate the upcoming transformations. We look ahead with Édouard Louis-Dreyfus, its Chairman elected on 4 April 2023, and Jean-Philippe Casanova, Managing Director.



On behalf of Armateurs de France, Édouard Louis-Dreyfus and Jean-Philippe Casanova are committed to combating social dumping and implementing measures to meet the challenge of decarbonisation.

"WE ARE AND WILL CONTINUE TO REMAIN RESOLUTE ON THE ISSUES AROUND SOCIAL DUMPING."

ÉDOUARD LOUIS-DREYFUS



What is your highlight of 2023?

ÉDOUARD LOUIS-DREYFUS One of the undisputed highlights of 2023 was the collective victory in the fight against social dumping on cross-Channel shipping, with the promulgation of the Le Gac Act on 26 July. This breakthrough is the culmination of a strong, swift and effective general mobilisation of the entire ecosystem, from ship-owners on both sides of the Channel to the French government and trade unions. It was vital to do everything possible immediately to put an end to this blatant distortion of competition and defend the working and pay conditions of seafarers. There is still a long way to go, but we are and will continue to remain resolute on the issues around social dumping.

JEAN-PHILIPPE CASANOVA At Armateurs de France, we are firmly committed to combating social dumping, since it has a direct impact on key issues such as jobs and quality of life at work. We are delighted that our initiative, our structured action and our determination, combined with the dedication and efforts of the various stakeholders, have led to legislation that restores fairness and the attractiveness of the professions and of French ship-owners. The fight against social dumping must take on a European dimension, by involving crews in a debate on a foundation of employment rights in the EU.

Quality of service at the centre of the ADF approach

8.3/10 is the average mark that Armateurs de France members have given to its services. "An encouraging score that reflects our commitment to a rigorous AFNOR certification process that began in 2008," says Jean-Philippe Casanova. All the teams at Armateurs de France are committed to a process of continuous improvement, with the aims of carrying out targeted lobbying actions, putting in place a formalised and transparent organisation, and communicating regularly and in a structured way towards our members and externally.

"THE SIGNATURE OF THE OFFICERS' MINIMUM PAY SCALE IS A HUGE SOURCE OF SATISFACTION."

JEAN-PHILIPPE CASANOVA



Has progress been made on other matters?

J.-P. C. The most striking step forward was the signature of the minimum pay scale for officers, with the unanimous approval of the social partners. This is a huge source of satisfaction, especially after spending a decade without any consensus between the two sides! We have furthermore set ourselves the target of reaching an agreement on minimum pay every year. As a result, in January 2024, it was agreed to raise the pay scale by 4%, giving officers a 14% increase over two years. Work is continuing to reach a consensus on the minimum pay scales for ratings. Overcoming this stumbling block is essential if we are to continue to work effectively on the industry's other priority issues, such as pensions, gender equality and the fight against sexual and gender-based violence.

É. L.-D. The agreement on minimum pay for ratings has not been signed since 2003. It is now time to forge ahead on this issue, which is important not only for seafaring personnel but also for the competitiveness of French shipowners. This revaluation makes perfect sense in the context of the so-called "host state" system, particularly at a time when the French government intends to accelerate the development of marine renewable energies. In addition to the benefits for the employees

concerned, the minimum social benefits set the threshold for competition in French territorial waters.

J.-P. C. I am confident in our collective ability to reach an agreement in the near future. Both employers and employees are aware of the need to reach an agreement.

An agreement on social promotion was recently signed by Armateurs de France, the French secretary of state for the sea, trade union representatives for merchant seafarers and OPCO Mobilités. What does it involve?

J.-P. C. The aim of this historic agreement is to promote career paths, in a context where the social ladder has been somewhat blocked in recent years. The idea is to free up the VAE (validation of acquired experience) so that ratings staff can progress to officer positions. It is essential to make our professions and career paths attractive if we are to meet the recruitment challenges facing the merchant navy.

É. L.-D. It's a win-win agreement. On the one hand, it broadens the scope of opportunities for seagoing personnel. On the other hand, shipowners expand their pool of talent at a time of growth and, therefore,

a need for manpower. We need to pull out all the stops to attract new talent.

With the ENSM (French Maritime Academy), for example, we are perfectly aligned with the goals to be achieved. One of the missions of the foundation set up last year by the ENSM is to raise the profile of our professions and promote them.

J.-P. C. For many years, we have worked closely with the ENSM, whose objective is to double the number of officers trained by 2027. We are fully associated with the school's objectives and performance agreement and the measures taken. We have regular, constructive discussions to ensure that the challenges facing the industry are taken into account as effectively as possible. And the results are compelling: ENSM graduates have an employment rate of almost 100%.

Last summer, the IMO (International Maritime Organisation) raised its climate ambitions. Global shipping is now expected to achieve carbon neutrality by 2050, with intermediate targets of a 20-30% reduction by 2030 and a 70-80% reduction by 2040 compared to 2008. What are your thoughts on this?

É. L.-D. That's the way history is heading. There is a collective and real awareness of the urgent need to reduce our carbon dioxide and greenhouse gas emissions. Today, shipping is the most efficient mode of transport per tonne transported: while 90% of the world's goods transit the seas and oceans, the resulting carbon emissions represent only 2.89% of the global total. Nevertheless, this is still too much, and shipping, which will continue to grow, must play its part in decarbonising world trade. We should not forget, however, that this decarbonisation will come at a cost that will have to be borne by end consumers.

Do you think the 2030 targets are achievable?

É. L.-D. The IMO's ambitions are laudable and motivating, but they fail to pass the reality check. Most French shipowners should be on track for 2030, thanks to a wide range of solutions: from

Setting a course for offshore wind power

"Since 2022, Armateurs de France has been working to develop a French marine services and works sector for offshore wind energy," explains Édouard Louis-Dreyfus. A charter drawn up with France Renouvelables and SER (*Syndicat des Énergies Renouvelables*) aims to structure a competitive French industrial proposition and promote local businesses and jobs. In November 2023, we were delighted and enthusiastic to witness RTE¹ sign the charter, thereby contributing to the vitality of this cross-industry movement!

eco-driving to propulsion assistance systems and optimising the energy consumed on board. For example, reducing speed is one of the simplest, most effective and most economical ways of reducing carbon dioxide emissions: a 10-15% reduction in a vessel's speed reduces fuel consumption by 30-40%. However, most of the options available come at a cost which can at times be significant. Investing in decarbonising their fleet can constitute a real headache for shipowners, many of whom in France are SMEs. It is vital that we find solutions to help them in their transformation.

What about reaching net zero in 2050?

É. L.-D. That's a totally different story! Reaching net zero by 2050 looks like a tall order, even with the best will in the world. We are faced with three major hurdles. Firstly, from a financial point of view: it will require a staggering €75 to €110 billion of investment over the 2023-2050 period to decarbonise the entire French maritime industry. Secondly, we are limited by the technical solutions currently available. Only a handful of fuels are compatible with carbon neutrality. None of them are currently universally applicable but, →

¹ RTE (*Réseau de Transport d'Électricité*), a regulated public service company and the contracting authority for the connection of all French offshore wind farms

most of all, we are light years away from an industrial production capacity commensurate to requirements that also include air and land transport. Thirdly, we must not underestimate the logistical constraints. The widespread use of a new fuel will require ports around the world to adapt... While decarbonisation is imperative, the road to achieving it is strewn with pitfalls and uncertainties.

J.-P. C. Armateurs de France is calling for a stable and coherent international framework to ensure that everyone pulls in the same direction. We are in a competitive environment where it is vital that all players abide by the same rules. What's more, we believe it is vital to include all greenhouse gases in future regulations. It is not appropriate to focus solely on carbon dioxide. Similarly, and in line with this logic, emissions must be calculated on a well-to-wake basis.

É. L.-D. Finally, I would add that 2050 is tomorrow! The environmental transformation of ship-owners is a long-term process, due to the lifespan of vessels. A ship ordered today and delivered in three years' time has every chance of still being in operation in 2050. Carbon neutrality must therefore be anticipated today. What's more, to achieve zero net greenhouse gas emissions by 2050, you need to replace almost the entire global fleet. That's mission impossible: taking into account the current production capacity of shipyards around the world, we've calculated that it would take... 100 years!

With 295 incidents recorded worldwide in 2023, the number of acts of piracy and banditry has remained stable, according to the MICA Center. But new threats are looming over ships and their crews. What can be done?

É. L.-D. Insecurity is a major concern, because it puts crews and business at risk. Faced with unprecedented forms of attacks, such as drone strikes in the Red Sea, shipowners and shipping personnel are defenceless. We therefore need protection and support measures. In this respect, we would like to pay tribute to the action and effectiveness of the French Navy, but it cannot secure

More shipowners display their green credentials

"Many French shipowners are actively and sustainably working to reduce their environmental footprint," applauds Jean-Philippe Casanova. To maximise and promote their efforts, 22 of them have opted to obtain GME (Green Marine Europe) certification. This label, supported by Surfrider Foundation Europe, is both ambitious and robust, thanks to its collaborative approach that involves shipowners working with experts, public authorities and environmental NGOs.

all shipping routes on its own. As is often the case, the answer must be found at European and international level.

J.-P. C. We are fortunate to be able to count on the involvement of the French Government, the mobilisation of the French Navy and the effective action of the MICA Center. The latter coordinates voluntary naval cooperation, an example of successful collaboration between the French Navy and private operators who share information for the benefit of maritime security. This initiative must be encouraged and widely deployed: more participants make the system more effective, thanks to a closer network across the seas and oceans.

A word on tax. What is the state of play with green bonus depreciation?

É. L.-D. This mechanism had been devised in collaboration with the government to encourage decarbonisation and took several years to become clear and effective. We thought we had achieved our goal when, last summer, we obtained a rescript clarifying the conditions of application. But a few months later, an amendment to a European regulation was written into the Finance Act for 2024 which dealt a damaging blow to a mechanism that had only just started to catch on.



"France is the only one of the IMO's 175 member countries to have a specific embassy (but one that is inspiring others!), ensuring a coherent presence at all levels, influence and visibility (submissions: third largest national contributor, first in the EU), promoting expertise, and with second place in the Secretariat (including the SG's Chief of Staff). Fit for new challenges, including decarbonisation!"

Marine de Carné de Trécesson de Coëtlogon,
Permanent representative
of France to the IMO

It meant that on 1 January 2024, the scope of the green bonus was significantly narrowed: LNG, LPG and equipment for reducing atmospheric pollutants are now excluded. The rates for other eligible assets have also been reduced. Given that there is no definitive decarbonisation solution that currently exists today, excluding transitional solutions from the scheme is tantamount to stripping it of its very substance. It is possible to benefit from the depreciation scheme in its current form by applying to the EU under the State aid regime. This usually takes 18 months, which is a timeframe that is incompatible with decision-making in the maritime sector. That is why we're working with the Government to restore the green bonus to its previous form.

What subjects are on the agenda for Armateurs de France in 2024?

É. L.-D. In addition to the topics previously discussed, we are taking a close look at the ETS carbon quota system. Since 1 January 2024, shipowners have had to pay a carbon surcharge based on their CO₂ emissions. The surcharge will be phased in gradually, reaching 100% of declared emissions in 2027, and will generate huge revenues. Three quarters of these will go to the shipowner's country, the rest to the EU. It is crucial that the share received by the French State benefits the French maritime ecosystem and its decarbonisation.

J.-P. C. The funds could, for example, be used to support retrofits and conversions of the existing fleet. This is Armateurs de France's main concern, and we need to make sure that this happens as soon as possible, because the question of financing is essential if we are to rise to the challenge of decarbonisation.

MEET2050, working towards decarbonisation targets

Armateurs de France supported the creation of MEET2050 (Maritime eco-energy transition towards 2050) in July 2023. "We firmly believe that this institute of expertise will provide invaluable support in structuring the industry, giving the French government and local authorities a clear, shared vision of the issues facing shipowners, and helping to influence international negotiations," emphasises Édouard Louis-Dreyfus. It will serve as a focal point for coordinating efforts and initiatives to help us address the challenges of 2050.

EDITORIAL

"LET'S MAKE 2024 A YEAR FOR OUR SEAFARERS AND FRENCH JOBS"

Combating social dumping in the maritime sector is one of the major challenges facing French shipping.

Éric Banel, Director General for Maritime Affairs, Fisheries and Aquaculture, looks back at the actions taken in 2023 to guarantee fair and equitable working conditions for workers at sea, while preserving the sustainability of aquatic resources.



ÉRIC BANEL,
Director General for Maritime
Affairs, Fisheries and Aquaculture

From a French perspective, 2023 was marked by the fight against social dumping. This legitimate fight is a battle for our companies and for French jobs. We launched it during the French Presidency of the European Union in 2022. It is now enshrined in law. In view of the competitive strategies of certain States and certain shipowners within the European Union itself, we share the fears of our social partners. The deterioration in working conditions, occurring in the name of competitiveness, weakens our social model, threatens our jobs and maritime safety. It is not acceptable. It has been unanimously condemned by all sides of industry.

Defending the French maritime employment model

2023 was a year of action. All the players in the French maritime transport industry mobilised - alongside the administration - to improve working conditions on board ships and defend the French maritime employment model. This is an imper-

ative for society, safety and environmental protection. And it's an achievable imperative! The bill tabled by Didier Le Gac, MP, was passed unanimously, a powerful expression of the unanimous desire to strengthen host State arrangements on all our coasts, and to put in place a dedicated arrangement for cross-Channel shipping. We are therefore making great strides forward.

Rallying European shipowners to the cause

For 2024, we now need to turn our collective attention to Europe and the world. We need to be persuasive if we are to win over European shipowners to this cause, which is the only guarantee of preserving the jobs and skills of our seafarers, and therefore of our businesses and our sovereignty.

I know I can count on the mobilisation of our shipowners and on the expert and active voice of Armateurs de France to uphold this social ambition. Together, let's make 2024 the year of our seafarers and French jobs!

BOURBON AWARDED THE BLUE CHARTER TROPHY



The Bourbon Evolution 802, Bourbon.



Armateurs de France presented the Blue Charter Trophy to the shipping company Bourbon at the 18th edition of the *Assises de l'économie de la mer* in Nantes.

The jury, chaired by Guillaume Vidil, Managing Director of Marfret (winner in 2022), and comprising well-known figures from the shipping world (see box), chose to distinguish

Bourbon's CASSIOPÉE programme this year. The aim of the CASSIOPÉE programme (standing for "Data collection and analysis for operational security, performance and energy efficiency") is to develop tools to support seafarers and land-based teams, to facilitate decision making and make their operations more environmentally friendly, while helping to improve their safety. —

Special award

DG AMPA¹ also received an award for its commitment to fair competition between maritime operators in French waters, the protection of seafarers and shipping safety through its actions on offshore wind energy and cross-Channel passenger transport.

Members of the 2023 jury

- **Marine de Carné de Trécesson de Coëtlogon**, Permanent representative of France to the IMO
- **Jean-François Jouffray**, President of the High Council for Seafarers (*Conseil supérieur des gens de mer*)
- **Romain Troublé**, President of Ocean & Climate Platform
- **Fanny Lossy**, Director for Climate, Environment and Safety at ECSA
- **Caroline Britz**, Journalist at *Mer et Marine*



"We would like to thank the Jury, as this Blue Charter Trophy is the recognition of our work on the connected vessel. CASSIOPÉE is an important initiative for both the company and the industry. I would like to congratulate the teams at Bourbon Marine & Logistics who are committed to the use of new technologies to improve operational safety, lighten the workload of seafarers and reduce the environmental impact on board vessels. By offering innovative marine solutions, Bourbon is more than ever the partner of choice for the major players in offshore energy."

Gaël Bodénès,
CEO, Bourbon

¹ Directorate General of Maritime Affairs, Fisheries and Aquaculture

2023: A YEAR IN FIGURES

99% of internet traffic passes through submarine cables

196 students graduated from the ENSM¹ in 2023

100% representativity

in the three maritime professional branches (officers, ratings, land-based)

90% of world trade is transported by ship

14,862 seafarers
9,065 land-based workers

The French flagged fleet is the **26th** largest in the world

Net zero in 2050: the Armateurs de France decarbonisation ambition

40 French shipowners are registered in the voluntary naval cooperation agreement, representing a total of 466 vessels

Up to **€110 bn** necessary between now and 2050 for the green transition of the maritime industry

344 companies make up the maritime branches

70% of French shipowners affected by NIS2 directive

More than **180** ships available for offshore wind power

¹ French Maritime Academy

THE TEAM AT ARMATEURS DE FRANCE

March 2024



"The Armateurs de France team has played an essential role in the accomplishment of all our projects. Their exceptional dedication and invaluable expertise have helped us overcome challenges together. I would like to thank them and pay tribute to their work throughout 2023, which marked the 120th anniversary of Armateurs de France. Our team remains, more than ever, committed to moving forward."

Jean-Philippe Casanova,
Managing Director, Armateurs de France



Philippe Costa,
Head of general affairs



Marie-Claire Denicourt,
Head of accounting and human resources



Marie-José Gharios,
Communications officer



Alizée Gosselin,
Legal and economic affairs officer



Nelly Grassin,
Head of environmental affairs



Delphine Laurent,
Executive assistant



Mathilde Prete Capasso Torre,
Head of European affairs



Cécile Rafat,
Head of legal and economic affairs



Pierre-Antoine Rochas,
Head of security, safety and port affairs



Maha Vandewalle,
Head of social affairs and training



Holding QUALI'OP certification, Armateurs de France constantly strives to maintain high quality service.

2023: A YEAR IN ACTIONS

Armateurs de France and its members continued to work together in 2023 to defend French shipping, guarantee the security of maritime transit, maintain social dialogue and make progress on fleet decarbonisation, as illustrated by these testimonials.

"NAVAL COOPERATION AND SECURING OF MARITIME TRANSIT"

Amiral Nicolas Vaujour, Chief of Staff of the French Navy

"The prosperity of our economy depends to a large extent on the security of maritime traffic. With an increasing number of crises extending into the sea, protecting these flows is once again at the forefront of our concerns. This creates a strong link between the navy and the merchant navy. To meet today's challenges and act effectively, we need to be aware and understand. This can only be achieved through regular exchanges, mutual knowledge and a bond of trust that has been patiently built up between the various players in the maritime world. The deployment of our frigates in the Southern Red Sea, the MICA Center in Brest, the voluntary naval control systems and the maritime security exercises are all valuable actions and tools for reducing risks and maintaining confidence."



"FRANCE IS SETTING UP ITS OWN CENTRE OF EXPERTISE ON THE DECARBONISATION OF SHIPPING"

Erwan Jacquin, President and co-founder of MEET2050

"With support from Armateurs de France and the highest level of government, the MEET2050 Institute was created in July 2023 at a meeting attended by 70 entities representing the entire maritime value chain. Since then, the team has grown and launched its first projects, notably CAP2050, which will develop a modelling tool for decarbonisation trajectories, improve database reliability and produce scenarios to inform public policy and industrial strategies. Joining MEET2050 means benefiting from its expertise, carrying out joint studies, mobilising funding, getting access to project results... and joining a stronger collective in its communication and lobbying actions."



"A SUSTAINABLE WAVE WITH GREEN MARINE EUROPE"

Antidia Citores, Project manager at Green Marine Europe

"Green Marine Europe environmental certification now covers 30 shipowners and shipyards, 22 certified shipowners, six European countries (France, Spain, Portugal, Sweden, Switzerland and United Kingdom) and 11 performance indicators. As one of its partners from the outset, Armateurs de France boasts a number of certified members, including Louis Dreyfus Armateurs, Brittany Ferries, CMA CGM, La Méditerranéenne, Bourbon Offshore Surf and Ponant. Thanks to the partnership between Surfrider Foundation Europe (EU) and Green Marine (CAN/US), the fleet of certified shipowners on both sides of the Atlantic will number just over 1,130 vessels by 2022, representing around 1% of the world fleet (> 400 Gt). So many exciting prospects"



"A VESSEL WITH A CARBON FOOTPRINT CLOSE TO ZERO IN OPERATION"

Mathieu Petiteau, Newbuilding and R&D Director at Ponant

"The objective of Ponant's R&D team is to deploy decarbonisation solutions adapted to our fleet. We are working on the design of a ship capable of achieving an operational greenhouse gas footprint close to zero. What size of ship, what technologies and what energies can be incorporated into a vessel to achieve the 2050 carbon neutrality target as early as 2030? Our Swap2Zero project, with its multi-energy model, aims to provide an answer to these questions through the design of a ship based on three main pillars: energy sobriety, energy efficiency and optimised use of renewable energies (wind, solar and low-carbon fuels). To carry out this project, we are joining forces with Bureau Veritas, the French flag and several French partners."



"AN ACCELERATION IN OFFSHORE WIND POWER"

Gro de Saint-Martin, Director Strategy & Development Offshore Grids at RTE

"RTE welcomes the collaboration initiated with Armateurs de France, which is particularly strategic given the accelerating development of offshore wind farms, which will require a wide range of maritime resources and services at each stage of the wind farm connection projects. A new step was taken with the signature of our joint engagement charter on 13 November 2023, a further step towards forming a French maritime team to support the energy transition!"



"SOCIAL DIALOGUE REMAINS A KEY ISSUE"

Éric Derrien, Chairman of the Social Affairs Committee and the Standing Joint Negotiating and Interpreting Committees (CPPNI) of the maritime transport and services industries

"This year's negotiations were turbulent, but always driven by the shipowners' desire to see our sector evolve. As Chairman of the Social Affairs Committee and the CPPNI, I have always been keen to defend the best interests of our members. However, after a five-year mandate, I will soon be stepping down from these responsibilities. I am honoured by the trust that shipowners have placed in me to bring the work and negotiations in the industry to a successful conclusion over the years. I leave behind me a number of projects that have been completed, such as the development of the minimum pay scale for officers and the consultation on social advancement, as well as projects that are still underway, such as minimum pay for ratings and the substantial project of merging the branches. Social dialogue therefore remains a key issue for our organisation in 2024 and for the years ahead."



434 SHIPS UNDER THE FRENCH FLAG

Transport fleet: 207 ships

| SHIP TYPE | Quantity | GT ¹ | DWT ² |
|--|----------|-----------------|------------------|
| CARGO | 23 | 34,871 | 20,512 |
| CEMENT CARRIER | 2 | 4,924 | 6,050 |
| PASSENGER SHIP | 16 | 9,949 | 2,774 |
| SCIENTIFIC RESEARCH AND EXPLORATION VESSEL | 2 | 9,891 | 5,420 |
| CRUISE SHIP | 16 | 171,896 | 23,646 |
| OIL TANKER | 25 | 1,661,653 | 3,093,573 |
| CONTAINER SHIP | 34 | 3,975,204 | 3,913,088 |
| RORO SHIP | 13 | 145,414 | 60,108 |
| FERRY | 51 | 912,963 | 201,440 |
| LNG TANKER | 25 | 2,366,797 | 1,912,020 |

7 years

Average age of the French shipping fleet

Source: Merchant Fleet Mission, July 2023

Service fleet: 227 ships

| SHIP TYPE | Quantity | GT ¹ |
|-------------------------------|----------|-----------------|
| BUOY TENDER | 10 | 2,504 |
| CABLE LAYER | 13 | 136,723 |
| DREDGER | 14 | 36,387 |
| OFFSHORE SERVICE VESSEL | 54 | 121,000 |
| TRAINING SHIP | 2 | 1,081 |
| PILOT BOAT | 1 | 499 |
| RESEARCH VESSEL | 7 | 12,822 |
| TUG BOAT | 109 | 57,422 |
| SAND DREDGER | 4 | 10,338 |
| MARITIME WORKS SUPPORT VESSEL | 13 | 3,304 |

16.3 years

Average age of worldwide fleet

Source: Merchant Fleet Mission, July 2023

Source: Merchant Fleet Mission, January 2024

¹ Gross tonnage above 100 UMS (Universal Measurement System)

² Deadweight tonnage

THE MEMBERS OF ARMATEURS DE FRANCE

ABCRM · ALCATEL SUBMARINE NETWORKS · ALKA MARINE SOLUTIONS · ARMAM · BESSÉ · BOLUDA FRANCE · BOURBON OFFSHORE SURF · BRITANNY FERRIES · BUREAU VERITAS · CARIBBEAN LINE · CATLANTE CATAMARANS · CCI BAYONNE · CEDRE · CLUB DE LA CROISIÈRE MARSEILLE PROVENCE · CLUB MED MARINE · CMA CGM · COMITÉ MARSEILLAIS DES ARMATEURS DE FRANCE · COMPAGNIE ARMORICAINE DE NAVIGATION · COMPAGNIE FRANÇAISE DE CROISIÈRES · COMPAGNIE POLYNÉSIIENNE DE TRANSPORT MARITIME · CONSEIL DÉPARTEMENTAL DE CHARENTE-MARITIME · CONSEIL RÉGIONAL DE BRETAGNE · CORSICA FERRIES · COSTA CROISIÈRES FRANCE · DFDS SEAWAYS · DRAGAGES, TRANSPORTS ET TRAVAUX MARITIMES · EXPÉDITION 7^e CONTINENT · EXPLORIS · EYSSAUTIER VERLINGUE · FÉDÉRATION FRANÇAISE DES PILOTES MARITIMES · FILHET-ALLARD · FIMAR · FRANCE CYBER MARITIME · FRANCE LNG SHIPPING · GASPE · GAZOCEAN · GAZTRANSPORT & TECHNIGAZ · GENAVIR · GEOGAS MARITIME · GRAND PORT MARITIME DE NANTES SAINT-NAZAIRE · GREENSHIP GAS · GROUPE LHD · HELVETIA ASSURANCES · HFW · INGEPAR · EXAIL/IXBLUE · JIFMAR OFFSHORE SERVICES · KARIBS LINK · KNUITSEN LNG FRANCE · LA MÉRIDIONALE · LES ABEILLES · L'EXPRESS DES ÎLES · LOUIS DREYFUS ARMATEURS · MARFRET · MARITIMA-SOGESTRAN · MARITIME NANTAISE · MEDLINK PORTS · MERCERON TP · MSC CROISIÈRES FRANCE · NAVALEO · NEOLINE · OPSEALOG · ORANGE MARINE · PENN AR BED · PILOTES DE DUNKERQUE · PILOTES DE LA GIRONDE · PILOTES DE LA LOIRE · PILOTES DE LA SEINE · PILOTES DE NICE/CANNES/VILLEFRANCHE · PILOTES DES PORTS DE MARSEILLE ET DU GOLFE DE FOS · PILOTES DU HAVRE/FÉCAMP · PLASTIC ODYSSEY EXPEDITION · PONANT · PWC PARTNER · RÉSEAU DE TRANSPORT D'ÉLECTRICITÉ · SEAOWL · SOCATRA · SOCIÉTÉ DE TRANSPORTS FLUVIO-MARITIMES DE L'OUEST · SUDILES · THOMAS SERVICES MARITIMES · TOTALÉNERGIES · TOWT · TRANSOCEANIC WIND TRANSPORT · VELA · V.SHIPS FRANCE · WATSON FARLEY & WILLIAMS · WINDCOOP · ZÉPHYR & BORÉE



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