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« North France Port Development »

During the 2023 National Maritime Conferences held in Nantes, the President of the Republic recalled that "our sovereignty is identically rooted in the access to our ports and in the capacity of the latter to irrigate our lands." He strongly emphasized the critical energy and decarbonization challenges that port gateways represent for France, most notably through the structural interconnections bridging maritime ports and inland waterways. The Hauts-de-France region sits at the absolute center of these macro-logistical stakes.

A highly dense port and logistical ecosystem

The Hauts-de-France region is strategically situated at the heart of a consumer population basin aggregating 80 million inhabitants, located under 300 kilometers from the twin megacities of Paris and London. This exceptional geographic configuration, coupled with its deep-rooted industrial and mining history, fully justified the progressive construction of a massive transport infrastructure network. Approximately 20% of national rail freight trains operate across this network daily. The region concurrently commands a highly developed highway grid (A16, A25, A1, A26) and disposes of 271 kilometers of wide-gauge inland canals (*canaux à grand gabarit*) within the Nord-Pas-de-Calais sector alone. The structural share of rail and inland waterway modal shifts remains exceptionally high: scaling to 15% for rail (compared to a 10% national average) and 5.7% for inland waterways (compared to 2.4% nationwide).

With 200 kilometers of maritime coastlines and premier port infrastructures, Hauts-de-France operates as a region possessing an immense maritime potential. Boulogne-sur-Mer rigidly maintained its position in 2023 as France's leading fishing port, with 29,000 tonnes of seafood landed, while standing as the undisputed national leader in seafood processing and agri-industrial transformation. Concurrently, Calais ranks as the premier passenger port nationwide (7.3 million travelers handled in 2023), commanding a historical 52% market share over ro-ro freight across the Strait of Dover (*le détroit du Pas-de-Calais*), representing 1.78 million cargo units. Calais furthermore disposes of a world-unique infrastructure asset with the Channel Tunnel—functioning as a true high-velocity dry port (*port sec*) unlocking deeply decarbonized logistics links with the United Kingdom.

Dominant across passenger flows, where it powerfully complements the ferry offerings of the ports of Calais and Dunkirk, the subsea rail tunnel directly challenges commercial aviation traffic. Getlink (the infrastructure manager of Eurotunnel) actively targets doubling its freight and transit volumes within the coming decade. Finally, the Grand Port Maritime de Dunkerque has engineered a highly comprehensive and balanced port business model, mastering diversified streams of dry and liquid bulk, deep-sea container lines, short-sea ro-ro traffic, and strategic transshipment energy flows bound for its industrialized hinterland (44 million tonnes handled in 2023).

Interconnecting into these deep-sea maritime gateways sits a highly dense regional grid of inland river ports and multimodal platforms. These assets encompass Ports de Lille (the 4th largest national river port, aggregating 12 separate territorial installations), the Docks Seine-Escaut complex in the Valenciennes industrial basin, and the flagship Delta 3 platform in Dourges—operating as a true extended gateway for the GPMD and a rail hub of paramount national importance—alongside alternative river terminals within the Oise valley (*Longueil-Sainte-Marie*).

This multi-modal infrastructure matrix enables the offering of a vast plurality of destinations, establishing the Hauts-de-France region as a premier European logistics hub. Indeed, the interconnected nodes of Calais, Dunkirk, Lille, Dourges, and Valenciennes seamlessly link up to a multitude of domestic and international destinations via rail, inland waterway, or short-sea shipping: including the Île-de-France region, the Grand Est basin (via a high-potential rail arterial highway connecting the GPMD to Metz, with

strategic expansion pathways targeting Alsace and Germany), and the West Coast via Rennes (a dedicated rail link opened in 2023 in partnership with the Lahaye Logistics Group), alongside Bordeaux, Toulouse, and the Mediterranean South via Avignon and Marseille (*Miramas*).

On a wider macroeconomic scale, these synchronized connections enable supply chains to reach the United Kingdom in record times via short-sea shipping (a brief 1-hour-30-minute crossing backed by 37 daily ferry departures), Switzerland, Poland, and even the Belt and Road Initiative (BRI) rail corridors directly originating from Dourges. Most decisively, advanced piggyback rail-road transshipment (*le ferroustage*) enables companies to directly connect to Turkey (via Sete), Spain, and Italy, without mobilizing a single long-haul heavy fuel truck on highway networks. Finally, on the international deep-sea liner shipping theater, CMA CGM's flagship FAL (French Asia Line) maritime services directly link Dunkirk to China, alongside alternative trade lanes servicing the Caribbean, complemented by two greenfield liner destinations opened in May 2023 connecting to the Middle East and Pakistan via Khalifa Port and Nhava Sheva.

These intensive trade flows are sustained by a local industrial ecosystem deeply invested in logistics corporate know-how, aggregating over 80 major transport and supply chain corporations and the regional center of excellence Euralogistic. The region disposes of a hyper-dense warehousing grid, calculating 11 million square meters of logistics real estate in 2022 (ranking as the 2nd largest regional warehousing park in France). This asset base is characterized by a remarkably high proportion of mega-fulfillment centers and a dynamic wave of greenfield constructions, securing operational warehouse availability levels significantly superior to alternative French regions. This real estate capacity constitutes a paramount factor of attractiveness for the entire port and logistical matrix, structurally integrated into an economic ecosystem uniquely predisposed to face the contemporary challenges of industrial reshoring and deep supply chain decarbonization.

Sustained dynamics and modal shift volumes

The region's infrastructure matrix has experienced a continuous expansion in traffic volumes over the past decade (excluding the COVID-19 anomalies). Within the container shipping segment, the GPMD recorded a spectacular growth path, skyrocketing from 250,000 TEUs in 2012 to reach 670,000 TEUs in 2023. At the Port of Valenciennes, the river terminal of Bruay-sur-l'Escaut / Saint-Saulve identically displays a marked dynamism: its container throughput was multiplied by 2.5 in 10 years, establishing it as the 4th largest inland river container terminal in France. Concurrently, container traffic across the Ports de Lille hit 153,000 TEUs, rising steadily since 2019, while the Dourges multimodal platform executed nearly 124,000 handlings in 2023, overwhelmingly driven by rail freight. Major local retail conglomerates, led by the Mulliez Group, powerfully drain import streams across these corridors.

Solid bulk commodities form the historical core of these exchanges and massified multimodal transport. This is highly visible within the construction materials sector, sustained by the presence of industrial giants such as *Cemex*, *Eqiom*, *Lafarge Holcim*, *Les Carrières du Boulonnais*, and *Lhoist*. Agricultural trade lanes are identically structural for regional flows, backed by a network of powerful agricultural cooperatives. Consequently, the Port of Dunkirk ranks as France's second-largest grain exporting gateway immediately after Rouen, handling 3 million tonnes in 2022 and commanding an immense expansion potential. Finally, heavy industrial dry bulks are driven by the *ArcelorMittal* steelworks complex in Dunkirk. These streams are heavily massified, most notably along inland waterways, where dry and liquid bulk commodities account for nearly 80% of total traffic within the Nord-Pas-de-Calais network (aggregating 8.3 million tonnes in 2022).

Roll-on/roll-off (Ro-Ro) traffic represents a core specialty and a historic pillar of the Hauts-de-France logistics grid. Cross-Channel freight flows established themselves at 3.46 million cargo units in 2023, a volume still experiencing a slight contraction compared to the 2019 pre-COVID baseline. Crucially, the Port of Calais stood as the very first gateway in Europe to equip itself with a dedicated rail motorway terminal (*terminal d'autoroute ferroviaire*) operated by VIIA, a specialized subsidiary of the SNCF (handling 41,641 rolling freight units in 2023, a +1% increase), while a secondary competitor, CargoBeamer, successfully established its facility nearby within the major logistics zone of *La Turquerie*. The strategic development of unaccompanied rolling freight (*fret non accompagné*) constitutes a paramount axis of growth for the cross-Channel corridor, where the Hauts-de-France region must aggressively reinforce its market positioning.

Energy hubs, carbon capture, and macro-infrastructure investments

Within the energy and utilities domain, traffic volumes are strategically vital and rising. Commissioned in 2017, the Dunkerque LNG terminal stands today as the second-largest liquefied natural gas facility in continental Europe. In 2023, 25% of France's total natural gas demand transited through this single terminal, representing 8.3 million tonnes. Its owner and infrastructure operator, *Dunkerque LNG*, masterminds an ambitious project to engineer France's very first CO₂ industrial hub designed to liquefy and export over 1.5 million tonnes of captured CO₂ annually toward deep subsea permanent storage geologies in the North Sea (Norway), collecting emissions upstream from the local *Eqiom* and *Lhoist* cement and lime plants.

The geostrategic positioning of the GPMD as an integrated energy hub remains a first-rate asset to generate low-carbon power locally (driven by the Gravelines nuclear power station and emerging marine offshore renewables) or import clean energies—acting as a primary trigger to attract heavy green re-shoring industries. The port concurrently commands a high capacity to supply alternative marine fuels and shore power systems to modern commercial fleets. Presenting shoreside infrastructures capable of accommodating next-generation alternatively propelled vessels constitutes a vital challenge for the future. Furthermore, ElecLink, the wholly owned subsidiary of Getlink that delivers subsea high-voltage direct current electricity via the Channel Tunnel since May 2022, has rapidly asserted itself as a macro-actor within the Euro-British power grid.

These metrics attest to a powerful regional dynamism backed by massive public funding, channeled through the mobility segment of the State-Region Planning Contract (CPER — *Contrat de Plan État-Région*) 2023–2027, representing a budget near €2 billion. This envelope is complemented by targeted macro-investment programs focusing on wide-gauge river retrofitting and the structural interconnection of the Seine and Scheldt (*L'Escaut*) river basins. This legal and financial framework unlocks major capital expenditures, such as the Cap 2020 master project at the GPMD—designed to double the terminal's container handling capacity—or the "Voie Mère" (Mother Track) railway expansion project inside the Port of Calais.

Concurrently, the European Union co-invests heavily alongside the French State and local regional collectivities to finance the construction of the Canal Seine-Nord Europe—the central link of the Seine-Scheldt network, representing a mega-investment exceeding €5 billion. Situated along the core European North Sea–Mediterranean transport corridor, the Seine-Scheldt network will offer a highly competitive, low-carbon alternative for heavy industrial freight logistics. To capture every single opportunity for modal shift and territorial growth, the Hauts-de-France Region entered into a strategic partnership with five intercommunalities to develop four greenfield inland ports along the Seine-Nord Canal route, successfully densifying the regional multimodal platform grid down into Picardy. These terminals will be structurally adjoined to existing logistics zones—such as E-Valley in Cambrai, which ranks as the largest e-commerce and logistics park in Europe—or newly engineered industrial hubs, unlocking excellent economic perspectives.

The GPMD as the spearhead of industrial re-shoring

Within this complex multimodal network, the Grand Port Maritime de Dunkerque commands a distinct positioning backed by a formidable development dynamic. Hit earlier than alternative gateways by the global energy transition—epitomized by the definitive closure of the Total oil refinery in 2010—the port successfully captured greenfield growth vectors across both maritime lines (cross-Channel operations, short-sea transshipment toward the British Isles, deep-sea container grids, LNG) and landside corridors (the clustering of heavy logistics, manufacturing, and low-carbon power generation facilities within or near the industrial-port zone). Together with HAROPA (Paris-Rouen-Le Havre) and the Grand Port Maritime de Marseille, the GPMD operates as a paramount strategic asset for the State's National Port Strategy. Within the highly competitive Northern Range, Dunkirk asserts itself as a more agile, highly flexible alternative facing the chronic congestion bottlenecks plaguing the major Benelux megagateways, a performance that has repeatedly secured it the top spot in the Port Shippers' Barometer established by Eurogroup Consulting. The reconquest of hinterland market share is firmly underway, manifested by an 11% surge in container traffic bound for the hinterland in 2023.

The doubling of the container terminal capacity under the master project "Cap 2020", slated for completion by 2028, will powerfully extend this expansion. The blueprint notably engineers the construction of two ultra-modern berths capable of accommodating the largest ocean-going container

ships in the world. It will thus endow the Hauts-de-France region with a world-class, high-efficiency transoceanic gateway, acting as a structural multiplier of competitiveness for the entire regional macro-economy.

In a highly complementary manner, the massive arrival of greenfield industrial installations within the industrial-port zone—including agribusiness transformation with Clarebout, and electric gigafactories with Verkor and ProLogium—will generate intense maritime and continental freight volumes. These supplementary bulk and containerized streams will enable the port authority to aggressively scale up massified transports, most notably along wide-gauge inland waterways. Combined with the construction of the Canal Seine-Nord Europe, the Cap 2020 master project stands as a decisive milestone to develop the integrated fluvio-maritime system of the Hauts-de-France around the core Channel-Scheldt-Oise logistics spine. Ensuring seamless connection and fluid alignment between the GPMD, the wider maritime coastline, and the inland river ports and multimodal dry hubs operates as a vital challenge for the future of the region.

Strategic macroeconomic challenges for the Northern Corridor

The extreme demographic density of the region, coupled with its crossroad positioning, induces heavy traffic flows that trigger severe infrastructure congestion, an aggressive real estate run on logistics warehousing that consumes precious arable land, and a high proportion of energy consumption and GHG emissions induced by freight logistics—particularly due to considerable transit flows, which were evaluated in 2020 near 90 million tonnes (ranking as the 2nd highest regional transit volume in Europe immediately behind the Ruhr valley).

A primary structural challenge resides in executing a profound modal shift toward sustainable transit architectures. Within this framework, cross-Channel freight flows bound for the United Kingdom could soon become entirely decarbonized, a performance that would represent an absolute global first. Getlink already operates on a highly competitive, fully electric zero-emission model through its subsea Eurotunnel Shuttle services. Concurrently, the Danish ferry giant DFDS, heavily anchored across Calais, Dunkirk, and Dover, is deploying massive investments to completely green its active fleet by 2040. Consequently, these maritime links are well-positioned to establish the world's very first green maritime corridor, pursuant to the multilateral principles of the Clydebank Declaration. This transition nonetheless raises intense logistical challenges regarding the upgrading of shoreside charging and alternative fueling port infrastructures.

Capturing a heightened share of current and future transit flows (within the geostrategic framework of the Seine-Scheldt network) represents an alternative core driver for regional development. To achieve this, the creation of an advanced trimodal logistics platform in the southern sector of the region—designed to operate in structural complementarity with the macro-projects led by HAROPA across the Yvelines and Val-d'Oise departments—stands as a flagship blueprint for the Northern Corridor, whose public financing is rigidly locked into the CPER 2023–2027 planning contract.

A secondary major challenge for the region, and more specifically for the GPMD, centers on successfully balancing cargo flows, which are today heavily dominated—in line with French national trends—by structural merchandise importations. Achieving a balanced, two-way pendulum equilibrium (*équilibre pendulaire*) remains exceptionally difficult for Dunkirk, Lille, or Douges, which directly hinders the profitability of multimodal rail and river services where transportation companies require balanced return flows. Without this pendulum symmetry, the acute economic burden of "empty logistics" (*la logistique du vide*) and empty container repositioning severely penalizes cumulative supply chain costs. The ongoing industrial re-shoring of the regional territory must actively contribute to bridging this structural gap. Indeed, the successful clustering of these greenfield manufacturing activities on port lands was the dominant factor that decided CMA CGM to open its new deep-sea regular line interconnecting Dunkirk, the Middle East, and the Indo-Pakistani peninsula.

Finally, a third paramount challenge for the region focuses on asserting its positioning face to the direct competition wielded by ultra-efficient Belgian and Dutch port gateways and logistics corporations. Tracking and attracting greenfield freight streams—such as those originating from the Grand Est region, a target formalized in early 2023 through a strategic partnership connecting Hauts-de-France stakeholders and the Port of Strasbourg—remains exceptionally arduous face to Northern Range mega-ports that deploy decarbonized hinterland services at an immense industrial scale while commanding significantly more diversified ocean liner services. Mathematically, Antwerp aggressively drains export streams to the detriment of its French neighbors. Consequently, a highly meticulous political attention

must be directed toward monitoring the fair conditions of competition bridging adjacent European economies, explicitly encompassing the social labor laws governing inland barging and rail freight personnel, state infrastructure funding levels, and the allocation of public operating or development subsidies.

Downdependence of the National Port Strategy across the Northern Axis

Confronted by these acute local challenges and the strategic orientations defined within overarching national blueprints—most notably the National Port Strategy—the State committed to engineering a dedicated institutional roadmap for the Northern Axis. Its administrative translation structurally factors in the heavy heterogeneity characterizing the port actors of the Hauts-de-France region, which aggregates nineteen logistics hubs of highly diverse legal statuses (comprising a *Grand Port Maritime*, mixed syndicates, a canal corporation, decentralized ports, public institutions, and private corporations).

This layout must concurrently cope with multi-polar traffic streams due to the complete absence of a single river "backbone"—such as the Rhône or the Seine corridors—and the crushing commercial competition of foreign transoceanic mega-ports, most notably Antwerp. Consequently, the core logic of the axis framework is deployed within this specific context to unify regional stakeholders around a shared strategic project and common development goals.

This high-level coordination is rigidly orchestrated by the General Delegation for the Development of the Northern Axis through a dedicated Port and Logistics Coordination Council. This animating structure, directly rattachée to the Prefect of the Hauts-de-France region, finds its legal foundation within the French Transport Code (*Code des transports*). Its core mandate targets federating the vast matrix of actors operating across the logistical and port spheres. Merged within this coordination council, the diverse members define a shared roadmap, bridging their structural differences in corporate status (public versus private) or territorial scales (local regional collectivities, Voies Navigables de France, the GPMD, etc.).

Accordingly, for the 2024 calendar year, four core pillars are explicitly identified: promotion, intermodality, environmental sustainability, and digital integration. Driven by targeted actions spearheaded by the DGDAN or executed in close collaboration with regional stakeholders—such as Norlink, Euralogistic, SNCF Réseau, VNF, and local economic operators—the overriding goal focuses on promoting this singular port and logistical complex.

To successfully execute these master actions, a powerful partnership framework was established with the Norlink Federation. This umbrella structure clusters the diverse corporate actors of the sector across three specialized sister associations: Norlink Port, Norlink Fluvial (inland waterways), and Norlink Ferroviaire (rail freight). The federation ensures the daily animation and international promotion of the Hauts-de-France port and logistical matrix.

Two specific action plans are under meticulous monitoring for 2024. The first focuses on maximizing the promotion and corporate visibility of the Northern Axis face to international institutional players and global economic stakeholders. It aims to forge a highly influential panel of institutional trendsetters, leveraging sovereign embassies and local cross-border economic networks.

The second action plan centers on executing a comprehensive, granular audit of the connectivity paths linking regional ports and multimodal dry hubs. Its objective targets mapping out the entire matrix of digital information systems utilized by the ports and multimodal platforms of the Hauts-de-France, tracking their active interconnections to precisely evaluate the commercial opportunity and technical modalities required to deploy a unified system unlocking heightened digital interoperability.

Furthermore, the DGDAN is currently piloting two major analytical studies engineered to deepen freight flow situational awareness and steer strategic actions pushing for modal shifts:

- The first study: executed in direct partnership with Euralogistic, focuses on a granular matrix analysis of carrier freight flows to precisely isolate the structural share of long-haul heavy road trucks (*ponds lourds*), thereby identifying specific corporate shippers uniquely positioned to act as prime candidates for an immediate rail or river modal shift.
- The second study: orchestrated in collaboration with the urban planning agency *Oise les Vallées*, complemented by a comprehensive market study entrusted to the Regional Chamber of Commerce and Industry (CCI), targets evaluating the precise economic development potential of inland river barging and river freight across the Oise valley corridor.

This synchronized association and partnership workflow with the Regional Council constitutes a paramount institutional stake for the Northern Axis, given that the local regional collectivity stands heavily

invested in the maritime domain—owning the decentralized port complex of Calais–Boulogne—and in modal shift infrastructures, operating as a founding institutional member of the Dourges Delta 3 platform while acting as a core capital investor in the region's rail and river freight networks and the mega-project of the Canal Seine-Nord Europe and its future inland port gateways.

Ultimately, the logistical infrastructure matrix of the Hauts-de-France represents a highly complex system defined by a remarkable diversity of actors. This mosaic operates as a major structural asset, generating numerous coexisting transportation alternatives and multi-modal solutions pre-engineered to successfully meet the modern challenges of decarbonized modal shifts. It is precisely by aggressively putting forward this intermodal complementarity—a true operational strength and a deep source of supply chain resilience during global geopolitical crises—that the regional hub will successfully assert its positioning as an unassailable, industrial, and deeply carbon-neutral transit gateway on the European map.

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