

Maritime Summary Note n°270 – April 2025

« French Guiana »

Geographically situated over 7,000 kilometers from Paris, French Guiana is the sole French Overseas territorial collectivity that operates concurrently as a department and a non-insular region. Located in South America, it shares sovereign land borders with Brazil to the southeast and south, and with Suriname to the west. It stands as the most heavily forested territory in France, with 97% of its surface area blanketed by an equatorial rainforest that remains among the richest and least ecologically fragmented in the world. Its 350-kilometer Atlantic coastline opens onto an Exclusive Economic Zone (EEZ) spanning 130,000 square kilometers, a natural shore characteristically defined by the presence of marine mangroves across 80% of its linear profile. The maritime boundaries dividing the French and Brazilian EEZs to the east were finalized through a bilateral treaty on January 30, 1981, while boundary negotiations with Suriname to the west successfully culminated in 2017. This study outlines the multifaceted maritime dimensions of French Guiana, focusing on its seaborne, port, halieutic, and offshore energy profiles.

Geopolitical context and demographic baselines

The population of French Guiana is undergoing an intense expansion path. Excluding Mayotte, it ranks as the region of France experiencing the highest demographic growth rate, logging a 1.6% annual increase between 2015 and 2021. Pursuant to INSEE data, the population was estimated in 2021 at slightly over 286,600 inhabitants, a dynamic coupled with a powerful and highly complex migration challenge to regulate. Mirroring alternative Overseas collectivities, French Guiana suffers from a substantial structural developmental lag, a reality severely felt by its population: 53% of French Guianese citizens live beneath the poverty line (subsisting on under €1,010 per month) compared to a 14% baseline in metropolitan France, while the structural unemployment rate climbs to 18%. Social and economic disparities within the national fabric are widening as the headcount of inhabitants explodes. The macroeconomic architecture of French Guiana remains heavily dependent on mainland France and the high-tech aerospace cluster of the Kourou Space Center (CSG). Outside occasionally volatile and irregular flights to Suriname and Brazil, there are virtually zero direct airline connections binding the territory to alternative South American nations. Furthermore, French Guiana ranks among the primary crime-prone departments in France regarding daily delinquency and organized heavy criminality, plagued by arms and narcotics trafficking, illegal gold mining, and illegal fishing. The sub-continental South American context largely explains this matrix of interlocking vulnerabilities, forming exogenous threats that weigh heavily on a territory that remains economically fragile.

The administrative and operational structure of the Port System

If one excludes the fluvio-maritime port of Saint-Laurent-du-Maroni—whose commercial activity is drastically bottlenecked by the shallow, non-dredged river channel of the Maroni River—the port of Pariacabo in Kourou—whose throughput is exclusively driven by the logistics of the CSG and the importation of refined petroleum products—and the marginal share of international air freight transiting via Félix-Éboué Airport, the Port of Dégrad-des-Cannes in Rémire-Montjoly operates as the near-exclusive gateway for the absolute entirety of commodities imported into or exported from French Guiana.

The Grand Port Maritime (GPM) de la Guyane ranks as the 23rd largest French port by commodity tonnage. It operates as a paramount, geostrategic actor within the regional economy, anchoring the integrated supply chain of a 84,000-square-kilometer territory—representing over 16% of the national landmass, backed by more than 700 kilometers of land borders with Brazil and 520 kilometers with Suriname—a geographic expanse equivalent to the surface area of Portugal.

The Dégrad-des-Cannes port site directly adjoins the economic activity park of the same name. The 67 clustered industrial corporations benefit from the immediate proximity of the infrastructures composing the French Guianese Industrial-Port Complex (CIP). Collectively, they employ 1,180 salaried workers, representing 2% of the total salaried workforce of French Guiana in 2021 (calculating 57,900 full-time equivalent salaried jobs), while generating 2.3% of the regional Gross Domestic Product (GDP). Generating €105.3 million in value, the maritime and port cluster also secures 3.9% of the cumulative wealth extracted from French Guiana's market sector (€2.7 billion). Beyond direct jobs, induced employment is generated through regional economic spillover effects; approximately 750 induced jobs are thus sustained by the wages distributed to the workforce of the CIP.

The international trade of French Guiana transits almost comprehensively through the GPM; indeed, 99% of the regional annual freight throughput is routed via maritime lanes. Between 2011 and 2021, seaborne traffic tonnage expanded by 35%, while the French Guianese population grew by 21%. This sharp demographic velocity, coupled with the resulting requirements for housing and infrastructure engineering, systematically fuels the scaling up of import volumes and maritime trade loops. In 2024, the GPM of French Guiana surpassed the symbolic milestone of 1 million tonnes handled, logging a +8.9% traffic expansion compared to the 2023 baseline.

French Guiana displays a structurally deficient trade balance. In 2021, importations climbed to 771,885 tonnes (a +4% increase compared to 2020), representing a financial valuation of €1.8 billion and accounting for 89% of the cumulative port traffic. Conversely, exportations contracted by 3.1% compared to 2020, falling to a low 93,368 tonnes. Consequently, French Guiana imports over 8 times more cargo volume than it exports.

The import matrix is characteristically dominated by breakbulk and general cargo at 61% (encompassing containerized retail freight, aerospace hardware, and military logistics), followed by liquid bulks at 27% (refined hydrocarbons, methanol), and dry bulks at 10% (cement clinker, gypseous minerals), while Roll-on/Roll-off (Ro-Ro) freight represents a minor 2% share of the GPM's global throughput. To absorb these expanding streams, the GPM de la Guyane formally budgeted within its latest strategic master plan a €15 million capital expenditure envelope to engineer a dedicated Ro-Ro terminal and execute a 1-hectare expansion of the container yard storage zone.

Metropolitan France remains the heavily privileged trade partner of French Guiana, accounting for 67% of non-petroleum importations in 2021. Conversely, excluding petroleum products, commercial exchanges with adjacent French Departments of the Americas (Martinique, Guadeloupe) remain exceptionally marginal, tracking at a low 2% of cumulative import values and 8% of exportations. Cross-border trade with adjacent sovereign neighbors Brazil and Suriname is identically under-developed, representing a mere 0.8% of import values and 0.6% of exportations. Finally, the vital inbound flows of refined petroleum products are predominantly sourced from Martinique, Guadeloupe, and the United States.

The specialized port facilities of Pariacabo in Kourou—which present restrictive nautical constraints, notably shallow depths and the severe narrowness of the Kourou River—are rigidly dedicated to receiving high-tech equipment assets tailored for the space base and unloading refined hydrocarbons. The GPM delegates the direct operational management of this specialized harbor facility to the Kourou Space Center (CSG), co-exploited by the *Centre National d'Études Spatiales* (CNES), *Arianespace*, and the *European Space Agency* (ESA). Following the independence of Algeria in 1962, General de Gaulle historically enacted the strategic decision to build a sovereign European space gateway in French Guiana in 1964.

Over recent years, European space activity suffered severe industrial setbacks. Chronic delays in the commercial commissioning of Ariane 6, technical failures plaguing the *Vega-C* light launcher, and the abrupt decoupling of the Euro-Russian partnership following the outbreak of the war in Ukraine in February 2022 (permanently halting *Soyuz* launcher operations from Kourou) heavily penalized the regional macro-economy. In French Guiana, one out of six private sector salaried jobs is structurally tied to the aerospace cluster, which generates approximately 13% of the territory's cumulative value-added. In 2023, a historical low of only 3 orbital launches was operated from the CSG, marking its lowest operational baseline since 2004.

However, the industrial horizons have successfully cleared up: Ariane 6 triumphantly executed its premier commercial launch, deploying the CSO-3 military reconnaissance satellite into orbit. Backed by four scheduled flights for *Vega-C* and the massive rollout of the *Amazon Project Kuiper* constellation, the flight manifest is ramping up, structurally capable of accelerating to 14 orbital launches per year.

The Geopolitics of Maritime Liners and Carbon Intensity Reconfigurations

From a shipping and hydrographic standpoint, French Guiana, Suriname, and Guyana form a distinct sub-continental maritime range baptized the Guiana Shield, whose trade corridors interconnect into the Lesser Antilles and Northern Brazil. For breakbulk and specialized heavy-lift project cargo, Marfret unifies French West Indian gateways and French Guiana. Crucially, the dedicated space logistics supply chain binding Europe to the CSG is executed through custom corporate underwriting agreements, notably leveraging the revolutionary wind-powered Ro-Ro cargo vessel *Canopée*, operated by *Zéphyr & Borée* and *Jifmar Offshore Services*.

Concurrently, conventional containerized liner shipping servicing the territory relies on two primary services: NEFGUI, which links the range directly to Europe, and Kalinago, which bridges French Guiana to the Lesser Antilles.

The transatlantic NEFGUI service deploys a fleet of 7 specialized vessels (comprising 1 Marfret ship, 5 CMA CGM combatants, and 1 chartered unit) specifically engineered to "Guyamax" parameters—rigidly restricted to a maximum 7-meter draft to navigate shallow coastal silting. This loop ensures a weekly direct connection to Northern Europe (logging an 18-day transit time to Le Havre), transiting via Caribbean hubs (*Philipsburg*, *Port of Spain*) before expanding its leg down to Northern Brazilian gateways (*Vila do Conde*, *Fortaleza*). In parallel, the regional inter-island feeder network bridges the territory to *Pointe-à-Pitre* (Guadeloupe) and *Fort-de-France* (Martinique).

To satisfy its mandatory greenhouse gas reduction targets, CMA CGM is completely overhauling its regional West Indian and South American shipping architectures. The transatlantic NEFWI service irrigating the Antilles is slated to deploy 7 next-generation 7,300 to 7,900 TEU mega-vessels powered by Liquefied Natural Gas (LNG), a technological shift designed to secure an IMO Carbon Intensity Indicator (CII) rating of B, contrasting sharply with the underperforming rating of E logged by current legacy vessels.

Crucially, this fleet upsizing will be executed to the detriment of direct transatlantic lines servicing the ports of the Guiana Shield. Consequently, French Guianese cargo streams will be systematically treated via secondary feeder loops routed from Caribbean transshipment hubs utilizing *Guyamax* vessels, which will nonetheless capture an optimized IMO CII rating of B (compared to a failing E for the contemporary feeder active on the line).

To date, there exists zero direct intra-regional maritime liner service interconnecting the diverse ports of the Guiana Shield without mandatory transshipment. For direct cross-border trade flows—which remain structurally modest—supply chains must transit via overland road infrastructure. Operators utilize the international river ferry linking Saint-Laurent-du-Maroni to Albina to reach Suriname, and leverage the Saint-Georges-de-l'Oyapock international bridge to cross into Brazil.

Consequently, the road transport mode absorbs the near-totality of physical freight logistics across the 450-kilometer coastal highway spine tracing the littoral from Saint-Laurent-du-Maroni to Saint-Georges. It is strictly along this linear corridor that the economic activity of French Guiana is clustered; outside this coastal strip, inland waterway fluvial transport remains the near-exclusive lifeline to supply isolated interior populations.

Concurrently, Saint-Laurent-du-Maroni operates as a border river-city undergoing a profound, high-velocity demographic and multicultural mutation, logging a population of 50,250 inhabitants (INSEE census) facing the Surinamese city of Albina across the Maroni River. The resulting land-use planning, public security, economic, and environmental stakes are monumental. By the 2030 horizon, its population is projected to permanently surpass that of Cayenne (63,468 inhabitants in 2021 source INSEE), creating an urgent imperative for sovereign public capital investments. Master plans are currently auditing the engineering of a greenfield judicial complex, alongside a massive Industrial-Port Complex (CIP) backed by extensive river dredging campaigns.

Agricultural cooperatives

Ultimately, regarding regional cooperation, cross-border integration encounters severe limits. Exhaustive technical and economic audits focusing on the viability of an intra-regional maritime cabotage network threading the Guianas have systematically failed to demonstrate its commercial or financial sustainability. Although geographically adjacent, the three territories of the shield remain structurally decoupled: characterized by deeply mismatched standards of living, divergent natural

resource endowments, incompatible macroeconomic baselines, and highly conflicting legal frameworks, technical norms, and customs regulations.

Each of these countries maintains privileged, historical trade exchanges with its former colonial power: Guyana with the United Kingdom (Commonwealth networks) and the United States, Suriname with the Netherlands, French Guiana with mainland France, and finally the federal states of Amapá and Pará with the rest of Brazil. For all that, a dedicated institutional forum for dialogue addressing port and shipping challenges exists through the "Guiana Shield Ports Conference", which formally convenes on a biennial basis.

By force of circumstance and due to the territory's severe natural constraints, the only contemporary intermodal solutions rely on freight arriving by sea, which is then picked up by road freight (for the coastal strip logistics), and subsequently forwarded via artisanal river barging to supply the isolated interior, or routed via air cargo for the most time-sensitive items. It is precisely for this reason that there is currently no domestic or regional maritime cabotage regular liner operational across the Guiana Shield.

Nevertheless, a milestone operational audit executed in 2017—Operational Study for Inter-Regional Cabotage from the Guiana Shield to the Caribbean, compiled by SeeUp/EY—demonstrated that intra-Guiana Shield trade volumes could genuinely justify the implementation of a regional short-sea shipping line. This study calculated an accessible market potential of 100,000 tonnes of breakbulk and general cargo (encompassing agri-food consumer products, agricultural inputs, forestry timber, and industrial construction materials).

Today, these physical traffic flows are executed overland via the river ferries of Saint-Laurent-du-Maroni crossing into Suriname, and through the Saint-Georges-de-l'Oyapock international bridge crossing into the State of Amapá in Brazil. However, the severe break-of-bulk disruptions systematically mandated by conflicting cross-border road transport regulations heavily constrain the expansion of these exchanges. To overcome these barriers, the GPM de la Guyane launched a formal Call for Expression of Interest (CEI — AMI) in 2022 to identify a commercial shipping operator capable of establishing and deploying this regional cabotage line. The Nantes-based eco-shipping pioneer Zéphyr & Borée was successfully selected. Over the long term, the company projects to deploy a specialized low-carbon short-sea vessel propelled predominantly by wind-assisted sail automation systems. In the short term, to successfully initiate the line and test market reactivity, the company plans the commercial commissioning of a conventional multi-purpose vessel (MPV). Currently, this innovative shipping project is temporarily on pause.

Concurrently, the GPM authority has isolated the agricultural grain sector as a primary target—a logistics stream that currently suffers from an absurd macro-economic pattern, where grains exit northern Brazil to transit all the way to Le Havre in mainland France, before being packed into containers and shipped back across the Atlantic to Dégrad-des-Cannes.

The strategic objective focuses on leveraging the commercial commissioning of a brand-new Border Control Post¹ at Dégrad-des-Cannes to engineer a short-circuit regional economy. This infrastructure allows bypassing the inefficiencies of the legacy triangular trade route: Brazil – Le Havre – West Indies/French Guiana. In parallel with this short-sea cabotage project, a dedicated grain terminal is under active feasibility audit, which would structurally scale up landside bulk warehouse storage capacities.

It is important to highlight the creation in 2014 of the Inter-port Coordination Council of the Antilles and French Guiana. This legislative provision, stemming from Act No. 2012-260 of February 22, 2012, which reformed Overseas ports, established an inter-port coordination council linking the Grand Ports Maritimes (GPM) of Guadeloupe, French Guiana, and Martinique. The council brings together representatives of the State, local regional collectivities and their groupings, the ports concerned, alongside qualified industry personalities.

Its core objective targets fostering the emergence of strategic cooperation, maximizing corporate synergies, and exploring potential resource pooling between the GPMs of Guadeloupe, French Guiana, and Martinique to aggressively scale up their competitiveness within a highly contested regional Caribbean basin. Under the roadmap of the 2025–2029 coordination master document, the action items are numerous:

¹ The Border Control Post (BCP) provides a structured mechanism to inspect non-European products intended for human or animal consumption, alongside comprehensive phytosanitary controls for live plants and vegetable materials.

- Coordination of regional development: establishing synchronized strategic guidelines across shared markets (joint international promotion for the cruise sector, container transshipment networks, and luxury yacht refit services), alongside industrial co-development on greenfield operations (such as intra-Caribbean short-sea containerized freight).
- Engineering unified responses to shared challenges: managing the ecological and energy transition (positive-energy ports—*ports à énergie positive*, circular economies, subsea seabed management, and marine pollution mitigation), climate resilience (natural disaster preparedness and coastal protection grids), and the digital transition (smart ports and corporate tech incubators).
- Alignment of business workflows and digital tools: homogenizing and optimizing the quality of service through standardized safety, security, and harbor operation procedures, coupled with the creation of professional networks to dynamically share specialized competencies.
- Mutualization of core tools and institutional functions: establishing a shared regional economic observatory and pooling a single chief accounting officer.

The Halieutic Sector

Commercial fishing operates as the third-largest economic sector of French Guiana, generating a €10.2 million annual turnover. Conversely to alternative French grand ports maritimes, the GPM de la Guyane does not host heavy fishing fleets or shoreside industrial seafood processing plants. Instead, these downstream processing operations and large fishing crafts are entirely centralized at the Port of Larivot (situated on the right bank of the Cayenne River), which is directly managed by the *Communauté d'Agglomération du Centre Littoral* (CACL). Across the entirety of French Guiana, 11 municipalities command a designated coastal landing point.

The regional seafood market is strictly structured around three target segments: tropical prawns, red snapper, and groundfish. In 2023, the total estimated volume of declared fish landings hovered around 3,270 tonnes.

Consequently, the fishing sector commands a predominant position in the French Guianese macro-economy, ranking as the third-largest production and export sector immediately behind the aerospace cluster and the mining industry.

Beyond its macroeconomic value, French Guianese fishing operations are tightly intertwined with national sovereignty stakes. This involves preserving French geostrategic interests within the waters under national jurisdiction through the formal allocation of fishing licenses and the strict surveillance of all seaborne extraction.

Indeed, rampant illegal fishing executed by Brazilian poachers to the east and by Surinamese or Guyanese braconniers to the west represents an immense ecological and economic threat, evaluated by experts to hover between 0.7 and 3 times the total local legal fishing effort.

Embedded within the Armed Forces in French Guiana, the active combat units of the French Navy, coordinating joint inter-agency task forces alongside the Maritime Gendarmerie, the Maritime Affairs administration, and Customs border patrols, continuously pilot high-intensity fisheries protection operations to counter this massive plundering of French Guianese halieutic resources. Illustrating the scale of this sub-continental friction, the FAG's "Polpêche" sovereign missions successfully seized 202 kilometers of illegal nets and 229,400 kilograms of poached fish in 2023 alone.

The fishing sector was exceptionally flourishing across French Guiana throughout the 1970s and 1990s. The industrial exploitation of French Guianese halieutic resources originally debuted in 1959, giving rise to intensive extraction orchestrated by specialized corporate fleets originating from the United States, South Korea, Japan, Barbados, Suriname, and Cuba. Although tropical prawn catches diminished during the 1980s due to localized resource depletion, commercial fishing remained the premier economic sector of French Guiana in 1995, deployed by a fleet of up to 70 specialized trawlers (*crevettiers*) alongside artisanal river canoes and decked day-boats.

At that era, the Port of Larivot, situated in Matoury, ranked as the third-largest fishing port in France. Until the 2000–2005 pivot period, the absolute headcount of active trawlers and shrimpers remained stable. Since then, however, industrial activity has dramatically collapsed; the total volume of declared seafood landings plummeted from a historical record high of 5,688 tonnes in 1981 down to a critical 152 tonnes in 2023.

Starting from the late 2000s, Ifremer observed that the landings extracted from artisanal coastal day-boats systematically became more volumetrically significant than those stemming from industrial prawn fishing, whose biological stocks collapsed from the 1990s onward. In terms of total tonnage, groundfish (*poisson blanc*) successfully supplanted tropical prawns. It was during this identical chronological window that numerous industrial shrimper captains chose to structurally execute a vocational conversion into coastal fishing, thereby reinforcing this alternative domestic cluster inside French Guiana. French Guianese fishing must currently confront multiplying structural challenges: including rampant illegal poaching, but identically exceptionally depressed wholesale market prices, which plummeted as low as €2.7 per kilogram in 2022.

Sovereign lines of action and development axes are focused on a significantly tighter regulation and suppression of Illegal, Unreported, and Unregulated (IUU) fishing, the 2024 implementation of a dedicated quality label for local coastal fishing to command premium market pricing and maximize corporate profitability, and systematic recourse to public financial subsidies (encompassing structural compensation for structural overseas surcosts, emergency fuel aid, targeted financial bailouts, and a comprehensive fleet renewal master plan). These efforts move hand in hand with the technical upgrading of port infrastructures, a tighter social and social security monitoring of mariners, and vocational education driven by the 2024 creation of a specialized maritime CAP degree, engineered to deliver professional horizons to French Guianese youth while rejuvenating the micro-economy of the fishing sector.

Offshore Energy Exploration and the Sovereignty-versus-Ecology Dilemma

The licensing and drilling of greenfield hydrocarbon exploration blueprints have been strictly prohibited across all French jurisdictions since the historic enactment of the Hulot Law in 2017. Nevertheless, the Minister for Overseas Territories, Manuel Valls, forcefully re-ignited the geostrategic debate regarding French Guiana in February 2025. Indeed, the near-unanimity of the French Guianese population alongside its elected regional officials—bridging both right-wing and left-wing political coalitions—unilaterally demands a structural legislative exemption to accelerate the macroeconomic development of the territory. Within the central government's cabinet ministries, however, executive opinions remain deeply divided.

Across the wider South American continent, adjacent sovereign nations are accumulating massive wealth and rapid industrialization thanks to offshore petroleum booms. The neighboring state of Guyana, henceforth qualified by global energy analysts as a "*mini-Qatar*," currently exports hundreds of thousands of crude oil barrels per day, routed predominantly toward European, Asian, and North American energy markets. Concurrently, inside Surinamese waters, TotalEnergies is poised to launch the commercial exploitation of massive offshore blocks recently discovered off its coastlines. Simultaneously, President Lula of Brazil is aggressively accelerating subsea hydrocarbon exploration campaigns, poised to accord greenfield environmental licenses to drill the sensitive marine structures flanking the mouth of the Amazon River, despite Brazil preparing to host the COP30 climate summit in late 2025.

Consequently, the core geostrategic question plaguing French Guiana centers on the actual, verified existence of commercial hydrocarbon deposits. Historically, the offshore exploration campaigns executed since the 1970s failed to deliver conclusive data. In 2011, a brief wave of energy optimism emerged following a localized discovery, yet subsequent exploratory appraisal drillings failed to confirm any commercial potential. Ultimately, in 2019, TotalEnergies permanently abandoned its projects, concluding that there are zero economically accessible hydrocarbon assets within the *Guyane Maritime* offshore block.

The local political pressure remains exceptionally intense to unearth a robust growth multiplier, with selected regional leaders asserting that the state must under no circumstance permanently abandon deepwater exploration campaigns. Yet, re-authorizing exploratory licenses is legally highly complex and would mandate a formal legislative amendment modifying the Hulot Law. Agnès Pannier-Runacher, the French Minister for the Ecological Transition, remains totally opposed to reopening this political debate. A definitive sovereign choice must thus be carved out between short-term economic development and long-term ecological preservation. On one hand, offshore hydrocarbons could operate as a powerful lever of industrial development for a territory in desperate need of public and private investment; on the other, they present a severe threat to the marine environment, standing in direct contradiction to the

global fight against climate change and the formal diplomatic commitments locked in by France during the COP28 summit for a progressive transition away from fossil fuels.

In any event, political and economic timelines operate on highly mismatched lifecycles; between initial seismic exploration campaigns and the ultimate commercial commissioning of a subsea field, decades of heavy capital engineering are structurally mandatory. France remains a marginal oil producer, generating on its sovereign soil only 1% of the petroleum it consumes annually. Nevertheless, the contemporary, highly volatile global geopolitical landscape will perhaps exert a decisive impact on the nation's overarching long-term energy strategy. The structural challenges confronting French Guiana are monumental, mandating the rapid deployment of a genuine, comprehensive State strategy, simultaneously securing regalian public safety on one hand, and anchoring long-term macroeconomic development on the other.

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