

Maritime Summary Note n°274 – October 2025

« New Caledonia, resources and regional challenges »

New Caledonia is an Overseas territory situated within the Southwest Pacific theater, located over 16,500 kilometers from Paris. The archipelago represents an emerged landmass of 18,576 square kilometers, structured around the main island of Grande Terre (measuring 400 km by 50 km, equivalent to twice the surface area of Corsica), the Belep Archipelago, the Loyalty Islands (Lifou, Maré, Ouvéa, Tiga), the Matthew and Hunter Islets, and the Chesterfield chain. Its Exclusive Economic Zone reaches a monumental 1.45 million square kilometers.

The territory is populated by 269,000 inhabitants, composed of 41.2% Kanaks (the historical indigenous population), 24.1% Europeans, 7.5% Caledonians (who reject precise categorization), and 27.2% classified as "others." Sociologically, New Caledonia operates as a multi-layered mosaic of communities (including Kabyle laborers, deportees from Vanuatu, Vietnam, and Indonesia, alongside free settlers originating from mainland France and Réunion Island). This society is fractured by severe inequalities, pitting an Oceanian population (Kanak, Wallisian, Polynesian) against a population predominantly originating from the Old Continent. Mirroring alternative Overseas collectivities, the Caledonian trade balance is structurally deficient, mandating a systemic requirement for external financing, while its exportations depend at a crushing 95% level on minerals and metals. Naturally, within this insular architecture, the sea stands as one of the defining features of New Caledonia.

An Exceptionally Complex Political Context

New Caledonia converted into a French colony as early as 1853, characterized by European settlement policies, extensive land expropriations (*accaparement des terres*) notably across the Southern region, and a rigid framework of racial segregation that persisted until the 1960s. Freedom of movement was strictly not achieved until 1956, and universal suffrage followed in 1957. Indigenous communities historically maintained a stark distance from the colonial society prior to structuring a powerful pro-independence coalition, the FLNKS. The violent civil unrest of the 1980s culminated in the Matignon Accords of 1988, followed by the Nouméa Accord of 1998. The Matignon Accords locked in a ten-year transitional cycle of economic, social, cultural, and institutional rebalancing, prior to the scheduled holding of a self-determination referendum in 1998.

Engineering a peaceful coexistence and a shared Caledonian destiny (*destin commun*) remains deeply intricate. Populations of European descent along with numerous other diverse ethnic groups are overwhelmingly attached to remaining within the constitutional framework of the French Republic. Conversely, the Kanak populations are resolutely mobilized for absolute independence.

Administratively, New Caledonia disposes of a highly autonomous, singular legal status, classified as a "sui generis" collectivity (or an Overseas collectivity with special status), with the sole exception of regalian competencies rigidly retained by Paris (encompassing justice, foreign affairs, currency, diplomacy, public order, and sovereign defense).

Nevertheless, the historic accords had masterminded three successive self-determination referendums under a heavily restricted electorate. This "frozen" electorate means that one out of five potential voters is systematically excluded from provincial ballots—a transitional mechanism judged legally acceptable by the European Court of Human Rights (ECHR) in 2005 "within the explicit framework of a decolonization process" but "only on a temporary basis."

These referendums were sequentially executed in 2018, 2020, and finally in December 2021 (the latter being resoundingly boycotted and contested by pro-independence forces regarding its operational modalities). They all resulted in maintaining New Caledonia within the fold of the French Republic, yet failed to unearth a genuine political consensus connecting the French State, pro-independence coalitions, and loyalist factions. Massive civil riots erupted across the archipelago in 2024, triggered by a projected

constitutional bill aimed at lifting the electoral freeze to expand voting rights to French citizens residing in New Caledonia for over ten years.

On May 13, 2024, New Caledonia violently tipped into systemic conflict, resulting in fourteen deaths and hundreds of severe injuries. On the physical infrastructure front, following approximately a month of intensive riots, the ultimate assessment estimated that 900 corporations and 200 homes were totally destroyed, 600 vehicles torched, and financial damages soared to slightly over €2 billion. Mechanically, 7,000 jobs were instantaneously wiped out, representing more than 10% of the island's entire private sector employment. Furthermore, two of the island's three primary nickel smelting megaplants (KNS — *Koniambo Nickel SAS* and PRNC — *Prony Resources New Caledonia*) faced imminent industrial closure, jeopardizing an aggregate 7,884 direct, indirect, and induced jobs.

This industrial retreat struck a baseline where raw ore and processed metal account for 95% of the island's exports. These riots unfolded against a backdrop of a severe macroeconomic crisis compounding since 2020, aggravated by persistent disparities between the Kanak people and the rest of the population; the median standard of living of the Kanaks remains twice as low as that of non-Kanaks.

The highly controversial bill to unfreeze the electorate was officially abandoned on October 1, 2024. Subsequently, on July 12, 2025, the French State, pro-independence negotiators, and loyalist representatives signed a landmark political compromise in Bougival (Yvelines, France). This accord outlines the prospective engineering of a sovereign "*State of New Caledonia*" coupled with the creation of a distinct "*Caledonian nationality*"; nevertheless, profound semantic ambiguities persist, and the text remains highly vague regarding its concrete legal and administrative implementation.

The citizens of New Caledonia are statutorily mandated to democratically validate or reject this historic accord via a general referendum scheduled for February 2026.

Concurrently, the French State commits itself to financing a comprehensive economic and financial refoundation pact structured around clear priorities: including the deep auditing of public finances, the rescue of social security accounts, a return to sustainable debt-to-GDP ratios, and a targeted capital injection into strategic sectors. Within this framework, critical assessments will necessarily focus on maritime domains, specifically the sovereign management of the resources flanking its 1.45 million km² EEZ and the modernization of its autonomous shipping register (which currently tracks approximately ten locally flag-registered commercial vessels).

The Port Infrastructure Grid of New Caledonia

The archipelago's maritime and shipping activity is structured around the infrastructure of the Port Autonome de la Nouvelle-Calédonie (PANC) located in Nouméa, supplemented by a network of secondary industrial ports whose operations are strictly tied to the nickel sector. The PANC operates as a state-owned industrial and commercial public establishment (Établissement public à caractère industriel et commercial — EPIC), managing both freight streams and passenger transits. It is technically capable of accommodating vessels up to 250 meters in length and spans over 1,000 hectares, clustering diverse harbor facilities divided between the Grande Rade (Large Roadstead) and the Petite Rade (Small Roadstead). The associated port employment basin sustains approximately one thousand salaried workers.

In 2024, the cumulative volume of seaborne freight handled across the territory stood at 9 million tonnes (Mt), marking a severe contraction compared to the 2023 baseline (a -36.4% collapse). The absolute bulk of this maritime traffic is directly generated by the transport of unrefined nickel ore—either routed to supply the historical SLN powerplant and metallurgical smelting facility in Doniambo or bound for direct international export—accounting for over three-quarters of global exchanges.

The remaining share relies on conventional commercial imports and exports servicing the domestic market through Nouméa and secondary gateways. Outside the exceptional 2024 traffic collapse triggered by the civil unrest, containerization averages around 100,000 TEUs annually, encompassing 60,000 laden containers characterized by a structural trade asymmetry (two-thirds inbound imports, one-third outbound exports). Liner connectivity is maintained with Australia and New Zealand, alongside long-haul loops bridging the territory to mainland France via the Panama Canal and Tahiti.

The principal secondary port gateways—including Nakety, Kouaoua, and Népoui—essentially accommodate specialized dry bulk carriers designed for the loading of raw, unrefined nickel ore. Conversely, the deepwater industrial ports of Doniambo, Vavouto, and Prony were custom-engineered in the immediate vicinity of major metallurgical processing plants to secure the massive importation of

required industrial inputs (such as coal and limestone) and the maritime exportation of high-value processed metallurgical products.

Domestic Passenger Transport and Insular Ferry Logistics

The domestic inter-island maritime passenger traffic (excluding international cruise lines) is executed by a handful of transport and maritime tourism operators. The premier carrier, SAS Sudiles, operates the high-speed passenger catamaran Betico 2, connecting Nouméa to the Loyalty Islands and the Isle of Pines. Driven down by the territorial crisis, the total headcount of passengers transported in 2024 across all destinations fell to 64,005 travelers, compared to 91,132 in 2023—representing a sharp -29.8% year-on-year contraction. Concurrently, the Mary D corporation organizes high-frequency daily tourist excursions out to the Amédée Lighthouse (Phare Amédée), while a dozen private companies practice as "taxi-boats," supplying transport links to the islets flanking Nouméa. To secure its industrial labor logistics, the firm Prony Resources deploys a dedicated maritime shuttle crew-boat, the Prony Express, engineered to transport its industrial workforce to the Prony complex on a daily basis. Finally, the local maritime line bridging Lifou to Tige is operated by SAS Mélita (a specialized subsidiary of the Sodil group). The absolute entirety of these domestic passenger ferries and local roll-on/roll-off cargo crafts fly the autonomous flag of New Caledonia.

The Geopolitical Foundations of the Nickel Crisis

The Caledonian subsoil contains world-class, dense concentrations of strategic metallic substances, encompassing nickel, chromium, iron, gold, copper, lead, zinc, silver, manganese, and cobalt. The local geology is characteristically defined by saprolite and laterite oxidized ores whose pure nickel grade is exceptionally high, climbing up to 20% across selected historical veins. Consequently, according to official datasets compiled by the US Geological Survey (USGS), the territory commands 7% of the planet's total verified global nickel reserves.

The processed chemical and mineral products derived from Caledonian nickel are overwhelmingly exported toward Asian marketplaces, spearheaded by mainland China (commanding a 33.8% market share in 2024), followed by South Korea (absorbing 14.8% of exports), Taiwan, and Japan, while mainland France only captures the fifth position on the matrix.

Surgically speaking, the nickel refined on the island encompasses two distinct categories of industrial commodities operating on strictly decoupled markets:

Ferronickel: Manufactured by the historical SLN (Doniambo) and Koniambo Nickel SAS (KNS) complexes, this iron-nickel alloy is exclusively tailored to supply the massive stainless steel manufacturing industries of the Asia-Pacific range.

Mixed Hydroxide Precipitate (MHP): Manufactured at the southern Goro complex by Prony Resources New Caledonia (PRNC), this chemical compound operates as a critical intermediate precursor required to engineer high-purity nickel tailored for lithium-ion batteries inside the burgeoning electric vehicle (EV) automotive market.

The nickel value chain in New Caledonia is currently traversing a profound, existential structural crisis. As the latest traumatic scar to date, the KNS powerplant and mega-smelter—one of the three industrial pillars of the island—permanently shut its gates in August 2024, triggering 1,200 direct layoffs. For the remaining active metallurgical operators, the short-term horizons remain deeply bleak.

Nevertheless, this metallurgical cluster operates as the absolute economic lifeline of the archipelago, underwriting 20% of cumulative Caledonian employment and a crushing 94% share of its total exports. The sovereign "Nickel Pact" engineered and proposed by the French State in late 2023 was resoundingly left unsigned, and the two remaining metallurgical industrial groups continue to collide with severe structural bottlenecks (primarily the prohibitive costs of energy inputs and local labor, coupled with restricted access to high-grade mining concessions) and a chronic deficit in baseline financial profitability. Commanding a 6% share of global production in 2023, New Caledonia nonetheless retains its positioning on the international podium of nickel giants, standing far behind the hegemonial expansion of Indonesia (which masterminds a monumental 50% of worldwide output) and the Philippines (tracking at 11%). Clustered over a 150-year industrial narrative, the Caledonian sector manufactured in 2023 slightly over 100,000 tonnes of refined nickel alongside 230,000 tonnes of extracted raw ore—a natural resource manne whose international exploitation injected nearly €1.9 billion in export revenues into the local economy.

However, the ultra-aggressive competition deployed by state-backed Indonesian production exerts a crushing downward pressure on the profit margins of all foreign producers, flooding international markets with cheap output, which mechanically triggered a severe -22% collapse in nickel cash prices on the London Metal Exchange (LME) between 2023 and 2024.

Crucially, inside Indonesia, these intensive mining extraction workflows are executed to the direct detriment of indigenous local populations (encompassing violent forced expropriations of local farmers and structural destruction of halieutic zones) and backed by catastrophic ecological pollution (including massive rainforest deforestation, and toxic contamination of regional water tables, soils, and air streams). Environmental stability and fundamental human rights are openly sacrificed on the altar of the Northern hemisphere's "ecological transition" and its hunger for green renewable energy components.

To actively counter this systemic crisis, a high-level United Nations expert committee formally recommended the creation of a global traceability, transparency, and accountability framework tasked with auditing the entire international supply chain of critical minerals vital to the energy transition. This proposed global mechanism is pre-engineered to deliver fully independent third-party evaluations tracking the explicit environmental, social, and governance (ESG) performance metrics of corporate actors—encompassing granular geographic tracking data, strict compliance with human rights and international labor laws, greenhouse gas (GHG) emission calculations, local ecological impact modeling, and anti-corruption auditing.

The UN panel concurrently suggested the engineering of a global sovereign fund, financed jointly by consuming States and mining corporations, to fully capitalize "post-mining" rehabilitation workflows (including extensive land remediation and long-term financial support for local communities following the permanent closure of an industrial site)—highly elevated principles that remain, in reality, deeply distant from contemporary marketplace operations.

Although high-grade Caledonian nickel could theoretically play a frontline role in securing the strategic supply chains of the European Union under the mandates of the Critical Raw Materials Act (CRMA), the domestic industry is deemed structurally unviable economically, pursuant to a stark audit report compiled by the French Inspectorate General of Finances. Consequently, rejuvenating the industrial competitiveness of the Caledonian nickel cluster operates as a monumental sovereign challenge, leaving the French State painfully torn between the strict mastery of its national budgetary deficits on one hand, and the acute geostrategic dread of a total collapse of the island's industrial base on the other.

Moving along this tightrope, the Bougival Accord formally incorporates a dedicated strategic master plan for the nickel sector, mapping out clear operational axes: including the political commitment to relaunch processing and refining activities inside the pro-independence *Province Nord*, securing sustainable access to raw ore deposits, completely overhauling the territorial Mining Code (*Code minier*), facilitating targeted direct unrefined ore exports, and, above all, benefiting from the technical and financial underwriting of Paris. A centralized monitoring committee, driven by a specialized interministerial task force, has been officially established to continuously track the practical application of the updated nickel pact alongside an emergency employment contract dedicated to Caledonian youth. Without long-term territorial political stability, the structural recovery and macroeconomic development of the archipelago appear entirely impossible.

The Halieutic Sector: Lagoons, Palangriers, and High-Seas Extraction

Parallel to mining logistics, the maritime economy is anchored by fishing operations, structured around three distinct operational typologies:

Lagoon fishing : Executed inside the coral reef by low-tonnage artisanal crafts, encompassing hand-line fishing, free-diving, or small-scale net casting to capture coastal reef fish, *trochus* sea snails (*trocas*—harvested for their edible meat and the high-value mother-of-pearl composing their shells), and sea cucumbers (*concombres de mer / holothuries*) exclusively processed to supply premium Asian delicacy markets. Both *trochus* and sea cucumber harvesting are rigidly regulated under strict conservation decrees, locking in minimum landing sizes per species, strict seasonal quotas, the demarcation of closed marine sanctuaries, a mandatory manual-only harvesting protocol, a absolute ban on night-time harvesting, and a strict administrative licensing and registration registry system governing authorized seafood wholesalers.

Coastal fishing : Practiced directly on the outer drop-offs of the coral reef barrier, primarily supplying fresh catches to the domestic urban marketplaces of Nouméa.

Deep-sea high-seas fishing : Conducted across the expansive waters of the 1.45 million km² EEZ utilizing specialized longliner vessels custom-engineered to target highly migratory pelagic resources, most dominantly albacore tuna, yellowfin tuna, bigeye tuna, marlins, and broadbill swordfish. Crucially, conversely to alternative Pacific island territories, the primary commercial outlet for New Caledonia's deep-sea longline fleet remains the affluent domestic market, which structurally absorbs the near-totality of the regional high-seas halieutic catch.

Export sales, although universally judged as structurally less profitable, enable the market valuation and clearing of halieutic surpluses relative to domestic seafood consumption. The exported volumes of tuna experienced an exceptional improvement across the 2024 calendar year, surging by +73% in volume and +81% in financial value. These streams predominantly feed the Japanese and French high-end marketplaces, alongside the industrial canneries of Samoa.

The Caledonian longline sector manufactures between 2,500 and 2,800 tonnes of fish annually, which encompasses a dedicated 300 to 400-tonne catch segment of high-value yellowfin tuna. Crucially, an absolute 80% majority of this yellowfin volume is exported whole and fresh to be commercialized at the prestigious auction clocks of the Tokyo fish market.

Consequently, when the national carrier Aircalin abruptly suspended its regular airline route connecting La Tontouta to Tokyo-Narita at the end of August 2024, the decision struck the halieutic value chain as a catastrophic operational blow. While the sector is currently auditing greenfield alternative export marketplaces, the baseline cost of Caledonian industrial production remains profoundly high face to the ultra-competitive pricing of foreign Asian longline competitors.

In parallel with open-sea fishing, New Caledonia disposes of a well-structured aquaculture sector specialized in tropical prawn farming engineered since the 1970s. The supply chain encompasses everything from industrial hatchery larval production and the painstaking pond rearing of post-larvae down to harvest, automated sorting, packaging, and international commercialization. In 2024, output reached 1,380 tonnes of prawns, distributed across 724 hectares of ponds and 16 specialized aquaculture farms. Nevertheless, the value chain is systematically confronted with multiplying climate, sanitary, and biological hazards, compounded by an intense seasonality, given that harvesting operations are rigidly compressed between March and June. To secure this vulnerable food-sovereignty asset, public authorities continuously intervene to underwrite the sector, injecting financial subsidies, funding targeted R&D via Ifremer, and providing advanced technical and scientific guidance through the Boulouparis Aquaculture Technical Center (CTA).

Overtourism Disruptions and the Protection of the Coral Sea

The pristine, world-class beauty of New Caledonia's marine fauna and flora traditionally attracts a substantial influx of international travelers. Tourist demographics are predominantly structured around inbound flows originating from mainland France, Wallis and Futuna, Australia, New Zealand, and Japan. To preserve this exceptional biodiversity, the Government of New Caledonia engineered the Natural Park of the Coral Sea in 2014. This massive Marine Protected Area (MPA) encompasses the absolute entirety of the territory's maritime space (EEZ), thereby blanketing 1.45 million square kilometers. It stands as the single largest marine protected area under French jurisdiction, and ranks as the third largest globally, trailing immediately behind the MPAs of Hawaii and the Cook Islands.

While New Caledonia had triumphantly recovered its pre-pandemic tourist baselines during the 2023 calendar year thanks to the comprehensive reopening of international borders, regional tourist arrivals experienced a catastrophic contraction across 2024. This structural collapse was directly fueled by the prolonged closure of La Tontouta International Airport following the violent civil riots, the complete suspension of scheduled flight rotations by regional carriers *Qantas* and *Air New Zealand*, and an intense risk-aversion displayed by international travelers face to the island's degraded security landscape.

In 2024, the total headcount of stayover tourists (excluding cruise passengers) plummeted to a low 59,399 arrivals, compared to a baseline of 125,097 in 2023. Although this metric remains slightly superior to the historical rock-bottom numbers logged during the public health lockdowns, it stands vastly inferior to the 2022 recovery baseline (78,749 tourists), branding 2024 as the third weakest year for Caledonian tourism since 2013.

Regarding the cruise shipping sector—and despite the progressive technical resumption of vessel calls—the 2024 calendar year registered a severe, structural deceleration. A mere 64 cruise ships and 191,528 passengers made port-of-call within the territory, contrasting sharply with the 118 vessels and 343,703

cruise tourists logged in 2023—representing a net decrease of 54 mega-liners and 152,175 travelers on a one-year horizon.

The total volume of active port-calls has now fallen beneath the cumulative baseline recorded during the 2020–2022 pandemic years (66 ships) [INDEX]. While localized cruise stops successfully resumed at Lifou in late 2022 and Maré in 2024, the jewel destination of the Isle of Pines remains strictly excluded from international cruise itineraries since 2021 due to local customary and environmental opposition.

New Caledonia as a Strategic Geopolitical Anchor in the Pacific

Through its vast network of Overseas territories, France maintains a robust, structural sovereign presence within the geostrategic theater commonly defined as the Indo-Pacific. The institutional and constitutional evolution mapped out within the framework of the Bougival Accord explicitly projects an expanded autonomous diplomatic scope for the future Caledonian executive, provided it operates in strict compliance with the international treaties and fundamental interests of the French Republic—specifically national security, sovereign defense, and vital state assets—although extensive legal precisions remain to be formulated.

The Armed Forces in New Caledonia centrally secure the tactical protection of the national territory along with the French EEZ, actively preserving France's geostrategic interests across Oceania. The FANC intervene under the dual umbrella of the Action de l'État en Mer and regalian sovereignty mandates, patrolling a cumulative maritime zone that expands to 2 million square kilometers when combining the EEZs of New Caledonia and Wallis and Futuna.

Within this vast oceanic space, the primary operational threats center on Illegal, Unreported, and Unregulated (IUU) fishing—mandating rigorous fisheries protection surveillance and the enforcement of fishing license validation regimes—coupled with the tracking of international narcotics trafficking traversing the high-seas maritime shipping highways connecting South America to Australia.

To counter these threats, the French state leverages active regional defense and customs cooperation treaties linking the FANC and French Customs to Australia and the Pacific Islands Countries (PICs), establishing joint intelligence and naval grids with Papua New Guinea, the Solomon Islands, Fiji, and Vanuatu.

Surgically speaking, a core geopolitical objective of this military architecture targets curtailing the aggressive economic and maritime expansion of China throughout the Pacific Ocean. New Caledonia has transformed into a primary target for Beijing's sophisticated gray-zone hybrid interference operations.

The Chinese apparatus actively deploys a veiled strategy of influence, funneling indirect backing and political leverage to pro-independence factions in order to structurally weaken its regional democratic competitors and progressively impose a new form of tutelage over the archipelago.

For Beijing, this long-term destabilization strategy delivers a dual geostrategic advantage:

Securing critical raw materials: locking in long-term, unassailable supply chains to feed its domestic industries with raw Caledonian nickel.

Executing a maritime breakout strategy: anchoring a permanent policy of Chinese geopolitical de-encirclement by effectively isolating Australia and securing greenfield, allied naval and logistical base-points at the very heart of the Southwest Pacific.

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