

Maritime Summary Note n°281 – May 2026

« Reunion Island »

Situated within the Southwest Indian Ocean theater, located over 8,000 kilometers from the French metropolitan mainland as the crow flies, La Réunion constitutes—alongside Mayotte—one of France's two sovereign Overseas departments inside the Indian Ocean range. The island, which unfolds across a physical surface area of 2,512 square kilometers, houses a population headcount of 890,000 inhabitants, rigidly ranking La Réunion within the category of small-scale insular spaces.

Mirroring numerous analogous territories, it relies almost exclusively on its primary maritime port gateway to process the absolute bulk of its international commodity imports and exports. Mechanically, between 98% and 99% of total commercial freight transits through the seaports, while the residual fractional share is masterminded by the airport gateway.

Consequently, across the island of La Réunion, port operations and wider maritime shipping activities function as the absolute beating heart of the regional blue economy. Pursuant to the statutory codifications engineered by the European Commission, the blue economy is defined as “the entire matrix of economic activities linked to oceans, seas, and coastlines, comprehensively encompassing the direct and indirect support services necessary for its active operations.”

It thus blankets vast operational perimeters, stretching from coastal tourism and halieutic fisheries protection to national sovereign defense, environmental littoral monitoring, and merchant marine transport. Across La Réunion, the blue economy is structurally anchored around three primary pillars: coastal tourism, seaborne shipping logistics, and Southern Ocean high-seas fishing. Accordingly, maritime vocation, halieutic resource management, and biodiversity preservation constitute the core keywords mobilized throughout this empirical analysis.

The Industrial-Port Complex Architecture

The blue economy generates a direct macroeconomic value-added of €485 million, translating grosso modo into 2.6% of the island's total GDP. Concurrently, the sector sustains approximately 10,000 salaried workers, representing 3.4% of total insular employment (INSEE, 2022 data).

When analytically isolating coastal tourism from the equation, the two premier value-generating sub-sectors driving the blue economy map out as: Port and naval shipping activities: generating €134 million in direct value-added. Halieutic and seafood resource exploitation: generating €67 million, distributed across a matrix of 500 active employer establishments¹.

When widening the analytical focus from the strict definition of the blue economy to audit the extensive industrial-port complex, it becomes resoundingly manifest that the cumulative pool of clustering activities nested within the harbor zone operates as a primary growth engine for the island territory of La Réunion. Pursuant to comprehensive INSEE audits, this industrial-port complex houses over 360 corporate enterprises, masterminding 5,700 direct jobs and unlocking a total value-added of €571 million, equivalent to 3% of the island's GDP. The associated labor force is structurally distributed as follows: 55% of total workers are integrated within pure maritime domain activities (encompassing commercial fishing fleets, naval construction and ship maintenance shipyards, cargo handling services, maritime customs, and Affairs Maritimes administrative bureaus), while the remaining 45% are employed across landside non-maritime activities (including manufacturing industries, domestic inland road transport, warehousing grids, and packaging centers).

Conversely, it is the non-maritime landside activities that generate the absolute largest share of the complex's cumulative value-added, capturing a dominant 60%. This cluster encompasses downstream

¹ Nevertheless, this economic fabric remains relatively unbalanced, given that a tight 1% of the total establishments concentrates a dominant 31% of regional employment and masterminds 37% of the cumulative value-added.

enterprises gravitating directly around harbor operations, such as domestic road transport and trucking companies operating in the inland distribution of commercial cargo arriving via cellular container ships. Symmetrically, it clusters wholesale trading firms, third-party logistics (3PL) providers, industrial storage operators, and specialized packaging and conditioning centers.

Nevertheless, despite this structural robustness, the port has been plagued over recent years by severe, chronic congestion bottlenecks, most acutely felt across its container storage yards. To systematically decongest the terminals, a critical engineering solution focuses on redeveloping the immediate back-port logistics zone.

A strategic plot spanning 17 hectares (out of a total 80-hectare territorial reserve) belonging to the Departmental Council, located a mere few cable-lengths from the *Port Est* terminal, has been mapped out to host these advanced storage extensions. To legally unlock this development, a landmark 75-year long-term lease was officially signed in 2024 between the Departmental Council and the Grand Port Maritime, authorizing the physical expansion of the port's intermodal platform.

Grand Port Maritime Réunion: A High-Performance Container Hub

Mirroring the sister ultra-marine gateways of Guadeloupe, Martinique, and French Guiana, Port Réunion is legally codified under French public law as a Grand Port Maritime. GPMs operate strictly as state-owned public establishments (*Établissements publics d'État*), statutorily tasked with masterminding and executing national public policies regarding sustainable spatial planning, infrastructure engineering, and regional environmental development.

Crucially, inside Overseas territories, GPMs are uniquely endowed with an expanded operational mandate, directly managing heavy handling terminals such as specialized bulk grain silos or bulk sugar exporting facilities. Conversely, the island of Mayotte does not fall under this state-owned GPM framework, operating instead under the direct jurisdiction of its local territorial collectivity through a long-term Public Service Delegation concession.

Commanding an annual freight volume of 6 million tonnes (Mt), Port Réunion firmly positions itself as the premier maritime gateway across France's entire Overseas network. Symmetrically, it ranks as the 4th largest container port in France, processing a structural throughput of 370,000 TEUs annually. Evaluated either by raw tonnage or by containerized volumes, the Réunionnais hub handles nearly double the traffic logged by each of the two French West Indian ports. For the insular economy of La Réunion, between 98% and 99% of cumulative outbound and inbound commodity flows mandatorily transit through this maritime harbor gateway. This structural trade imbalance materializes in severe macro-financial asymmetries: with inbound imports soaring to €7.1 billion annually, contrasted against a minor, restricted outbound export envelope of €413 million.

Within its immediate regional basin, which is essentially composed of islands, Port Réunion stands—all proportions kept—as one of the single most dynamic port gateways. Two distinct categories of port complexes emerge across this southwestern Indian Ocean range. The first encompasses hubs commanding traffic volumes exceeding the one-million-tonne threshold: namely Mauritius, La Réunion, and Madagascar (although the latter geographically escapes the category of small insular spaces). The second category clusters territories such as the Seychelles, Mayotte, and the Comoros, which generate significantly less voluminous freight totals, tracking well below the one-million-tonne mark.

The seaborne traffic of Mayotte systematically fluctuates at the rhythm of recurring local strikes and a highly chaotic management of its harbor infrastructure (plagued by persistent disputes, focusing notably on port handling fees, pitting the Departmental Council, the public service delegate, and *Mayotte Channel Gateway*, the official port manager² since 2013). Symmetrically, inside the Seychelles, the primary port is undergoing a comprehensive rehabilitation program; the engineering works, funded in part by the AFD, consist of constructing a brand-new, 310-meter-long commercial quay.

Across the Comoros archipelago, two primary ports have been erected: the first serves the capital island (Grande Comore) at Moroni, while the second is established on the island of Anjouan at Mutsamudu. While the Port of Moroni severely suffers from a chronic deficit in adequate infrastructure (forcing merchant vessels to be entirely discharged offshore via lighterage barges), the Port of Mutsamudu, which is regularly silted up by heavy sedimentation, is currently undergoing rehabilitation.

² The delegation contract, which was set to run through 2028, was overturned by the Mayotte Administrative Court. Mayotte Gateway Channel is expected to lose management and operation of the port in September 2026.

Concurrently, Madagascar displays a highly atypical port morphology. Out of the 15 ports lining its extensive coastline, only two are technically capable of accommodating modern ocean-going commercial vessels: Toamasina (currently being expanded) and Ehoala. A titanesque modernization program is underway inside the gateway of Toamasina; financed predominantly by Japanese capital, the project consists of constructing a next-generation container terminal, engineering a 10-hectare yard bounded by a 470-meter-long quay dredged to a depth of 16 meters. These works, representing a cumulative capital expenditure of \$639 million scheduled for completion by the 2028 horizon, will legally and technically empower the port to simultaneously handle two panamax-sized vessels.

The Spatial Segmentation of Harbor Activities: Port Ouest vs. Port Est

Maritime shipping and logistics operate as the secondary baseline pillar of La Réunion's blue economy, masterminding 14% of local business establishments and absorbing 38% of direct maritime employment. This sector is structurally anchored around the infrastructure of the Grand Port Maritime.

The island of La Réunion houses two distinct harbor sites: Port Ouest, the original historical facility, and Port Est, the modern deepwater port. Although separated by a mere 3 kilometers as the crow flies, Port Ouest and Port Est form a single, unified port entity under a centralized management.

The historic site of Port Ouest covers approximately 70 hectares and disposes of a cumulative quay length of 3 kilometers. Engineered at the close of the 19th century, this basin stands as the smaller of the two harbor locations, with its maximum draft depths capped at 9 meters. Today, it hosts numerous boutique activities tied to artisanal fishing fleets and yachting marinas. Crucially, it concurrently shelters the third largest French naval base, functioning as the sovereign homeport and logistics support center for French Navy surface combatants permanently deployed across La Réunion and the wider Southern Indian Ocean zone.

Ship repair operations are identically anchored within this historical zone of the *Pointe des Galets*. The sector is currently undergoing a structural renewal, propelled by the recent delivery of a 120-meter-long by 32-meter-wide floating dry dock. Purpose-engineered to accommodate high-seas fishing longliners and French Navy patrol vessels, this floating dock is statutorily tasked with rejuvenating an industrial activity that had fallen into deep decline due to fierce, crushing competition from the neighboring island of Mauritius.

Nevertheless, commercial freight logistics have not comprehensively deserted these legacy quays. Port Ouest continuously shelters a dedicated bulk sugar exporting terminal (processing bulk raw exports), alongside specialized shoreside berths dedicated to the importation of liquid bitumen and construction cement aggregates.

The secondary facility, Port Est, operates as the undisputed beating heart of commercial industrial-port activities. Spanning 112 hectares, it is bounded by 1.6 kilometers of linear quays, dredged to deep drafts ranging between 13 and 16 meters. The absolute crown activity of this basin unfolds inside the high-performance container terminal. It concurrently structures around specialized ro-ro (roll-on/roll-off) and conventional berths, alongside dry bulk and liquid bulk terminals.

Notably, this industrial section of the port complex is directly flanked by a major EDF thermal power plant. This infrastructure commands a unique environmental characteristic: since the 2024 baseline, it has been comprehensively retrofitted to be fueled exclusively by liquid biomass manufactured from rapeseed oil, thereby structurally converting into a 100% bioenergy power station.

Finally, a relatively modest cruise shipping activity is integrated within the port complex, logging 43,400 passengers in 2024 compared to 20,400 in 2023. Following the total strategic withdrawal of *Costa Cruises* from the southwestern Indian Ocean range in 2020, passenger volumes had experienced a drastic collapse (plummeting to a low 11,000 travelers in 2022, contrasted against a historic high of 119,000 passengers in 2019).

Henceforth, the sector is recording a progressive upward recovery, cresting at 44,000 cruise passengers across the 2025 calendar year. Premium global cruise brands—exemplified by *AIDA Cruises* (operating Seychelles–South Africa or Dubai–South Africa itineraries), *MSC Cruises* (deploying long-haul transoceanic loops between Italy and South Africa, or regional South Africa–Mauritius runs), and *Hapag-Lloyd Cruises* (routing Port Louis–Cape Town tracks)—have successfully re-integrated Port Réunion within their deployment matrices during the southern austral summer. In total, approximately thirty mega-cruise liners executed a formal port-of-call at La Réunion in 2025.

Returning to seaborne trade, the Grand Port Maritime (GPM) of La Réunion achieved a historic record in 2025, with total cargo throughput modelizing past the 6 million tonnes threshold. This unprecedented

volume represents a powerful 15% expansion between 2023 and 2025. A symmetric macro-performance had previously been logged in 2021, within a post-pandemic economic context fueled by massive synchronized recovery packages.

To anchor a regional baseline comparison within the southwestern insular basin, the neighboring island of Mauritius identically recorded an intense expansion curve, surging by +22% between 2023 and 2024. Consequently, Mauritian port traffic has henceforth scaled up to reach 9.8 Mt in 2025, fast approaching the milestone 10-million-tonne mark.

In the specific case of Port Réunion, the infrastructure operates under a deeply engrained, highly diversified generalist vocation. In alternate terms, general cargo maintains an absolute structural preeminence, accounting for nearly two-thirds of the port's total throughput. This cargo family is overwhelmingly dominated by cellular container streams.

Concurrently, the cumulative volume of bulk commodities hovers around 2.1 Mt. Inbound liquid bulks are predominantly structured around critical imports of automotive diesel, liquid biomass, and aviation kerosene. Symmetrically, dry bulk streams are heavily dominated by industrial importations of sustainable wood pellets, agricultural cereals, and clinker—the limestone and alumino-silicate mineral precursor vital to manufacturing construction cement.

The strategic volume of transshipment activity remains highly fluctuating across the terminals. The hub logged an absolute record high in 2024, handling 114,000 TEUs. This logistical surge was directly driven by the formal commissioning of a next-generation reefer container yard, a technical upgrade synonymous with industrial renewal.

Geographically, this maritime transshipment engine is masterminded at a 50% level by the macroeconomic dynamics of the greater Southwest Indian Ocean rim: 54% of transshipped flows originate from or are bound for Southern Africa, while Southeast Asia accounts for 16%, matching symmetric 16% fractional shares generated by the Persian Gulf monarchies and the Indian subcontinent respectively.

Port Réunion is directly called by approximately fifteen regular liner shipping routes: encompassing 11 dedicated container lines paired with 3 roll-on/roll-off (ro-ro) loops—averaging 3 monthly ro-ro port-calls—and conventional breakbulk vessels. Inside the containerized segment, a powerful duopoly emerges, spearheaded by MSC (*Information System and Shipping*) and CMA CGM. Acting in close operational synergy, these two global maritime leaders lock in an overwhelming 80% market share across all shipping matrices (encompassing inbound imports, outbound exports, and transshipment handling).

Strategically, Port Réunion is nested at the crossroads of numerous international global shipping lanes, integrated via secondary feeder lines or embedded along macro-oceanic loops. Within the global network operated by Maersk, for instance, Port Réunion functions primarily as a feederized.

Accordingly, it is serviced by a dedicated secondary feeder rotation baptized the IOI (Indian Ocean Islands) loop, which systematically couples Port Victoria (Seychelles), Port Réunion, Port-Louis (Mauritius), and Toamasina (Madagascar), routing these regional volumes directly to and from the sovereign transshipment mega-hub of Salalah (Oman).

For the ocean carriers MSC and CMA CGM, La Réunion wears a dual strategic hat. On MSC's "NWC to Ipak" liner loop, the Réunionnais port operates as a major direct port of call; however, it transitions as a secondary gateway on the "IOI" route, which pivots out of the transshipment hub of Colombo.

Symmetrically, within the network network strategy (*réticularité*) adopted by CMA CGM, Port Réunion acts simultaneously as a regional redistribution node, a feederized port, and a direct port of call on a global macro-oceanic highway. Consequently, dedicated feeder shipping lines branch out from the splitting hub of La Réunion to irrigate other regional island gateways, specifically the IOIFEED1 and IOIFEED5 loops.

This hub positioning is heavily accentuated by its operational coverage on the Karibu line (a trade route stretching all the way to Khalifa Port in the UAE, via Mombasa and Mogadishu). It is called directly on the New Nemo loop connecting Europe to Australia. La Réunion is identically touched by CMA CGM's secondary feeder networks, such as the Mozex line, which runs between the transshipment hub of Tanjung Pelepas (Malaysia) and Mozambique.

High-Seas Halieutic Extraction and the TAAF Economy

Within this insular blue economy, the seafood and marine products sector—propelled by Southern Ocean high-seas fishing—stands as the single most productive and lucrative engine. It established itself as the premier export sector of La Réunion in 2023, generating €123 million, crushing the traditional agricultural backbones of cane sugar (€44 million) and rum (€21 million) (INSEE, 2023 data).

The maritime fishing sector is fragmented across three operational typologies : Artisanal fishing harvesting approximately 900 tonnes annually, Open-sea longline fishing tracking at 2,000 tonnes, Industrial fishing intimately bound to the French Southern and Antarctic Lands (TAAF), accounting for approximately 4,900 tonnes³.

Consequently, the core of halieutic extraction is concentrated within the TAAF, which are subdivided into three distinct geographic components: the Scattered Islands (almost comprehensively clustered inside the Mozambique Channel, stretching from north to south through *the Glorioso Islands, Juan de Nova, Bassas da India, and Europa*, with the sole exception of *Tromelin* located northeast of Madagascar), the Southern Indian Ocean Islands (situated in the subantarctic zone, comprising *Amsterdam, Saint Paul, Crozet, and the Kerguelen Islands*), and Adélie Land in Antarctica.

Statutorily, these territories do not form part of the European Union, categorized instead as Overseas Countries and Territories (OCTs — PTOM). Blanketing vast marine expanses, the TAAF must permanently confront severe law enforcement and environmental monitoring challenges, notably Illegal, Unreported, and Unregulated (IUU) fishing and structural overfishing. These scattered, isolated territories share multiple structural features: they remain highly difficult to access, denuded of permanent human populations, and harbor an exceptionally rich, unique marine biodiversity characterized by an exceptional state of conservation of natural habitats.

Among these distributed territories, the most prosperous industrial fishing operations are concentrated within the subantarctic waters. Indeed, this Southern Ocean fishery generates a monumental 95% of the cumulative value-added of the island's entire halieutic sector. Among the primary targeted biological resources, the Patagonian toothfish, the *Antarctic cod (cabot)*, and the *Antarctic butterfish (rouffe antarctique)* are strictly subjected to catch quotas; alternative species operate without Total Allowable Catches (TAC), such as the *grenadier*.

Ultimately, Southern Ocean high-seas fishing stands out as the supreme export engine of La Réunion, generating €122 million for 4,900 tonnes exported in 2024. The Patagonian toothfish—universally baptized "white gold by virtue of its massive value-added and a per-kilogram price tag ranking among the most expensive on international seafood markets—distinctly stands out, single-handedly masterminding 91% of total maritime fishing export revenues.

Sovereign Naval Anchor and Geostrategic Force Projection

Equipped with its permanent naval base placed under the operational authority of the FAZSOI (Armed Forces of the Southern Indian Ocean Zone), La Réunion functions as the undisputed geostrategic pillar of the French Republic within the Indian Ocean theater. The sovereign hub serves as the permanent homeport for a naval fleet of 6 surface vessels, prominently including the surveillance frigates *Nivôse* and *Floréal*, alongside the specialized polar patrol and research vessel *L'Astrolabe*.

This military base operates, among other critical mandates, as the primary regional support anchor tasked with executing sovereignty patrols and fisheries protection across the Exclusive Economic Zones (EEZs) of France's scattered ultra-marine territories dotting the Mozambique Channel and the subantarctic southern islands. Behind the unmatched Pacific domain (6.8 million km²), the combined maritime EEZ of the French Indian Ocean and Antarctic territories ranks as the second largest under French jurisdiction, shattering the 2.7 million km² threshold when integrating the specific zones of La Réunion (312,000 km²), Mayotte (431,000 km²), and the TAAF subantarctic districts.

The Permanent Area of Responsibility under the FAZSOI high command spans 14 sovereign nations, encompassing 10 coastal states in Southern Africa and 4 island members of the Indian Ocean Commission (IOC — *Commission de l'Océan Indien*). Within this massive ZRP, French armed forces maintain a permanent, fortified military presence across three of the Scattered Islands (Glorioso, Juan de Nova, and Europa), masterminding a synchronized rotation of 15 garrisoned soldiers every 45 days.

Logistically, it is the state-backed research and supply vessel *Marion Dufresne* that masterminds, from its rear logistics base in Port Réunion, the comprehensive lifelines and rotational servicing of the TAAF. It executes heavy missions encompassing freight transport, marine fuel replenishment, and personnel routing, paired with world-class oceanographic scientific research via its onboard specialized laboratory matrices.

³ The TACs (total allowable catches) for toothfish total 4,780 metric tons in 2025. They are divided between the Kerguelen Islands (3,780) and the Crozet Islands (1,000 metric tons). The TACs have decreased by 800 metric tons (a 14.3% drop) in one year due to the threat to the resource. Australia, our distant neighbor, has also reduced its TACs by 17%.

Symmetrically, the *Champlain*—an Overseas Support and Assistance Vessel identically homeported in La Réunion—executes tactical supply runs to the TAAF approximately four times a year, tightly interwoven with its sovereign maritime surveillance and border patrol operations.

Future Perspectives: Regional Port Ranges and Smart/Green Alliances

Outside traditional coastal tourism assets, expanding La Réunion's blue economy flows directly through maximizing its maritime and port terminal throughput. Developing premium cruise lines and expanding deepwater transshipment segments represent the primary development targets for the Grand Port Maritime.

Nevertheless, the impending commissioning of a completely modernized, next-generation port complex in Toamasina (Madagascar) is poised to thoroughly reshuffle the regional logistical cards. Consequently, it stands manifest within the shipping landscape that maritime *rentes de situation* are by no means eternal; the delicate networks of regular ocean liner routes are dynamically engineered and dismantled at the whim of the shifting corporate ambitions and vessel deployment strategies of global shipowners.

Yet, as counter-intuitive as it may theoretically appear, the coexistence of a highly advanced network of competing ports within a shared region does not exclusively operate as a destructive engine of pure commercial rivalry; it can symmetrically generate an optimized regional maritime connectivity, fostering industrial consolidation and driving a significantly better organization of the entire regional port range.

Moving along this integrated path, maritime analysts observe a powerful rise in multi-layered cooperation frameworks bridging regional gateways, seamlessly binding small island ports to the rising gateways of the East African littoral range. This institutional alignment materializes through synchronized public-private actions focusing on four strategic axes:

- The pooling of best practices: optimizing high-value cruise reception and tourist passenger flows.
- The deployment of "Smart Port" dimensions: accelerating the comprehensive digitization, EDI integration, and automated tracking of harbor complexes.
- The execution of "Green Port" initiatives: engineering eco-responsible logistics platforms, executing cold ironing electrification, and mitigating biodiversity footprints.
- Specialized maritime workforce certifications: masterminding high-level professional formations, inter-port immersion pipelines, and accelerating the professional inclusion of women within port handling and handling industries.

Ultimately, within a contemporary macro-context where maritime strategies and blue carbon development plans have been elevated to the premier rank of European, national, and regional public priorities—materialized by the comprehensive regional master action plan⁴ adopted in 2021 by the Indian Ocean Commission—blue economy activities operate more than ever as highly critical, vital assets for the survival of La Réunion.

Against this geostrategic backdrop, a multitude of structural challenges are mapping out, centered on the optimization of the local naval shipbuilding and repair industry (maintenance and floating drydock repair workflows), the enforcement of robust maritime surveillance, the protection of isolated ultra-marine sanctuaries backed by titanesque EEZs, and, globally, the expansion of local innovation capacities and ecological energy transitions. These constitute the definitive, multi-dimensional challenges that this French insular territory must successfully master at the heart of the southwest Indian Ocean.

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⁴ The IOC's action plan builds on several joint programs focused on maritime safety, the conservation of coastal and marine biodiversity, and, more broadly, island development.