

ANNUAL REPORT  
2021/2022

# D A R E

TO EXPLORE  
NEW WAYS

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NEW WAYS

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# DR A R E

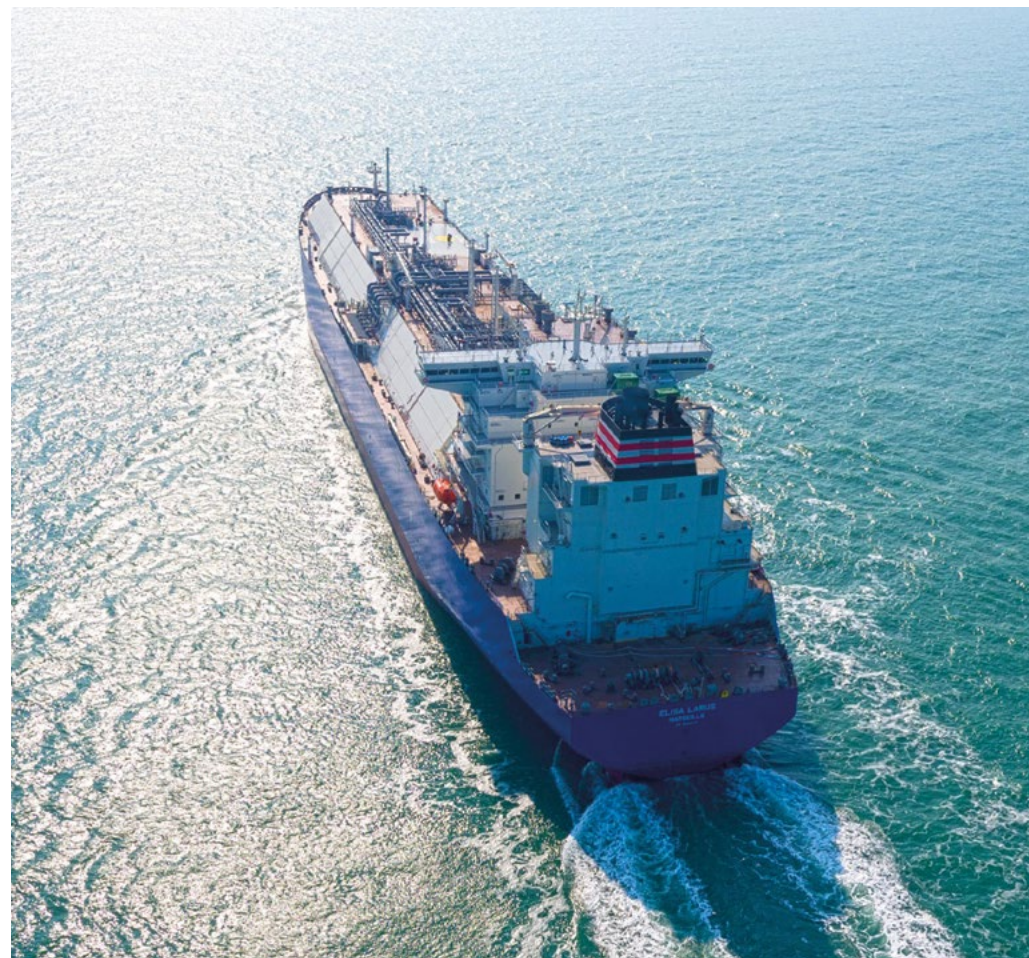
## TO DEFEND THE ESSENTIALS

In response to the public health, economic and geopolitical crises, Armateurs de France and its members remain fully mobilised to keep the world turning. Here we take stock of the situation.



## RENEWING, DEVELOPING AND MODERNISING A COMPETITIVE FRENCH FLEET

March 2022. With world events dominated by the conflict in Ukraine, Jean-Emmanuel Sauvée, chairman of Armateurs de France, Jean-Philippe Casanova, managing director, and Jean-Marc Lacave, his predecessor, look back on the past year and the first challenges of 2022.



France LNG Shipping's *Elisa Larus*, one of the most modern LNG carriers flying the French flag, equipped with a low-speed dual fuel engine

### Would you describe 2021 as a continuation of 2020?

**JEAN-EMMANUEL SAUVÉE** Yes, and that much is true both at home and abroad. Firstly with the Covid crisis which persisted, with its many consequences for shipowners from all over the world. Whether it was the problem with crew changes, that of seafarer vaccination, or disruption to the supply chain, the effects of the pandemic were, and continue to be, challenges for the entire shipping community. All of this on a backdrop of the ecological and energy transition which remains the main priority of the shipping sector.

### And this priority is reflected in the Fontenoy du Maritime process in France?

**J.-E. S.** I would like to recall that our strategic plan for the merchant navy that we drew up in 2020 contributed substantially to getting the Fontenoy du Maritime process afloat. Armateurs de France's experts and members became actively involved in this collaborative programme aimed at consolidating France's maritime power and promoting the French flag. As further proof of the Government's political commitment to the shipping sector, it was President Macron himself who came to the *Assises de l'économie de la mer* in Nice in September 2021 to announce the main measures resulting from this major consultation. We, French shipowners, welcome the progress made on exemptions from wage costs, green asset over-depreciation, the guarantee of Strategic Project Insurance and the training of seafarers, but we expect much more! This long-distance trip has not yet reached its destination port... This is why Armateurs de France last autumn asked for a Fontenoy steering and monitoring committee to be created to exchange, every week, with the staff of the Ministry of Marine Affairs. The points on our agenda include the work and missions, validated by the Prime Minister, on the evaluation of the tonnage tax, the implementation of alternative financing and crowdfunding tools, and changes to ship mortgage law. →



**"OUR STRATEGIC PLAN FOR THE MERCHANT NAVY THAT WE DREW UP IN 2020 CONTRIBUTED SUBSTANTIALLY TO GETTING THE FONTENOY DU MARITIME PROCESS AFLOAT."**

JEAN-EMMANUEL SAUVÉE



**"THE FONTENOY PROCESS HAS HELPED PROGRESS TO BE MADE IN A FEW AREAS, PARTICULARLY IN GREEN OVER-DEPRECIATION OR THE COMPATIBILITY OF BPI INSURANCES WITH THE FRENCH TAX-BASED LEASES."**

JEAN-MARC LACAVE



**What can we take away from the measures relating to financing?**

**JEAN-MARC LACAVE** The issue of ship financing is essential for shipowners because everything depends on their ability to renew, develop and modernise their fleets competitively. The Fontenoy process has helped progress to be made in a few areas, particularly in green over-depreciation or the compatibility of BPI<sup>1</sup> insurances with the French tax-based leases. However, we must remain attentive to the proper implementation of these measures. And there are still several outstanding issues on financing: I could mention, for example, the retrofitting of existing ships and new ships financed with conventional loans under the ecological transition. Without forgetting alternative financing means such as the *certificat d'investissement maritime*<sup>2</sup>, which contributes to reducing the equity capital required from shipowners. Consequently, discussions must be pursued vigorously.

**And social matters were also part of the discussions...**

**JEAN-PHILIPPE CASANOVA** Social harmonisation between European flags is a recurrent demand of Armateurs de France so that our shipping companies can compete on equal terms with their competitors and the employment of French seafarers can develop within shipping companies. The Fontenoy work triggered debate between the

European Union's Member States. The symposium on social dumping to be held in La Rochelle in early 2022 is an illustration of this.

I would also like to emphasise our satisfaction with regard to the extension of the support scheme for shipping companies, for a period of three years, to all navigation segments. We regret, however, that only ratings and junior officers are covered by this aid.

Finally, we welcome the doubling of student numbers at the ENSM by 2027. There is a great need for officers, and we hope that the academy will be able to meet the target. In any case, Armateurs de France is fully mobilised to ensure the success of this measure and also continue the discussions initiated under the Fontenoy agreement on social promotion.

**What about the third working group?**

**J.-E. S.** This working group entitled "Strengthening strengthening the French maritime industry for the benefit of all players in the maritime ecosystem" is a response to our desire for greater economic solidarity. Indeed, how can it be acceptable that today only 5% of the 350 million tonnes of goods that enter and leave our ports each year do so under the French flag? We are fighting to structure a targeted incentive policy aimed at developing the shipping and port industry in a continuous and operational dialogue between the players in the sector. Armateurs de France signed

two joint declarations of reinforced economic solidarity at the last Assises de la mer: one with the shippers, our clients, represented by AUT<sup>3</sup>, and the other with the shipbuilding industry, our technical partners, represented by GICAN<sup>4</sup>. The implementation of these charters is now underway.

**Is this also an opportunity to highlight the contribution of the sector to the development of offshore renewable energy?**

**J.-E. S.** The Minister of Marine Affairs has a strong interest in this subject. Annick Girardin commissioned Frédéric Moncany de Saint-Aignan, Chairman of the French Maritime Cluster, who submitted a report to her in February 2022 highlighting the fact that maritime works and services, provided by specialised vessels and teams, make up a significant proportion of the value chain for offshore wind farms. This report contains a number of levers that could optimise the contribution of these operators to the development of wind farms in French waters. This is another topic of solidarity that Armateurs de France is closely monitoring.

**Changes in the French administration were also on the agenda at Fontenoy. Were any key decisions made?**

**J.-P. C.** Indeed, and already in March 2022 we have witnessed the creation of the Directorate General for Maritime affairs, fisheries and aquaculture (DG AMPA in French) under the authority of the Minister of Marine Affairs and the Minister of Agriculture and Food. This is further proof of France's maritime ambition and a very positive signal for the profession, which will facilitate the development of the blue economy and jobs. This new central administration structure, headed by Eric Banel, former managing director of Armateurs de France, has more than 3,000 members of staff spread across the regions. It is fully focused on the sustainable development of maritime activities, as close as possible to the users of the sea and coastal communities.



*"The creation of a Directorate-General for Maritime Affairs, Fisheries and Aquaculture is the culmination of a new maritime ambition for France. It is the first administrative department to focus entirely on the sustainable development of economic activities at sea and on the coast. An administration that is more strategic, facilitating its ecosystem and firmly rooted in communities. An administration that organises and reconciles the different uses of an increasingly coveted maritime area, reaffirming the importance of the sea in public policy. An administration that addresses the issues of training, ecological transition of ships and competitiveness, at both European and international levels. This integrated approach, within a directorate with an enlarged scope, will guarantee greater efficiency. With 300 staff at headquarters and 2,700 on the coast, we now have an unprecedented strike force serving maritime employment, our companies and the French flag."*

**Éric Banel,**  
Director General for Maritime Affairs,  
Fisheries and Aquaculture

**Do your formulations in your new document entitled "Fostering a new ambition for French shipping", sent to the presidential candidates, therefore sum up the repercussions of the Fontenoy approach? to which Armateurs de France remains particularly attentive?**

**J.-E. S.** The results of the Fontenoy du Maritime process were only a temporary port call for us; we want to go further, and without delay. This is the whole idea of the "new ambition" that we submitted to the presidential candidates. The subject of shipping is still not prominent enough in the key issues, →

1 French Public Investment Bank  
2 Maritime investment certificate  
3 Association of Transport and Freight Users  
4 French Maritime Industry Group

**"WE MUST BE ABLE TO ACCELERATE THE RENEWAL AND GREENING OF OUR FLEET, WHICH IS THE ONLY WAY TO ACHIEVE THE EXTREMELY AMBITIOUS TARGETS SET BY THE IMO AND EUROPE."**

JEAN-PHILIPPE CASANOVA



even though it is of critical importance! Let us remind ourselves that shipping is the backbone of world trade and international logistics chains: it handles nearly 90% of world freight transport and is essential for supply chains. Maritime services also provide high added value for manufacturers and are highly strategic for France. These include, for example, wind energy services, offshore activities, and the laying and maintenance of submarine cables through which 99% of intercontinental Internet traffic passes!

**And what are your expectations of the European Union, for which France has held the presidency since 1 January 2022?**

**J.-M. L.** It is a fantastic opportunity for us, just at a time when Europe is leading several initiatives under its Green Deal or in the employment field. France has already grasped this opportunity at the La Rochelle symposium on maritime employment and skills and at the One Ocean Summit in Brest. The expectations of French shipowners have not changed: prevent distortions of competition with shipowners from other regions of the world, aim for social harmonisation for seafarers between European flags, and help to further the energy transition through sustained funding of research, innovation and the deploy-

ment of industrial solutions that meet new environmental requirements. All these issues deserve a decisive commitment from France, which the French Presidency of the European Union must encourage.

**The International Maritime Organisation (IMO) also regulates your sector, in particular in the area of environmental protection. How do you coordinate these two levels of regulations?**

**J.-P. C.** Armateurs de France is totally committed to the decarbonisation of shipping, but shipowners need to be supported by specific means. Let's not miss this opportunity of our time! This means that we must be able to accelerate the renewal and greening of our fleet, which is the only way to achieve the extremely ambitious targets set by the IMO and Europe.

Over the last ten years, shipowners have stepped up their efforts to reduce their carbon footprint: reduced ship speed, optimised routes, improved hull, bulb and propeller design, electric assistance, recovery of sources of heat and cold, etc. However, the solutions to achieve total decarbonisation are not yet available: there is a need for a technological breakthrough and intensified R&D on alternative fuels (hydrogen, ammonia, etc.).



*"The financing of ships is a key issue for the renewal and development of the French fleet. Today, we have two major concerns: access to equity for shipowners, which is essential for the acquisition of ships, and the additional cost of eco-conversions, estimated at 20% of the price of the ship for a transition technology. The Fontenoy du Maritime initiative has led to a better understanding of these phenomena and several levers have been supported by Armateurs de France. Here, I am referring to the creation of the certificat d'investissement maritime and the improvement of the green over-depreciation scheme, which we are monitoring very closely. In order to meet the needs of all our members, we are also advocating for a mechanism that is complementary to green over-depreciation for shipowners who cannot benefit from it."*

**Cécile Rafat,**  
Head of economic, tax and statistical affairs,  
at Armateurs de France



Pilot boat from the Marseille-Fos station, pictured in front of CMA CGM's Jules Verne

**So does this mean a subtle balance?**

**J.-P. C.** It is essential that the Government accelerate this transition while ensuring that international and European regulations do not penalise the progress made by shipowners and harm European cabotage. As part of the European Green Deal in particular, the European Commission announced in July 2021 its intention to integrate shipping into the European carbon emissions trading system (ETS). However, French shipowners stress that it is essential to ensure that this mechanism guarantees that European fleets are competitive with their non-European competitors. Shipping must therefore be integrated into the ETS in such a way that the system is flexible, consistent and compatible with future IMO market measures aimed at reducing greenhouse gas emissions. Above all, it is imperative to systematically promote the adoption of rules at IMO level, as international regulation will always be more effective than a collection of regional rules stacked upon one another.

**The burning issue today is the conflict in Ukraine. What are the first impacts you can see on the sectors you represent?**

**J.-E. S.** This war has many consequences on our activities and those that worry us the most relate to our crews. First and foremost, their safety is an absolute priority! The seafarers are also facing problems including repatriation difficulties, work contract extensions, salary payment problems... Together with the international shipping community, we are doing our utmost to ensure that seafarers do not become collateral victims of this new crisis. To this end, Armateurs de France is closely following the work of the IMO with regard to the impacts of the conflict on shipping and crews, particularly in the Black Sea and the Sea of Azov. At a special session in early March 2022, →



## Fostering a new ambition for French shipping and maritime services

**Because a competitive merchant fleet is essential to France's strategic independence and economic influence, Armateurs de France proposes a new ambition for the shipping sector. This document, whose main points are listed below, was sent to all the candidates running in the French presidential election.**

### Promote jobs in shipping to provide the French sector with a competitive and relevant flag

This sector relies first and foremost on seafarers who are renowned worldwide for their skills, but whose numbers must be increased. This can only be done within the framework of fair competition between flags and with asserted solidarity between economic players, with the aim of promoting the growth of the French maritime sector.

### Elevate French ports to a position of international excellence

The national port strategy must aim to give France a leading position in international trade as a gateway or hub for Europe, and to contribute to the country's industrial and economic development.

### Strengthen the maritime potential of the overseas territories and communities

France's maritime area is the second largest in the world and covers all the oceans. Its overseas territories hold substantial maritime potential, which must be strengthened to provide new prospects for economic development in these communities.

### Support the ecological transition of shipping

The merchant navy must make considerable investments to meet the targets set by the International Maritime Organisation (40% less CO<sub>2</sub> emissions from ships by 2030 compared to 2008 per tonne transported) and the European Union's Green Deal (55% less by 2030 and net zero carbon by 2050). The sector has strong potential for innovation and adaptation, and must therefore benefit from a regulatory framework and financing suited to its specificities.

this UN body stressed the need to preserve the integrity of maritime supply chains and ensure the safety and well-being of seafarers, notably by designating them as essential workers and guaranteeing their mobility. It also called for the establishment of a Blue Maritime Safety Corridor for the safe evacuation of mariners and ships in high-risk areas. Armateurs de France will remain attentive, for as long as is necessary, to the repercussions of this war on the everyday lives of our seafarers, who must be protected.



*"Shipping is essential for our economy and its actors, who are spearheading its green transformation. Our organisation thus drafted various proposals which were submitted as part of the presidential debate at the beginning of 2022.*

*As I supported them in front of the candidates and their representatives, I noticed that politicians were clearly interested in our sector, whose strategic role was particularly underlined during the Covid crisis. Faced with the stakes of international competitiveness and the challenge of energy transition, we were thus able to make the voice of our members heard and set out our big issues – in terms of training, financing, ecology, and port and overseas territory strategies.*

*This exercise is designed to contribute to embodying, but above all to implementing, a new ambition for French shipping, and which we are preparing to renew after the parliamentary elections."*

**Laurène Niamba,**

Head of institutional relations  
and legal affairs at Armateurs de France

## CONTAINING THE IMPACT OF THE COVID CRISIS

Île d'Aix, Louis Dreyfus Armateurs.

The shipping industry is highly strategic, as illustrated by this cable ship: 99% of intercontinental internet data travels through submarine cables. It is of vital importance to preserve these activities.



The Covid-19 pandemic took an unprecedented toll on the lives of seafarers. In 2020, according to the United Nations (UN), 400,000 seafarers, almost a quarter of the total workforce, were stranded on board ships, unable to be repatriated. In 2021, despite a slight improvement in the health situation, the difficulties linked to the mobility of seafarers persisted and constituted a priority issue for shipowners.





Orange Marine

**T**he United Nations described it as a humanitarian crisis, calling on Governments at its 75<sup>th</sup> General Assembly to grant seafarers key worker status to facilitate their passage across borders and return to their ports of embarkation, or simply to return home at the end of their mission. France was among the first countries to recognise this status for seafarers, and Armateurs de France warmly welcomed this initiative, hoping that it would contribute to improving the fragile situation of seafarers.

#### Key worker status for seafarers

Throughout this critical period, the organisation and shipping companies stepped up their efforts to ensure that crews could change over in optimal safety conditions and to guarantee seafarer well-being: diplomatic negotiations, organ-

isation of flights, maritime hubs, widescale deployment of testing, etc. To do so, it worked closely with the emergency response unit of the *Guichet unique du Registre International Français* (RIF), which proved extremely efficient at this sensitive time. Thanks to the RIF's actions, 15,400 seafarers were able to transit through France, regardless of their nationality or that of their vessel. In addition, Armateurs de France and its member companies signed the worldwide call in the form of a manifesto called the "Neptune Declaration on Seafarer Wellbeing and Crew Change". Signed by more than 800 companies and organisations, the declaration aims to take action through four main actions: recognising seafarers as key workers and giving them priority access to vaccines, establishing gold standard health protocols based on existing

best practices, increasing collaboration between ship operators and charterers to prevent difficulties being exacerbated, and ensuring air connectivity between key maritime hubs. At the beginning of 2021, Armateurs de France also sent a letter to the Minister of Marine Affairs expressing its grave concern about the activity of seafarers and asking her to give them priority access to vaccines. In April, it subsequently wrote to the Prime Minister to again demand priority access to vaccinations for seafarers on ships flying the French flag. The organisation's perseverance bore fruit belatedly, as the French government only included seafarers among the priority groups for vaccination in early May. In the summer of 2021, the entry into force of the health pass led to a new

action by Armateurs de France: another letter addressed to the Minister of Marine Affairs to request, this time, the compulsory vaccination of seafarers in order to anticipate the unequal treatment of unvaccinated seafarers abroad during crew changes. The letter also called for the establishment of vaccination centres in French ports for all seafarers, regardless of their nationality or flag. Here again, this initiative was partly successful: foreign seafarers were able to be vaccinated on French soil. Despite these actions, difficulties persist, the Covid crisis has not let up, and the conflict in Ukraine is also threatening the safety of seafarers. Armateurs de France is therefore not relenting in its efforts.

#### Ferry/cruise sector: an unprecedented crisis!

As key activities of France's foreign trade, cruises, sea crossings and connections between mainland France and islands represent, in normal circumstances, more than 30 million passengers per year. Passenger transport alone accounts for about 20% of European shipping and Europe accounts for almost 25% of the world cruise market<sup>1</sup>. Faced with an unprecedented drop in international tourism due to lockdowns and travel restrictions, the industry experienced a decline of up to 70% in passenger numbers and significant revenue losses. Having been on a strong growth dynamic prior to the pandemic, the cruise market is thus one of →



Inaugurated in 2021, DFDS' Côte d'Opale is the longest cross-Channel ferry

<sup>1</sup> Source: EMSA Covid Report



the hardest hit segments. Ferry and cruise companies have been exposed to geopolitical and health crises for many months. But their determined mobilisation, backed up by the Government, the regional councils and the members of parliament from coastal areas, has made it possible to set up multi-sectoral or ad hoc aid schemes to keep up the pace of ecological transition and innovation. Armateurs de France has strived to make its voice heard at the highest level of the Government to obtain the necessary support from the public authorities to overcome this unprecedented crisis and preserve French employment.

It is also worth underlining the level of solidarity between shipowners. In September 2021, CMA CGM and Brittany Ferries signed a partnership aimed, in addition to making a substantial investment in the ferry company, at developing cross-Channel maritime shipping and sharing experience in the field of liquefied natural gas propulsion. To continue to steer this sector towards a resilient and more sustainable future, at the end of 2021 the Minister of Marine Affairs launched a mission on the economic model of this market to provide the struggling companies with a forward-looking vision of this model.

At the same time, Armateurs de France calls for an ambitious support policy that notably advocates the fight against intra-Community social dumping, the recognition of the excellence of French seafarers and hotel staff, the promotion of France as a destination and the improvement of port fluidity, which has become particularly problematic in view of Brexit. Strengthening the attractiveness of the cruise register and that of Wallis and Futuna, also remains a major issue, about which the organisation has issued concrete proposals. —

## The French president meets seafarers

To mark the closing of the One Ocean Summit, Emmanuel Macron came to meet the crew of the *Salamanca*, the first Brittany Ferries ship propelled by liquefied natural gas, and the venue for the event. Praising the efforts made by the shipping sector during the public health crisis, the president reiterated his support for the company, the leading employer of French seafarers.

"In Nice, at the *Assises de l'économie de la mer* in September 2021, Emmanuel Macron had made me a promise," explains Jean-Marc Roué, Chairman of the Supervisory Board of Brittany Ferries. "He had said to me: 'I will come and meet your seafarers and pay tribute to the courage and commitment that they have shown throughout this pandemic'. And he kept his word. Alongside Jean-Emmanuel Sauvée, Chairman of Armateurs de France, I welcomed



the President who came with Jean-Yves Le Drian, Minister for Europe and Foreign Affairs, Annick Girardin, Minister of Marine Affairs, Jean-Charles Larssonneur, Member of Parliament for Brest, François Cuillandre, Mayor of Brest, and

the First Quaestor, Florian Bachelier. This is a great recognition for our company and its commitment to the energy transition. I thanked him for choosing Brittany Ferries and the *Salamanca* as a partner for the One Ocean Summit."

## The Blue Charter Trophy dedicated to seafarers



The Minister of Marine Affairs presents the trophy to Nolwenn Cazé at the traditional Armateurs de France gala evening

Every year, the Blue Charter Trophy (*Trophée de la Charte Bleue*) rewards a shipping company that has contributed to one or more aspects of sustainability - economic, social, environmental. Given the exceptional nature of 2020, marked by the COVID-19 crisis, Armateurs de France dedicated its 2021 Trophy to the crews, saluting their courage and unfailing commitment in the face of the difficulties caused by the public health crisis.

Nolwenn Cazé, second captain of Orange Marine, designated to represent all the crews, received the trophy from the Minister of Marine Affairs at the annual Armateurs de France gala evening at the end of 2021. After thanking the organisation and its members for this recognition, Nolwenn Cazé added: "I would like to remind everyone that for many seafarers, whatever their nationality, crew changes continue to pose problems today with the pandemic resuming and some

people still encountering difficulties in getting vaccinated. Seafarers are still at the heart of the storm! Governments and national and international maritime organisations must therefore continue their mobilisation on the issue, so that seafarers can at last perform their strategic missions in the best conditions."

To mark this tribute, Armateurs de France made a donation to the *Fédération Nationale des Associations d'Accueil des Marins* (National Federation of Seamen's Associations) to give telephone cards to seafarers to stay in touch with their families. On 25 June, International Day of the Seafarer, volunteers from the 20 Seamen's clubs in France, accompanied by representatives of the trade organisation, handed out these cards to seafarers who were moved by this gesture of solidarity.

<sup>1</sup> Source: Rapport EMSA Covid



SUPPLY CHAIN DISRUPTION:  
THE MOBILISATION  
OF FRENCH SHIPOWNERS



Congestion in the port of Los Angeles: a reflection of the global logistics crisis

The public health crisis caused major disruption to the logistics industry and to freight shipping. The imbalance between the high demand from developed economies for imported goods and the supply of effective transport capacity resulted in higher freight rates.

This imbalance, which affected all modes of transport, was aggravated by certain factors inherent in the crisis: shortage of raw materials, slow-down in production, labour shortfall and congestion in ports, pressure on land transport modes, etc. In this unprecedented context, the French shipping companies CMA CGM and Marfret were quick to react. CMA CGM increased the transport capacity of its fleet by 9.1% between June 2020 and June 2021 and made more port calls in order to ease congestion. It also took the initiative of freezing freight rates for its short sea contracts between September 2021 and January 2022. Marfret pursued a

policy of group investment and commitment to increase its owned transport capacity on its North-South routes. Two 2,500 TEU container ships, the *Douce France* and the *Marius*, have already been delivered. French shipowners also played a more strategic role than ever for France by allocating additional capacity towards metropolitan France and maintaining continuous supplies to French overseas territories despite a drop in the volumes

that were usually carried. To avoid imbalances in the long term, the French shipping and logistics organisations also decided to reinforce by developing and perpetuating relationships based on trust. This intention resulted in the signing of a joint declaration by Armateurs de France and AUTF (Association of Freight Transport Users) in September 2021, witnessed by the Minister of Marine Affairs, Ms Annick Girardin. —



François Soulet de Brugière (AUTF) and Jean-Emmanuel Sauvée (Armateurs de France) sign the joint declaration in the presence of Annick Girardin, at the Assises de la Mer, in 2021



**“Whether they are used to transport raw materials, finished products, or oversized parcels, or to lay the submarine cables that are essential for connecting people, ships play a central role in globalisation.**

Today, a large proportion of green energy is produced offshore with the tremendous growth in marine renewable energy. By disrupting economies and slowing down trade, the public health crisis highlighted the crucial role played by shipping and maritime services. In addition to the 90% of trade represented by maritime transport, 99% of the data exchanges generated by the Internet pass through submarine cables. In our group, we ensured our business continuity while working vigorously for the recognition of seafarers’ essential worker status.

From an economic point of view, thanks to our historical expertise in dry bulk transport, we can offer an analysis of the market over the period. Firstly, this crisis had a very negative impact on the first five months of 2020. The BDI - Baltic Dry Index - indeed fell by half over this period. However, the various stimulus plans introduced by governments around the world then began to trigger an upturn in the economy from the summer of 2020 onwards. This catching up process was strongly amplified in the first three quarters of 2021. Between June and December 2020, the BDI rose by a factor of 2.5 and then by a factor of four between January and September 2021. The significant congestion in China, largely due to anti-Covid measures, is also an important explanation for this rise. However, from October 2021 onwards, the trend was reversed. As the catch-up had been too violent, a strong correction followed, amplified by a drop in activity in some heavy industries. The BDI was divided by four again. This drop in activity in bulk industries became worse again at the end of 2021 with what appears to have been the Chinese government’s desire to both purify the air before the Winter Olympics and limit price rises in certain raw materials.”

**Antoine Person,**  
Executive Vice President of Louis Dreyfus Armateurs group



**“The COVID-19 pandemic resulted in the disruption of global supply chains, with port congestion being the most visible effect in the containerised shipping sector.**

Since mid-2020, the logistics and freight transport industry has been facing a situation of imbalance between effective capacity and very strong demand. This situation continued into 2021.

Faced with this unprecedented situation, shipping lines, and CMA CGM in particular, responded by deploying all the solutions within their power. To serve its clients, CMA CGM increased its shipping capacity by 5.8% in 2021 and its container fleet was also reinforced by 20% compared to June 2020. We adjusted our services, adding Le Havre to the rotation of our flagship Asia-Northern Europe route, in addition to Dunkirk, which was already served. We continue to mobilise additional space allocations between Asia and France, especially for SMEs. In addition, we froze our spot rates between Europe and the French West Indies/Guiana/Reunion/Mayotte from 1 May 2021.

The pandemic thus underscored the need to accelerate the energy and digital transition of our industry. The CMA CGM Group has set itself the goal of being Net Zero Carbon by 2050. Since 2017, CMA CGM has chosen to invest in dual fuel vessels currently powered by liquefied natural gas (LNG). The engine installed on these vessels is also compatible with bio-LNG and synthetic methanes. CMA CGM Group will have a fleet of 44 e-methane ready vessels by the end of 2024.”

**Jacques Gérault,**  
International Advisor for shipping policy at CMA CGM



A photograph of two maritime professionals in a ship's bridge. On the left, a man in a white captain's uniform with gold stripes on his shoulders is smiling. On the right, a woman in a white officer's uniform with gold stripes is also smiling. The background shows the interior of a ship's bridge with various instruments and screens.

# D A R E

## TO EXPRESS CONVICTIONS

Defending French shipping is a matter of working towards the decarbonisation of the sector, attracting, training and retaining talent, and guaranteeing the safety of seafarers and fleets, all in a complex political environment. Here is an update on these different themes.



## THE TEAM AT ARMATEURS DE FRANCE



*"The sea is my passion! It is therefore an honour for me to become part of the French shipping team, this great family which I am so fond of. Shipping is a concentrate of big issues: environment, economics, social affairs, security, geopolitical events, etc., and French shipowners operate at the heart of maritime activities and even at the heart of their domestic and global economies. With the experts at Armateurs de France and its members, we are working at every level to develop the French fleet, one of the youngest, most modern, most diversified, safest, most innovative and cleanest fleets around!"*

**Jean-Philippe Casanova,**  
Managing Director  
of Armateurs de France



From left to right: Agnès Rincé, Head of communications ; Laurène Niamba, Head of institutional relations and legal affairs; Maha Vandewalle, Head of social affairs and training; Philippe Costa, Head of general affairs; Nelly Grassin, Head of quality and technical safety, security, and environmental affairs; Jean-Marc Lacave, former Managing Director; Jean-Philippe Casanova, current Managing Director; Marie-Claire Denicourt, Head of accounting and human resources; Pierre-Antoine Rochas, Technical security, safety and port affairs officer; Mathilde Prete Capasso Torre, Head of European affairs; Cécile Rafat, Head of economic, tax and statistical affairs; Marie-José Gharios, Communications officer.

### A new pilot for the Armateurs de France crew

It is a first in the history of Armateurs de France: since the arrival of the new managing director, there are two seafarers at the helm of the professional organisation. Jean-Philippe Casanova, a maritime pilot, now seconds Jean-Emmanuel Sauvée, the Chairman of the association since April 2020, to defend the interests of shipping and maritime services companies.

### The background of Jean-Philippe Casanova

He succeeded Jean-Marc Lacave as managing director of Armateurs de France in January 2022.

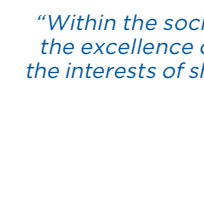
A graduate of the École Nationale de la Marine Marchande (National Merchant Navy Academy), which he began attending in Marseille in 1990, he qualified as Captain 1st Class in Maritime Navigation (C1NM) and started his career as a maritime pilot at the Marseille/Fos pilot station in December 2001. He was elected Secretary General of the French Federation of Maritime Pilots in 2012, a position he held until 2015 before becoming its Chairman until July 2021. He is also a member of the Conseil Supérieur de la Marine Marchande and the Board of ENSM, and participates in IMO sessions as an advisor to the French delegation.

## WHAT OUR MEMBERS SAY



*"The French overseas territories and communities are a source of maritime power. Across all the oceans in the world, they are geostrategic vectors, providing France with a 10.8 million km<sup>2</sup> EEZ<sup>1</sup> that is plentiful in resources that must be protected and harnessed by various economic sectors. The issues of overseas shipowners are continuously relayed by Armateurs de France. The organisation supports us, for example, in signing ships up to the French Flag Register amid fierce competition for transport between islands."*

**Roland Bellemare,** Managing Director – L'Express des Îles



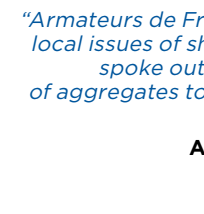
*"Within the social affairs committee of Armateurs de France, we work to maintain the excellence of French maritime training. The organisation perfectly represents the interests of shipowners, particularly with the French Maritime Academy (ENSM), and proves to be a valuable aid in exchanges with this institution."*

**Isabelle Dumas,** Fleet Training Director – Ponant



*"We work hand-in-hand with Armateurs de France to draw up and implement environmental best practices. The proactiveness of the team furthermore enabled Orange Marine to be among the first French companies to be awarded the Green Marine Europe label, which is a great source of pride for us!"*

**Didier Dillard,** Managing Director – Orange Marine



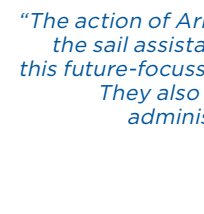
*"Armateurs de France is a valuable intermediary when it comes to representing the local issues of shipping companies at national level. For example, the organisation spoke out on behalf of its members involved in the transport and extraction of aggregates to defend their interests in the public debate on floating wind farms in Southern Brittany, by drafting a stakeholder report."*

**Agnès Garçon,** Mining Resources Officer – Sablières de l'Atlantique



*"Offshore wind farms are developing at increasing speed in France and Europe. We need Armateurs de France to consolidate the competitiveness of our French offerings, be it on technical, environmental or social aspects, and thereby capture our full share of these markets."*

**Loïc Thomas,** President – Thomas Services Maritimes



*"The action of Armateurs de France provides strong support for the deployment of the sail assistance solution among decision makers. Its experts work to promote this future-focussed sector at many events and institutional speaking opportunities. They also provide us with essential assistance in implementing financial and administrative mechanisms suited to the use of wind energy in shipping."*

**Jean Zanuttini,** President – Neoline

<sup>1</sup> Exclusive Economic Zone



As a holder of Quali'OP certification, Armateurs de France constantly ensures it provides high-quality services.



## UNITED TO BETTER PROTECT THE ENVIRONMENT

Armateurs de France is at the centre of synergies to preserve biodiversity, and fight climate change and atmospheric pollution. In spite of a complex public health crisis, it has continued to act on many fronts and its commitment has remained unshakable.

In November 2021, Brittany Ferries took delivery of its first LNG-powered vessel: the Salamanca



**F**or both today and tomorrow, Armateurs de France and its members are more mobilised than ever to develop concrete solutions and reduce the environmental impact of their activities. This is illustrated in two key concerns: reducing greenhouse gas (GHG) emissions and preserving biodiversity.

### The race to zero carbon

According to Armateurs de France, it is at the IMO<sup>1</sup>, the regulatory body for maritime transport and services, that the sector's regulations should be determined, particularly those aimed at reducing the environmental footprint of vessels. Consequently, after adopting the EEDI<sup>2</sup> for new vessels in 2011, the IMO is accelerating the reduction of CO<sub>2</sub> emissions from existing vessels, with two instruments due to come

into force on 1 January 2023: the EEXI<sup>3</sup>, a technical measure, and the CII<sup>4</sup> which focuses on the operational part of the vessel.

To achieve an overall reduction in GHG emissions from vessels, the IMO also aims to introduce a market-based measure such as a levy or ETS<sup>5</sup>, a fuel lifecycle regulation, and another to encourage the use of renewable and low-carbon fuels.

In 2018, the strategy adopted by the IMO was to halve GHG emissions by 2050 compared with 2008. Armateurs de France reiterates that it supports the inclusion of all GHGs in the revision of this strategy to be adopted in 2023. These ambitions are supplemented by those of the European Union and its regulatory package (fit for 55, see Europe chapter page 32).



*"During the One Ocean Summit, many commitments were made before the French President in favour of environmental protection by the shipping and maritime services sector: 22 shipowners signed up to the GME label, the designation of a SECA<sup>6</sup> zone in the Mediterranean in 2025, the submission to the IMO of a PSSA<sup>7</sup> in the Western Mediterranean and the launch of the T2EM<sup>8</sup> MEET 2050 Institute. I welcome this French dynamic which illustrates the commitment of the entire maritime sector to reduce its impact on the environment. While vessel decarbonisation is a priority, we are not forgetting the importance of the issues related to biodiversity."*

**Nelly Grassin,**  
Head of quality and technical safety, security and environmental affairs at Armateurs de France

## 86

LNG-fuelled vessels in operation or on order from French shipowners

First bunkering of bio-LNG in Rotterdam by CMA CGM and Shell



In this context, Armateurs de France represents French shipowners in the various bodies (ECSA<sup>9</sup>, ICS<sup>10</sup>, Permanent Representation of France to the IMO) and ensures that the measures adopted are in line with the specificities of shipping, without overlooking the availability of technologies and fuels at competitive costs. The organisation advises each of its members and regularly convenes them in its environmental committees, where information and best practices are exchanged, in workshops involving representatives of the Administration, and in webinars dedicated to technologies and future fuels. During the One Ocean Summit in Brest, the Government and the maritime sector, brought together under the umbrella of the French Maritime Cluster, launched the MEET 2050 Institute to guide shipowners in the ecological and energy transition of their vessels. Shipowners will not be able to achieve the zero carbon objective on their own. There must be increased collaboration with all the

players in the chain: from shipyards and energy providers to equipment manufacturers, shippers, ports, financiers... everyone must join forces! (See quote from Frédéric Pouget page 26).

The institute will assist shipowners in their technological choices: which energies and technologies, which storage and supply, at what cost and for what efficiency? Shipping companies are facing a major environmental challenge and need to be supported!

### Green Marine Europe

Already in 2021, eleven shipowners<sup>11</sup> signed up to Green Marine Europe (GME), a voluntary European certification programme. It is aimed at improving the environmental performance of ships based on eight criteria, among which pollutant and GHG emissions, underwater noise, invasive species, management of waste and oil discharges, and ship recycling. To keep their label, shipowners are required to demonstrate progress on these criteria from one year to the next. →

1 International Maritime Organization  
2 Energy Efficiency Design Index  
3 Efficiency Existing Ship Index  
4 Carbon Intensity Indicator

5 Emissions Trading System  
6 Sulphur Emission Control Area  
7 Particularly Sensitive Sea Area  
8 Coalition for the Maritime Environmental and Energy Transition

9 European Community Shipowners' Associations  
10 International Chamber of Shipping

11 Brittany Ferries, Corsica Linea, Ifremer and its subsidiary Genavir, La Méditerranée, Orange Marine, Socatra, Penn Ar Bed, Maritima, Maritime Nantaise, Ponant, Sogestran Shipping





*“Shipowners cannot order a zero-emission vessel on their own! They are neither manufacturers nor design offices and they do not have the capacity to invest massively in R&D and demonstrators. They must therefore work as a team with all the maritime manufacturers. The T2EM Institute and its programme ‘Zero Emission Vessels and Ports’ enables this collaboration: by building on an academic, scientific and industrial foundation and by analysing the data provided by shipowners, it will create consortiums articulating the various initiatives and consolidate them by mass-developing the solutions. Finally, it will represent the voice of French shipping towards political decision-makers.”*

**Frédéric Pouget,**  
Group Maritime Director  
at Brittany Ferries

# 22

French shipowners  
applying to be members  
of GME in 2022.



Having been deeply involved in the creation of this label, Armateurs de France is now working to develop and promote it. The organisation strongly believes in the importance of dialogue with environmental NGOs and the entire maritime industry to successfully achieve an ecological transition in maritime transport and services.

The organisation also sits on the Board of Administration of the Ocean & Climate Platform, a coalition committed to the preservation of the oceans, climate and biodiversity, and which promotes the label. Spearheaded by Surfrider Foundation Europe, GME is a label created by and for the industries, making it a powerful initiative. Robust and ambitious, it guides shipowners in their daily work and highlights their positive impact initiatives: integration of wind, LNG powered vessels, speed reduction, particulate filters, reduction of underwater noise, etc. Armateurs de France actively contributes to the revision of the label's criteria, and also takes part in the development and

steering committees to support its members in the process.

In the belief that it is important to involve all stakeholders, Armateurs de France also held a lecture with Surfrider Foundation Europe at the World Impact Summit in Bordeaux in December 2021. The aim here was to raise public awareness of the environmental challenges of shipping and to encourage shippers to sign up to GME.

During the One Ocean Summit in Brest, GME announced eleven new candidates applying to receive the label in June 2022: CMA CGM, Manche Îles express, Compagnie Polynésienne de transport maritime-Aranui cruises, Express des îles, Îliens, Louis Dreyfus Armateurs, MSC Croisières, Plastic odyssey, SPM Ferries, Stena line and TOWT. As a first step in its European development, GME is also getting involved in the environmental proactivity of the entire maritime sector (labelling of shipyards), following the example of Green Marine, the North American label of which it is the European version.



Ponant's *Commandant Charcot* is the first hybrid electric polar exploration vessel, and is powered by LNG



The *Piana* and the *Kalliste*, La Méditerranée, the first shipping company in the Mediterranean to adopt electrical shore-to-ship connections in Marseille

## Wind for Goods

Available all over the world, free of charge and GHG-free, wind is an energy just waiting to be harnessed! While it is not a new energy, it has been renewed and adapted. The technologies are available and French shipowners are already willing to power their vessels with wind. This could be witnessed at the Wind for Goods event, organised in September in Saint-Nazaire by Nantes Saint-Nazaire Développement in partnership with the Wind ship Association and supported by Armateurs de France. The aims of this day were to discover the concrete solutions and innovations that contribute to the decarbonisation of shipping, and to discuss the key issues of this very dynamic sector in France.



Wisamo, an inflatable, retractable and automated wing sail, will be tested on the Compagnie Maritime Nantaise's ro-ro container ship *MN Pélican*

## Acting for biodiversity

As a cornerstone of the GME label, the preservation of biodiversity is a central concern for French shipowners, particularly as signatories of the Blue Charter, through which they undertake to provide responsible maritime transport and services. In 2021, Armateurs de France, together with government officials and IFAW<sup>1</sup>, developed infographics to explain how shipping, which generate underwater noise, impact sea mammals. These tools also describe the commitments and efforts made by shipowners to reduce this impact. Furthermore, as a member of the French underwater noise community, the organisation participated in the national seminar on underwater noise in the Mediterranean last September in Toulon. Armateurs de France is also closely following the ongoing revision of the 2014 IMO guidelines to ensure that effective and accessible mea-

sures are put in place for shipowners. A recent but notable project is QWIO<sup>2</sup>, a project by the Wildlife Conservation Society to study and reduce the effects of underwater noise from ships on marine species in the Western Indian Ocean. Accompanied by the organisation, three shipowners - Boluda, Socatra and Ponant - decided to join the project and measure the acoustic impact of their activities in this area. The preservation of biodiversity occasionally requires the establishment of particularly sensitive sea areas to avoid collisions with cetaceans. Such is the case in the western part of the Mediterranean Sea. Together, France, Monaco and Italy will submit a designation proposal to the IMO in December 2022. Armateurs de France will seek to ensure a global approach to the consequences of such a specification and the establishment of binding measures for vessels. —

<sup>1</sup> International Fund for Animal Welfare  
<sup>2</sup> Quiet Western Indian Ocean



## STIMULATING SOCIAL DIALOGUE

Maintaining healthy industrial relations is an issue that features high up on the Armateurs de France agenda. As a leading figure in collective bargaining, the organisation gave fresh impetus in 2021 to the reorganisation of maritime occupational branches, and played a decisive role in the exchanges conducted on workplace accidents and occupational illnesses.



**A**rmateurs de France was once again declared the only employer organisation to be representative in the sector's three branches: officers, ratings and sedentary personnel - as confirmed by ministerial orders published at the end of 2021. This recognition means that Armateurs de France can continue to negotiate and conclude collective bargaining agreements in these professional branches. Building on this possibility, it aims to be proactive in the work initiated to merge the branches.

### Bringing branches together: a true challenge

Initiated in 2015, the plans to merge branches in France aim to streamline a particularly fragmented collective bargaining landscape. The goal is to move from approximately 700 branches to 100 in the space of

10 years. While the Employment Act (*Loi Travail*) of 8 August 2016 offered a significant boost, the first ministerial order on mergers published in 2017 led to about 30 collective bargaining agreements merging into one. On 5 June 2019, a legal opinion was published on the merging of the collective bargaining agreements of the operating personnel of maritime transport and services companies, tugboat companies and waterway services. Following the issuance of this opinion, a representative trade union from the waterway branch exercised its right to object, so no order was published. The COVID-19 health crisis also slowed down the process. However, reducing the number of branches is still an important objective and the Directorate-General of Labour (*DG Travail*) wishes to continue to bring them together. Consequently,

Armateurs de France took the initiative of convening the social partners to negotiate an agreement on merging the collective bargaining fields, the idea being to achieve a merger that is concerted rather than imposed. The task is substantial: the social partners of the merged branches have five years to harmonise their respective collective bargaining corpuses without departing from the law as it stands, and while maintaining the specific features of each agreement. In so doing, they must create a single collective agreement, since otherwise one of the existing agreements will apply. During this period, however, the collective bargaining agreements remain in force.



*"On 9 February 2022, a symposium was held on employment and skills in the European shipping sector. This event, presented as part of the Fontenoy du Maritime consultation discussions, was very well received by Armateurs de France. The main issue is to restore fairer competition between European flags. We are expecting a lot to come out of this: limiting social dumping, achieving Europe-wide convergence in social matters, laying down key principles regarding social standards, and harmonising European training standards. We are now hoping for concrete measures and remain fully mobilised on these issues."*

**Maha Vandewalle,**  
Head of social affairs and training  
at Armateurs de France

All the parties involved in the merger have asked the Directorate-General for Labour for a reasonable period of time to negotiate. Nevertheless, the exchanges have slowed down in recent months, due to the lack of a response from the Administration and pending the publication of the orders on trade union representativeness in the *Journal officiel*. These decrees are essential, since they set the rules for the participation of employee unions in collective bargaining. They were eventually published in 2022, releasing the social partners from their state of limbo and allowing them to resume the talks that has been suspended.

### Priority on concertation

Armateurs de France remains heavily invested in collective bargaining at branch level. In particular, it has raised the compensation of union representatives sitting on joint committees by concluding a dedicated agreement in the three branches it represents. These representatives must be given support to ensure the best possible environment for dialogue. In addition, the branches have been involved for several months in an Employment and Skills Development scheme with the support of OPCO Mobilités. Under this programme, they have already received a comprehensive diagnosis of the shipping sector. Finally, the sedentary personnel branch has just signed an agreement on teleworking following many months of discus-

sions. Reinforced and deployed as a matter of urgency during the lockdown, teleworking is a work organisation method that the social partners wanted to regulate. This has finally become a reality.

### Best preventing occupational risks

In September 2021, Armateurs de France took part in a joint working group on the introduction of a branch logic in the workplace accident and occupational illness regime (*AT-MP* in French) for seafarers. Chaired by Philippe Laffon, Inspector General of Social Affairs, this group did not reach a consensus on the need to build a workplace accident and occupational illness branch on the model of land-based or agricultural activities, but gave priority to the deployment of preventive actions. The shipping sector suffers from deficiencies in this area. Moreover, public subsidies are minimal, and the actions carried out could be better coordinated. The report issued at the end of this work includes the following proposals: increase the involvement of the ENIM<sup>2</sup> in prevention actions, allocate an additional budget to finance them and appoint the social partners to the ENIM's Board of Directors to steer them.

The organisation is in favour of developing a solid policy of occupational risk prevention, for the sole benefit of the health of seafarers and in the interest of shipowners. It has every intention of contributing to this effort. —

### Sexual harassment and violence: time for action!

In every sector of activity, sexual harassment and violence against women continue to exist, and the shipping industry is unfortunately no exception. Armateurs de France has decided to fully commit itself to combating this violence in the hope that this work will lead to the implementation of concrete actions. It will therefore be leading, together with a trade union representative, a joint working group set up by the Maritime Administration. It will also dedicate part of its social day to awareness-raising and prevention against these abuses. Finally, it supports the proposals made by the IMO on the subject, convinced that it is necessary to act quickly and decisively to put an end to this violence.

<sup>1</sup> Source: report published by Mr. Philippe Laffon, Chairman of the working group on the AT-MP branch  
<sup>2</sup> Établissement National des Invalides de la Marine / Seafarers' Health Service

# 100%

The rate of representativity of Armateurs de France in the sector's three branches

# 18%

The drop in occupational illnesses between 2016 and 2019<sup>1</sup>



## SECURITY AND SAFETY COMMITTED TO EXCELLENCE

In close collaboration with its partners in France and abroad, Armateurs de France continues its unwavering commitment to maritime safety and security. It unites its members around the sharing of best practices and the search for new solutions.

The French navy's amphibious helicopter carrier Dixmude, on a Corymbe 156 mission in the Gulf of Guinea



*"The French Navy-Shipowners Meeting illustrates the close ties between the two navies and their commitment to work together for a safer shipping world. It brings together representatives of all French shipping companies as well as various components of the French Navy (EMO Marine<sup>12</sup>, CECLANT<sup>13</sup>, MICA Center). Over the course of a day of talks and visits, the event provides participants with the opportunity to engage in high-level exchanges on the most topical issues. In 2021, we dedicated the meeting to improving mutual knowledge with regard to the fight against drug trafficking and to consider new synergies in information sharing and training."*

**Pierre-Antoine Rochas**,  
Technical, security, safety and port affairs officer at Armateurs de France

This special relationship is very valuable to French shipowners. It is also illustrated by the increased sharing of feedback and the strengthening of mutual knowledge, through numerous theme-based meetings with, as a highlight, the French Navy/Shipowners Meeting organised in Le Havre in November 2021 (see quote from Pierre-Antoine Rochas).

Armateurs de France also works actively alongside the CSM<sup>3</sup> and with its institutional partners (ICS<sup>4</sup>, ECSA<sup>5</sup>, etc.) by making the voice of French shipping heard.

### Cyber security: reinforced support

Like any business sector, the maritime industry is facing growing numbers of cyber threats. Company headquarters and port infrastructures are exposed to ransomware, phishing and identity theft, and ships to AIS<sup>6</sup> and GNSS<sup>7</sup> jamming. Strengthening the protection of operational and information systems is essential: it is a strategic issue for this high value-added sector of activity.

Armateurs de France supports the maintenance of a regulatory framework adapted to the specificities of

shipping and supports its members in bringing their ships into compliance with the IMO<sup>8</sup> regulations that came into force in early 2021. The organisation also represents shipowners within C2M2<sup>9</sup> and the association France Cyber Maritime.

Similarly, in collaboration with its associate members (Bessé, PwC), it organised a dedicated webinar and workshop in 2021, while contributing to the production of an ANSSI<sup>10</sup> publication for decision-makers in the sector.

### Maritime regulations

Active on all fronts, Armateurs de France assists its members in matters of regulatory compliance and represents them at the Central Safety Commission, which examines proposals for ships flying the French flag. At the same time, it participates in the regulatory review work led by the Administration, to adapt its requirements to technical developments and the emergence of new operational constraints. Such was the case for the deployment of a passenger travel data collection system for maritime transport (PNR-M<sup>11</sup>) or the repair in France of ships powered by LNG. —



*"French shipowners have increased their requests for assistance from their institutional and military partners. Despite fewer attacks at the end of the year in the Gulf of Guinea, the threat is still present, and merchant ships continue to maintain a high level of vigilance."*

**François Morizur**,  
Group Security Director  
at Bourbon

**C**onsolidating synergies with the French Navy and the Ministry of the Armed Forces remains a priority for Armateurs de France. And for good reason: last year, there were once again many threats to ship security: theft at anchor in South-East Asia, security issues in the Mozambique Channel, piracy and robbery in the Gulf of Guinea, with a peak in seafarer kidnappings in early 2021.

### Seafarer security: an absolute priority

The organisation advocates a stronger naval presence in the Gulf of Guinea and deeper regional, European and international military cooperation. It welcomes the commitment of new European naval resources in the framework of the coordinated maritime presence, which must now be made permanent. At the same time,

there must be greater communication of information on the location and use of the resources deployed by France to combat piracy.

Maritime intelligence and information sharing play a key role in preventing threats. Armateurs de France is a committed partner of the MICA Center<sup>1</sup> and its teams, and thank them in particular for their initiatives for the benefit of French and foreign shipowners. The strengthening of voluntary naval cooperation<sup>2</sup> and the widening of the scope of illegal activities monitored are also new synergies that provide the basis for closer collaboration between the merchant navy and the French Navy, particularly during major crises such as the Ukraine-Russia conflict, which is having a major impact on shipping traffic in the Black Sea at the time of writing.

**71**  
seafarers kidnapped  
in the Gulf of Guinea

**317**  
acts of piracy and robbery  
reported worldwide,  
a decrease of 15.5%  
compared to 2020

2021 report, MICA Center

1 Maritime Information Cooperation & Awareness Center  
2 "Voluntary Naval Cooperation" (CNV in French) deploys cooperation between private operators and the French Navy to enable the exchange of information on maritime security

3 Defense coordinator for maritime security  
4 International Chamber of Shipping  
5 European Community of Shipowners' Associations  
6 Automatic Identification System

7 Global Navigation Satellite Systems  
8 International Maritime Organisation  
9 French Cyber Council for the Shipping World  
10 National Agency for Information System Security

11 Passenger Name Record Maritime  
12 Navy Operation Command  
13 Chief Commander for the Atlantic



## ECOLOGICAL TRANSITION EUROPE STEPS UP A GEAR

The European Union has introduced a comprehensive legislative package aiming to give structure to the low-carbon transition and the modernisation of its merchant navy fleet. This translates into significant progress in the areas of environment and sustainable finance.



Wind of Hope, Louis Dreyfus Armateurs, an innovative and hybrid offshore windfarm support vessel offering 15% lower CO<sub>2</sub> emissions

**A**rmateurs de France plays an active part in European institutional activities to protect the competitiveness of the different sectors it represents.

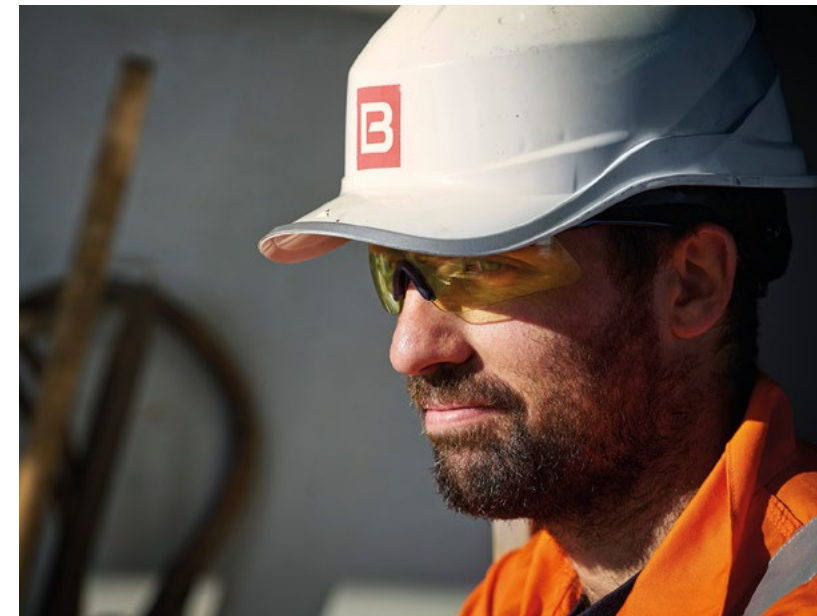
### Rising to the climate challenge

On 14 July 2021, the European Commission published its *Fit for 55* package of legislative proposals to accelerate the fight against climate change and put the European Union on the road to net zero carbon. This set of regulations implements the objective of the Climate Law adopted by the Council in December 2020, which aims to reduce net emissions by 55% by 2030 compared to 1990 and achieve carbon neutrality by 2050. Among the major initiatives impacting shipping, Armateurs de France is keeping a close eye on the revisions of the ETS<sup>1</sup> directive, those on renewable energies and energy taxation, and the introduction of a regulation to facil-

itate access to alternative fuels: FuelEU Maritime.

Strongly committed to the ecological and energy transition, the organisation supports all the objectives pursued and is mobilising to find international solutions that comply with the principle of technological neutrality, guarantee a general harmony between the various legislative texts in the package, and provide access to the funding that is essential for the greening of vessels. Another point of increased vigilance: the timetable for implementing the measures must take into account the availability of technical solutions and alternative fuels.

It is essential, for example, that the European Union articulate the *Fit for 55* package in such a way that a review clause for the regulatory objectives defined can be aligned with the objectives adopted by the IMO<sup>2</sup>. This clause should also make it



Bourbon



*"Armateurs de France uses its power of influence with national and supranational bodies to address European issues. We are very involved at European level and are a driving force for new proposals within the working groups and executive committees of ECSA<sup>5</sup>, the European body that brings together the national shipowners' associations. Once again this year, we held regular meetings with the MEPs of the French delegation to the European Parliament and with the heads of the French permanent representation in Brussels."*

**Mathilde Prete Capasso Torre**,  
Head of European Affairs  
at Armateurs de France

possible to analyse the effects of this regional decision on how European shipowners are treated elsewhere in the world.

As disruptive solutions for shipping are not yet available, Armateurs de France considers it essential that emission reductions achieved by each fuel type be calculated over the full life cycle, and that all texts pursue the principle of technological neutrality. Indeed, innovations require R&D&I<sup>3</sup> to be conducted into technological performance and scalability. The development of hybrid solutions and synthetic fuels is therefore essential. Other, more operational measures such as reducing the speed of certain vessels<sup>4</sup>, also constitute an immediately applicable low-carbon solution. These measures should also be used as incentives in funding decisions.

is also expected that specific funding windows will be created, devoted to the energy transition of vessels on a European scale. In short, European shipowners are asking for support for R&D&I, technology deployment and investment to renew and develop their fleets. The targeting of funding will also have to respect the alignment with the IMO trajectory of greening criteria, the principle of technological neutrality and ensure a fair competition framework for the different sectors of activity, as provided for in the taxonomy regulation. —

### Funding the transition

Finally, any ambitious legislation must be backed up by an appropriate investment financing policy. This is why part of the revenue generated by maritime transport and services under the ETS must be channelled back into the sector to help finance innovation projects. It

### The French presidency of the European Union

As part of its activities in 2021, Armateurs de France drew up a roadmap to target and outline the main expectations of French shipowners in view of the French Presidency of the Council of the European Union. These recommendations include redesigning an intra-European competition policy that ensures a level playing field and international competitiveness; turning the Green Deal legislative framework into an opportunity by supporting the financing of an environmentally friendly European fleet; and seeking to introduce a policy that ensures long-term stability for all legislative initiatives dealing with maritime activities.

1 Emission Trading System  
2 International Maritime Organisation  
3 Research, development and innovation

4 Vessels in the bulk shipping segment  
5 European Community of Shipowners' Associations

### The European shipping fleet in figures

**23,400**  
vessels

**2 million**  
direct and indirect jobs

**39.5%**  
of the world fleet in terms of gross tonnage

The Economic Value of the EU Shipping Industry, 2020, Oxford Economics



# 425 SHIPS UNDER THE FRENCH FLAG

## Transport fleet: 192 ships

SHIP TYPE	Quantity	GT <sup>1</sup>	DWT <sup>2</sup>
CARGO	15	31,084	20,930
CEMENT CARRIER	2	4,823	6,050
PASSENGER SHIP	16	9,035	2,644
SCIENTIFIC RESEARCH AND EXPLORATION VESSEL	1	9,403	4,871
CRUISE SHIP	16	172,253	23,605
OIL TANKER	32	1,761,794	3,343,267
CONTAINER SHIP	32	3,650,703	3,600,432
RORO SHIP	20	149,118	65,544
FERRY	47	823,063	156,410
LNG TANKER	11	838,352	661,236

## Service fleet: 233 ships

SHIP TYPE	Quantity	GT <sup>3</sup>
BUOY TENDER	9	3,193
CABLE LAYER	12	115,903
DREDGER	14	35,517
OFFSHORE SERVICE VESSEL	55	137,078
TRAINING SHIP	2	1,081
PILOT BOAT	1	499
RESEARCH VESSEL	5	12,004
TUG BOAT	117	59,357
SAND DREDGER	5	10,596
MARITIME WORKS SUPPORT VESSEL	13	3,294

Source: Merchant Fleet Mission - January 2022  
1 Gross tonnage above 100 UMS (Universal Measurement System)  
2 Deadweight tonnage  
3 Source: French maritime Pilots Federation

# THE MEMBERS OF ARMATEURS DE FRANCE

ABCRM • AGENCE MARITIME DE L'OUEST • ALCATEL SUBMARINE NETWORKS • ALKA MARINE SOLUTIONS • ARMATEURS CALÉDONIENS • BESSÉ • BOLUDA FRANCE • BOURBON OFFSHORE SURF • BRITTANY FERRIES • CARIBBEAN LINE • CATLANTE CATAMARANS • CCI BAYONNE • CEDRE • CMA CGM • COMITÉ MARSEILLAIS DES ARMATEURS DE FRANCE • COMPAGNIE ARMORICAINE DE NAVIGATION • COMPAGNIE POLYNÉSIENNE DE TRANSPORT MARITIME • CONSEIL DÉPARTEMENTAL DE CHARENTE-MARITIME • CONSEIL RÉGIONAL DE BRETAGNE • CORSICA FERRIES • DFDS SEAWAYS • DRAGAGES, TRANSPORTS ET TRAVAUX MARITIMES • EXPÉDITION 7<sup>e</sup> CONTINENT • EYSSAUTIER • FÉDÉRATION FRANÇAISE DES PILOTES MARITIMES • FILHET ALLARD • FIMAR • FRANCE LNG SHIPPING • GASPE • GAZOCEAN • GENAVIR • GEOGAS MARITIME • GREEN SHIPPING HOLDING • GREENSHIP GAS • GROUPE LHD • HELVETIA ASSURANCES • HFW • INGEPAR • IX BLUE • JIFMAR OFFSHORE SERVICES • KARIBS LINK • KNUTSEN LNG FRANCE • LA MÉRIDIONALE • LD BULK • LES ABEILLES INTERNATIONAL • L'EXPRESS DES ÎLES • LOUIS DREYFUS ARMATEURS • MARFRET • MARITIMA-SOGESTRAN • MARITIME NANTAISE • MEDLINK PORTS • MERCERON TP • NEOLINE • ORANGE MARINE • PENN AR BED • PILOTES DE DUNKERQUE • PILOTES DE LA GIRONDE • PILOTES DE LA LOIRE • PILOTES DE LA SEINE • PILOTES DE NICE/CANNES/VILLEFRANCHE • PILOTES DES PORTS DE MARSEILLE ET DU GOLFE DE FOS • PILOTES DU HAVRE/FÉCAMP • PLASTIC ODYSSEY EXPEDITION • PONANT • PWC PARTNER • SEAOWL FRANCE • SEAOWL MARINE • SGS FRANCE • SOCATRA • SOCIÉTÉ DE TRANSPORTS FLUVIO-MARITIMES DE L'OUEST • ST MANAGEMENT • SUDILES • SYNDICAT PROFESSIONNEL DU LAMANAGE DES PORTS DE LA MANCHE, DE LA MER DU NORD ET DE L'ATLANTIQUE • THOMAS SERVICES MARITIMES • TOTALENERGIES • TOWT - TRANSOCEANIC WIND TRANSPORT • V.SHIPS FRANCE • ZÉPHYR & BORÉE

8.6 years  
Average age  
of the French  
shipping fleet

15.5 years  
Average age  
of worldwide fleet

100  
pilot boats<sup>1</sup> also  
under the French flag

1<sup>st</sup>  
all-electric zero  
emission pilot boat  
in the world, flying  
the French flag,  
launched in Sète  
in April 2022





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