



The Port of Le Havre

HAROPA PORT – Major River-Sea Port, Seine Axis

The Port of Rouen

2024–2025 Activity, Competitive Positioning and Outlook

F. Levesque

Engineer

CESAM Average Surveyor in Le Havre

Court-Appointed Expert, Rouen Court of Appeal

Court-Appointed Expert, Douai Administrative Court of Appeal



Executive Summary

Le Havre — now integrated into the unified HAROPA PORT grouping (Le Havre, Rouen and Paris, merged since June 2021) — remains France's leading container port and its second largest by overall tonnage, behind Marseille. 2025 activity confirms moderate but genuine growth: 84.7 Mt of maritime traffic (+2%) and a historic level of 3.2 million containerised TEU (+4%), following an exceptional rebound of +18.7% in 2024. The port is investing heavily (€190M in 2025, with more than €1bn programmed for 2026-2030) and is diversifying its model toward decarbonised energy (offshore wind, hydrogen, e-fuels).

Against Rotterdam, Antwerp-Bruges and Hamburg — whose combined tonnage remains three to five times higher — Le Havre remains a port facing growth challenges at the scale of the Hamburg-Le Havre range. The main short-term risk is not cyclical but structural: the reshuffling of shipping alliances (Gemini, Premier Alliance) is reducing direct calls by the largest container ships at Le Havre, as at Marseille, in favour of the Northern hubs.

1. Context and scope: what is “the port of Le Havre” today?

Since 1 June 2021, the Grand Port Maritime du Havre has merged with those of Rouen and Paris to form HAROPA PORT, a single entity that now publishes consolidated statistics for the entire Seine axis. Formally, there is therefore no longer a separately published “Le Havre only” statistic.

In practice, this consolidation barely changes the economic reading: Le Havre is the group's deep-sea maritime frontage and accounts for almost all of the containerised traffic and seaborne cargo (Rouen being oriented toward grain and bulk exports, and Paris toward river-based and urban logistics for the Île-de-France region). Le Havre's own economic development agencies present HAROPA's overall figures as those of “the port of Le Havre”. This is the convention adopted in this study: the figures cited below are HAROPA PORT's, to be read as representative of Le Havre's activity.

2. 2024 Activity

Indicator	2024	Change vs 2023
Total maritime traffic	83.19 Mt	+2.4%
Seaborne containers	3.1 M TEU	+18.7%
of which transshipment	—	+56%
Rail containers	120,000 TEU	record
River containers (Île-de-France)	220,000 TEU	—
Liquid bulk	39.97 Mt	-5.1%
of which crude oil	19.4 Mt	-1.5%
of which refined products	15.3 Mt	-6.3%
Dry bulk	11.75 Mt	-7.5%
of which cereals	7.08 Mt	-4%
Ro-Ro (vehicles)	272,563 units	+5.6%
Cruise	206 calls / 512,784 passengers	+13.2% / +11.6%
Revenue	€437M	+3.6%
Investment	€146M	+29%

2024 was a year of marked rebound for containers (+18.7%), driven by the recovery from global logistics disruptions and a strong surge in transshipment (+56%). Conversely, liquid and dry bulk declined, penalised by a mediocre 2024 grain harvest and a downturn in refining activity. Half of the investment (€73M) was already directed toward the ecological transition.

3. 2025 Activity

Indicator	2025	Change vs 2024
Total maritime traffic	84.7 Mt	+2%
Seaborne containers	3.2 M TEU (record)	+4%
of which hinterland	2.3 M TEU (record)	+4%
of which transshipment	—	+2.4%
Rail containers (Le Havre)	145,000 TEU	+18%
River containers (Île-de-France)	stable	+1%
River + rail modal share	20.3%	+0.6 pt
Dry bulk	12.92 Mt	+10%
of which cereals	7.36 Mt	+4%
of which sand/gravel/aggregates	—	+30%
Liquid bulk	39.7 Mt	stable
of which crude oil	20.38 Mt	+5%
of which refined products	—	-9%
Ro-Ro (vehicles)	242,000 units	-9.2%
Cruise	205 calls / 476,205 passengers	≈-0.5% / -7%
Revenue	€435M	≈stable
Investment	€190M	+30%

2025 confirms the growth trajectory without repeating the exceptional container surge of 2024: growth normalised (+4%) but still reached a historic level. Dry bulk benefited from a good grain harvest and sustained demand for aggregates (construction), while Ro-Ro vehicle traffic fell sharply (-9.2%), reflecting a sluggish European car market. Investment continued to accelerate (+30%), confirming a strategy of moving up the value chain rather than a pause after the 2024 peak.

4. Le Havre against its European competitors

Le Havre belongs to the “Hamburg-Le Havre range”, the North European port frontage running from the Elbe to the English Channel, grouping the major sequential ports of North-West Europe. Compared with these ports, as well as with its main French rival Marseille-Fos, Le Havre remains a player in a sensitive position by tonnage, but a significant container port on the French scale.



Port	2024 Tonnage	2025 Tonnage	Δ Tonnage	2024 TEU	2025 TEU	Δ TEU
Rotterdam	435.8 Mt	428.4 Mt	-1.7%	13.8 M	14.2 M	+3.1%
Antwerp-Bruges	278.0 Mt	266.5 Mt	-4.1%	13.5 M	≈13.6 M	+0.7%
Hamburg	111.8 Mt	114.6 Mt	+2.6%	7.8 M	8.3 M	+7.3%
Le Havre (HAROPA)	83.19 Mt	84.7 Mt	+2%	3.1 M	3.2 M	+4%
Marseille-Fos	70.6 Mt	74.0 Mt	+5%	1.45 M	1.45 M	stable

Three lessons emerge from this table. First, in tonnage, Le Havre remains far behind the range's three giants: Rotterdam weighs more than five times its volume, Antwerp-Bruges more than three times, and Hamburg still 35% more. Second, in 2025 both Rotterdam and Antwerp-Bruges declined in total tonnage (-1.7% and -4.1% respectively), a sign of a weakened European industrial and petrochemical base, whereas Le Havre and Marseille-Fos grew, buoyed by profiles less dependent on heavy oil/petrochemical bulk. Finally, on containers specifically, Hamburg saw the strongest growth of the period (+7.3% in 2025, driven by China, Malaysia and India), while Antwerp-Bruges lost range market share, falling from 30.6% in 2024 to 29.3% in 2025 (-1.2 point).

The Mediterranean and extra-European context

The repositioning of global maritime trade since the Red Sea crisis (Houthi attacks, diversions via the Cape of Good Hope since late 2023) and the introduction of the European maritime carbon tax (EU-ETS) in 2024-2025 have had a redistributive effect on traffic toward less-regulated or non-EU ports: British ports (Felixstowe, Southampton, London Gateway) have shown growth of around 300% since late 2023, while Egyptian, Turkish and Israeli hubs have also captured transshipment traffic. Conversely, Piraeus (Greece) lost nearly 27 points of market share in TEU-miles between 2023 and 2025. This underlying trend weakens EU ports as a whole, Le Havre included.

5. Shipping lines and carriers serving Le Havre

HAROPA PORT highlights a broad shipping offer: around 45 shipping lines operate at Le Havre, with connections to more than 670 ports worldwide and nearly 2,800 recorded service offerings (direct and transshipment lines combined). The port does not, however, publish an official breakdown of container traffic by carrier. That said, the following general trends stand out.

CMA CGM holds a structurally dominant position there: the French carrier, whose GMP/Terminal de France group is a shareholder in Port 2000's main terminal, has made Le Havre its historic home port in Northern Europe and deploys the bulk of the Ocean Alliance's lines (CMA CGM, COSCO, Evergreen, OOCL) to Asia from there.



MSC, which has become the world's largest carrier and left the 2M alliance in 2025, now operates a significant and growing offer solo, notably via the Terminaux de Normandie/TPO, in which the group is an investor (through TiL, its terminal subsidiary). Maersk and Hapag-Lloyd, united since February 2025 within the Gemini Cooperation, remain present but are progressively reducing direct calls by their largest container ships in favour of feeder links from Rotterdam and Antwerp (see section 7). As compensation, Le Havre has gained several additional weekly, lower-capacity services to Asia and the United States. The Premier Alliance (ONE, HMM, Yang Ming), formed after the 2025 alliance reshuffle, rounds out the offer with a more limited number of calls announced for 2026. In total, these four groupings (Ocean Alliance, MSC, Gemini, Premier Alliance) cover almost all of the 3.2 million TEU handled in 2025, the remainder being carried by regional or specialised carriers (intra-European feedering, African lines, etc.).

A strong signal of Le Havre's anchoring in MSC's strategy emerged in the summer of 2026: the Swiss carrier confirmed the transfer of its French head office, currently in Puteaux, to Le Havre, into a new 10,000 m² building across 8 floors near the Bassin de la Citadelle (estimated for 2028). This is MSC's way of making

6. The terminals of the port of Le Havre

The port of Le Havre comprises two main geographical areas: the historic docks, close to the city centre, and Port 2000, the deep-water extension built to the south of them, in the Seine estuary, and commissioned in 2006.

Port 2000 concentrates the bulk of deep-sea container traffic: 4.2 km of quays and around ten berths, split between the Terminal de France (operated by GMP, a group linked to CMA CGM) and the Terminaux de Normandie/Terminal Porte Océane – TPO (operated by TiL, MSC's terminal subsidiary). It is this area, capable of receiving one giant container ship per day, that has enabled Le Havre to receive vessels of more than 20,000 TEU. Between Port 2000 and the historic docks lie the Terminaux Nord (the Atlantique, Amériques and Europe quays, operated by the Générale de Manutention Portuaire), older but still active in container and bulk handling. The historic docks themselves (Vauban, Eure, Commerce, Paris-Vatine, Citadelle, Roi, Barre, Manche, Bellot, etc.) today mainly host leisure boating, local bulk activity and the port's specialised terminals: the Ro-Ro terminal for vehicles, the multimodal terminal (LHTE) which handles rail/river transshipment, the Pointe de Floride cruise terminal (currently being electrified for zero-emission berthing), and the new floating LNG terminal (FSRU Cape Ann, Bougainville quay, in service since 2023). Away from the main port complex, some twenty kilometres to the north-west along the coast, the Antifer oil terminal (Saint-Jouin-Bruneval) receives the largest tankers (VLCCs) thanks to its deep waters, linked by pipeline to the refining facilities of the Le Havre region. The map below schematically positions all of these terminals.

Table of terminals and their activity

Terminal	Zone	Main operator	Estimated annual capacity	Key infrastructure
Terminal de France (TDF)	Port 2000	GMP (CMA CGM)	1.5 M TEU	1,400 m of quay, 4 berths, 90 ha
Terminal Porte Océane (TPO)	Port 2000	GMP / MSC	≈1 M TEU	Latest-generation gantry cranes, direct deep-water access
Terminal de Normandie	Port 2000	MSC (Terminaux de Normandie)	≈1.5–2 M TEU (triple expansion under way)	Major transshipment hub for MSC
Terminal de l'Atlantique	Historic port	Hanseatic Global Terminals	600,000 TEU	1,300 m of quay, 35 ha, heavy-lift and conventional cargo
Container & General Cargo Terminal (TCMD)	Historic port	Maritimes de Seine – AMS (Kuhn group)	150,000 TEU / 800,000 t	1,150 m of quay, multi-purpose (ro-ro, heavy-lift)
Ro-Ro terminal	Historic port	Specialised operators	≈100 ha of storage	Dedicated to new vehicles and industrial rolling equipment
Bulk terminals (liquid/dry)	Dedicated zones	CIM, TotalEnergies, Multivrac	Several Mt/year	Hydrocarbons, agri-food, coal/biomass

Estimated capacities.

Several elements round out this picture. Port 2000 can receive fully laden ships of up to 24,000 TEU, 24 hours a day and without waiting for the tide — a structural advantage over the historic docks, which are subject to tidal range. The so-called ‘chatière’ project, a direct link between Port 2000 and the Seine river network bypassing the historic docks, aims to improve the deep-water terminal’s river connectivity toward Île-de-France, in support of the modal shift discussed in section 8.3.



7. The structural challenge: the reshuffling of shipping alliances

The most significant development for Le Havre's future is not cyclical but structural. Since February 2025, the new Gemini Cooperation alliance (Maersk and Hapag-Lloyd) has reorganised its network around the major Northern hubs (Rotterdam, Antwerp) and has progressively withdrawn its largest container ships (up to 24,000 TEU) from direct calls at Le Havre and Marseille, favouring feeder links from those hubs instead. As compensation, Le Havre benefits from additional links to Asia and the United States, but these do not fully offset the loss of mother-vessel capacity.

The potential consequences are clear: longer transit times on certain routes (up to 21 days via Gemini versus 8 days via a direct MSC service), which particularly penalises short-cycle sectors (fashion, luxury goods, perishables); a risk to port employment (dockworkers) should volumes handled through direct stevedoring decline durably; and a need for French shippers to adapt their supply chains, potentially in favour of increased routing via Rotterdam or Antwerp with pre-/on-carriage by land to France. For now, Le Havre is responding by focusing on its operational efficiency and strengthening its secondary services rather than on a head-on reconquest of giant direct services.

8. Outlook: investment and strategic diversification

8.1 Investment trajectory

- €190M invested in 2025 (+30%), after €146M in 2024; cumulative 2020-2025 total: €1.1bn.
- 2026-2030 plan: more than €1bn programmed, with 2026 revenue anticipated at €443M.
- Marketable land: 456 ha in Normandy and 30 ha in Île-de-France today, with a target of 700 to 800 ha available by 2030, a sign of a determined strategy of reindustrialisation and hosting new logistics warehouses (including a 23,000 m² low-carbon project).
- Key 2026 projects: electrification of Pointe de Floride, a new dredging vessel, 110 'Borne&Eau' river charging stations, and development of the Port Seine Métropole Ouest logistics land (100 ha).

8.2 Energy diversification: the decarbonisation wager

Le Havre is building on an already-established base in offshore wind, namely the Siemens Gamesa plant (36 ha, around 750 jobs), the only site in the world assembling both wind turbine blades and nacelles, positioning itself as a national hub for the energy transition. Three major industrial projects, announced under the France 2030 programme, together represent €2.6bn of investment and around 640 direct jobs expected between 2026 and 2029:

- Livista Energy (Luxembourg): lithium refinery for batteries: €1.2bn, 300 direct jobs.
- Air Products (United States): renewable hydrogen import terminal: €1.1bn, up to 270 potential jobs; agreement with TotalEnergies for 70,000 tonnes of renewable hydrogen per year from 2030.
- Qair (France): production and storage of hydrogen and methanol for maritime transport: €500M, 150 direct jobs.

These three projects fall within a France 2030 envelope that reserves 1,500 hectares nationwide across Marseille-Fos, Le Havre and Dunkirk for the establishment of decarbonised industries — a direct response to international competition over the siting of new green industrial capacity, and a diversification path that reduces Le Havre's dependence on the container and oil freight cycle alone.

8.3 Multimodality and the Seine Axis

The combined river + rail modal share is rising (20.3% in 2025 versus 19.7% in 2024), driven in particular by containerised rail freight (+18%). This dynamic is part of the Seine Axis strategy (Le Havre-Rouen-Paris), which aims to turn the Seine valley into an integrated logistics corridor linking the seaport to the Parisian and Île-de-France hinterland, reducing dependence on road transport (which nonetheless remains dominant, at around 70% of inland flows).

The Canal Seine-Nord Europe project, distinct from the Seine Axis but structurally important for the Northern frontage, could eventually play a more mixed role: it opens new river outlets toward Belgium and Northern France, but also makes it easier for shippers in that area to access Belgian and Dutch ports, reinforcing competition rather than giving Le Havre exclusive traffic capture.

9. History of major incidents in the port and industrial area (2016–2026)

The Le Havre industrial-port complex (the port of Le Havre, the Gonfreville-l'Orcher platform, the Port-Jérôme-sur-Seine refineries) concentrates a large number of regulated industrial facilities, including several upper-tier Seveso sites (refining, LPG storage, petrochemicals). Beyond routine or moderate-stakes cases, this industrial density exposes the area to a recurring technological risk. Over the past decade, this risk has materialised through several incidents which, while having no major human or environmental consequences, each required the activation of emergency plans and provide a useful measure of the area's operational risk. Of these three incidents, only one is directly maritime in nature.

Date	Site / facility	Nature of incident	Main consequences
14 Dec 2019	TotalEnergies — Normandy refinery, Gonfreville-l'Orcher	Fire (hydrocarbon circulation pump)	Fire brought under control within hours; large plume of black smoke; no injuries
11 Mar 2024	ExxonMobil / Esso — Port-Jérôme-sur-Seine refinery	Fire in a distillation unit	5 minor injuries (including 2 firefighters); fire contained in 30–40 min
20 Mar 2024	GIE Norgal — upper-tier Seveso LPG terminal, Gonfreville-l'Orcher	Ship/jetty collision (chemical tanker Chem Argon)	Gas leak brought under control; jetty destroyed; no injuries — see detail below

Norgal incident — collision of the chemical tanker Chem Argon with the gas jetty (20 March 2024)

(File on which CL Surveys is acting)

GIE Norgal operates, on route de la Chimie in Gonfreville-l'Orcher, a terminal for receiving, storing and shipping bulk liquefied petroleum gas (propane and butane), classified as an upper-tier Seveso site (authorisation regime, AIOT code 0005800521). The site has a total capacity of around 90,000 m³ of refrigerated LPG, split between propane (a sphere of about 5,000 m³ and a cylindrical tank of about 35,000 m³) and butane (a tank of about 50,000 m³), connected to a maritime jetty shared with the neighbouring company Alkion.

The gas is received by ship and by pipeline, then shipped out by tanker truck, rail tank car and pipeline on behalf of several market operators (Antargaz, Total Petrochemical, Vitogaz).

On Wednesday 20 March 2024, at around 3:00 pm, the chemical tanker Chem Argon (a chemical/oil products tanker flying the Liberian flag, 146.5 m long, 11,918 GT, 19,993 DWT, built in 2016), then under the conduct of a Le Havre maritime pilot, struck the shared Norgal/Alkion jetty during a manoeuvre. The impact damaged gas transfer pipework, causing an LPG leak. Norgal immediately triggered its Internal Emergency Plan (POI), active for just over 5 hours, with mobilisation of emergency services and the regional industrial inspectorate (DREAL). No injuries were reported and no significant pollution was observed; the jetty, however, suffered partial destruction rendering it completely unusable.

The unavailability of the jetty immobilised the site's maritime receiving and shipping capacity for an extended period. A supplementary prefectural order of 11 October 2024 set the technical requirements governing the reconstruction of the structure. The works notably required the electrical reconnection of three gas detectors and the repositioning of one of them. The site's next hazard study review is expected by the end of 2027.



A legal debate arose over the possible liability of the pilotage service, which we will refrain from commenting on, as the debate is purely legal in nature (a Court of Cassation ruling was handed down on 22 October 2025). The same question had arisen, though it did not go as far, in the case of the mv Citius, discussed further below in this note.

This incident, although brought under control without injury or serious pollution, illustrates a risk specific to industrialised port areas: that of the nautical/industrial interface, where a ship's manoeuvre can directly damage a major-hazard facility, independently of any internal malfunction at the Seveso site itself.

10. HAROPA PORT: a single territory, from the estuary to Île-de-France

Since the merger of 1 June 2021, HAROPA PORT presents itself institutionally as 'one port, 3 territories': Le Havre, the maritime gateway on the estuary; Rouen, the river-sea port midway along; and Île-de-France, the final outlet toward Greater Paris. The three territorial directorates are linked by the Seine along its entire navigable course, with around 120 km between Le Havre and Rouen, then around 24 hours of river navigation between Rouen and the Paris-region ports (Gennevilliers in particular).

Across the whole group, HAROPA PORT claims 16,000 hectares of combined land area and 23,000 hectares of water surface, with around 12 million m² of storage space along the Seine axis. The group directly employs 1,900 staff and generates around 160,000 associated jobs (direct and indirect), for estimated annual economic value of €7.3bn and revenue of €435M in 2025. In traffic terms, HAROPA PORT handled 84.7 Mt of seaborne cargo and 18.1 Mt of river traffic in 2025.

Le Havre — the maritime frontage

Le Havre's territorial area alone covers 77,700 hectares (a perimeter that includes the maritime approaches and the entire port district, well beyond the industrial-port footprint alone) and 35 km of quays, served by 6 locks and 20 bridges, as well as 150 km of roads and 160 km of internal railway track.

Rouen — the river-sea port

Rouen's territorial directorate extends, in HAROPA's own terms, 'from Honfleur to the Pont Guillaume-le-Conquérant', along 120 km of navigable Seine. Its port district covers 38,000 hectares, including 4,700 ha of land area (65% of which is designated natural), with 12.6 km of quays. Ships of up to 292 m in length and 150,000 DWT can access it, subject to a draft of 11.30 to 11.70 m and a minimum air draft of 50 m under the main bridges; the port receives 3,500 to 4,000 ship calls annually. The port of Rouen is particularly recognised for its grain and agro-industrial activity.

Île-de-France — the metropolitan outlet



The Paris territorial directorate manages, through four port agencies, nearly 70 urban ports and more than 40 river stopping points across Greater Paris. Its main multimodal platforms are Gennevilliers (401 ha, the largest river platform in Île-de-France, home to more than 250 businesses), Bonneuil-sur-Marne (the second-largest river port in the Paris region, more than 180 businesses), Limay-Porcheville (125 ha, materials and energy) and Bruyères-sur-Oise.

11. The port of Rouen: France's grain export capital

Within HAROPA PORT, Rouen is the Seine axis's agro-industrial and grain hub. The port claims the rank of leading Western European port for grain exports, accounting on its own for around half of French seaborne wheat and barley exports and nearly 15% of European grain exports — a weight that regularly earns Rouen the description of handling one in every two tonnes of grain exported by sea from Western Europe.

The port also handles more than 2 Mt of related agro-industrial products and around 2.5 Mt of liquid and solid fertilisers per year, making it France's leading transit point for fertilisers.

Port silos and their capacities

The port of Rouen's overall grain storage capacity reaches around 1.3 million tonnes, of which around 900,000 tonnes is capacity dedicated specifically to exports, spread across five main port silos:

Silo / operator	Site	Storage capacity	Throughput / features
Sénalia	Grand-Couronne	250,000 t (several hundred cells)	170 m quay; 3 Neuero gantries, up to ≈1,000 t/h each (combined rate ≈3,000 t/h); up to 700 trucks/day received
Groupe BZ — Maison Bleue terminal	Petit-Couronne	130,000 t (75,000 t + 55,000 t extension / 30 cells, 2026)	Extended 350 m quay, draft increased to 11.50 m; target of >2.5 Mt exported/year (+25%)
Socomac (Soufflet Group/InVivo)	Rouen	185,000 t (capacity increased by 25%)	≈2 Mt/year passing through the site; 60% moved by barge
Simarex	Rouen	Dome silos (e.g. dome no. 4: 20,000 t, 46.4 m diameter)	Silo approved as a delivery point for the Euronext Milling Wheat No. 2 contract
Sévépi — UCAYC	Grand-Couronne / Petit-Couronne	—	Cooperative silo rounding out the port's export-dedicated offer

2024 and 2025 developments: an uneven season

The 2023-2024 grain marketing year ranked among the port's five best ever, with 8.7 Mt exported. The 2024-2025 season, by contrast, saw a sharp decline: 5.21 Mt exported (-40%), representing 54% of French seaborne grain exports — a decline directly linked to the worst French common wheat harvest in forty years.

For comparison, the world's three largest grain and oilseed export ports each handle between 50 and 75 million tonnes per year (Rosario, Argentina; New Orleans, Mississippi; and Santos, Brazil).

On the infrastructure front, this period was marked by the launch, in October 2024, of extension works on the Groupe BZ silo at Petit-Couronne (groundbreaking), the installation of two new mooring dolphins and a 16 m extension of the port jetty, as well as a notable logistics innovation: the trial, on 7 March 2025, of a 'two-tide' ship transit, allowing the usable draft — and therefore the port's competitiveness on the heaviest cargoes — to be optimised.

12. History of major incidents at the port of Rouen

Like Le Havre, the Rouen industrial-port area, a major component of HAROPA PORT, concentrates numerous regulated industrial facilities, including several upper-tier Seveso sites (chemicals, nitrogen fertilisers, oilseed crushing) directly interwoven with the agro-industrial terminals. The table below lists the most notable incidents that have occurred in this area in recent years.

Date	Site / facility	Nature of incident	Main consequences
26 Sep 2019	Lubrizol and Normandie Logistique, Rouen (Seine riverside)	Major chemical fire (upper-tier Seveso site)	≈9,500 t of products burned; 22 km smoke plume; agricultural restrictions; no direct casualties
12 Jan 2020	Simarex, Petit-Couronne	Fire in a silo handling tower (50 m high)	50 firefighters, 30 vehicles; 100 m security perimeter; barge traffic diverted; no injuries
13 Mar 2020	Saipol, Grand-Couronne	Explosion then fire (biodiesel production unit)	50 employees evacuated; nearby schools placed in lockdown; no injuries
4 Mar 2022	Sénalia, Presqu'île Élie, Rouen	Fire on a grain conveyor belt (20 m high)	63 firefighters; 30 people evacuated; site shut down for 3 days
8 Jan 2025	LAT Nitrogen (formerly Borealis/GPN), Grand-Quevilly	Opening of a safety valve on the ammonia unit	Temporary flare-up brought under control in 10 min; no impact on staff/residents/environment

A textbook case of transport and maritime risk interwoven with an urban fabric: the animal meal storage crisis and the Sagatrans fire (1996–2001)

(File on which CL Surveys acted)

In the late 1990s, the bovine spongiform encephalopathy (BSE, or ‘mad cow disease’) crisis led the French State to ban, in 2000, the incorporation of animal meal into livestock feed. This decision overnight created a national stockpile of several hundred thousand tonnes of animal meal and fat with no outlet, which the State had to store on an emergency basis at some twenty sites across France — the simultaneous national stockpile peaking at around 770,420 tonnes in October 2003, before a gradual drawdown completed in 2009 (the last stock destroyed at Rogerville, Seine-Maritime).



A 'Mission Proust', set up at the end of 2000, was tasked with rationalising this crisis logistics operation and reducing its cost to the State. Rouen's port warehouses, thanks to their available volume, were among the sites massively requisitioned for this temporary storage of highly unstable materials.

However, the absence of any regulatory outlet for these products — suddenly banned from animal feed, while land-spreading was also prohibited, and incineration likewise — had a fairly disastrous effect at Rouen, highlighting a situation of administrative prohibition and an administrative no-man's-land in terms of any other available solution for a product prone to self-heating and self-combustion. This is exactly what occurred at Sagatrans in 1996, turning into a fire involving material by then classified as waste, in a warehouse located in an urban area.

This 7,000-tonne stock of meat-and-bone meal stored at Sagatrans, on the port of Rouen, was the site of a deep-seated smouldering self-combustion phenomenon: bacterial fermentation of the organic matter, combined with its high fat and moisture content, caused the internal temperature of the pile to rise without any external ignition source. More than 400 tonnes of meal had to be urgently evacuated to external incineration units, under an emergency and exceptional administrative authorisation, to contain the risk.

In June 1999, hot spots reaching 150°C were detected inside a 12-metre-high dome of animal meal, stored on behalf of the State (Office de l'Élevage) in Warehouse 22 of the port. Given the risk of a dust explosion in such a large mass, a salvage operation mobilised teams for more than six months: the meal had to be spread out in successive 50 cm-thick layers to dissipate the accumulated heat and halt the exothermic reaction, before complete evacuation to cement plants licensed to incinerate it in kilns — an operation that continued until the end of 2001...

The lessons learned from this crisis, combined with those of more recent industrial incidents, have directly shaped the regulatory framework now applicable to the bulk storage of organic or combustible materials at the port of Rouen: permanent thermal monitoring by thermocouples, a ban on giant domes and strict limits on the height of outdoor piles of fermentable materials (often kept under 2 to 3 metres depending on the product), dust-control measures under the ATEX directive (forced ventilation, industrial dust extraction, certified electrical equipment), and a requirement for every operator to include, in its Internal Emergency Plan, smothering/inerting protocols...

13. Sea-river navigation between Le Havre and Rouen

The link between Le Havre and Rouen, over around 120 km of the Seine, combines two quite distinct navigation regimes: tidal maritime passage upriver for seagoing vessels using the estuary channel, and continuous river navigation, notably via the Tancarville canal, for barges and self-propelled river craft wishing to avoid the most exposed part of the estuary.



The maritime channel and the tidal constraint

Before the major engineering works of the 19th and 20th centuries, passage up the estuary was gruelling: shallow depths, sometimes under a metre at low water on spring tides, together with shifting sandbanks, forced transit times of 8 to 30 days between Le Havre and Rouen depending on conditions. Embankment works undertaken from 1850 onward and regular dredging campaigns progressively stabilised and deepened the channel: a new channel opened in 1961 (8 m at neap tide, 10 m at spring tide), the dyke was extended in 1979 (by around 2 m), and the permissible draft was raised to 10.7 m from 2007 for 97% of rising tides. The draft target now being pursued is 11.7 m on the way up and 11.3 m on the way down. Upstream of Rouen, the channel is calibrated to a uniform width of around 80 to 100 m, with a guaranteed water depth of 3 to 4 m.

Under current conditions, the passage from Le Havre to Rouen is completed on a single tide, taking around 6 hours of navigation, compared with several days in the 19th century. This is an advance that directly accounts for the growth in the size of ships received (tonnage passing through Rouen thus rose from 10 Mt in 1950 to 83 Mt as early as 1973), more so than for any growth in the number of transits. Night navigation nevertheless remains prohibited on certain stretches, and the passage of certain distinctive points (buoys, tight meanders such as that at Quillebeuf-sur-Seine — see the MV Citius focus below) requires heightened vigilance, particularly for the largest vessels.

The Tancarville canal — the continuous river route

Alongside the maritime channel, the Tancarville canal, opened in 1887, offers river craft a 25 km link between Tancarville and Le Havre that lets them avoid the most exposed part of the maritime estuary. Crossed by a single lock measuring 180 m by 23 m, it has a depth of 3.50 m and 7 m of clearance under its structures. These characteristics, combined with the calibrated channel upstream, allow continuous river navigation between Le Havre, Rouen and, beyond, the entire Seine axis as far as Île-de-France.

Pilotage, the linchpin of navigational safety

The safety of this mixed navigation relies largely on maritime pilotage, organised into two complementary stations. The Le Havre station has 48 pilots, 2 helicopter pilots, 2 winch operators and 30 seamen, with 6 vessels, a launch based at Fécamp, a simulator and a maintenance workshop; pilotage is compulsory there for any ship of 70 m or more, or carrying dangerous goods. The Seine station (Rouen-Caen-Dieppe), historically descended from the Quillebeuf station and expanded through the mergers of Villequier (1948), Honfleur (1958), Dieppe (1976) and Caen (1991), has 54 pilots and carries out around 12,000 pilotage assignments a year for some 3,500 ships, representing 22 to 26 Mt of maritime traffic. HAROPA PORT credits this service with the equivalent of 2.5 billion tonne-kilometres kept off the roads each year. Pilotage is compulsory there beyond 55 m from the roadstead up to Caudebec-en-Caux, beyond 45 m between Caudebec and Rouen, for any passenger vessel of 25 m or more, and for any dangerous cargo; both stations operate 24 hours a day, 365 days a year.



This organisation has recently been supplemented by a notable operational innovation: the trial, on 7 March 2025, of a ‘two-tide’ ship transit downriver, allowing a passage to be split across two successive tidal cycles to optimise the usable draft for the most heavily laden ships — a pragmatic response to the estuary’s physical constraints, rather than relying on dredging alone.

14. Focus: the grounding of the MV Citius in the Seine (18 December 2016)

(File on which CL Surveys acted)

The Citius is a bulk carrier built in 2010, at the time registered under the British / Isle of Man flag, measuring 287 m in length by 45 m in beam, of 88,479 GT for a deadweight of 170,923 tonnes — a vessel notably larger than the maximum dimensions usually cited for the port of Rouen (292 m but 150,000 DWT at most). Having called at another European port beforehand, she was due to complete the discharge of around 80,000 mt of coal at Rouen.

On Saturday 18 December 2016, shortly after midday, after the pilot had begun the passage up the Seine in foggy conditions, the Citius ran aground at Quillebeuf-sur-Seine, in one of the tight meanders of the lower Seine located between Le Havre and Rouen — a particular point in the channel already identified as tricky for the navigation of large vessels. The ship’s bow drove into one bank of the river and her stern into the opposite bank. The grounding brought navigation on the Seine to and from Rouen to a temporary halt for several days, for the duration of the refloating operations.

The refloating operation was carried out at high tide, after several unsuccessful attempts and fears of a major incident following a possible breach of the ship’s hull. A small fleet of around ten tugs, together with the standby assistance of the Abeille Liberté — the state standby emergency towing vessel based at Cherbourg — was dispatched to the scene and led most of the refloating manoeuvre, backed up by Le Havre and Rouen port tugs mobilised for the vessel’s initial securing. Operations continued through part of the night, and the Citius was refloated at around 2:30 am, then towed and moored at the Radicatel berth on the Seine, where the ship was able to undergo the checks and follow-up operations required after the grounding.

No casualties or significant pollution were reported in the press following this event, which ended with the ship refloated in under one full tidal cycle. This incident also prompted reflection on the possible liability of the pilotage service regarding the decision to take a vessel of this size onto the Seine in foggy conditions — Normandy’s weather being what it has long been known to be.



15. Conclusion

The port of Le Havre, and more broadly the Seine axis, enters 2026 in a position of relative strength financially and industrially, with continued growth in container traffic, supported by sharply rising investment and a credible, State-backed energy diversification — but facing a real structural risk to its status as a direct port of call for the largest container ships, owing to the reshuffling of global shipping alliances. The 2024-2025 trajectory shows a port offsetting this risk through hinterland growth (rail, river) and a diversification strategy toward new energy sectors, rather than through a head-on confrontation with Rotterdam and Antwerp-Bruges on volume alone. It is this shift — from a port focused on container volume to a port that is also an industrial and energy platform — that appears to be the central wager of the 2026-2030 outlook.

That said, the medium- to long-term outlook remains an open question, despite HAROPA's strong dynamism, in the face of the ever-increasing gigantism of the fleet's ships, which argues more in favour of Northern European ports — which nonetheless have river access (or, for Rotterdam, partial river access) — whereas Le Havre has direct open-sea frontage access...

In any case, every effort has been made for several years now – and plans are in place – to make Le Havre the dedicated national port for the major domestic consumer market, and even more. And Le Havre has many strengths in this regard. As the saying goes, isn't it better to be resourceful amongst the great than small amongst the great...

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FRANCE Head office
Lyons La Forêt
 +33.2.32.49.49.00
 info@cl-surveys.com

FRANCE Head office
Paris
 +33.1.56.89.80.80
 info@cl-surveys.com

RUNGIS
 +33.1.46.87.39.30
 rungis@cl-surveys.com

LE HAVRE
 +33.2.35.41.11.38
 lehavre@cl-surveys.com

LILLE
 +33.3.20.32.04.50
 lille@cl-surveys.com

DUNKERQUE
 +33.3.28.21.30.31
 dunkerque@cl-surveys.com

ROUEN
 +33.2.35.89.16.80
 rouen@cl-surveys.com

BREST
 +33.2.97.55.99.80
 brest@cl-surveys.com

RENNES
 +33.2.99.67.01.92
 rennes@cl-surveys.com

NANTES
 +33.2.40.25.84.29
 nantes@cl-surveys.com

TOURS
 +33.2.47.72.88.75
 centre@cl-surveys.com

BORDEAUX
 +33.5.56.12.36.45
 bordeaux@cl-surveys.com

TOULOUSE
 +33.5.61.54.08.55
 toulouse@cl-surveys.com

PERPIGNAN
 +33.4.84.25.87.00
 perpignan@cl-surveys.com

MARSEILLE
 +33.4.91.03.11.27
 marseille@cl-surveys.com

ALPES & SUISSE
 +33.4.79.28.12.66
 suisse-alpes@cl-surveys.com

LYON
 +33.4.37.25.57.48
 lyon@cl-surveys.com

STRASBOURG
 +33.3.88.16.26.35
 strasbourg@cl-surveys.com

BELGIUM
 +32.3.641.82.00
 info@cl-surveys.be

PORTUGAL & SPAIN
 +34.910.39.17.06
 info@cl-surveys.es

NETHERLANDS
 +32.3.641.82.00
 info@cl-surveys.nl

GERMANY
 +49.151.10.332.837
 info@cl-surveys.de

UK
 +44.7470.729477
 info@cl-surveys.co.uk

NORTH AMERICA
 +1.(445).213.3023
 northamerica@cl-surveys.com

CARAÏBES
 +596.6.96.00.61.06
 caraibes@cl-surveys.com

ASIA
 +86.153.0062.9097
 info@cl-surveys.cn

RUSSIA
 +7.812.380.74.04
 cl.ru@cl-surveys.com

CAMEROON
 +33.1.56.89.80.80
 cameroon@cl-surveys.com

SENEGAL
 +33.1.56.89.80.80
 senegal@cl-surveys.com

ALGERIA
 +33.1.56.89.80.80
 algeria@cl-surveys.com

INDIA
 +33.1.56.89.80.80
 info@cl-surveys.in

OTHER COUNTRIES
 +33.2.32.49.49.00
 internationalclaims@cl-surveys.com