

Le transport maritime : quelles incidences sur l'espace et les territoires ?

Antoine Frémont

Chargé de mission aménagement du territoire à RFF

IHEDATE. Séminaire 2. Les territoires et les temps du système productif

Caisse des dépôts, Paris, 14 février 2013

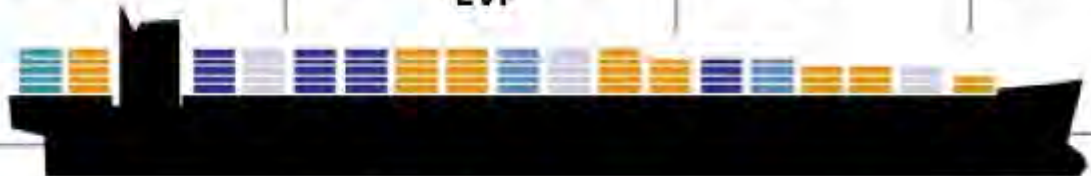
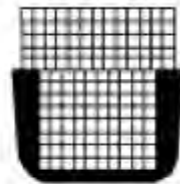
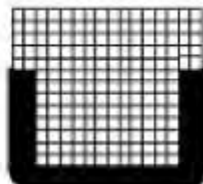
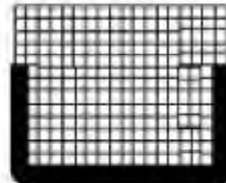
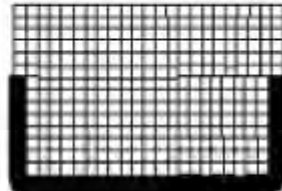
Temps long

Evolution techniques et
organisationnelles



SPECIALISATION



Génération	Capacité de transport EVP	Date	Longueur	Largeur	Tirant d'eau
 2-3	3.000-5.000	1980	260-295 m	32,20 m	 13,50 m
 3-4 Post-panamax	5.000-6.000	1992	284-318 m	39,20-42,00 m	 13,50-14,50 m
 5-6	5.000-8.700	1997	263-350 m	39,20-42,00 m	 13,50-14,50 m
 7	bis 14.000		jusqu'à 400 m	jusqu'à 55 m	 14,50 m

EVP: conteneneur Equivalent Vingt Pieds

<http://www.globalsecurity.org/military/systems/ship/container-types.htm>

Making Waves

February 21, 2011
INTRODUCTION



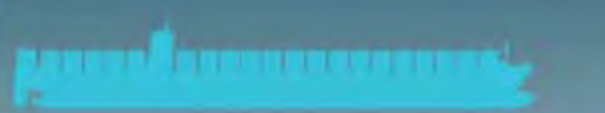
Building the Triple-E, the world's biggest and most efficient container vessel



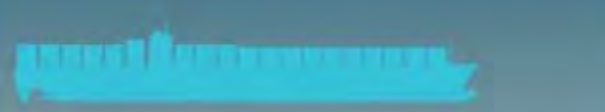
2013
Triple-E Maersk Class
18.000 TEU



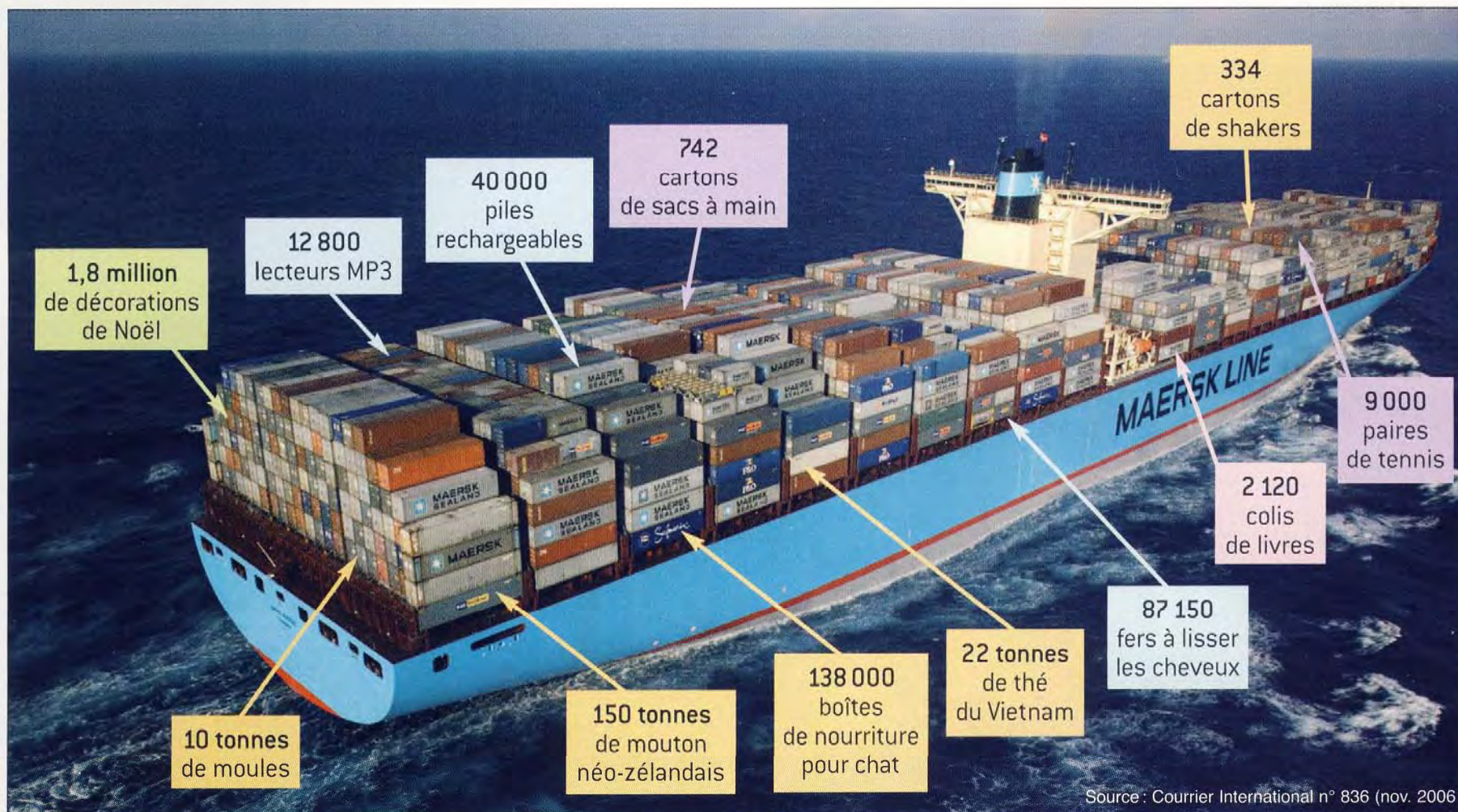
2006
Emma Mærsk Class
15.500 TEU



1997
Sovereign Mærsk class
8.100 TEU



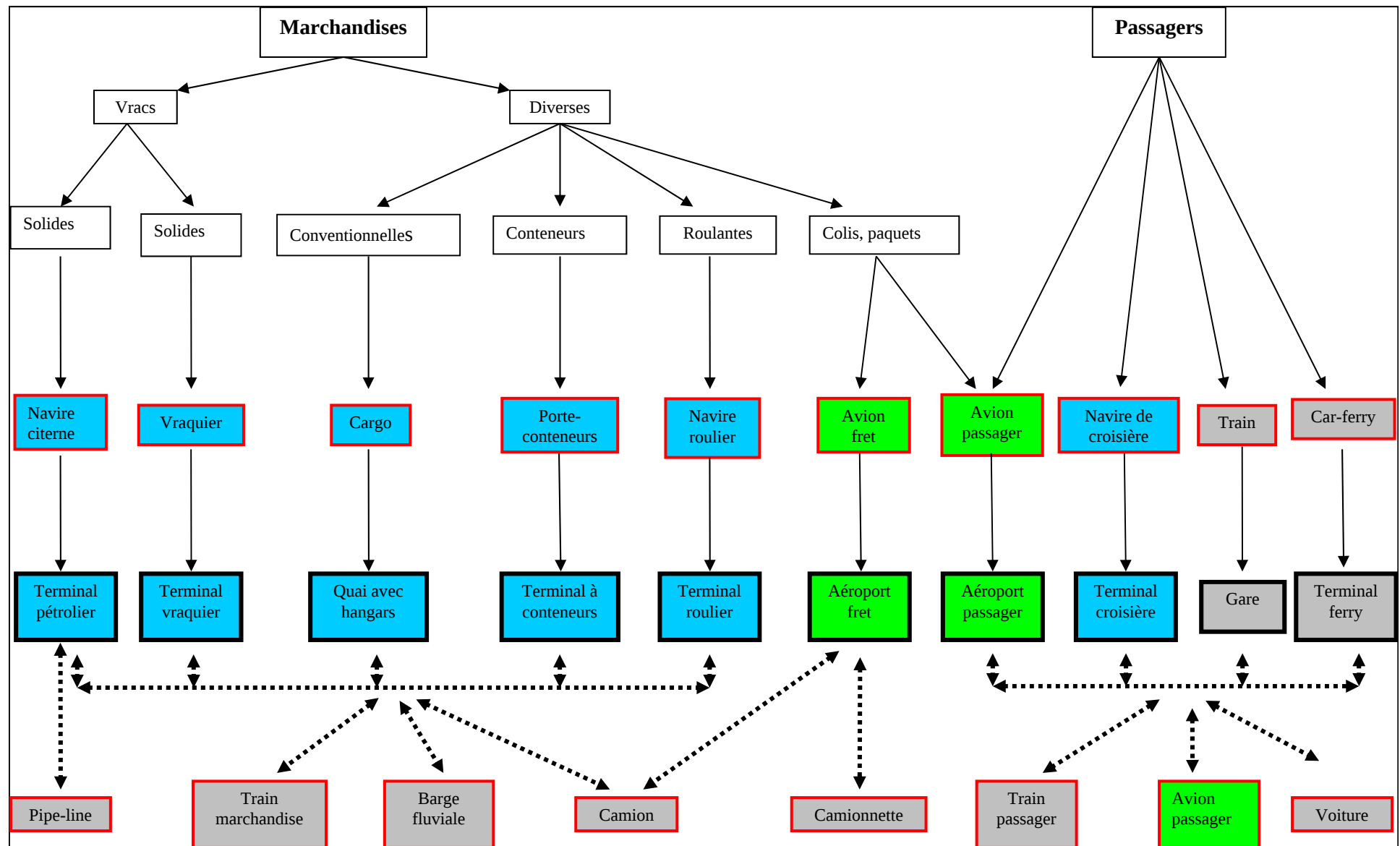
1996
Regina Mærsk class
7.100 TEU



1

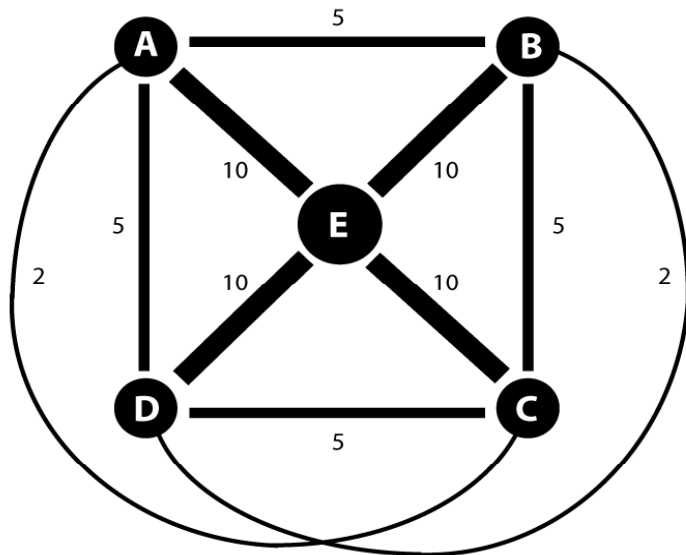
Porte-conteneurs géant (397 m de long, charge de 11 000 conteneurs) de la firme danoise, MaerksLine.

Types de flux et modes de transport

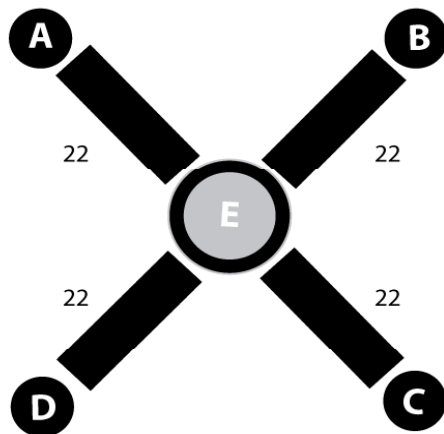


Source: Frémont, Flux et transports, in La mondialisation, CNED/SEDES, 2006

Réseau totalement maillé

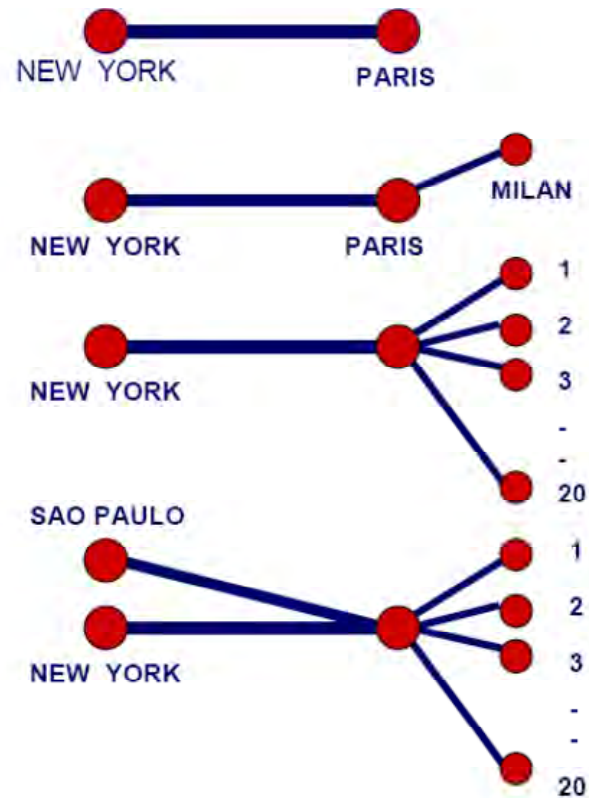


Réseau "hub and spokes"



-  liaison et nombre de passagers
-  aéroport et nombre de passagers
-  passagers en transit dans l'aéroport

Réseaux « hub and spoke »



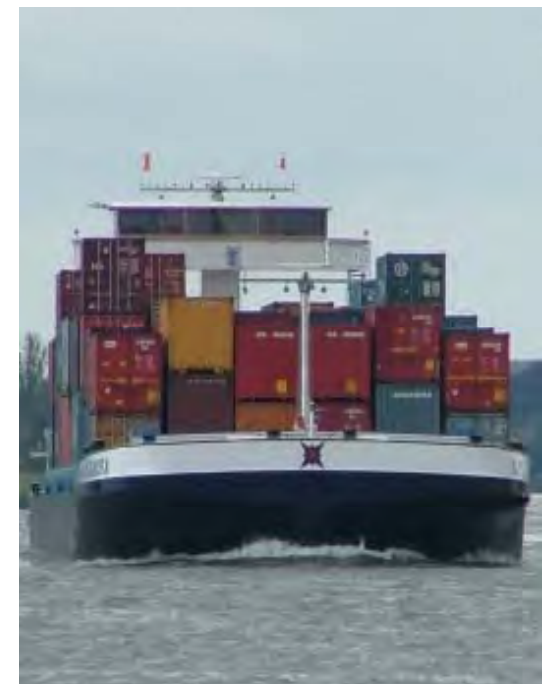
NOMBRE DE MARCHES DESSERVIS

3 MARCHES

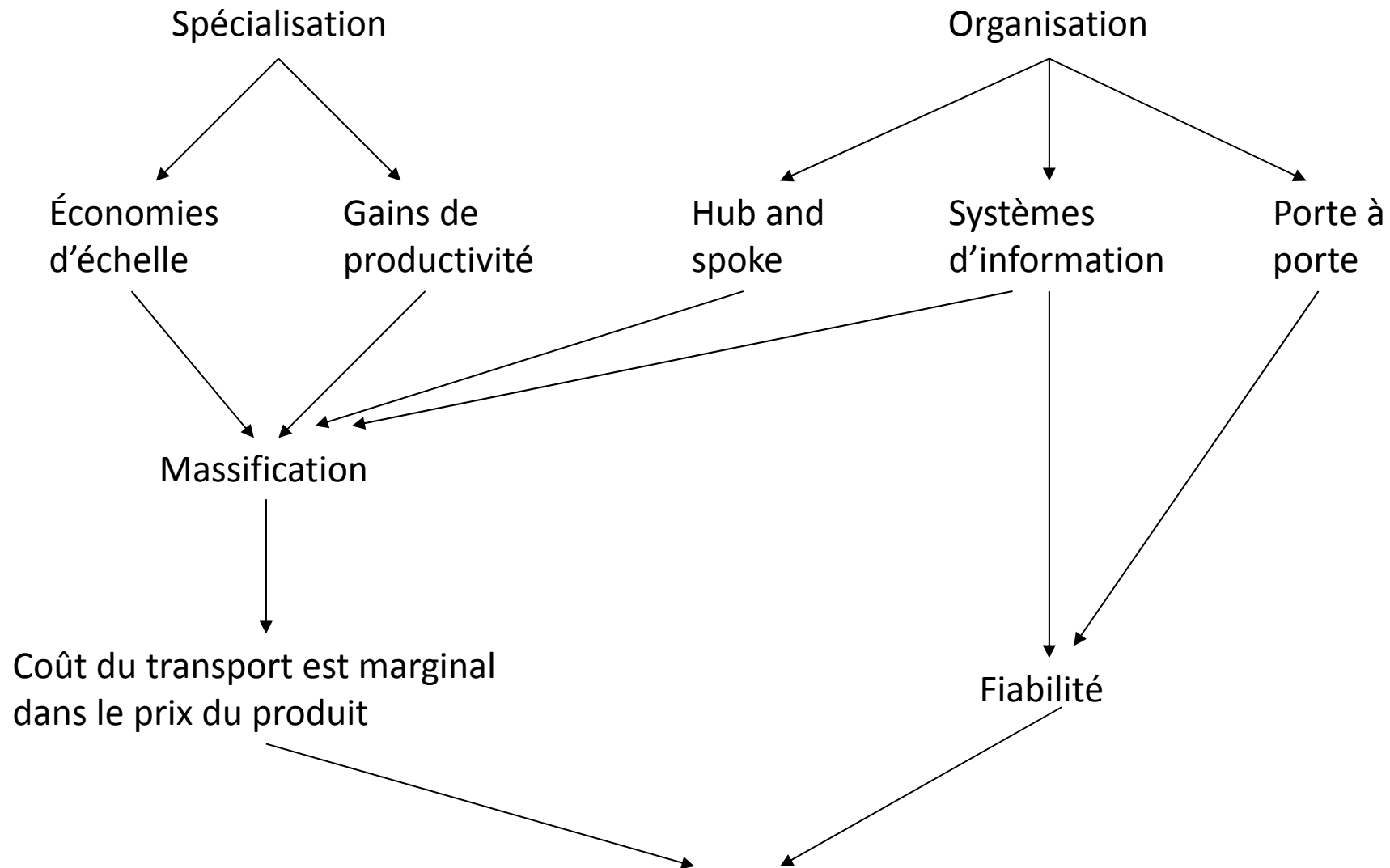
41 MARCHES

62 MARCHES

Chaînes de transport porte à porte



Transport maritime et mondialisation



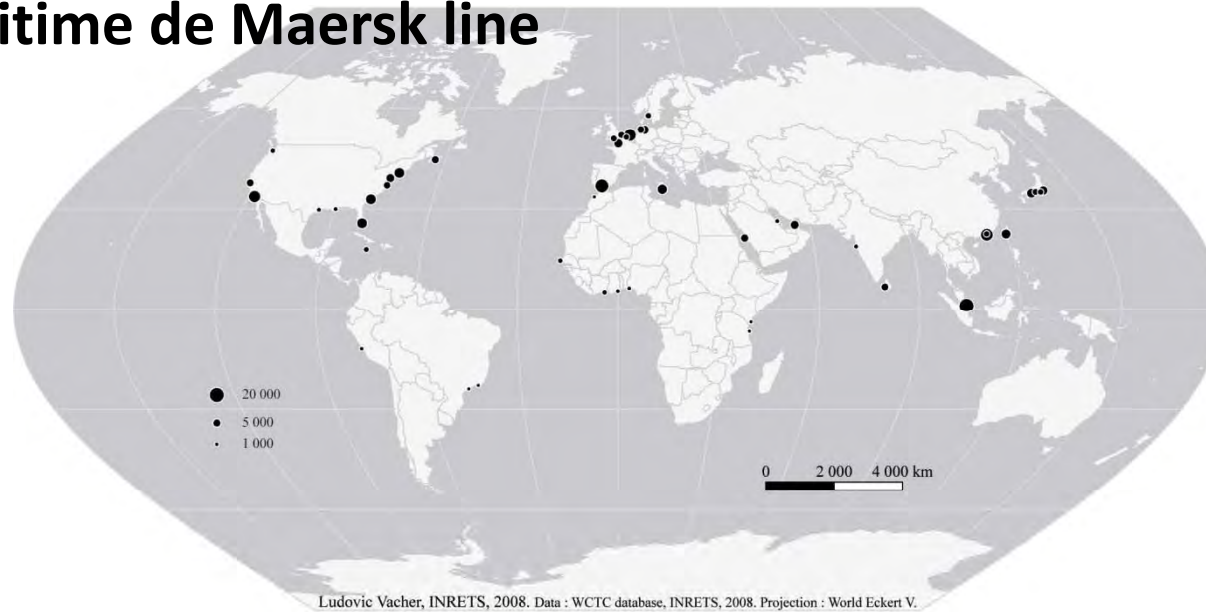
Effet boule de neige entre transport maritime et commerce international

**Temps long
de
la compagnie maritime**

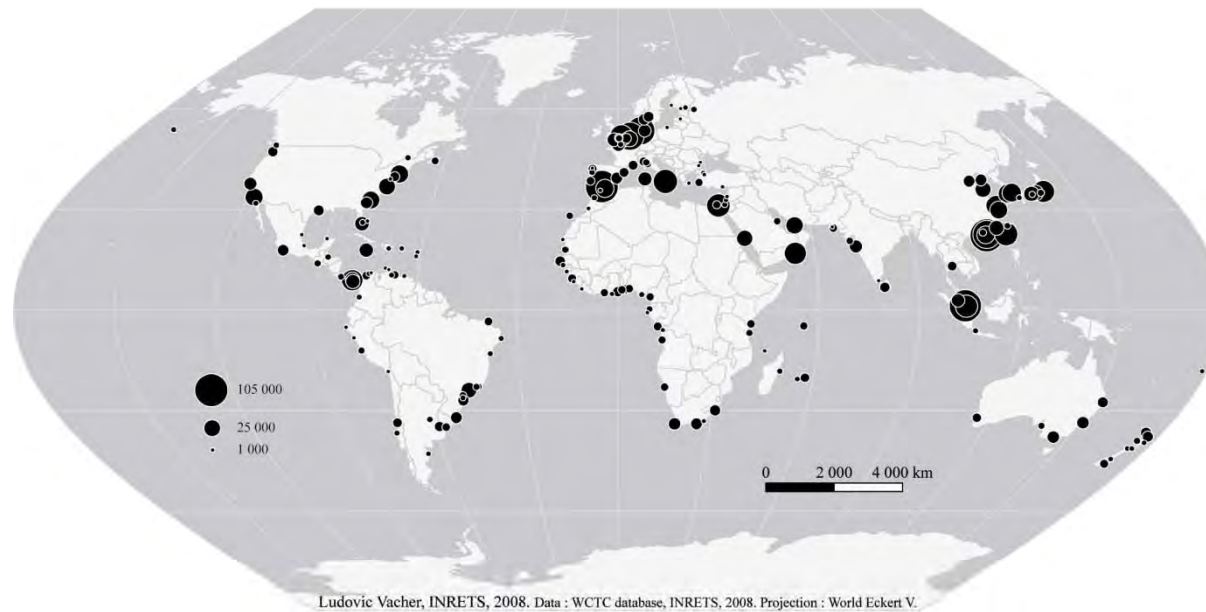
Ex de Maersk Line
« With constant care »

Réseau maritime de Maersk line

En 1994



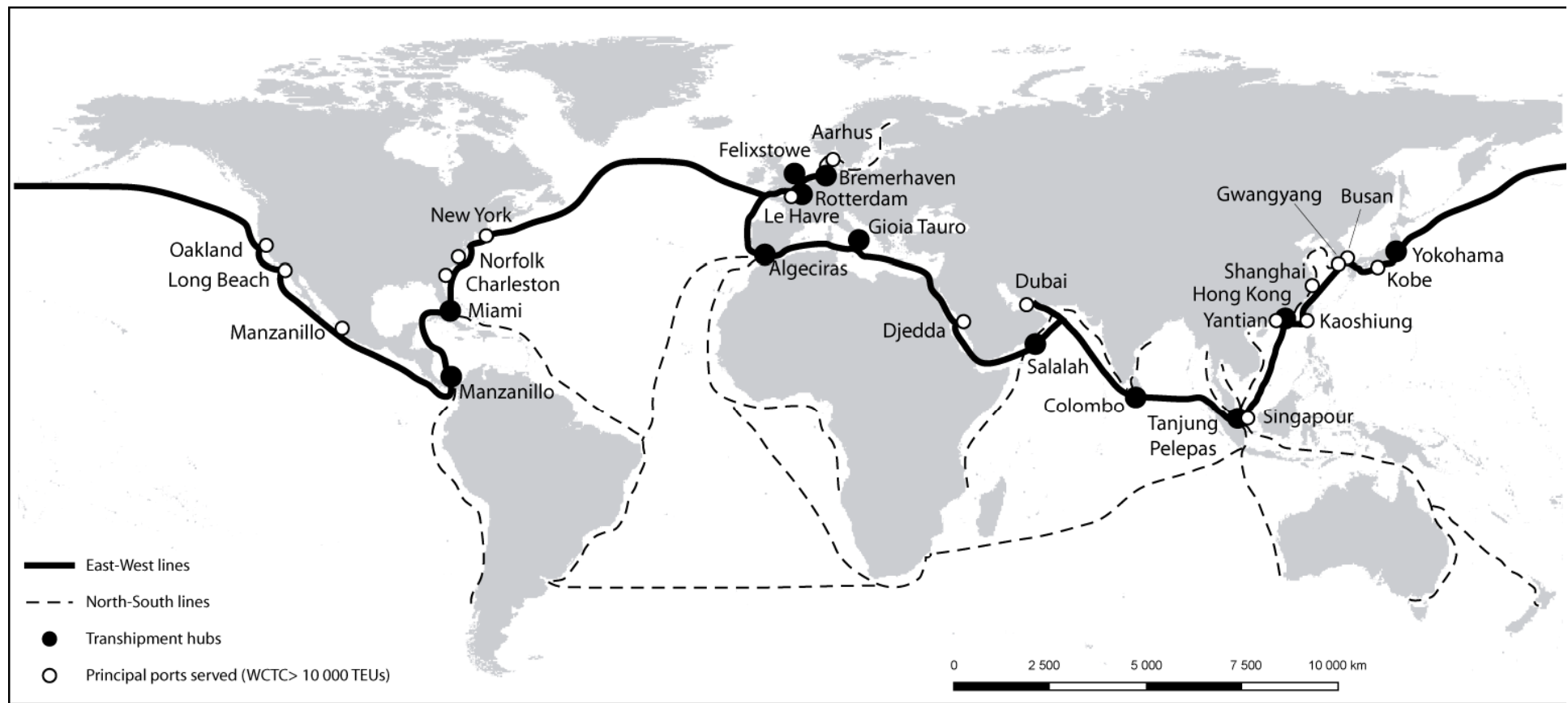
En 2006



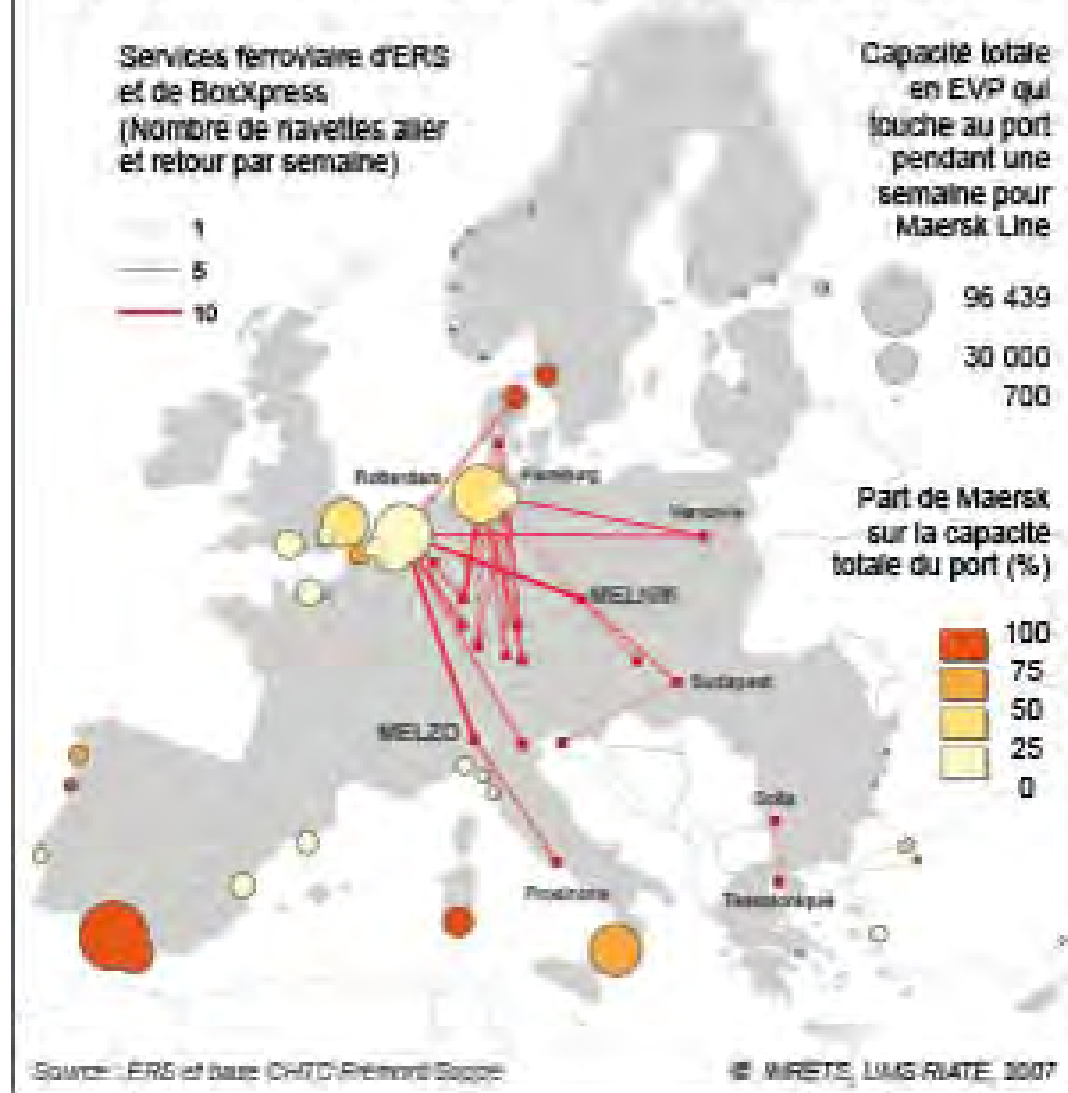
Source: FREMONT A., (2010) Maritime Networks: a source of competitiveness for shipping lines, in CULLINANE Kevin (editor), **International Handbook of Maritime Business**, Edward Elgar, pp.150-173.

Une couverture globale des marchés

Exemple de Maersk



13.7 - La desserte maritime ferroviaire de l'Europe par l'armement de lignes régulières Maersk, 2006



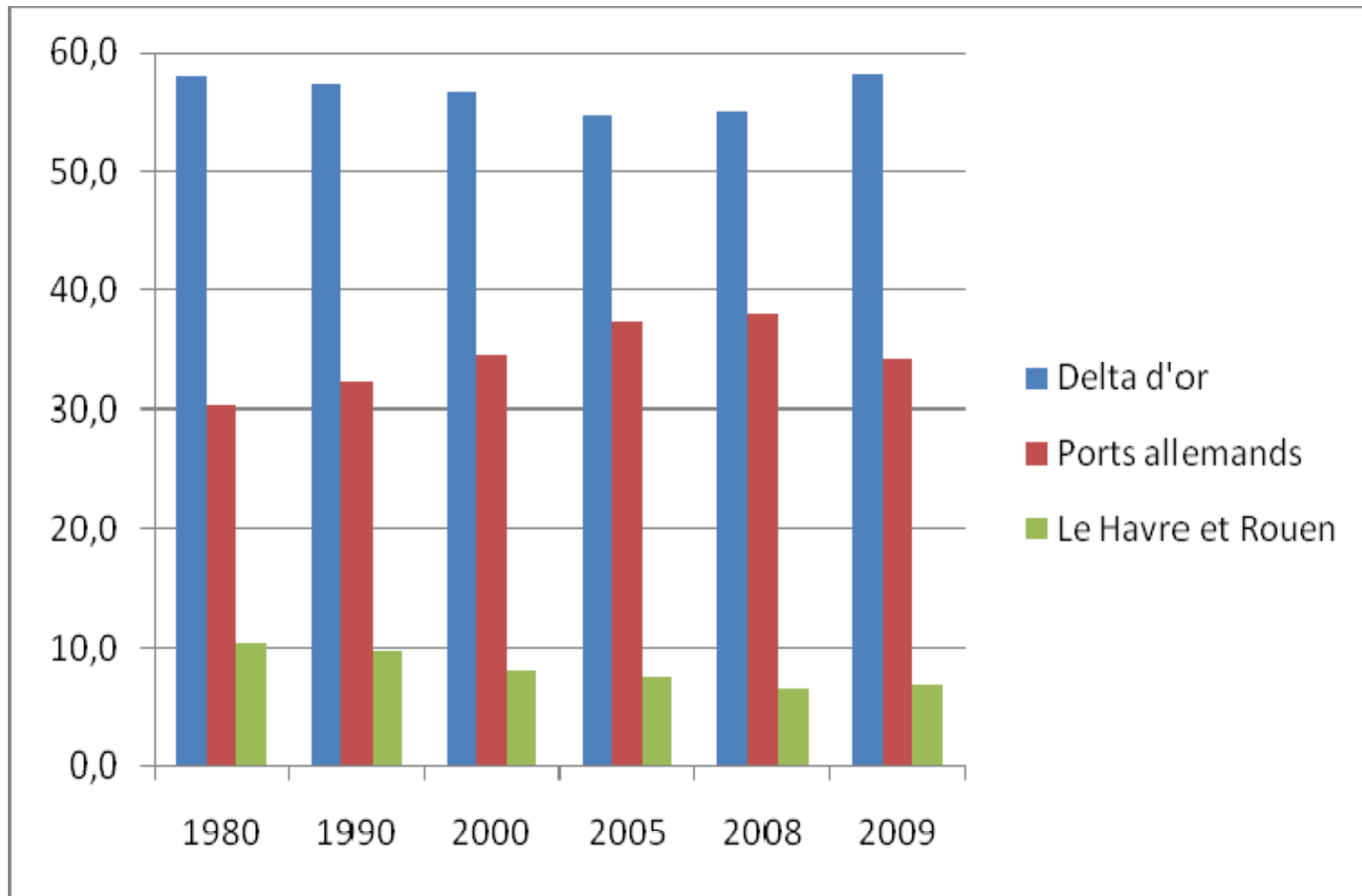
FREMONT A. (2008) L'Europe : puissance maritime, in C. DIDEON, C. GRASLAND, Y. RICHARD (sous la dir. de) : **Atlas de l'Europe dans le monde**, Paris, Belin-Reclus, à paraître.

**Temps long
des
ports maritimes**

Ex du Havre, la porte océane

Range Nord Europe: Parts de marché pour le trafic des conteneurs par grands ensembles géographiques

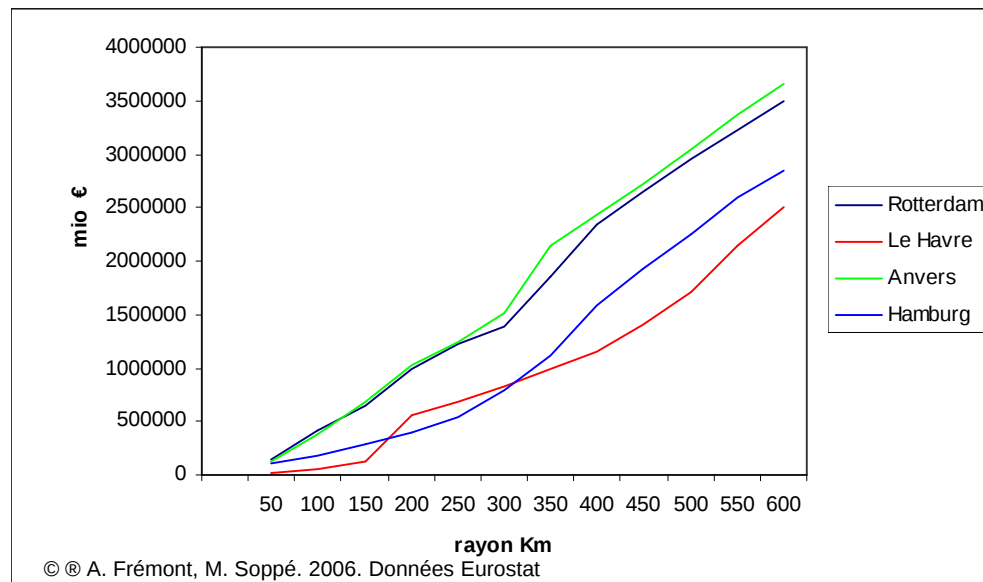
En % du nombre de conteneurs manutentionnés



Source: d'après statistiques des autorités portuaires

L'hinterland

PIB cumulé dans les zones concentriques autour des ports en 2002



Source: FRÉMONT, A., SOPPÉ, M. (2007) Port concentration, shipping line concentration and port hierarchy. The example of the Northern European range, in J. WANG, TH. NOTTEBOOM, B. SLACK (sous la dir. de) : **Ports, Cities and Global Supply Chains**, Ashgate, pp. 105-120.



PIB régional (en valeur) (en millions de parité de pouvoir d'achat)



Services ferroviaires conteneurisés à partir du Havre, Anvers et Rotterdam

Décembre 2010



Source : Data from Port Authority

Le Havre	Anvers	Rotterdam	Hambourg
42	137	261	750

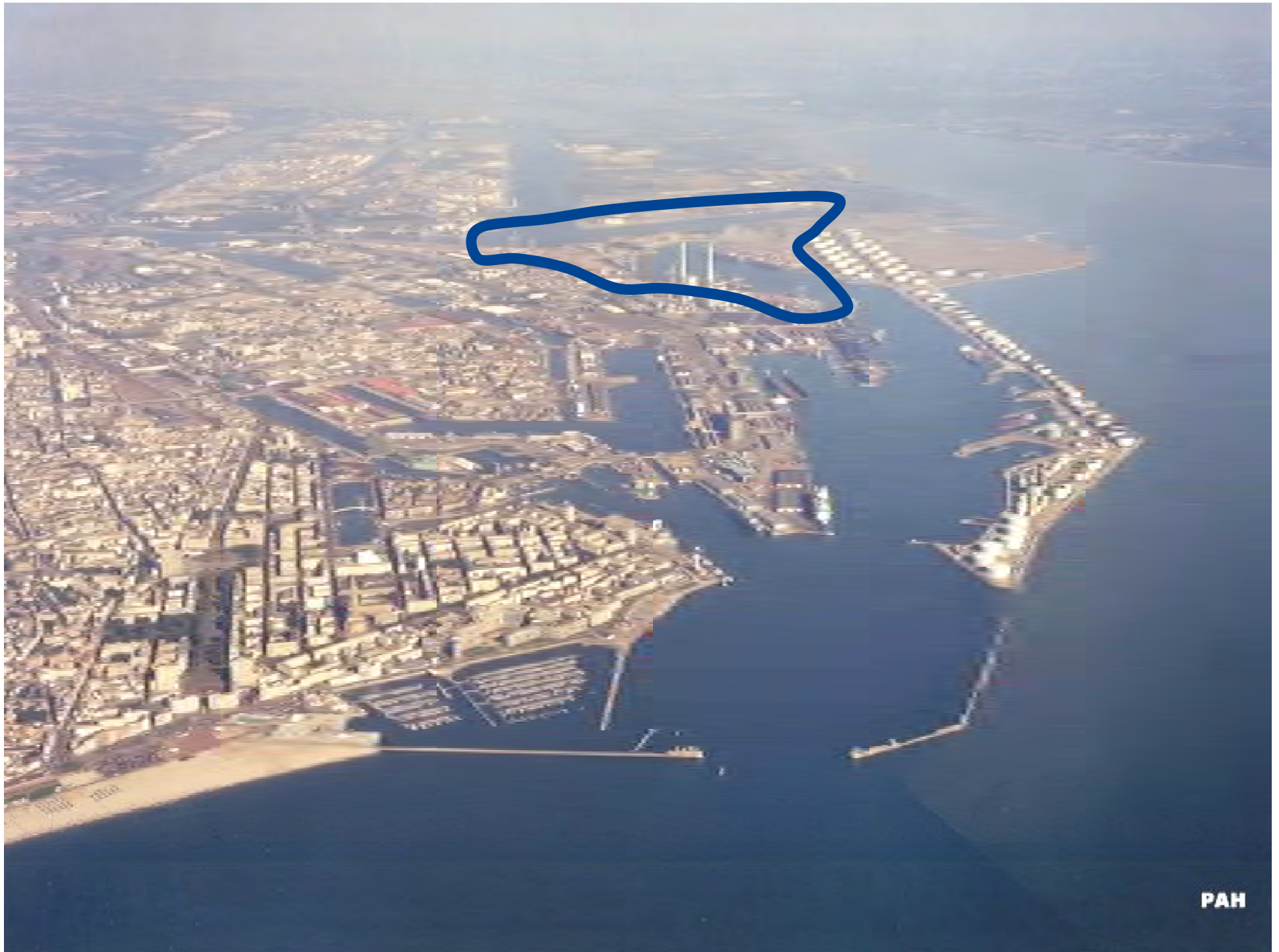










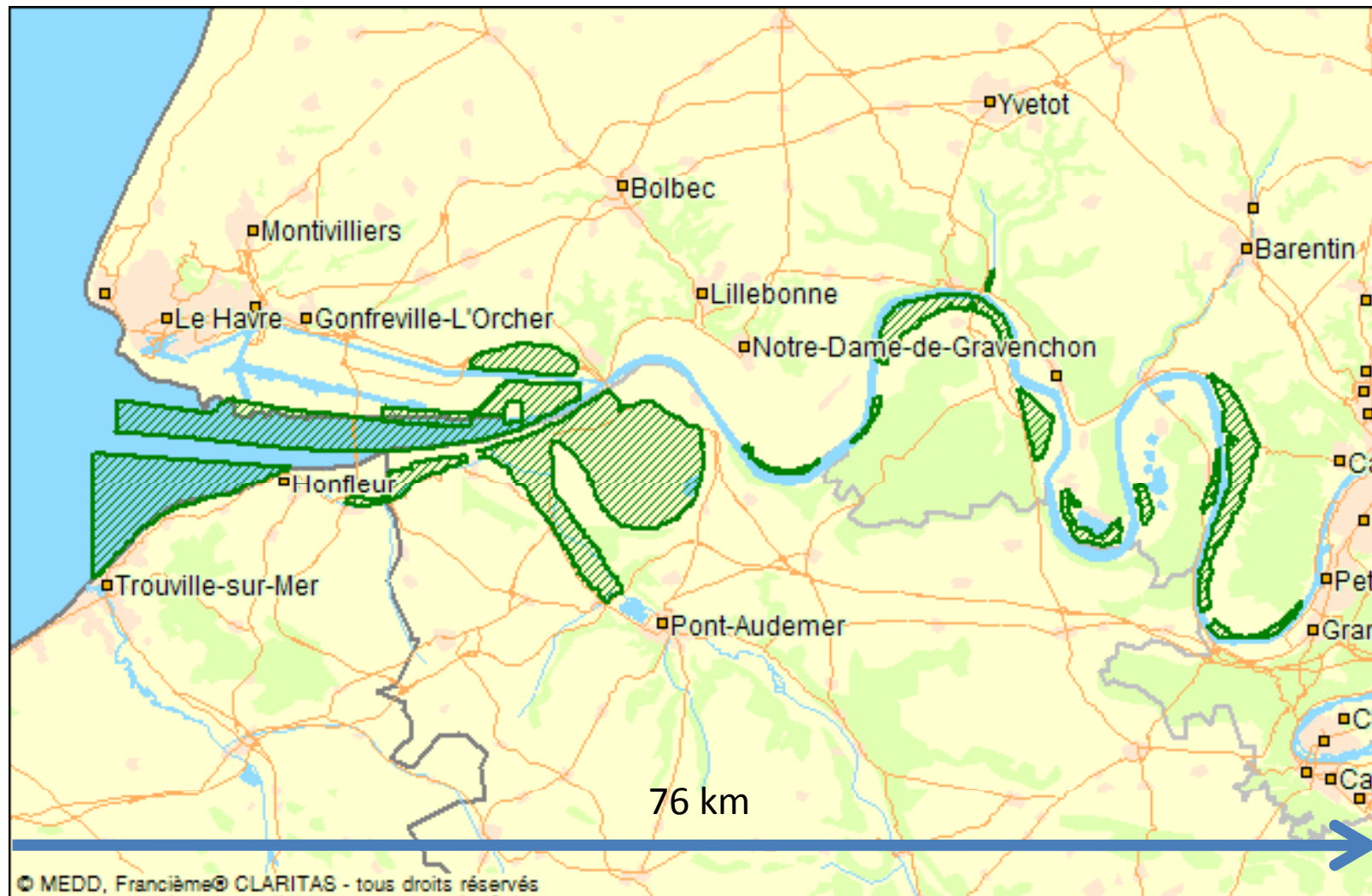






Source: PAH

Sites Natura 2000 dans l'estuaire de la Seine



 Site natura 2000

Source: <http://natura2000.ecologie.gouv.fr/sites/FR2310044.html>

Temps long des Etats

Ex de l'Asie orientale

LES PLUS GRANDS ARMEMENTS MONDIAUX

Part des vingt premiers armements mondiaux dans le total mondial et par grands continents d'appartenance

	1979	1989	2000	2007	2012
TOTAL DES VINGT PREMIERS	44,1	32,8	52	82,3	83,9
Dont Europe	21,5	8,6	21,2	45,5	44,5
Dont Amérique du Nord	12,7	4,5	0	0	0
Dont Asie	9,9	15,7	27,6	34,7	35,2
TOTAL MONDIAL (EVP)	0.951	2.995	6.490	11.629	16.044

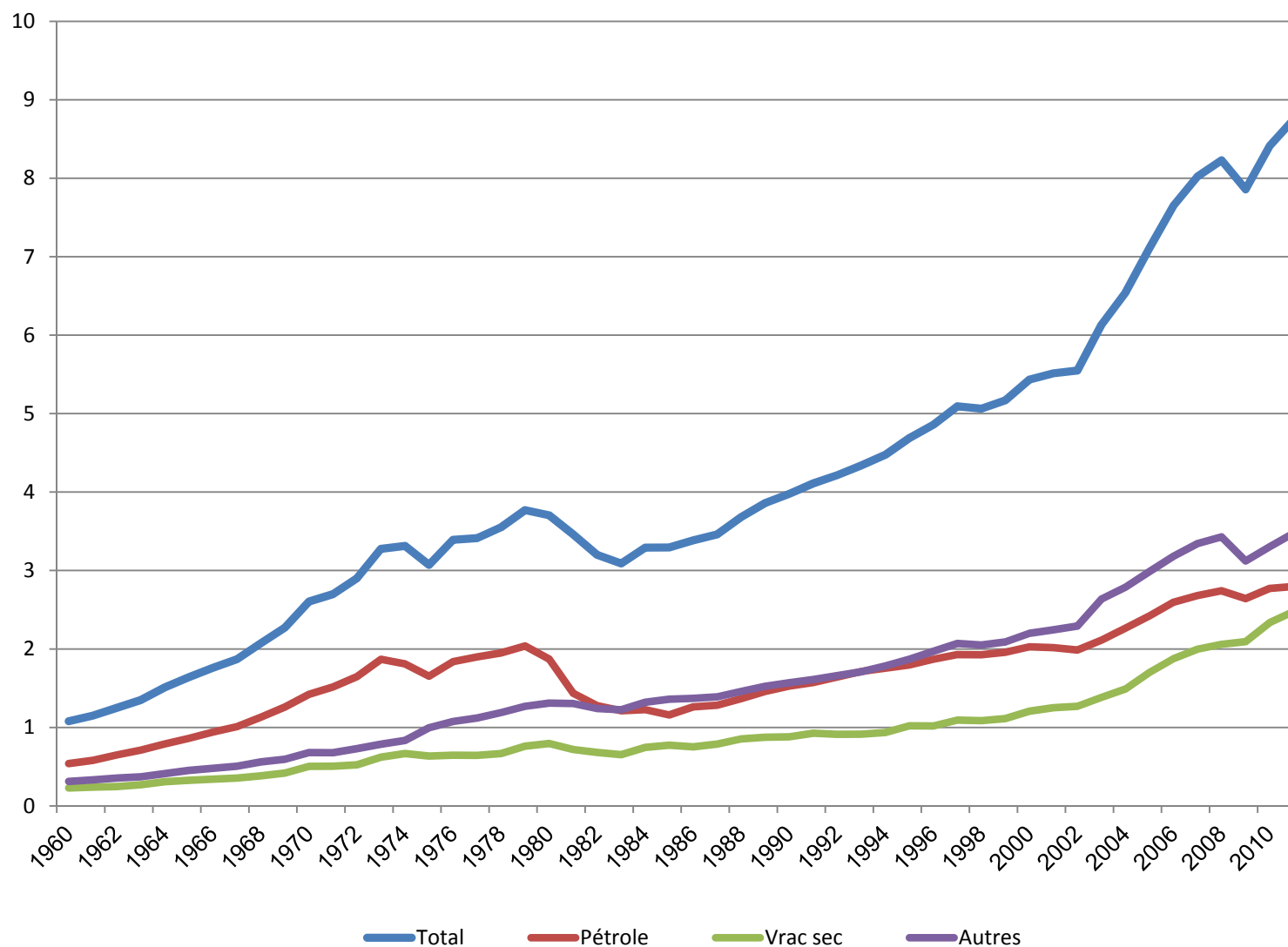
Grand Alliance: HL, NYK, OOCL, MISC: 340 navires, 993 000 EVP

New World Alliance: APL, MOL, Hyundai: 210 navires, 720 000 EVP

Coscon/K-Line/Yangming/Hanjin alliance

**Rétroaction de ces temps longs
sur
les systèmes productifs**

Transport par voie maritime des grands types de marchandises. En milliards de tonnes, 1960-2011

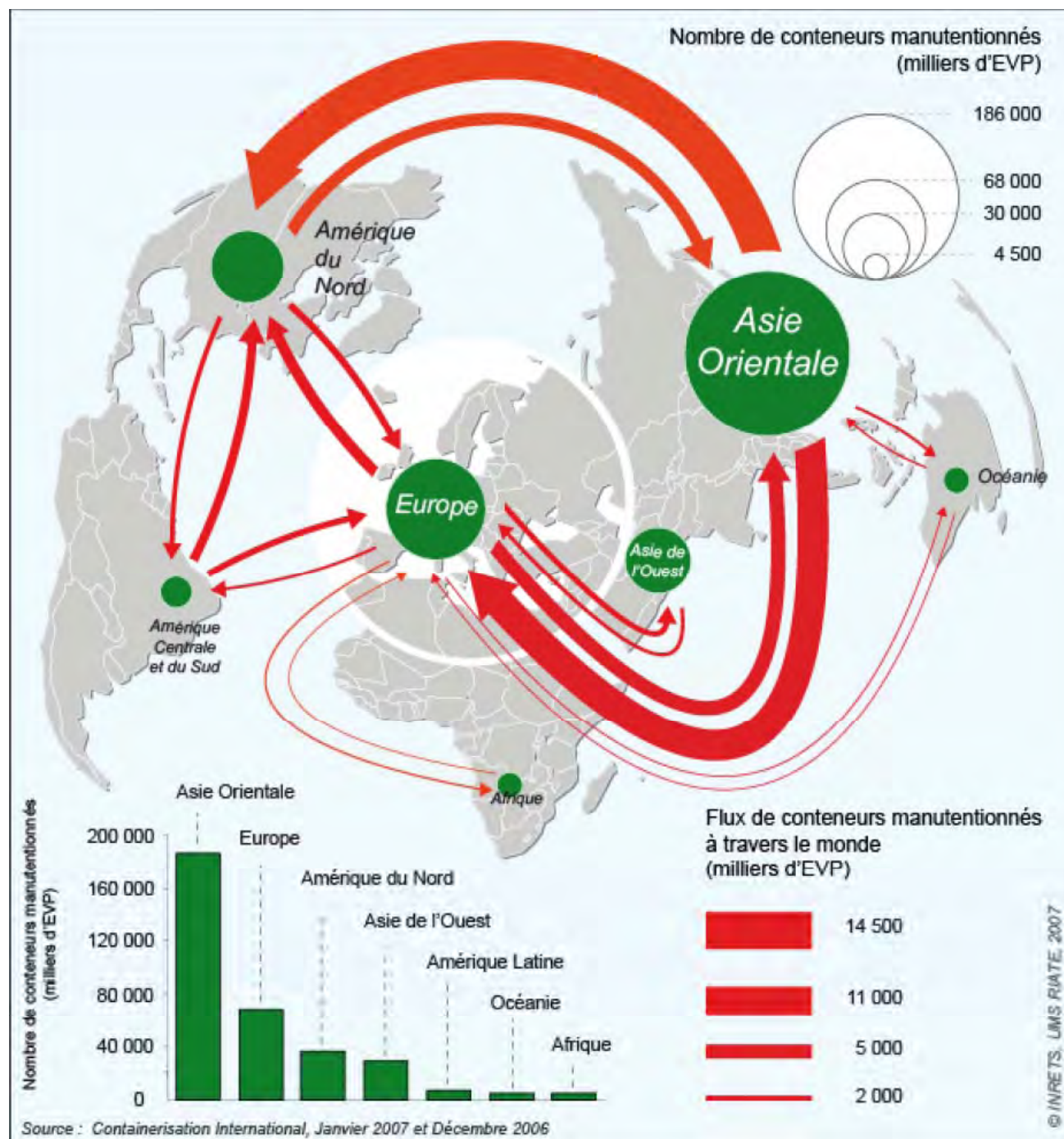


L'artère
circum-
terrestre

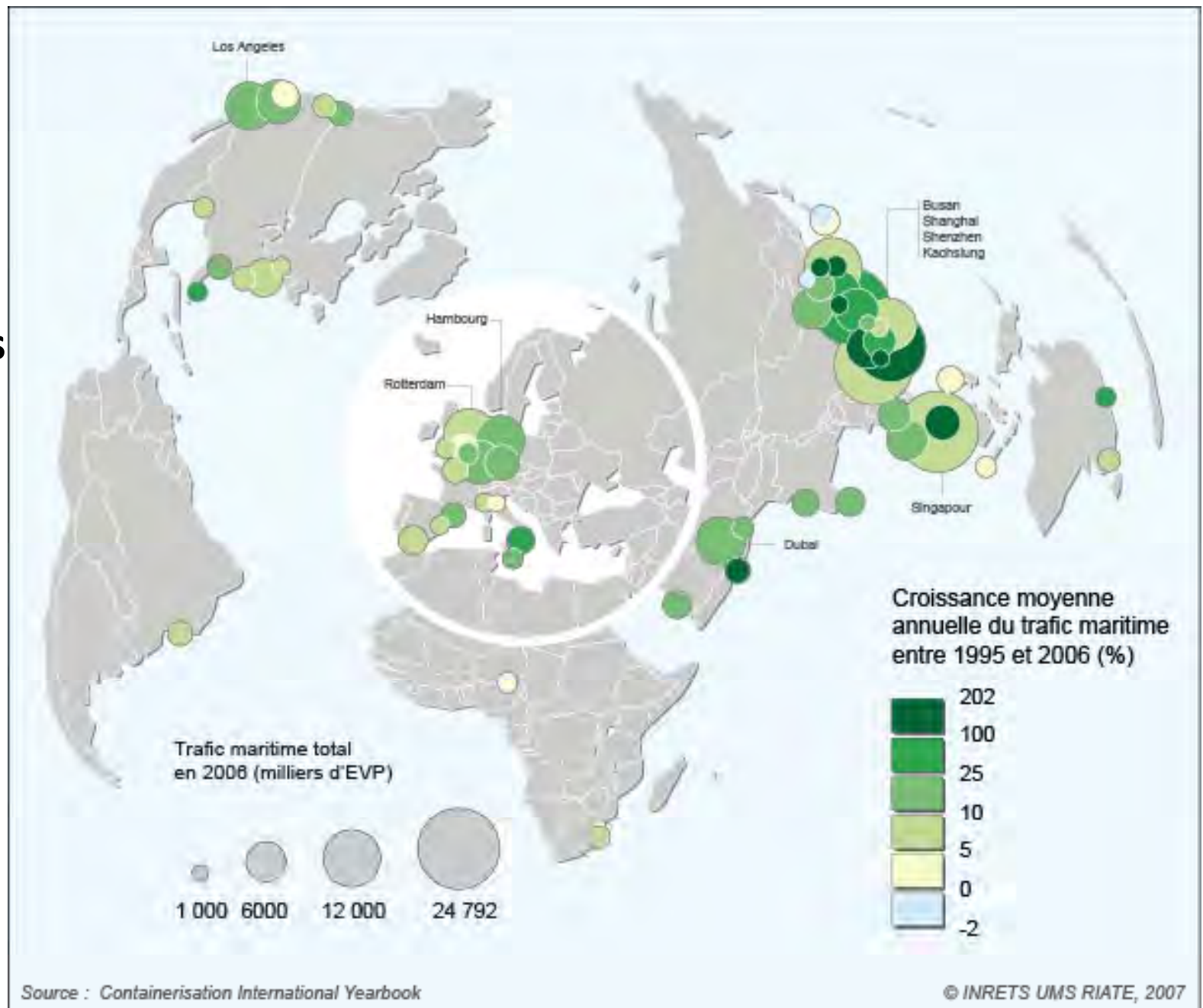
+

Premier marché:

L'intra-asiatique

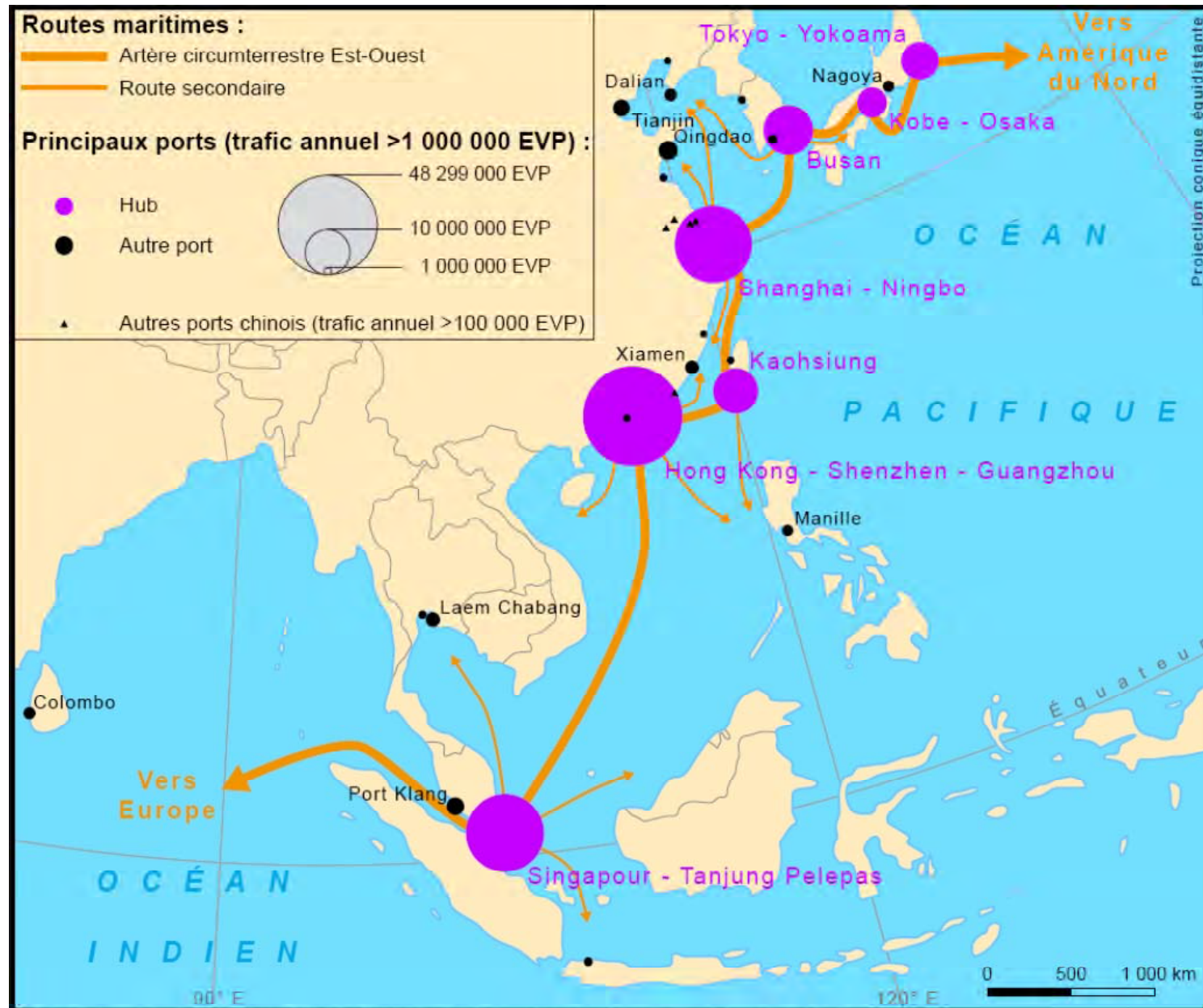


Les plus grands ports à conteneurs en 2006



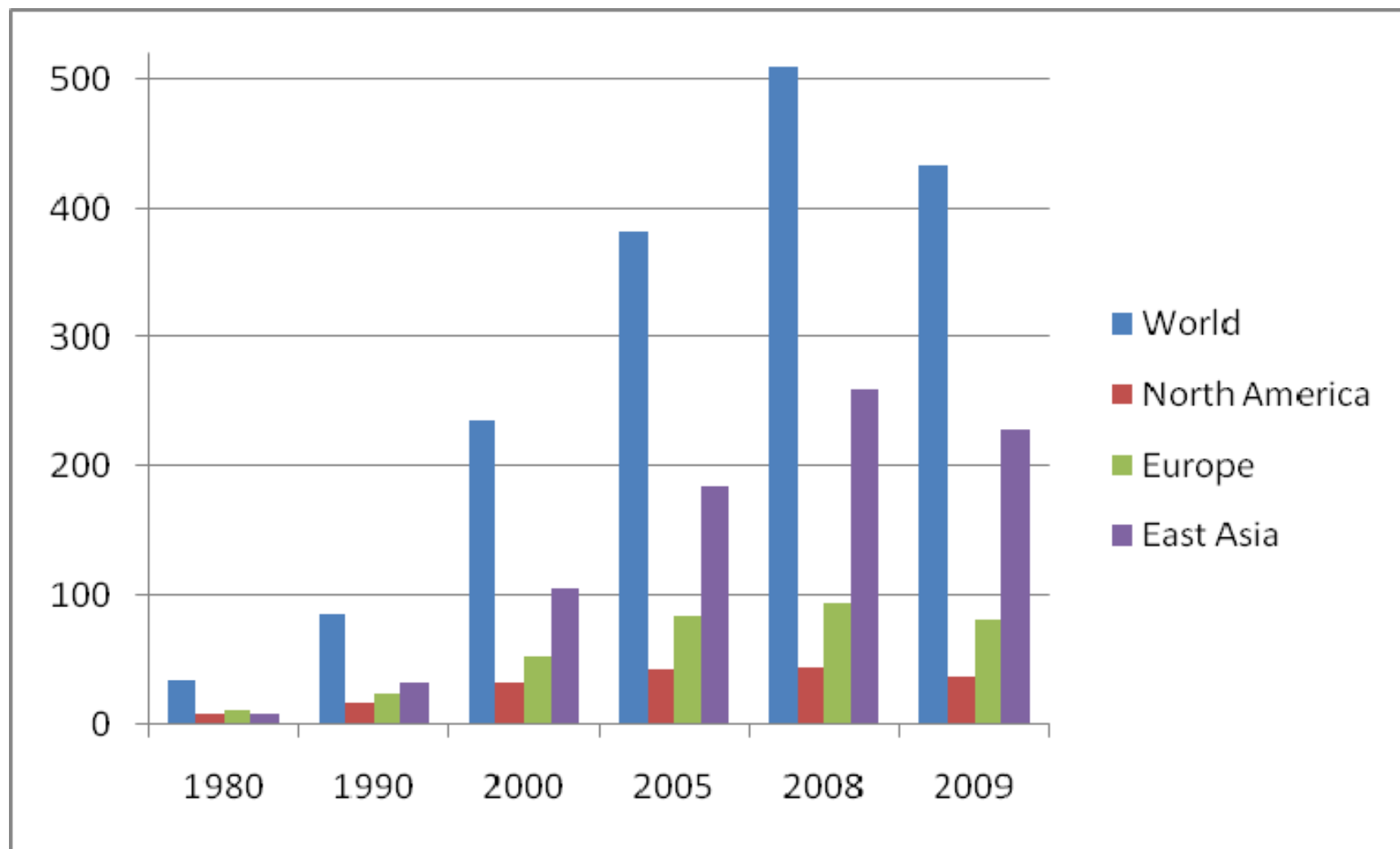
Source: FREMONT A. (2009) L'Europe : puissance maritime, in C. DIDELON, C. GRASLAND, Y. RICHARD (sous la dir. de) : **Atlas de l'Europe dans le monde**, Paris, La documentation française, pp.133-144.

La route maritime de l'Asie



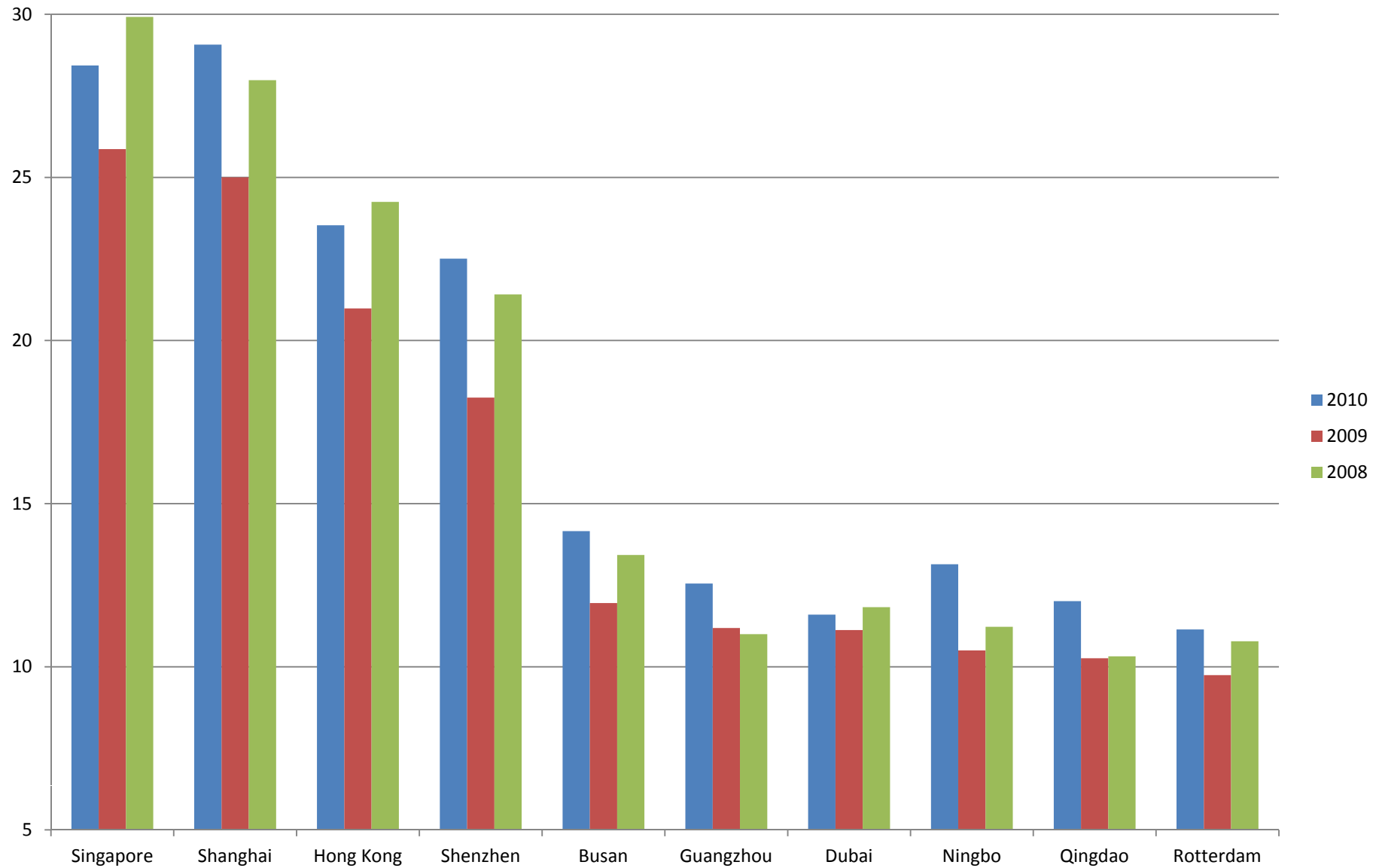
Trafic conteneurisé par grandes régions depuis 1980

Millions TEUs

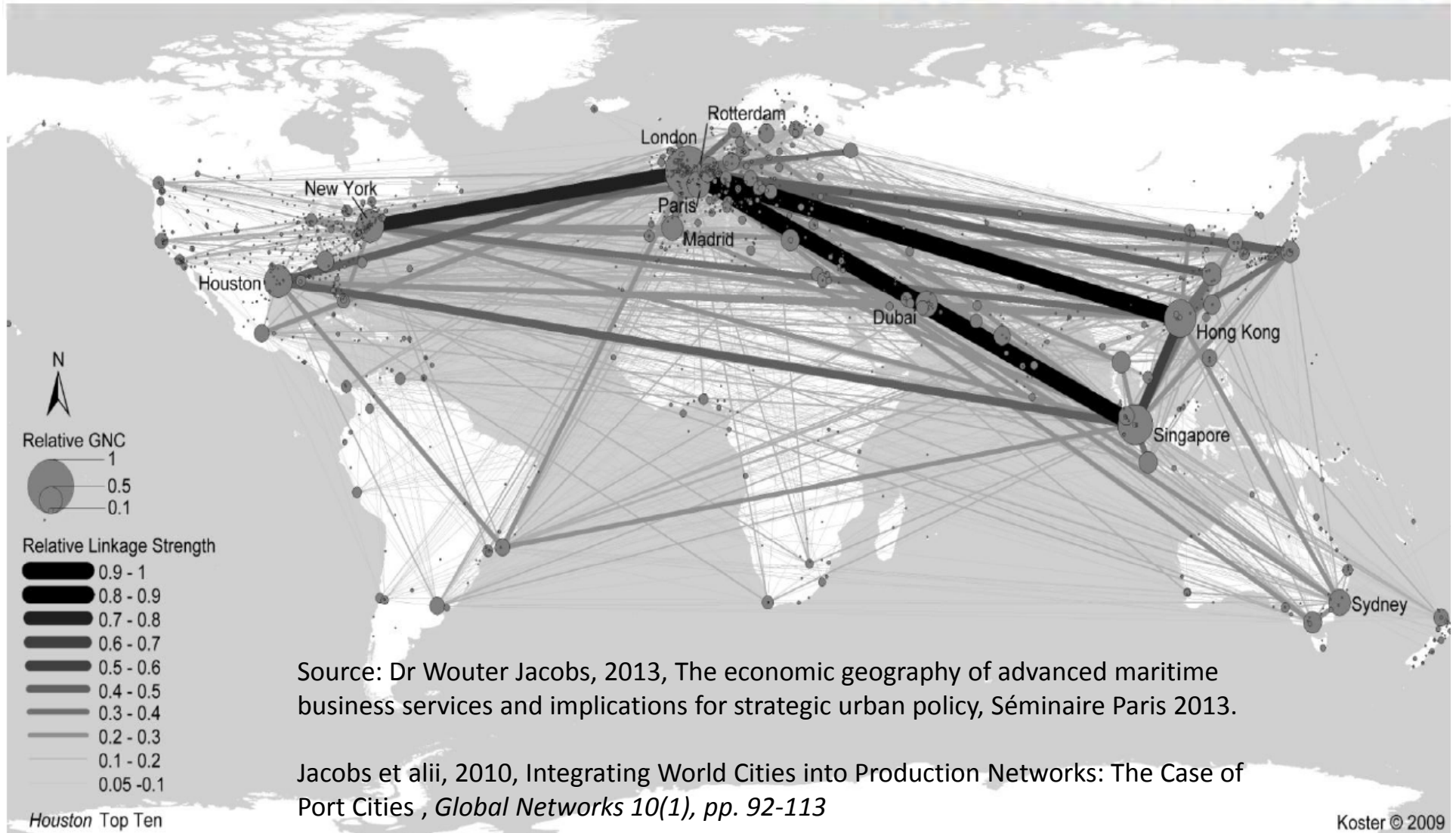


Source: Based on CI-OnLine

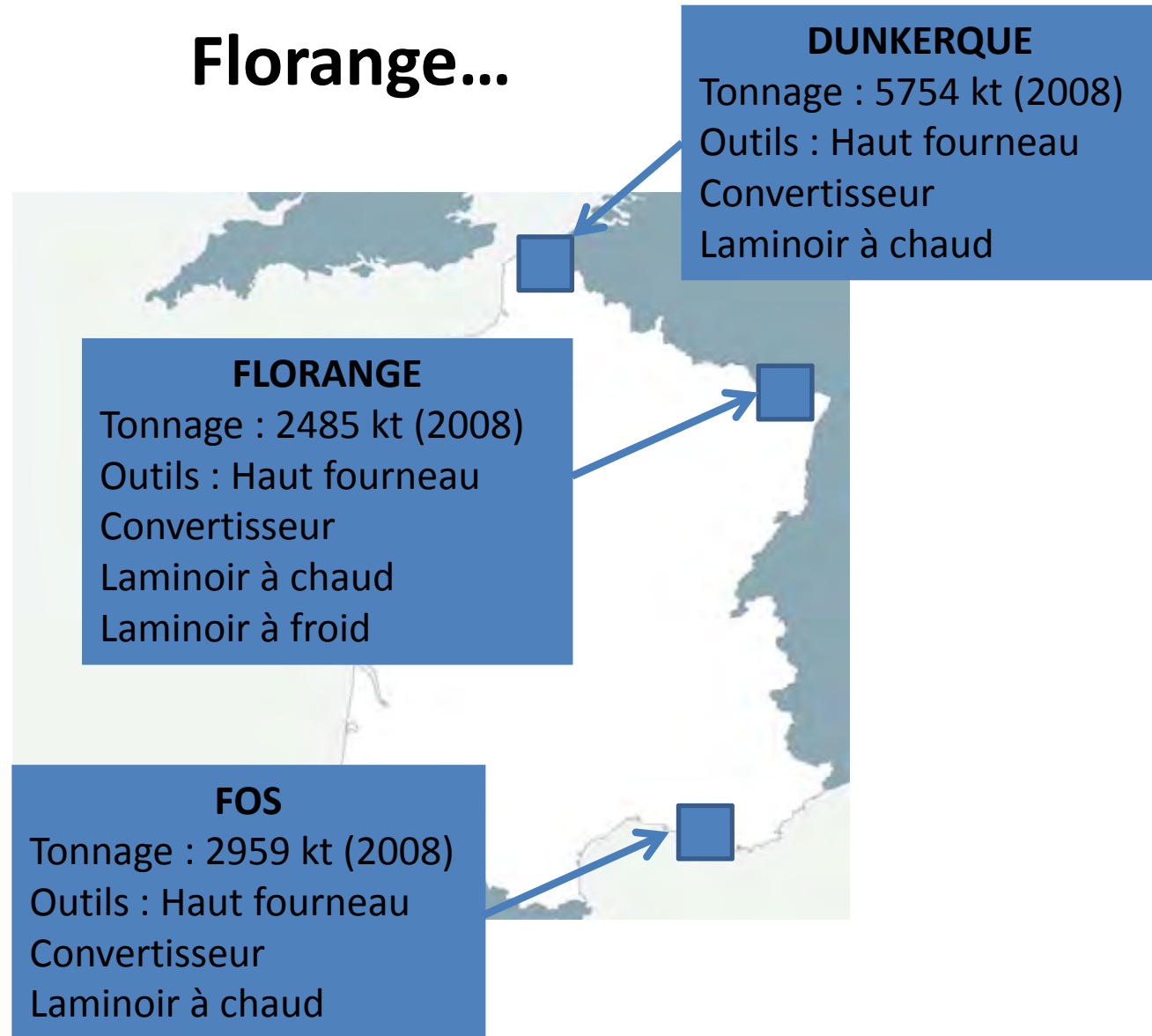
Trafic 2008-2010 des 10 premiers ports à conteneurs



Global Network of Maritime Advanced Services (Jacobs et al 2011)



Florange...



<http://www.acier.org/sites-de-productions/sites-francais.html>



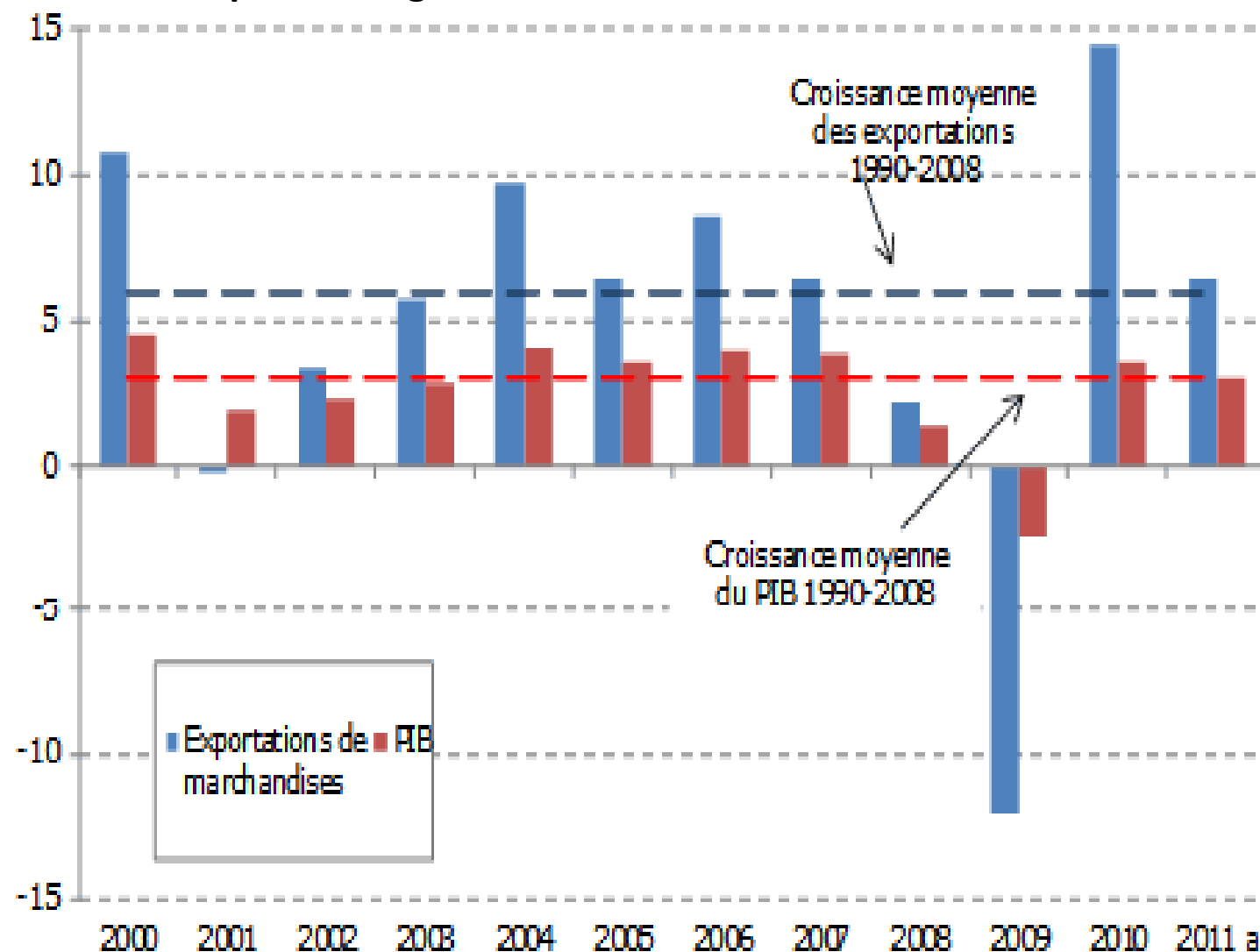
Dunkerque 2011



Le temps de la crise

Croissance en volume du commerce mondial des marchandises et du PIB, 2000-2011.

Variation annuelle en pourcentage



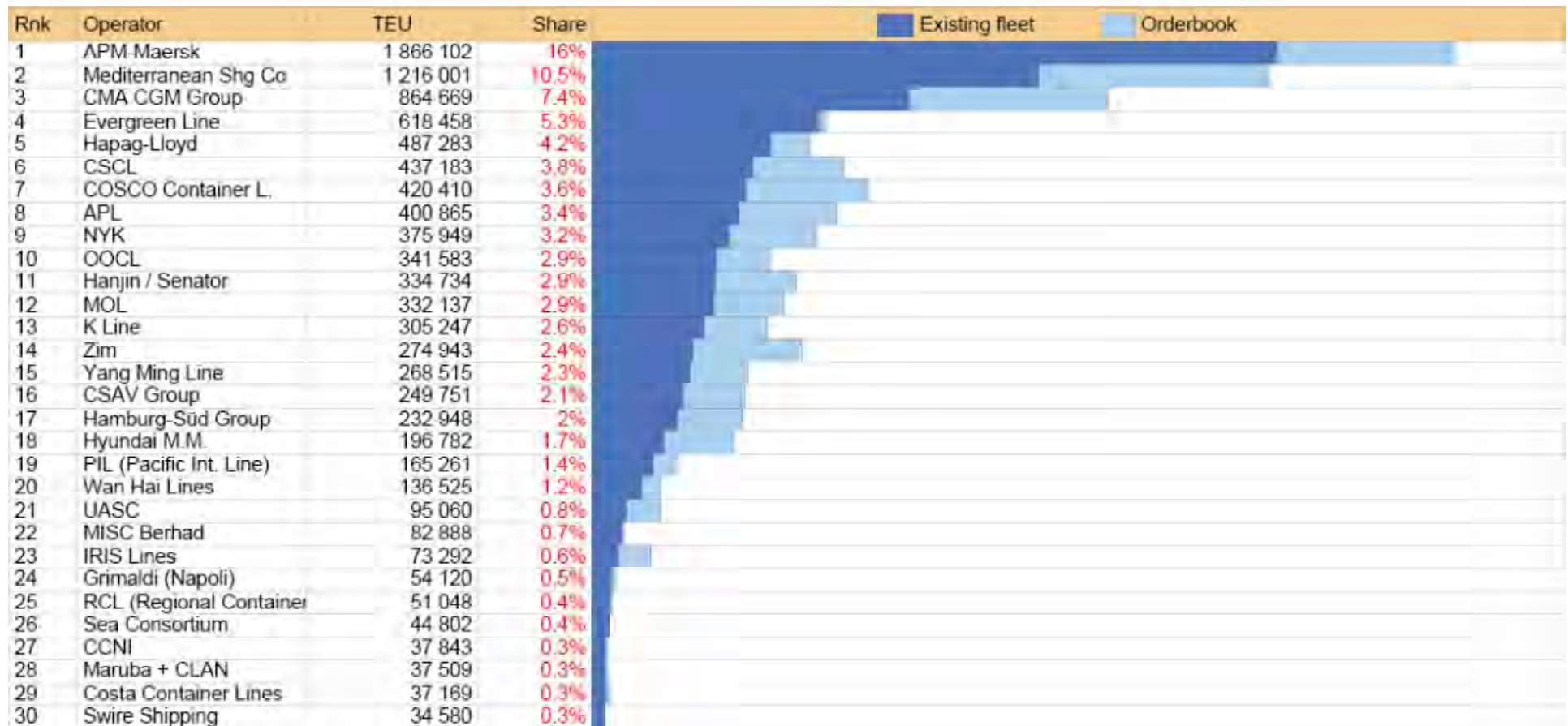
Source: OMC

AXS-Alphaliner TOP 30 carriers

Operated fleets as at 30 November 2007

The TOP 30 carriers

- > The percentage shown on the left of each bar represents the operator's share of the world liner fleet in TEU terms
- > The light coloured bar on the right represents the current orderbook (firm orders)



AXS-AlphaLiner TOP 100

Operated fleets as per 14 October 2009

THE TOP 100 LEAGUE

> The percentage shown on the left of each bar represents the operator's share of the world liner fleet in TEU terms.

> The light coloured bar on the right represents the current orderbook (firm orders).

Rnk	Operator	TEU	Share	Existing fleet	Orderbook
1	APM-Maersk	2,016,225	14.9%		
2	Mediterranean Shg Co	1,504,891	11.1%		
3	CMA CGM Group	1,025,108	7.5%		
4	Evergreen Line	575,393	4.2%		
5	APL	540,053	4.0%		
6	Hapag-Lloyd	467,796	3.4%		
7	CSCL	461,379	3.4%		
8	COSCO Container L.	455,526	3.4%		
9	NYK	412,119	3.0%		
10	Hanjin Shipping	410,737	3.0%		
11	K Line	341,889	2.5%		
12	MOL	336,743	2.5%		
13	OOCL	326,941	2.4%		
14	Hamburg Süd Group	324,737	2.4%		
15	Yang Ming Line	318,008	2.3%		
16	CSAV Group	304,013	2.2%		
17	Zim	273,759	2.0%		
18	Hyundai M.M.	273,467	2.0%		
19	PIL (Pacific Int. Line)	182,583	1.3%		
20	UASC	175,427	1.3%		
21	Wan Hai Lines	129,313	1.0%		
22	MISC Berhad	110,625	0.8%		
23	IRIS Lines	110,560	0.8%		
24	Sea Consortium	56,657	0.4%		
25	RCL (Regional Container L.)	51,291	0.4%		
26	Grimaldi (Napoli)	50,988	0.4%		
27	TS Lines	44,395	0.3%		
28	Maruba + CLAN	37,157	0.3%		
29	CCNI	36,712	0.3%		
30	SITC	34,266	0.3%		

All information above is given as guidance only and in good faith without guarantee

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Alphaliner - TOP 100

Operated fleets as per 11 February 2013

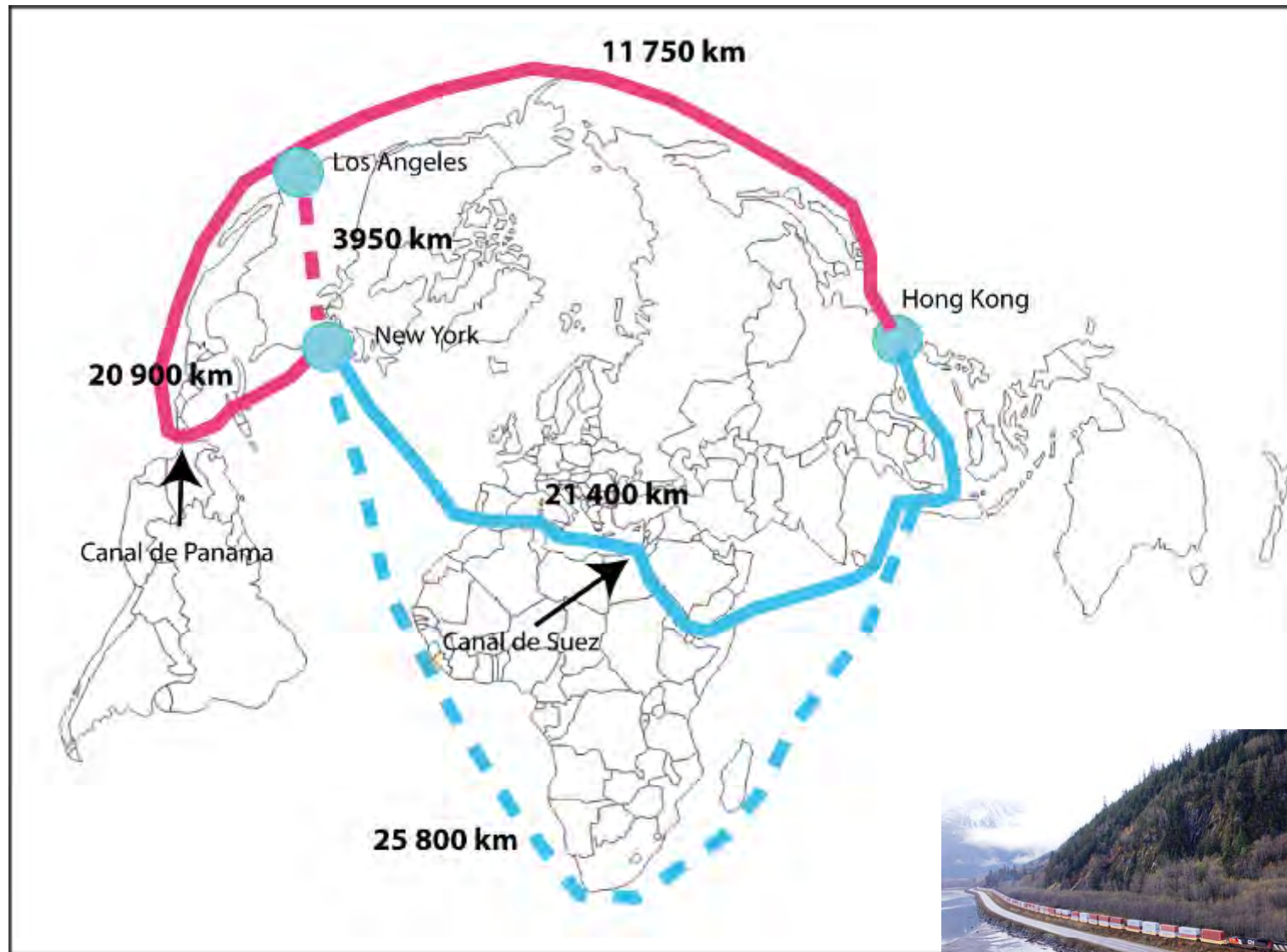
THE TOP 100 LEAGUE

> The percentage shown on the left of each bar represents the operator's share of the world liner fleet in TEU terms.

> The light coloured bar on the right represents the current orderbook (firm orders).

Rnk	Operator	TEU	Share	Existing fleet	Orderbook
1	APM-Maersk	2,618,807	15.5%		
2	Mediterranean Shg Co	2,254,634	13.4%		
3	CMA CGM Group	1,394,630	8.3%		
4	Evergreen Line	720,893	4.3%		
5	COSCO Container L.	714,659	4.2%		
6	Hapag-Lloyd	636,460	3.8%		
7	APL	598,024	3.5%		
8	Hanjin Shipping	579,840	3.4%		
9	CSCL	565,567	3.4%		
10	MOL	507,988	3.0%		
11	OOCL	454,871	2.7%		
12	Hamburg Süd Group	425,917	2.5%		
13	NYK Line	412,859	2.4%		
14	Yang Ming Marine Transport Corp.	358,510	2.1%		
15	K Line	352,754	2.1%		
16	Hyundai M.M.	351,925	2.1%		
17	Zim	322,205	1.9%		
18	PIL (Pacific Int. Line)	301,384	1.8%		
19	UASC	272,089	1.6%		
20	CSAV Group	257,462	1.5%		
21	Wan Hai Lines	154,986	0.9%		
22	HDS Lines	86,320	0.5%		
23	TS Lines	81,003	0.5%		
24	X-Press Feeders Group	79,248	0.5%		
25	NileDutch	67,484	0.4%		
26	SITC	62,121	0.4%		
27	KMTC	52,901	0.3%		
28	RCL (Regional Container L.)	52,573	0.3%		
29	CCNI	42,728	0.3%		
30	STX Pan Ocean (Container)	39,978	0.2%		

Routes between Hong Kong and New York



Source: Frémont, 2010, Le canal de Suez : quels enjeux stratégiques ?, *Revue Moyen-Orient*



**Le temps
du
quotidien**

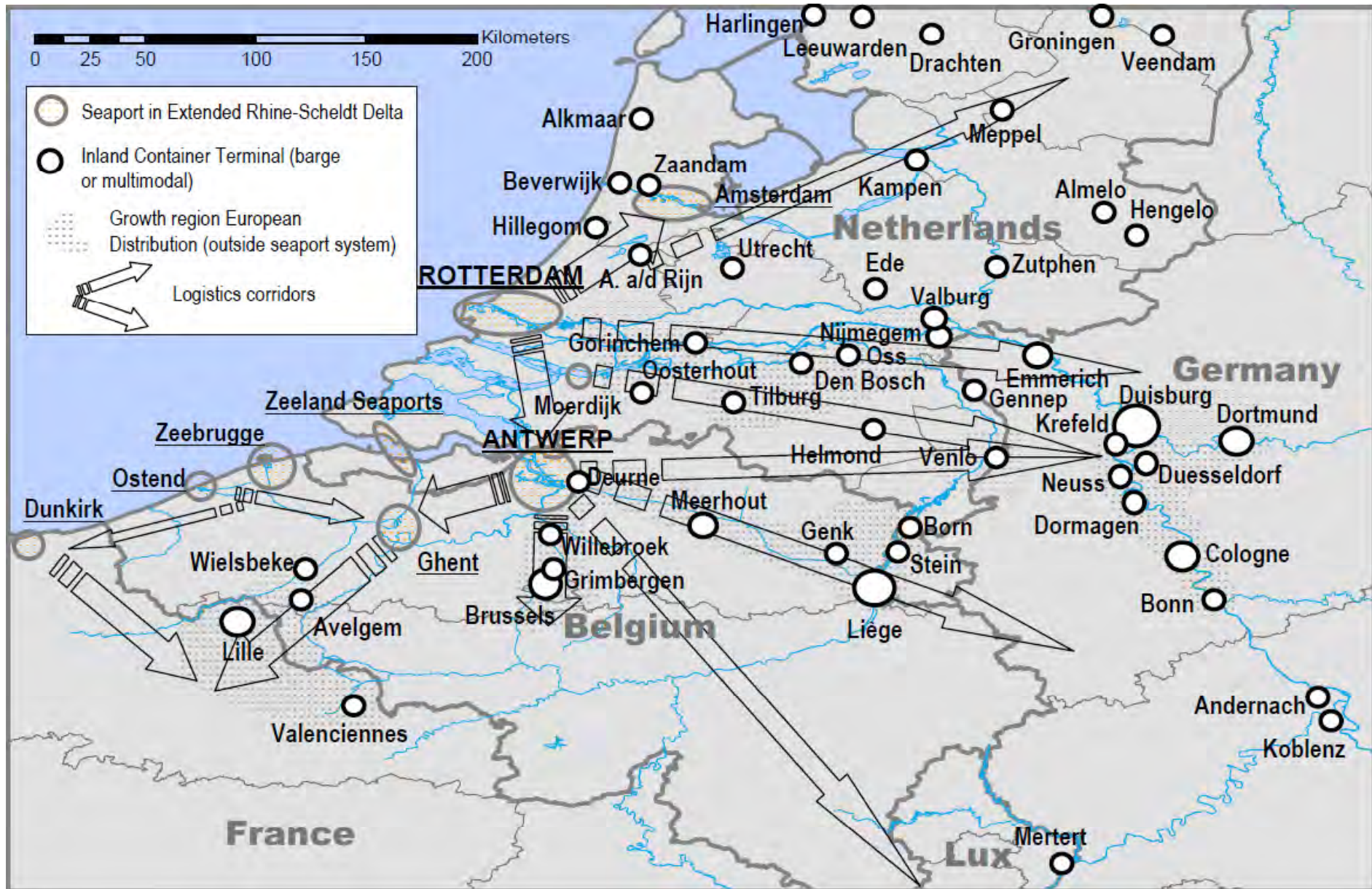
- **L'Emma Maersk immobilisé dans le canal de Suez suite à une avarie (06/02/2013)**
- **Le Grande Nigeria en avarie de propulsion à la sortie du port du Havre (06/02/2013)**



- **Le chimiquier Gascogne libéré, l'équipage est sauf (07/02/2013)**

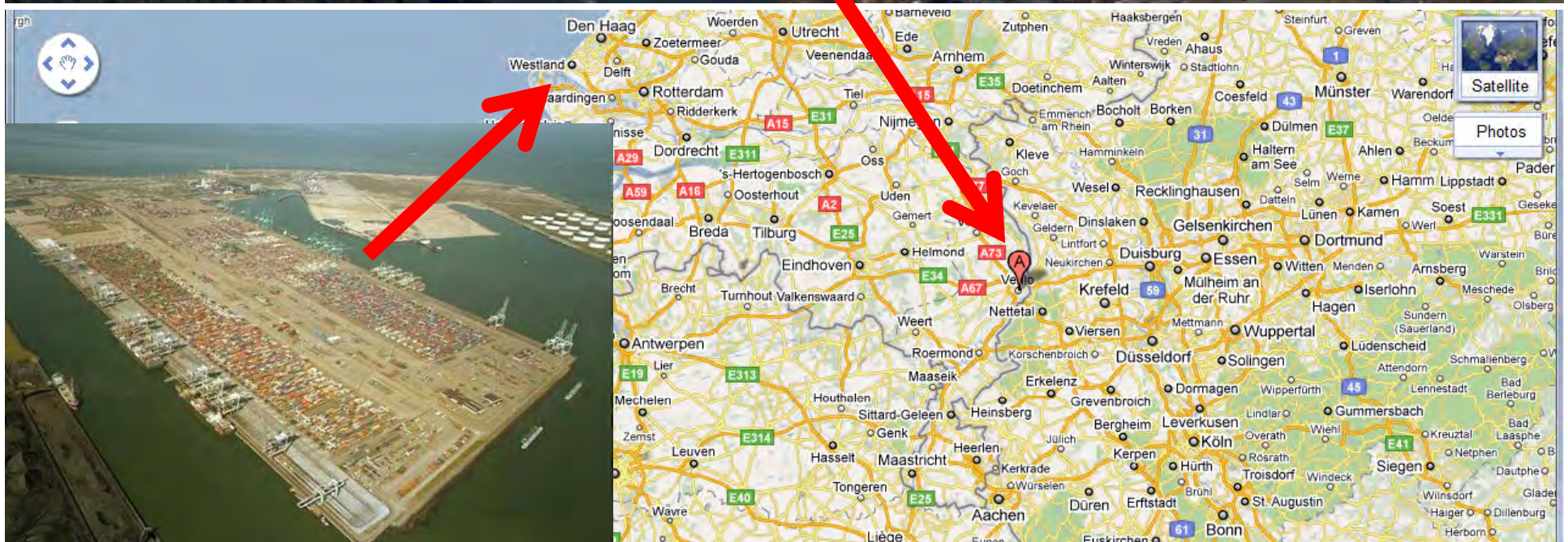


Région logistique des ports du Delta d'Or



Source: Notteboom, 2009, Economic analysis of the European seaport system, Report, ESPO

Maasvlakte et Venlo Inland terminal





Merci pour votre attention