



# PRESS KIT

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# SUMMARY

- Press release: *Between performance and resilience, the Port Boulogne Calais consolidates its position*
- Boulogne-sur-Mer: Species recorded at the fish market (tonnages)
- Investments: 2025 review & 2026 forecasts



## 2025: BETWEEN PERFORMANCE AND RÉSILIENCE THE PORT BOULOGNE CALAIS CONSOLIDATES ITS POSITION

In 2025, in an environment that remains tense, the Port Boulogne Calais consolidates its position thanks to generally stable results and a strong capacity to adapt. The Boulogne-sur-Mer fish auction maintains its momentum, cross-Channel tourism is growing and freight remains solid despite a slight decline. Trade terminals maintain their tonnages, rail motorways set a new record, and shipbuilding confirms the strength of its activity. Only the import-export of new vehicles and the export of submarine cables proved less buoyant than expected.

### ■ THE BOULOGNE-SUR-MER AUCTION CONFIRMS ITS MOMENTUM IN 2025 AND PREPARES TO SUPPORT THE INDUSTRY IN FACING THE CHALLENGES OF 2026

In 2025, activity at the Boulogne fish auction remained particularly strong. Volumes sold reached 32,500 tonnes, virtually unchanged from 2024 (-1%), while the average price per kilogram rose slightly to €2.83 (+1%). The value therefore remained high at nearly €92 million, just 1% less than in 2024, a record year.

The Boulogne-sur-Mer fish auction thus retains its status as France's leading fish auction, both in terms of volume and value.

#### • Top 3 most sold species in 2025

**Sardines** are the most commercially exploited species, with nearly **3.3 million tonnes** caught. Although their value is modest (€0.86/kg), they have played an essential role for fishermen. Not subject to quotas, they have helped to partially offset the decline in volumes of other species, particularly mackerel, which has been heavily impacted by quota reductions between 2024 and 2025 (-30%).

**Coalfish**, mainly from the Euronor fleet, recorded remarkable growth: **+20%** in volume (3.2 Mt) and **+16%** in average price (€2.10/kg compared to €1.80 in 2024). It remains the second most sold species at auction.

**Scallops** also enjoyed a very favourable season, with a **23% increase** in volume (2.6 Mt) and a stable price of £2.95/kg.

#### • Concrete measures to support producers

In order to enhance the appeal of the fish auction and support professionals, the Port Boulogne Calais rolled out two new measures in 2025:

- the «transport bonus», introduced at the beginning of the year, to encourage the repatriation to the Boulogne fish auction of volumes landed at forward bases. Indexed to the quantities brought back, it has notably enabled the sale of an additional 500 tonnes of saithe by Euronor;
- The 17% reduction in fish tank cleaning fees, implemented mid-year, aims to reduce the burden on fishermen and buyers.

These measures are part of an overall strategy to strengthen the competitiveness of the sector and support local activity.



## • 2026: a tense year for the Boulogne fishing industry

The year 2026 looks set to be particularly challenging for the sector. The European Union's decision to reduce France's mackerel quota by 70% for 2026 is a severe blow to Boulogne fishing, which is already facing a 30% reduction in 2025.

Mackerel is one of Boulogne-sur-Mer's flagship species and can account for up to 30% of the turnover of certain vessels. This further decline could directly undermine certain shipping companies and fishmongers specialising in the processing of this species.

## ■ ON THE CHANNEL, A CONTRASTING EVOLUTION IN TOURISM TRAFFIC BETWEEN PRIVATE VEHICLES AND COACHES, AND A FREIGHT MARKET THAT IS DOWN SLIGHTLY BUT REMAINS ROBUST

### • Passenger vehicle activity continues to rise

**7,197,306 passengers** passed through the port of Calais in 2025, a slight decrease of 1.6% compared to 2024. This decline is mainly due to a 15% contraction in the coach segment (57,583 units), as a result of the slowdown in short stays (one to two days). The port of Calais is logically following the downward trend observed across the entire Strait (-12%).

Despite this context, the port of Calais is **confirming its position as the benchmark**: three out of four coaches bound for the United Kingdom choose the Calais platform.

**Light vehicle** traffic continued its positive trend, driven in particular by an excellent summer season. It **increased by 2.5%** (1,373,756 units) compared to 2024.

**In total**, passenger vehicle traffic (cars, coaches, motorcycles, caravans) reached **1,431,339 units**.

### • Confirmed leadership in cross-Channel freight in a tense market

In 2025, **1,714,187 heavy goods vehicles** passed through the port of Calais, representing a decline of 3.6% in line with the general contraction of the market across the Channel. In a particularly challenging economic, geopolitical and regulatory environment, the port of Calais nevertheless demonstrated **remarkable resilience**.

Since Brexit came into effect in January 2021, cross-Channel freight traffic has fallen by nearly 15%, representing more than half a million fewer heavy goods vehicles. Against this backdrop, the port of Calais has managed to **strengthen its competitiveness** and gain **7 points of market share**, confirming the performance of its infrastructure and organisation. More than one in two lorries uses the Calais facilities.

**Unaccompanied freight** (trailers without drivers) also saw a slight decline of 2%, with **43,343 units** transhipped.



## ■ WITH NEARLY 2 MILLION TONNES, TRADE TERMINALS MAINTAIN STABLE OVERALL TONNAGE

In 2025, the commercial terminals in Boulogne and Calais recorded a **combined tonnage of 1.9 million tonnes**, slightly lower than in 2024.

### • Boulogne: a particularly dynamic year in 2025

The commercial terminal at the port of Boulogne has recorded remarkable performance, with a **7% increase** in bulk traffic, exceeding **710,000 tonnes**, a level **not seen since 2018**.

Export traffic, which accounts for **more than 80%** of total activity, reached **583,539 tonnes**, an **increase of 17%**. This growth was mainly driven by flows to Finland and Sweden, particularly in limestone (301,000 tonnes) and quicklime (214,000 tonnes).

In terms of imports, the terminal handled a total of **129,472 tonnes**, a volume largely supported by natural sand traffic (nearly 95,000 tonnes), which saw a sharp increase. This sand, sourced from Belgian and Dutch underwater quarries, is intended for the construction sector.

### • Calais: a more mixed year for bulk cargo

The Calais commercial terminal is experiencing less favourable conditions, with a 31% decline in bulk cargo handled, representing **415,000 tonnes** (imports and exports combined).

On the import side, after a particularly dynamic 2024, sand traffic fell by 57% (47,500 tonnes compared to 110,500 tonnes). Petroleum coke, on the other hand, grew strongly, with an increase of nearly 70% (36,200 tonnes).

In terms of exports, construction materials (gravel) fell by nearly 60% (66,650 tonnes). Activity at the sugar terminal remained stable at 52,720 tonnes.

The volume of submarine fibre optic cable exports reached 20,000 tonnes, down 57%. Initial forecasts for growth in ASN's activities for 2025 have ultimately been postponed to 2026.

Rail tonnage reached nearly **825,000 tonnes** in 2025, an **increase of 12%**, driven by the sustained development of rail motorways.

The tonnage of the commercial port of Calais is down slightly to **1.2 million tonnes** (1.3 million tonnes in 2024).



## ■ RAIL-ROAD TRANSPORT CONFIRMS ITS GROWTH MOMENTUM AND SETS A NEW RECORD

In 2025, the rail motorways operated by our partner VIIA continued to grow. **52,203 units** – trailers and containers – were transported to and from the Calais intermodal terminal, representing a **14% increase** in activity.

This performance is based on the consistently strong Calais/Le Boulou route, but also on the sharp acceleration of the Calais/Sète route, where traffic doubled during the year.

The **outlook for 2026** looks **particularly favourable**. The commissioning at the end of last year of a new rail terminal at the port of Sète, equipped with Modalhor technology, will increase the service's capacity from 3 to 5 weekly rotations.

## ■ RO-RO: IMPORTS/EXPORTS OF NEW VEHICLES DOWN ON FORECASTS

After an encouraging end to 2024, new vehicle traffic for both imports and exports failed to reach expected levels in 2025. The closure of the Stellantis plant in Luton (United Kingdom) in the second quarter had a significant impact on import volumes.

A total of **16,637 vehicles** were handled at the port of Calais in 2025, a decrease of 33%. Nearly **90% of these flows came from imports**, mainly from Turkey (nearly 9,000 units) and the United Kingdom (6,500 units).

However, the **outlook for 2026** looks **much more favourable**. The Charles André Group (GCA) has confirmed the signing of a contract for 35,000 Stellantis vehicles, starting in April, from the Hordain and Rennes plants to Sheerness (England).

Flows from Turkey and the United Kingdom are also expected to consolidate during the year.

## ■ SHIPBUILDING: SUSTAINED ACTIVITY AND SOLID OUTLOOK

The **order book of Socarenam**, one of the major players in French shipbuilding, **shows exceptional visibility**, with a guaranteed workload for the next five years. The year 2025 was marked by the delivery of several patrol boats, while other units are currently under construction at the Boulogne site, the company's historic birthplace, and at Calais.

The **Calais dry dock**, which has been unused for nearly twenty years, is undergoing **major modernisation work**. This upgrade will strengthen the site's industrial capacity and support the growth of Socarenam's activities in order to meet a particularly busy order book.



## ■ DECARBONISATION AT THE HEART OF OUR STRATEGY

The year 2025 began with the announcement that the port's high-voltage electricity supply had been secured. The **connection contract signed with RTE** was a founding step towards decarbonising the Calais-Dover link. By 2029/2030, **100 MW of power** will be delivered to the port.

In 2025, technical teams began preliminary design work on the infrastructure that will enable energy to be converted and distributed and ships to be connected and recharged. This work is being carried out in close **cooperation** with the **ports of Dover and Dunkirk**, as some of the technical solutions must necessarily be equivalent to ensure compatibility with the fleets of shipping companies. The latter are, of course, closely involved in this design stage.

The Port also continued to implement its **decarbonisation plan** with several actions in 2025: continuing to replace public lighting with low-energy LED equipment, switching the service vehicle fleet to electric, a programme to renew the cooling units in Boulogne-sur-Mer, and obtaining 50 001 certification for energy management.

Key figures for 2025			
<b>Total tonnage: 43 Mt</b>		- 2	
<b>Turnover: €158 million</b>		+ 1	
<b>Ferry activity:</b>		<b>Fishing activity:</b>	
• Tonnage: 40 millions tonnes	-2	• Tonnage: 32,500 tonnes	-2
• Freight units: 1.7 million	-3.6	• Total value: €92 million	-1
• Passengers: 7.2 million	-2		
• Passengers vehicles: 1.4 million	+1.6		
<b>Rail motorway activity:</b>		<b>Trade activity:</b>	
• 52,203 units (trailers and containers)	+14	• Total tonnage : 1.9 million tonnes	-5
		• Calais: 1.2 million tonnes	-7
		• Boulogne: 710,000 tonnes	+7



# INVESTMENTS: 2025 REVIEW & 2026 FORECAST

Port Boulogne Calais is continuing its investment strategy in order to support its customers' development, enhance the security of its infrastructure, accelerate its digital transformation and energy transition, and consolidate the attractiveness of its two port sites.

## ■ 2025 RESULTS

In 2025, Port Boulogne Calais invested approximately €10 million\* in port infrastructure in Boulogne and Calais.

• **In Boulogne**, fishing and seafood activities, as well as all associated logistics, accounted for the majority of investments, amounting to around £3.2 million out of a total budget of £4.8 million for the year.

- **€860,000:** continuation of work to modernise and bring the high- and low-voltage electrical network up to standard (total cost: €3 million);
- **€725,000:** demolition of brownfield sites in Capécure and hangar D3 in the commercial port;
- **€600,000:** roadworks and public lighting overhaul, work begun in 2023. These major works (€6.5 million over five years) are part of the plan to revamp Capécure's image and attractiveness, which includes the complete renovation of roads, public lighting with a switch to LED and the development of green spaces;
- **€200,000:** modernisation of the IT network to improve its reliability and increase connection speeds (storage area, slipway, quay terminals);
- **€180,000:** provision of two new weighing and registration terminals for fishermen at Quai Gambetta.

• **At the port of Calais**, investments totalling €5.6 million in 2025 focused mainly on the facilities needed to implement the new EES (Entry Exit System) border controls, as well as on accelerating the digital transition.

- **€1.8 million:** continuation of work on the new EES (Entry Exit System) border controls, mainly involving the construction of a new building for control personnel;
- **Nearly €1 million** for digital transition and digitisation (IT network, tracking, new software, etc.);
- **€280,000:** completion of phase 2 of the programme to convert the railway platform lighting to LED, which will continue in 2026 for the rest of the eastern port. (total cost €1.1 million).





# INVESTMENTS: 2025 REVIEW & 2026 FORECAST

## ■ 2026 FORECAST

A total budget of €15.4 million\* will be allocated to the two sites:

### • In Boulogne-sur-Mer : €4.4 million

Some significant investments:

- **€1.2 million:** modernisation of IT equipment and software at the fish auction (replacement of screens in 2026 and sales software in 2027)
- **€740k:** replacement of refrigeration units in the Jean Voisin hall (total cost: €1.5 million)
- **€600,000:** continuation of roadworks
- **€420k:** demolition of the last vacant lots on Rue A. Adam and Rue L. Fontaine and demolition of Hangar D8 at the commercial port
- **€250k:** installation of a video surveillance system in the Capécure area.

### • In Calais : €11 million

Some significant investments:

- **€1.5 million:** construction of new service pontoons;
- **€800k:** reorganisation and digitisation of access to and exit from the eastern port serving the intermodal terminal, ro-ro terminal, sugar terminal, etc.;
- **€700k:** development of a secure export car park within the Calais 1 cross-Channel terminal;
- **€500k:** new CMMS (Computerised Maintenance Management System) software;
- **€400k:** Reinforcement of the embankments along the cable-laying quays necessary to support ASN in its development needs;
- **€450k\* \*:** final phase of work as part of the EES

(\*) For the port of Boulogne-sur-Mer, the investments are part of the 2022-2027 Multi-Year Investment Plan (PPI). This programme is financed, at different levels, by the Hauts-de-France Region, which owns the port infrastructure, by the Communauté d'Agglomération du Boulonnais (CAB), as well as by the French State and the European Union.

(\*\*\*) With regard to the port of Calais, investments made as part of the implementation of the SEA are co-financed by the European Union.

