



SHORT SEA CONFERENCE 2011



**« Stimulating Intermodality through
Motorways of the Sea »**

BRITTANY FERRIES

Tuesday 13 April 2011 - Bilbao

Brittany Ferries

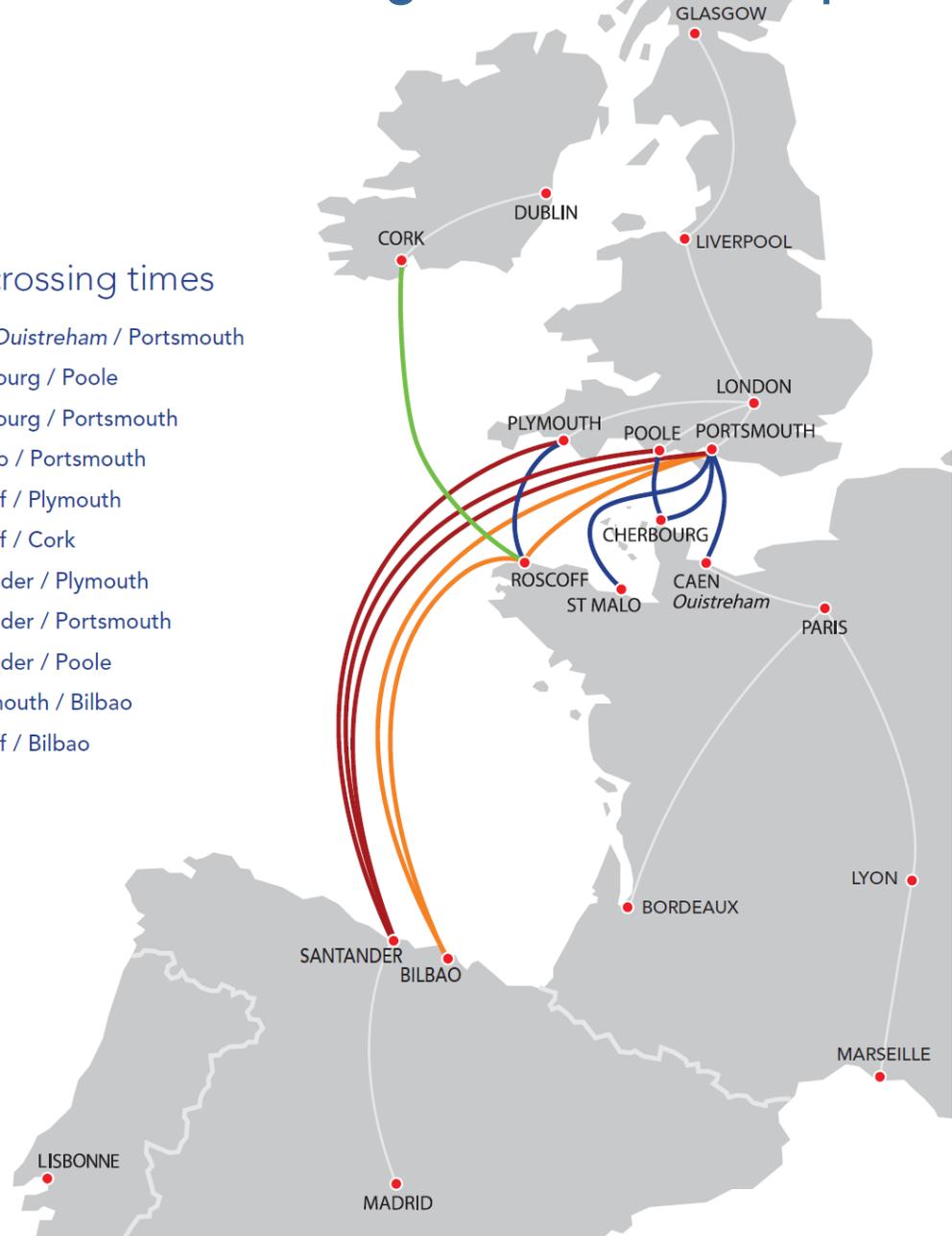


Motorways of the Sea serving Atlantic Europe

- ✓ **Company created in 1972**
- ✓ **Farmers and agricultural cooperatives**
- ✓ **French flag**
- ✓ **9 Ropax vessels**
- ✓ **10 Routes**
- ✓ **2.5 millions passagers (85% from UK & Ireland)**
- ✓ **190.000 Freight units**

Average crossing times

- 5:45 ■ Caen-Ouistreham / Portsmouth
- 4:00 ■ Cherbourg / Poole
- 3:00 ■ Cherbourg / Portsmouth
- 8:45 ■ St Malo / Portsmouth
- 6:00 ■ Roscoff / Plymouth
- 14:00 ■ Roscoff / Cork
- 19:00 ■ Santander / Plymouth
- 24:00 ■ Santander / Portsmouth
- 27:00 ■ Santander / Poole
- 24:00 ■ Portsmouth / Bilbao
- 21:00 ■ Roscoff / Bilbao



Brit



The Fleet



✓ 7 Ropax vessels

✓ 1 RoRo

✓ 1 High Speed Catamaran

6 buildt from year 2000 and 3 during the nineties

Brittany Ferries

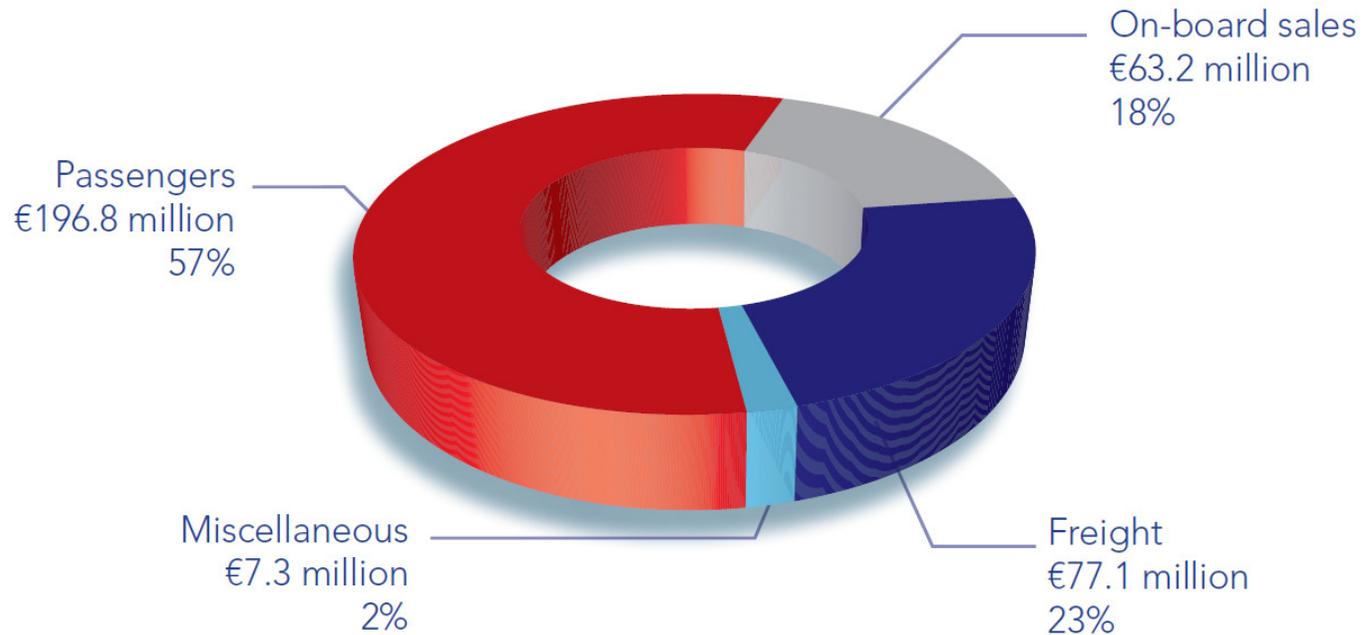


Turnover

as at 30th September 2010



Brittany Ferries



TURNOVER 2010 (consolidated) : 344,4 M€

Freight activities 23%



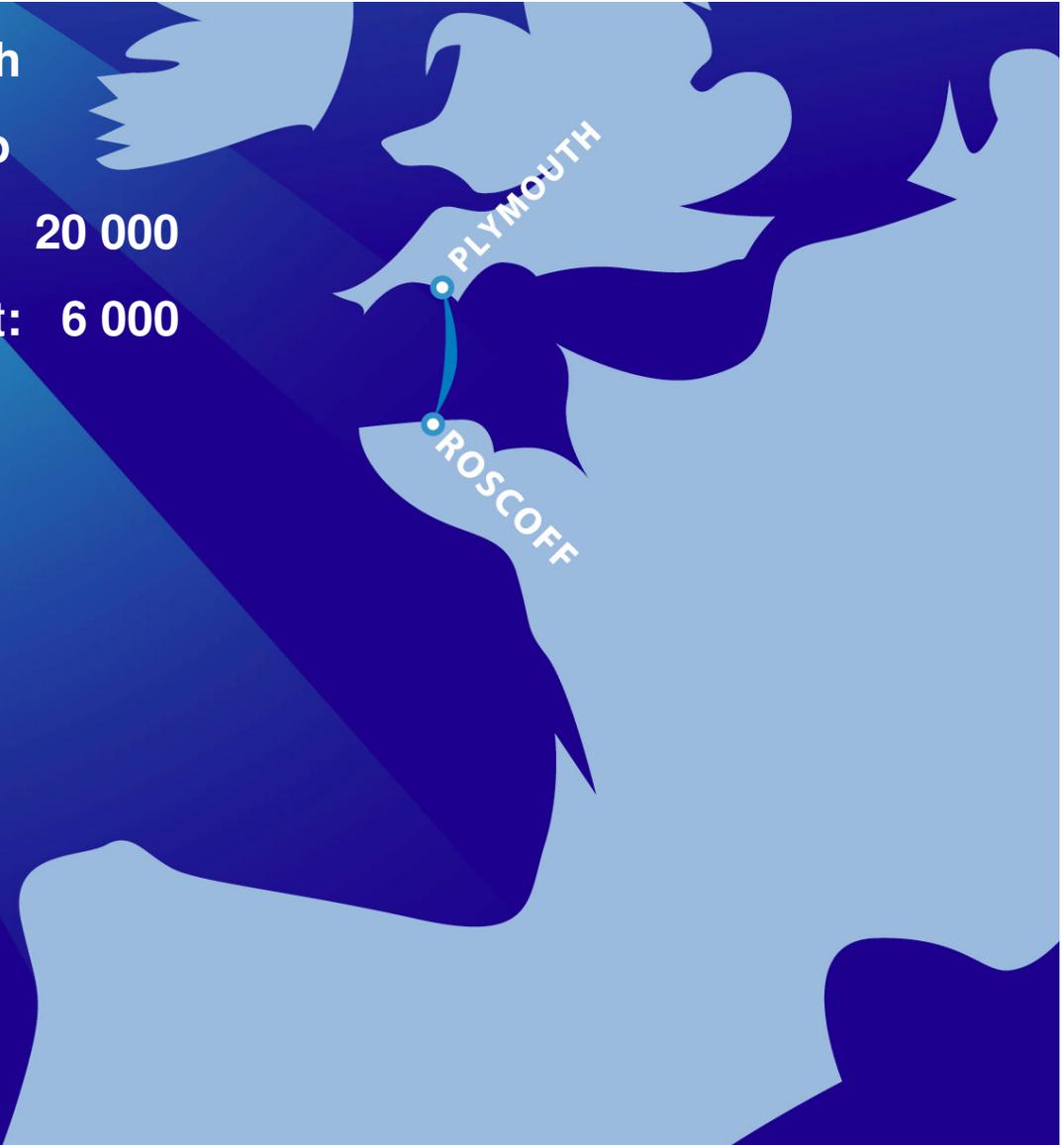
Brittany Ferries

1973 : Roscoff-Plymouth

Fleet: 1 RoRo

Traffic: Pax : 20 000

Freight: 6 000





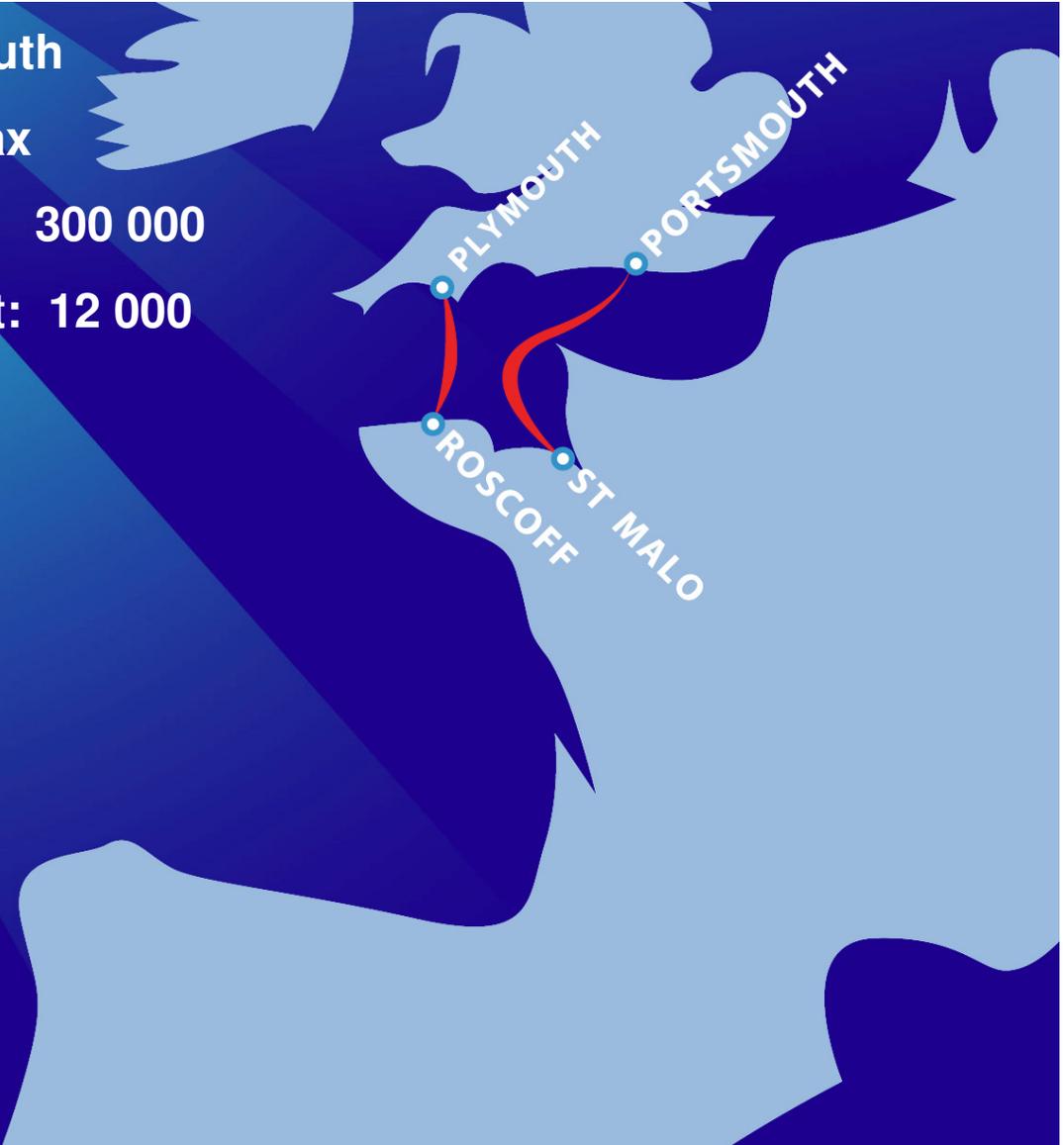
Brittany Ferries

1976 : St Malo-Portsmouth

Fleet: 2 RoPax

Traffic: Pax : 300 000

Freight: 12 000

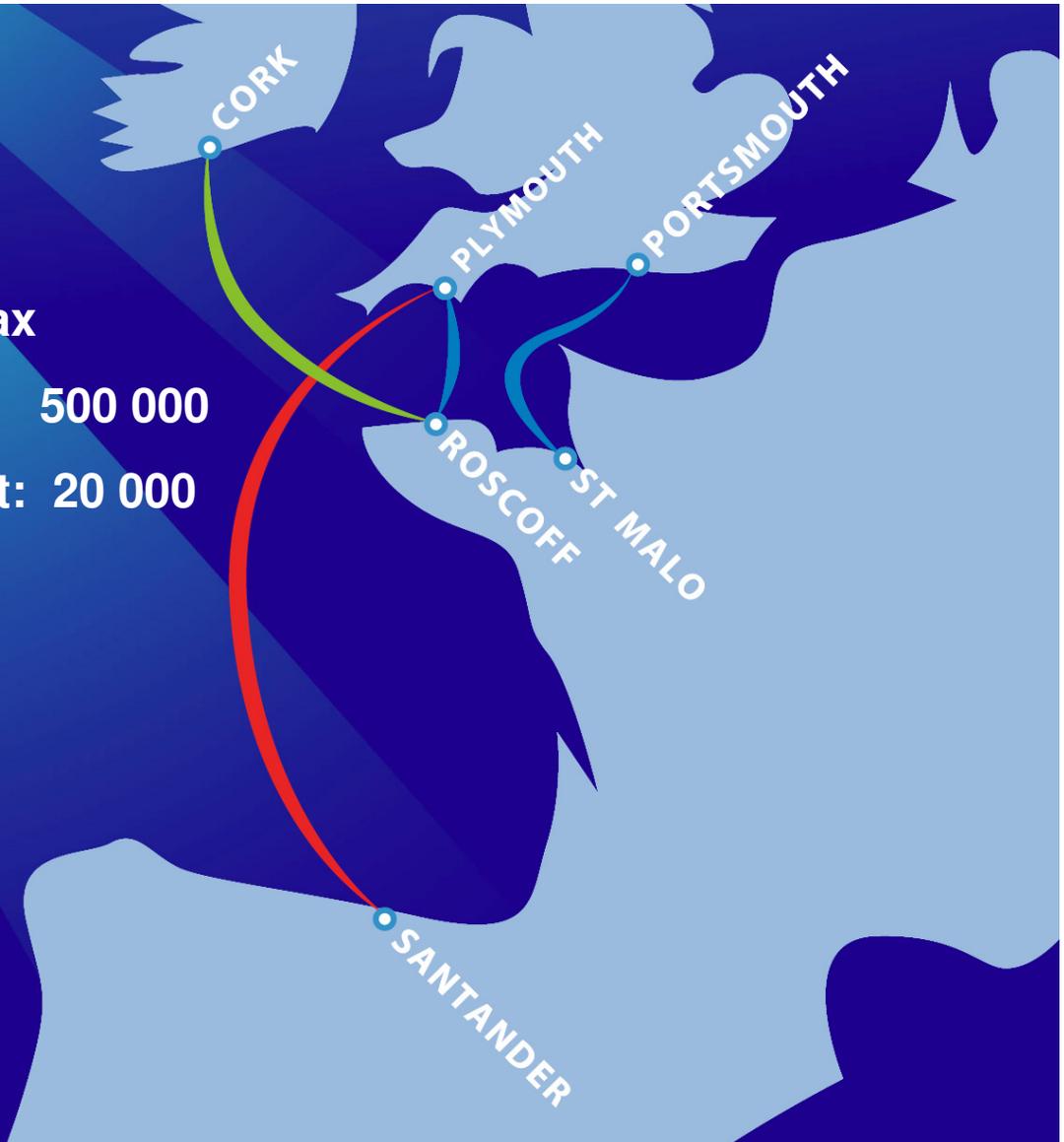




Brittany Ferries

1978 : Roscoff-Cork
& Santander Plymouth

Fleet: 4 RoPax
Traffic: Pax : 500 000
Freight: 20 000





Brittany Ferries

1985 : Cherbourg-Poole

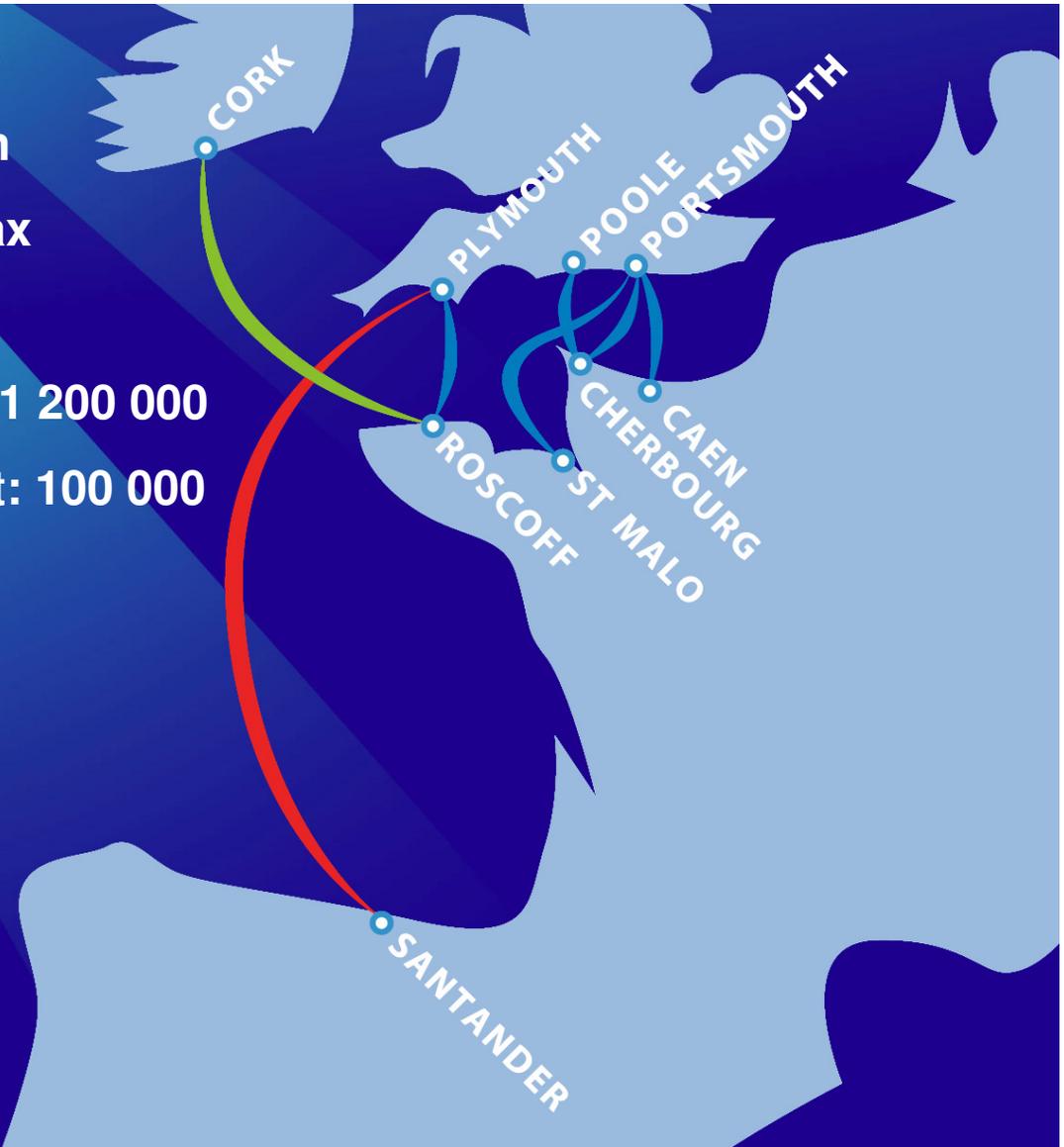
1986 : Caen-Portsmouth

Fleet: 4 RoPax

2 RoRo

Traffic: Pax : 1 200 000

Freight: 100 000



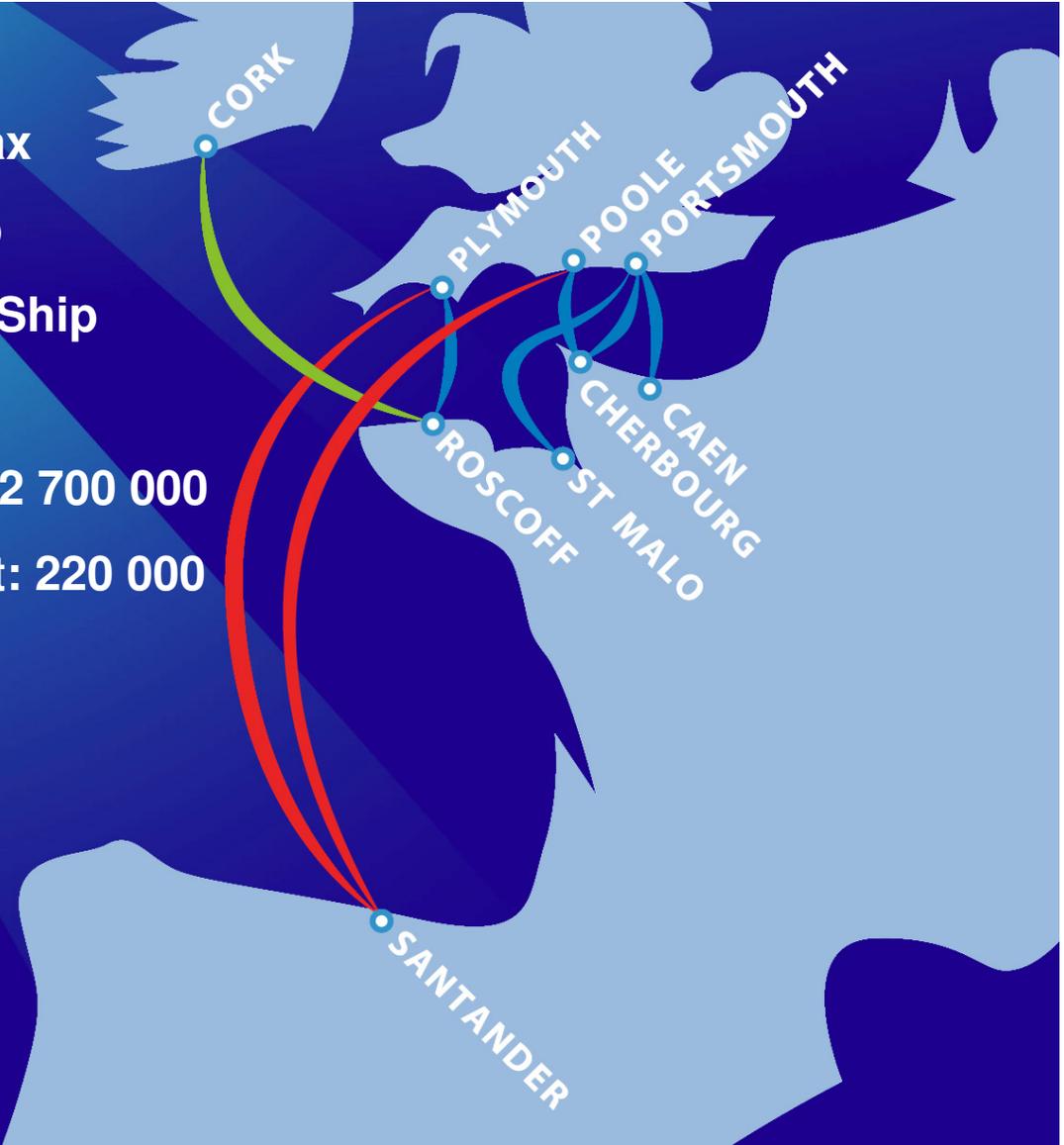


Brittany Ferries

2007 : Poole-Santander

Fleet:
6 RoPax
2 RoRo
1 Fast Ship

Traffic:
Pax : 2 700 000
Freight: 220 000





The way to the création of the UK-Spain Motorway of the Sea

Armorique (2ret. Cross.)	1978	230 lm	1.000 Freight veh.
Quiberon	1982	600 lm	1.500 Freight veh.
Bretagne	1989	700 lm	2.000 Freight veh.
Val de Loire	1993	1.300 lm	2.500 Freight veh.
Pont Aven	2004	1.500 lm	5.000 Freight veh.

+ Cotentin (+1 Ret.cross.)	2008	2.200 lm	10.000 Freight veh.
+ Cap Finistère (+2 Ret.cross.)	2010	2.000 lm	19.000 Freight veh.

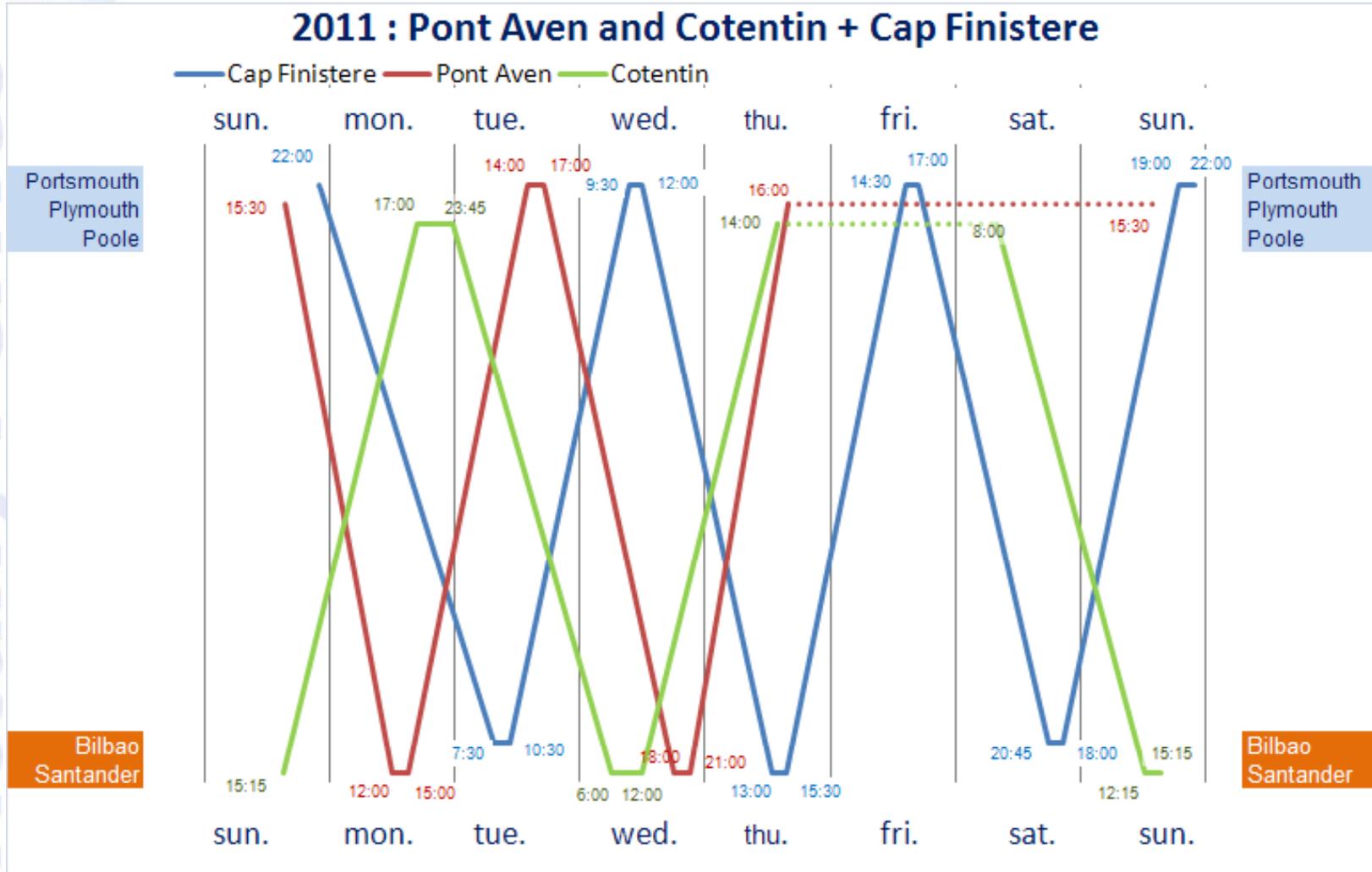
+ Cotentin (1 A/R)	2011	2.200 lm	30.000 Freight veh.
+ Cap Finistère (1 A/R)	2011	2.000 lm	

Up to 7 departures per week in each direction



The way to the création of the UK-Spain Motorway of the Sea

Brittany Ferries

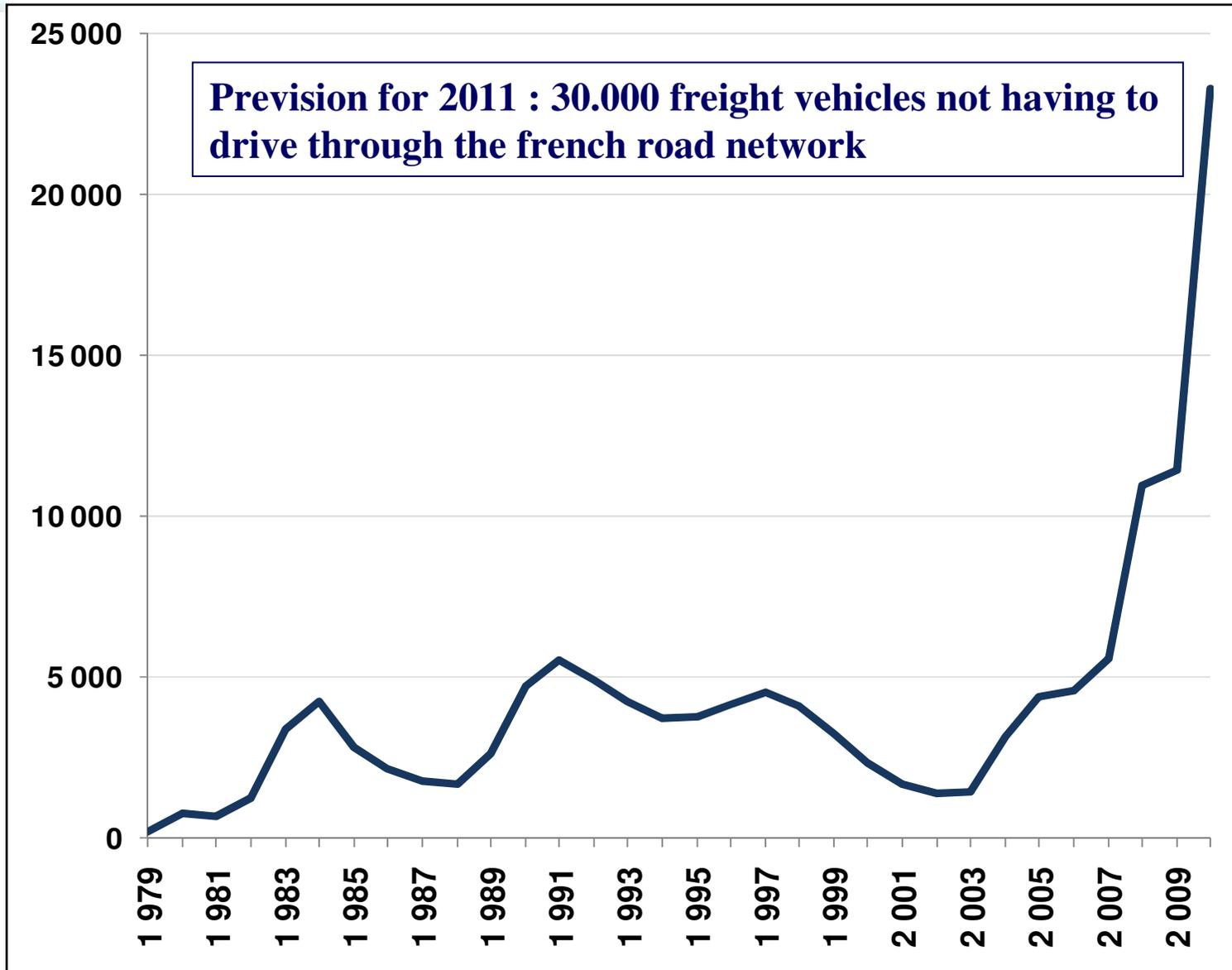


7 departures per week in each direction



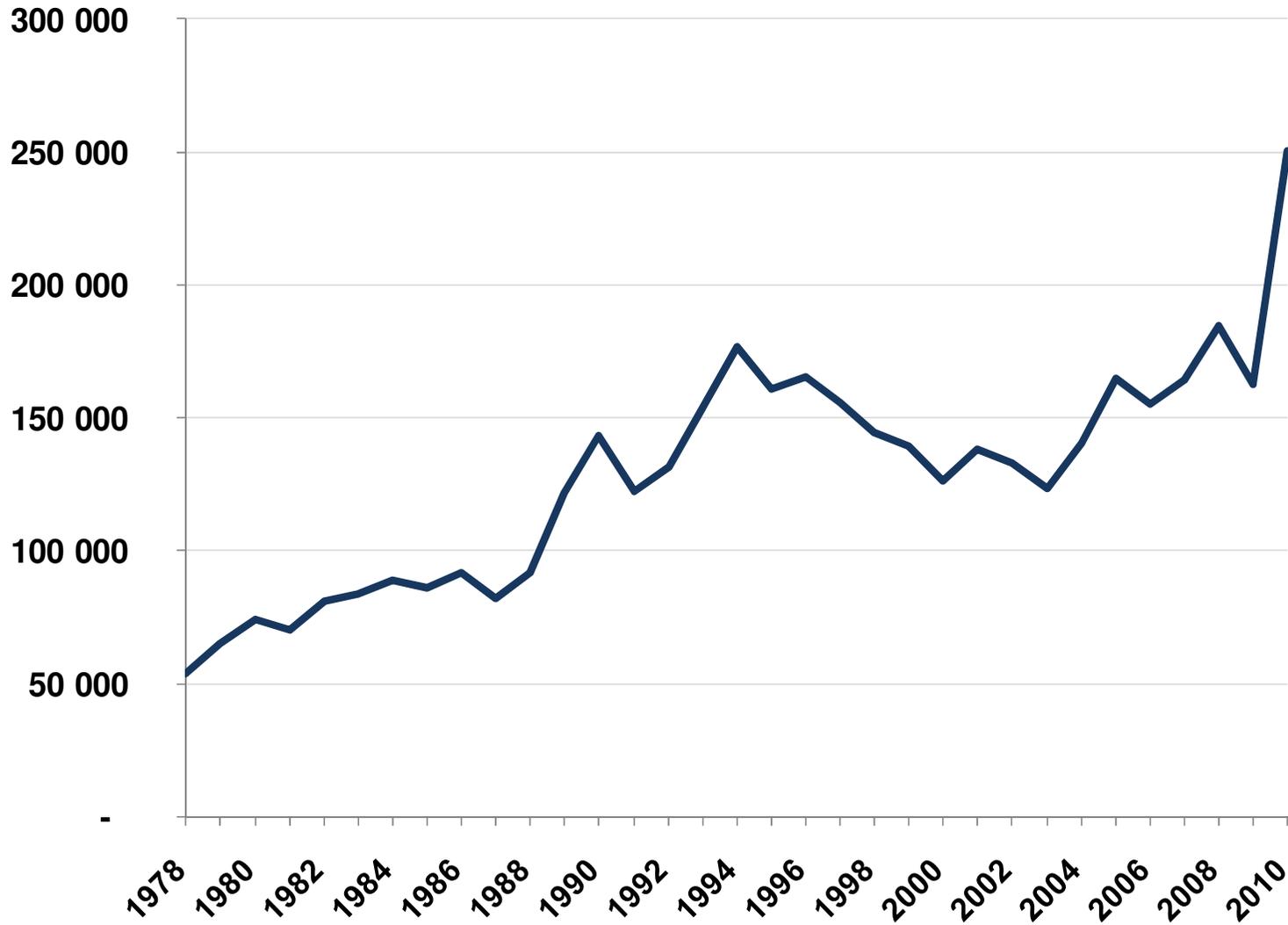
UK – Spain Traffic evolution

Brittany Ferries





This development is sustained by the British tourist market to the Iberian Peninsula.





Motorways of the Sea serving Atlantic Europe

Innovative

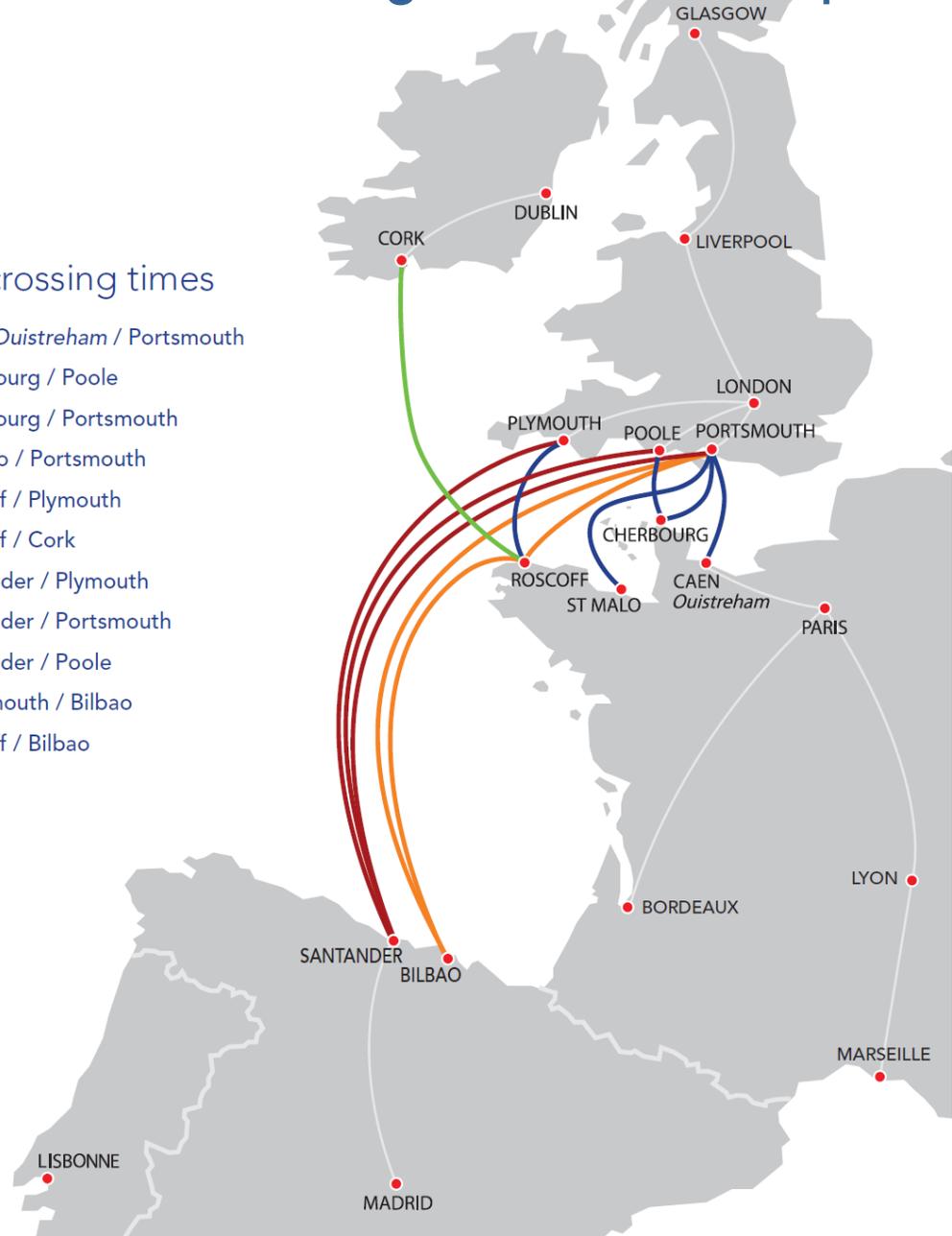
✓ 7 return crossings per week

✓ 15 hours less than driving through France

✓ Competitive

Average crossing times

- 5:45 ■ Caen-Ouistreham / Portsmouth
- 4:00 ■ Cherbourg / Poole
- 3:00 ■ Cherbourg / Portsmouth
- 8:45 ■ St Malo / Portsmouth
- 6:00 ■ Roscoff / Plymouth
- 14:00 ■ Roscoff / Cork
- 19:00 ■ Santander / Plymouth
- 24:00 ■ Santander / Portsmouth
- 27:00 ■ Santander / Poole
- 24:00 ■ Portsmouth / Bilbao
- 21:00 ■ Roscoff / Bilbao



Brittani



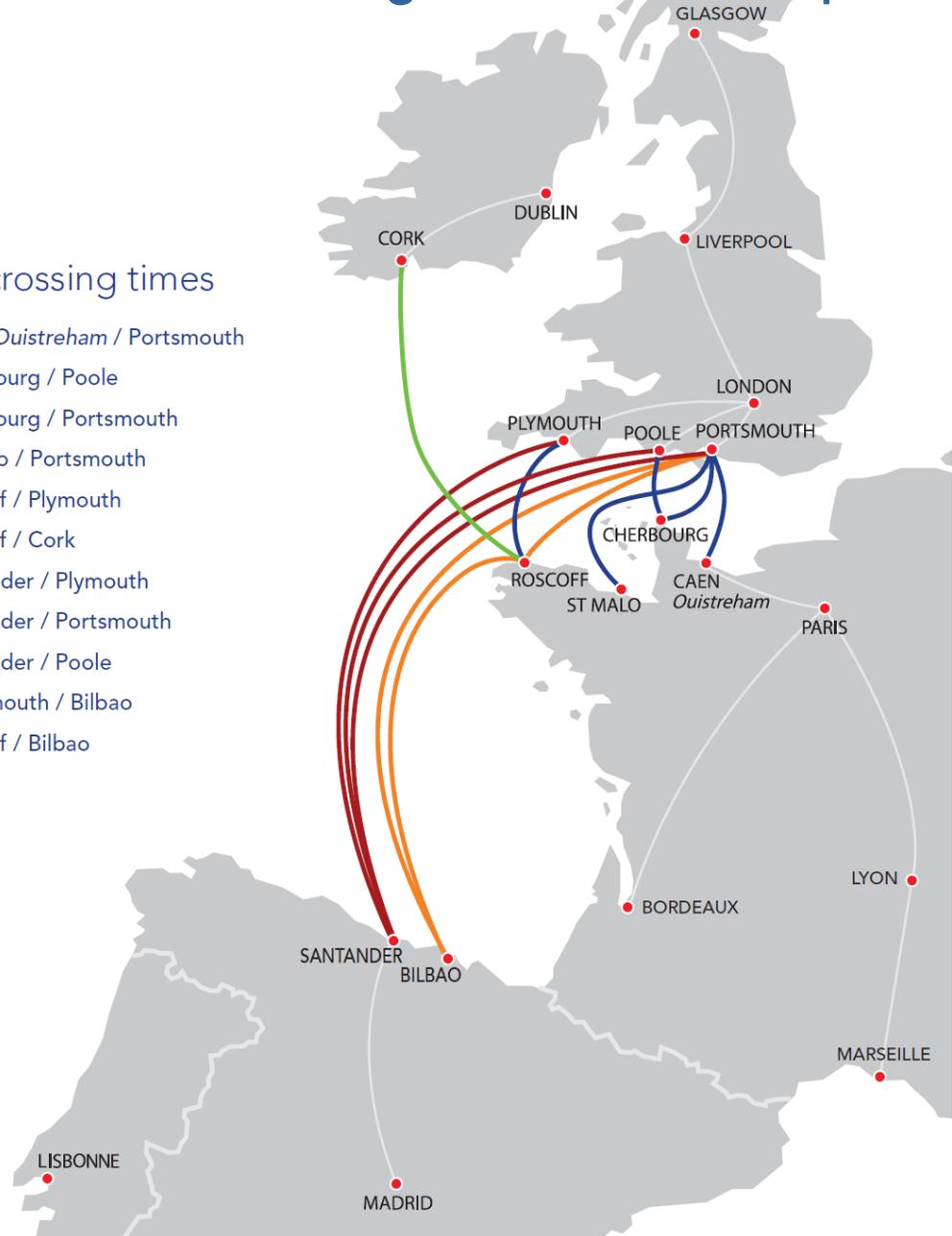
Motorways of the Sea serving Atlantic Europe

Intermodal Integration

- ✓ Terminal equipments
- ✓ Transport network connexions
- ✓ IT technologies
- ✓ Unaccompanied trailers
- ✓ Combined transport
- ✓ Insurance and liability

Average crossing times

- 5:45 ■ Caen-Ouistreham / Portsmouth
- 4:00 ■ Cherbourg / Poole
- 3:00 ■ Cherbourg / Portsmouth
- 8:45 ■ St Malo / Portsmouth
- 6:00 ■ Roscoff / Plymouth
- 14:00 ■ Roscoff / Cork
- 19:00 ■ Santander / Plymouth
- 24:00 ■ Santander / Portsmouth
- 27:00 ■ Santander / Poole
- 24:00 ■ Portsmouth / Bilbao
- 21:00 ■ Roscoff / Bilbao





External cost, Social and Environmental benefits of the Motorways of the sea 17.8Million € / year

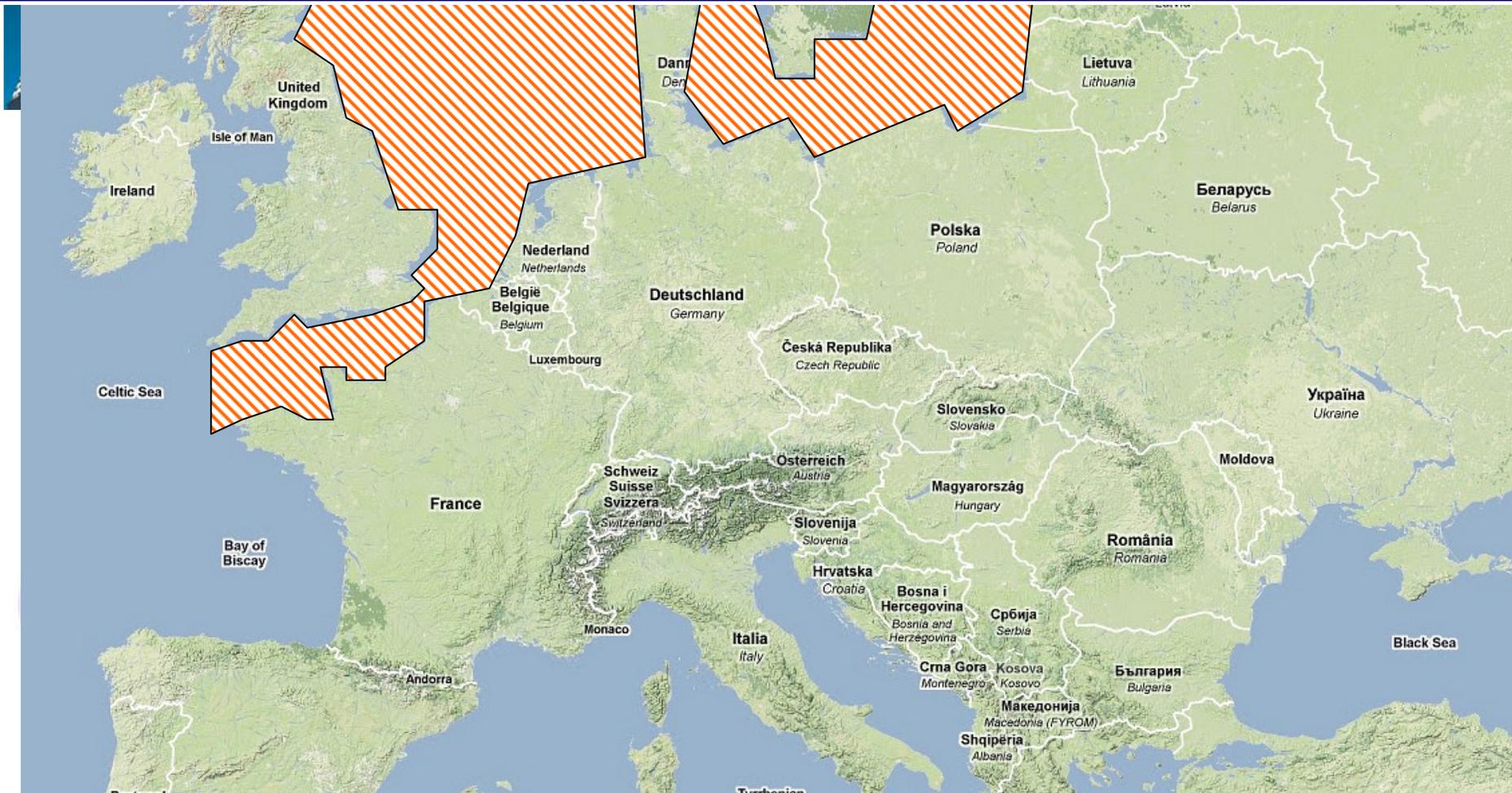
External costs :

- Investments,
Pollutions, noise
bottlenecks,
accidents
- Maritime : 0.009€
T/KM
- Road : 0.035€
T/KM



Source : Calculateur Marco Polo (EACI)

The near future with Marpol VI



Marpol Annex VI – All ships - 1.0% Sulfer since 01/07/2010



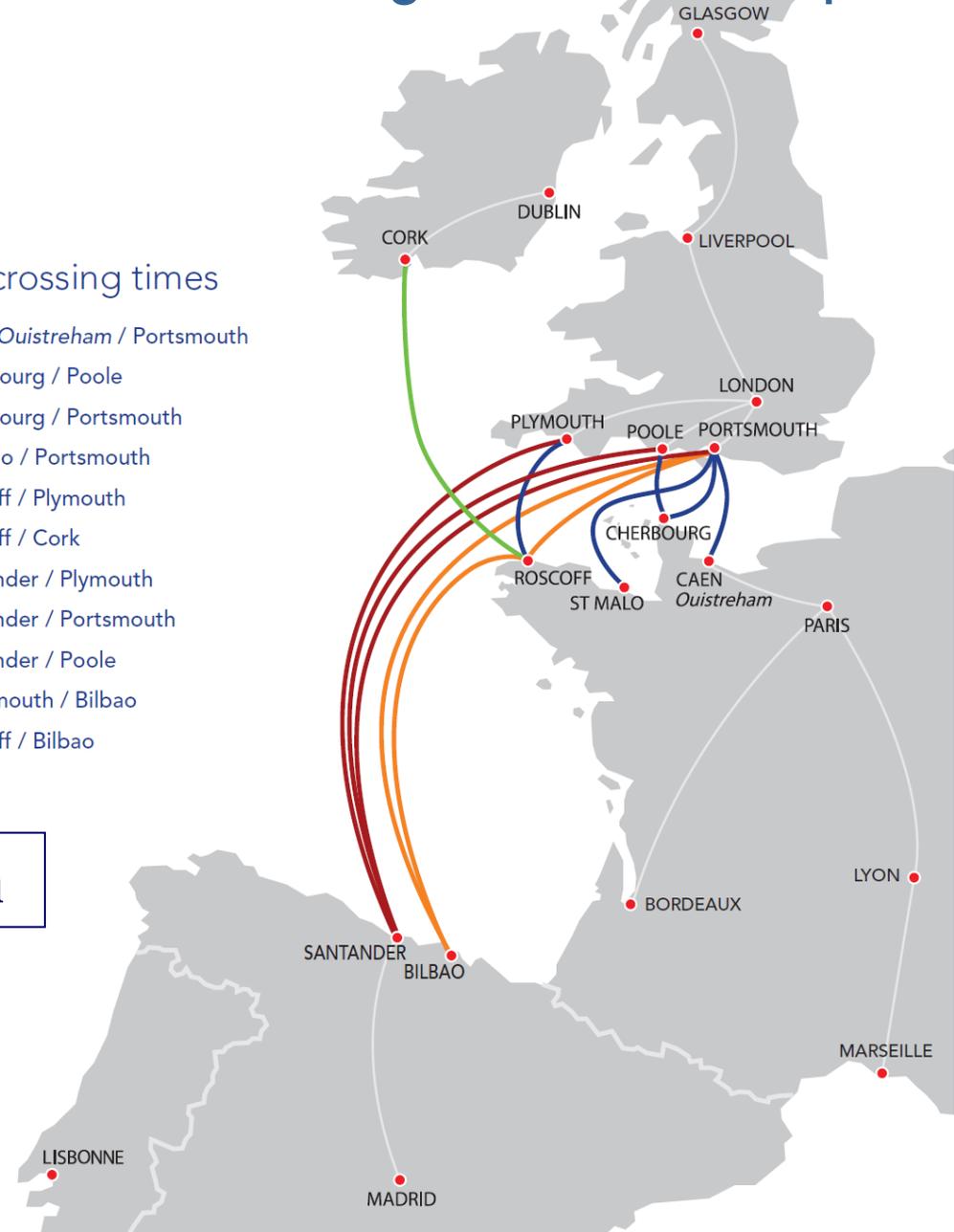
Marpol Annex VI – All ships - 0.1% Sulfer from 01/01/2015



Motorways of the Sea serving Atlantic Europe

Average crossing times

- 5:45 ■ Caen-Ouistreham / Portsmouth
- 4:00 ■ Cherbourg / Poole
- 3:00 ■ Cherbourg / Portsmouth
- 8:45 ■ St Malo / Portsmouth
- 6:00 ■ Roscoff / Plymouth
- 14:00 ■ Roscoff / Cork
- 19:00 ■ Santander / Plymouth
- 24:00 ■ Santander / Portsmouth
- 27:00 ■ Santander / Poole
- 24:00 ■ Portsmouth / Bilbao
- 21:00 ■ Roscoff / Bilbao



Thank you for your attention

Britany Ferries