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The CCIMP (Marseille-Provence Chamber of Commerce and Industry) has been running the airport since 1934. In 1987, the French government renewed the concession for a further thirty years.

Civil airfield open to public air traffic.
Open to international traffic.
Open 24/7.
Rated category A (long-haul services operated in all circumstances).

The airport site
650 hectares; 2 runways (Runway 1 is category III)
Runway 1 - 3,500m x 45m, orientation 13/31
Runway 2 - 2,400m x 45m, orientation 13/31

Airport capacity
11.5m passengers
95 check-in desks
40 boarding gates
55 aircraft stands (25 alongside the terminals, 30 remote stands)

Passenger traffic
8,260,619 - France’s 4th-busiest airport

Movements
97,220 commercial aircraft movements

Cargo
51,793 tonnes (2nd-busiest French regional airport)
56,500 tonnes including mail

Flights in 2013 (summer)
131 scheduled routes to 101 airports in 30 countries
operated by 28 scheduled airlines

Turnover
127.7 million euros

Investments
29.5 million euros

EBITDA
35.9 million euros

Number of employees at the airport
5,567 employees, including 362 employed by AMP.

Marseille-Provence CCI has run the civil section of Aix-les-Milles airfield since 1980.
What kind of year was 2013?
Despite a slight drop in passenger traffic in 2013, we did not call any of our projects into question. On the contrary! As early as January, we delivered our new commercial concept comprising 14 new eateries and 10 new shops including a FNAC, an OM Store, La Cure Gourmande, etc. By November, sales at our retail outlets were up by 28%. We also continued to invest in products and services.

What innovations enhanced the “passenger experience” in 2013?
The first thing to mention is better public transport. Thanks to the efforts of local and regional councils, approximately one passenger in seven now uses public transport to get to the airport. That meant 1.15 million travellers in 2013, giving an average of 3,150 per day. There are now direct train and bus services to 69 destinations in 10 French «départements», including Martigues, Salon de Provence, Marseille Euroméditerranée, Sisteron, Saint-Tropez… 63 trains from 42 destinations pull into the Vitrolles-Marseille-Provence Airport train station every day. You can catch a direct train to the airport from Avignon TGV Station and even Perpignan!

Which other strategic choices embraced innovation?
We really placed the accent on creating products and services that make departure easier for passengers – from preparing their journey right through to the boarding lounge. Sold both by travel agencies and direct - via the airport’s revamped websites - they met with unprecedented commercial success. In 2013, over 5 million people used our websites, generating 500,000 connections to sites selling flight tickets. The use of the mobile application increased by 170%, with 1,200 users per day. According to the iRank charts, our airport is Number 1 in France outside Paris in terms of presence on social networks. Passengers can book a parking space at the P10 or the long-term car park online – and do so, 500 times a day! The extension to the P7 car park has added 900 new parking spaces, taking capacity at the airport to over 14,000 vehicles. Every month, the fast-track, the VIP lounges and biometric border control are used by 2,500, 4,800 and 9,500 clients respectively.

26 million euros are earmarked to continue improving the client experience in 2014, including extending the retail zone in terminal mp².
April
After almost one year of works, 8 April saw the inauguration of the new shops and restaurants in terminal mp1. Investments amounting to several million euros improved the range of facilities (14 new eatery brands and 10 shops) and customer satisfaction. From Burger King to the Chefs en Provence restaurant, from the Casino mini-market to the FNAC store, from Starbucks to the OM Store, the range is now worthy of a major regional airport. 52 new jobs were created.

The extension to the P7 car park was delivered on the eve of the spring holidays. It boasts the latest innovations such as directions to the nearest available space. The extension adds almost 900 extra parking spaces, taking total parking capacity at AMP to over 14,000.

Ryanair launched its summer programme, featuring eight new destinations out of mp². Chania (Crete), Essaouira, Rabat, East Midlands (England), Pisa, Venice-Treviso, Warsaw and Barcelona-Reus took the total number of destinations in the airline’s schedule to 43. The mp1 + mp² summer season had never been richer, with 131 scheduled routes to 101 destinations in 30 countries.

May
On 13 May, at the Routes Europe Congress in Budapest, AMP was awarded the “Highly Commended” prize in the 4- to 20-million-passenger category. Awarded by the airlines, the prize recognises the quality and effectiveness of tools put in place by the airport to attract new airlines and open new destinations. The prize enhanced the visibility of destination Marseille-Provence, showcasing it to over 100 international airlines and almost 1,000 representatives of European airports.

The first direct flight from Marseille to New York (JFK) took off on 31 May. XL Airways operates two flights a week. To mark the inaugural flight - the result of long and constant efforts to link the two cities - AMP and Autogrill got into the American spirit with special passenger offers from Starbucks, Chefs en Provence and Burger King. After the return flight from New York to Marseille on 3 June, the XL Airways aircraft was “christened” by the fire fighters at AMP. On board with the first American tourists, were travel agents and journalists from New York, all here to visit the region.
June
After months of tests, mp Airport officially introduced its free Wi-Fi, offering 20 minutes to all passengers in all terminals, in public and restricted zones. Clients at the Business Centre and in the VIP lounges continue to enjoy unlimited free Wi-Fi.

On 5 June, a Marseille-Istanbul route was launched by Turkish Airlines, the airline that flies to more destinations than any other carrier. Adding four flights a week, Turkish Airlines broadened the options for travelling to Turkey (Pegasus and Air France also fly to Turkey) and opened up connecting flights to tens of destinations in Asia, Africa and the Middle East.

November
To launch the winter 2013/2014 season, terminal mp²'s innovative website, www.mp2.aeroport.fr, unveiled its new search engine and a brand new function: “Which destinations on which days of the week?” The client enters the days of the week on which s/he wishes to fly out and back, and the app. produces a list of direct-flight destinations and their prices. City-break clients in particular were keenly awaiting this innovation. All possible options are displayed in one click, saving the chore of trolling through all of the destinations or several websites. This on-line innovation is just one of many, such as finding public transport to get to the airport, and the «destination pages” that provide practical details of cities in our network at a glance.

December
The end of “Marseille-Provence, European Capital of Culture 2013”. The event had been promoted throughout the entire year within the framework of a partnership between AMP, Marseille’s Tourism and Congress Board, Bouches-du-Rhône Tourisme and the association MP 2013 (radio and press campaigns in France and abroad), as well as with the CCIMP and the City of Marseille (Internet promotion, 2 million pages viewed).
An undeniable success in terms of culture, European Capital year stimulated demand for “Marseille-Provence” in all major outbound tourism markets. And above all, it boosted the destination’s image - including among airlines.
Traffic stable at 8.3 million passengers

International up, domestic down.

With a total of 8.26 million passengers in 2013, traffic at the airport was down slightly (-0.4%). If connecting passengers are excluded from the calculation (-61.3%), the number of local passengers totalled 8.21 million, i.e. +0.5% compared to 2012.

This relative stability was expected. After a traffic increase of 12.7% in 2012 (one million extra passengers), driven mainly by the Air France base opening in 2011 and the Ryanair network being extended, the goal for 2013 was consolidation in a tough economic context.

The overall result masks a major discrepancy: international traffic continued to grow (+3.8%), whereas domestic traffic fell (-3.5%).

International traffic (4.62 million passengers) continued its upward trend. Routes to Europe recorded the biggest growth rates and attracted 103,400 extra passengers. Routes to North Africa and medium-haul flights (beyond Europe) went up by 61,000 passengers. Long-haul flights attracted 6,700 more passengers. These good results are the consequence of route openings and increased frequencies: the arrival of Turkish Airlines, the launch of Marseille-New York, richer summer schedules by low-cost carriers, etc.

Domestic traffic, totalling 3.6 million passengers, was impacted by a substantial drop in the number of passengers flying between Marseille and the provinces (-93,400 passengers). This reflects drastic reductions in Air France and Ryanair’s domestic programmes. Furthermore, 19,500 fewer passengers flew to Paris due to Air France’s cut-backs to Orly. 18,500 fewer passengers flew to Corsica as connecting traffic fell: more direct flights were operated to Corsica from other cities throughout the provinces and Europe.

In terms of destinations, London continued to top the international charts with 482,428 passengers and an increase of 12%. England’s capital benefited from growth on the easyJet route to Gatwick and British Airways’ new strategic focus on London Heathrow, its main hub. Algiers (+13%) and Amsterdam (+12%) were also up, the former due to increased demand from travellers who come from, or simply love, the destination, and the latter confirming its vocation as a hub for the AF/KLM group.

As for passengers on domestic flights, Nantes (+3%), Lille (-7%) and Ajaccio (-4%) were the three leading regional destinations outside Paris (Orly and CDG). Bordeaux lost its third place; its traffic figures receded by 18% in 2013.
Traffic results and 2013/2012 variations

<table>
<thead>
<tr>
<th>Category</th>
<th>2013</th>
<th>Variation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial aircraft movements</td>
<td>97,220</td>
<td>-3.9%</td>
</tr>
<tr>
<td>Commercial passengers (local + 1 connection)</td>
<td>8,260,619</td>
<td>-0.4%</td>
</tr>
<tr>
<td>Locals on domestic flights</td>
<td>3,596,935</td>
<td>-3.5%</td>
</tr>
<tr>
<td>Locals on international flights</td>
<td>4,616,659</td>
<td>+3.8%</td>
</tr>
<tr>
<td>Connections</td>
<td>47,025</td>
<td>-61.3%</td>
</tr>
<tr>
<td>Including:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local passengers on traditional, scheduled flights</td>
<td>5,987,025</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Low-cost passengers</td>
<td>1,998,025</td>
<td>+7%</td>
</tr>
<tr>
<td>Passangers vols charters</td>
<td>202,104</td>
<td>-28%</td>
</tr>
</tbody>
</table>

Breakdown of passenger traffic

- Domestic traffic: 43.8%
- International traffic: 56.2%

Top 10 destinations

<table>
<thead>
<tr>
<th>Destination</th>
<th>2013 Passengers</th>
<th>Variation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Paris-Orly</td>
<td>974,185</td>
<td>-2%</td>
</tr>
<tr>
<td>2 Paris CDG</td>
<td>638,415</td>
<td>0%</td>
</tr>
<tr>
<td>3 London</td>
<td>482,428</td>
<td>+12%</td>
</tr>
<tr>
<td>4 Nantes</td>
<td>340,570</td>
<td>+3%</td>
</tr>
<tr>
<td>5 Algiers</td>
<td>278,183</td>
<td>+13%</td>
</tr>
<tr>
<td>6 Lille</td>
<td>255,565</td>
<td>-7%</td>
</tr>
<tr>
<td>7 Ajaccio</td>
<td>241,762</td>
<td>-4%</td>
</tr>
<tr>
<td>8 Bastia</td>
<td>238,068</td>
<td>0%</td>
</tr>
<tr>
<td>9 Amsterdam</td>
<td>234,986</td>
<td>+12%</td>
</tr>
<tr>
<td>10 Munich</td>
<td>211,523</td>
<td>+7%</td>
</tr>
</tbody>
</table>
Passengers

Infrastructures

Three major projects to enhance facilities and processes for passengers (and the aircraft that carry them), with immediate and future effect, were launched or continued by AMP in 2013.

• Reconstructing Taxiway Charlie 4
  When the time came to repair this run-down taxiway located between the runways and the terminal buildings, AMP seized the opportunity to divert its path and position further away from the passenger terminals. The surface area that was freed up will be reserved for future projects to create aircraft stands, and also opens up possibilities for extending the low-cost mp² terminal. The taxiway's new dimensions meet the standards required for the Airbus A380.
  Cost: €9.6m, including €8.4m in 2013.

• Extending the luggage sorting zone in the international hall
  This project, initiated in autumn 2013, will increase the amount of hold luggage that can be processed in the international zone, helping avoid problems of saturation during the summer. The two luggage sorting belts have been transformed. The luggage handling capacity of each belt has increased from 75 to 150, and they can be used simultaneously.
  Cost: €3.9m, including €1m in 2013.

• Underpass in the North zone
  The underpass tunnelled out beneath terminal mp² to improve the flow of traffic in the restricted zone has opened up new perspectives for modifying the layout of terminal mp². The space freed up on the ground floor can be used to channel the flow of passengers differently, to create a new retail area, to scale up luggage sorting operations, and to increase the space dedicated to security inspections.
  Cost: €4.4m, including €4m in 2013.
Traffic down slightly, reflecting the economic context

In an economic climate marked by a drop in commercial dealings, the fall in cargo traffic was only -2.3%. With 51,793 tonnes of air cargo processed in 2013, Marseille-Provence remains the 3rd airport in France for cargo, behind Paris and Toulouse (2nd airport in France for express freight, behind Paris).

Express freight continued to be driven by e-commerce, both import and export. Despite a 2% drop in volume (45,508 tonnes), express freight increased its market share and now accounts for 88% of traffic at the airport (+0.5% on 2012). In 2013, Fedex bought out Tatex. The world player then set up at the airport, which was good news for Marseille-Provence, heralding higher traffic levels. On the operator front, DHL and TNT were the only players to record growth in tonnage (respectively +6.6% and +0.2%), while Bridges WW chalked up good results to Malta and Algiers (+4.3% and +36%).

The crisis had a more damaging effect on traditional cargo: it fell by 5.3% (6,285 tonnes). Further negative forces included the hostage situation in In Amenas, Algeria, in early 2013 (oil zone) and the state of emergency in Tunisia. Traditional cargo only accounted for 1% of all cargo aircraft movements (wide-bodied Russian charters and special flights carrying oil equipment bound for Hassi Messaoud in Algeria).

Air Corsica became the leading carrier in volume terms, ahead of Air Algérie. The airline’s traffic was boosted by express parcels and letters for Corsica. Air France was down (-6.9%), reflecting its gradual withdrawal from this market at Marseille-Provence. Meanwhile, newcomers Air Madagascar, XL Airways and Turkish Airlines carried cargo in their holds.

Post Office traffic dropped again in 2013 (-14%). La Poste favours road and rail for its letters.

Breakdown of air cargo traffic
(Traffic and percentage of traffic)

<table>
<thead>
<tr>
<th>Cargo traffic 2013</th>
<th>Traffic (tonnes)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air cargo</td>
<td>51,793</td>
<td>-2.3%</td>
</tr>
<tr>
<td>Cargo aircraft movements</td>
<td>9,361</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Mail</td>
<td>4,707</td>
<td>-1.4%</td>
</tr>
</tbody>
</table>

22% Traditional Cargo
6,285 tonnes

88% Express freight
45,508 tonnes
Quality

Passengers survey
Two surveys were carried out in 2013: one in June, the other in December.

- In June, 2,500 questionnaires were collected at mp1 and mp2. For departures, the overall passenger satisfaction rate was 92.6% at mp1 and 88.9% at mp2, i.e. +1.9% and +0.8% compared to summer 2012. The figures were better in arrivals: 97% of passengers said they were satisfied at mp2 (+5.6% vs. 2012); 100% at mp1 (+1.5%). The retail renovation efforts deployed by the airport in mp1 in 2012 were rewarded by “overall satisfaction with shops and services” (+11.6%), “choice of products in the shops” (+11.5%), and “the number and diversity of shops in the boarding lounge” (+11.1%). On the other hand, “dealings on the phone”, “the variety on offer in bars and eateries” at mp2, and “wait-time at check-in and for security inspections” can still be improved.

- In December, the overall satisfaction rate fell to 92% for departures at mp1 and 85.7% for departures at mp2. The fall at mp2 highlights the need to renovate a low-cost terminal that has been the victim of its own success. This will be carried out in 2014. The 20-point hike in satisfaction with shops, compared to winter 2012, endorses the decision that AMP took to overhaul the range of shops and eateries; the work was completed at the beginning of the year. Renovating the washrooms at mp1 and mp2 was also well perceived by passengers.

- Passengers expect improvements in “time spent waiting to collect luggage” and “going through security inspections”. On the latter point, security agents are going to be taught how to carry out their work in a courteous manner.

Managing client complaints and requests
- The complaint rate in 2013 was 1.4 complaints per 10,000 passengers (1 in 2012). Out of a total of 1,208 complaints, 45% pertained to car parks (problems getting in, codes, etc), 34% to “check-in, boarding and disembarking” (of which two thirds pertained to security inspections – time spent waiting, items confiscated, etc), and 16% to “things to do, entertainment, shopping”, with vending machines accounting for almost half of these complaints.

- 1,985 “client requests” were processed in 2013. The majority reflected the increase in sales of products and services on AMP websites, and were mostly reimbursement requests for parking reservations that had not been used.

Quality & Customer Relations Department in full swing
This department strives to improve the passenger experience. In 2013, it fitted out boarding lounges in mp1 and optimised waiting areas in Hall 4, tied in with the new retail offering. All departments at AMP remain committed to the Quality Assurance Policy that we introduced in 1997.

N.B.
After a follow-up audit in November 2013, LRQA revalidated the ISO 9001/2008 standard of the Quality Management System (QMS) at AMP.
Commercial Development

Reaping the rewards of retail renovations

2013 was a year of outstanding growth thanks to the successful transformation of the retail facilities at mp1. 24 new points of sale were created within just nine months (end 2012-early 2013), enabling us to renew 100% of the non-duty-free shopping opportunities at mp1. Shops, restaurants, services, advertising: all business sectors affected by the redeployment and installation of new facilities enjoyed an increase in sales – particularly those in the public zones.

New concepts in the field of food and beverage correspond to current consumption trends: snacking, convenience, digital, local food (consuming food produced within a radius of 100 to 250 kilometres), etc.

Some figures demonstrating client approval:

- +7%: overall turnover (compared to 2012)
- +30%: turnover for all food and beverage outlets
- +26%: turnover for all shops and restaurants in mp1
- 50+: new jobs created

The percentage of “very satisfied” restaurant customers at mp1 doubled from 16% in 2010 to 34% in 2013.

In light of the resounding success at mp1, an identical policy to redesign the retail experience at mp² and bring it up to scratch will be launched in 2014, taking low-cost up market.

Evolution of TO per business sector

<table>
<thead>
<tr>
<th>Business Sector</th>
<th>Turnover in €k</th>
<th>2013/2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car hire</td>
<td>47,501</td>
<td>+ 1.4%</td>
</tr>
<tr>
<td>Shops (RZ+PZ)</td>
<td>30,655</td>
<td>+ 8%</td>
</tr>
<tr>
<td>Services</td>
<td>24,859</td>
<td>+ 4.2%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>14,635</td>
<td>+ 30.2%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>117,650</strong></td>
<td><strong>+ 6.6%</strong></td>
</tr>
</tbody>
</table>

Infrastructures

- Work on shops and services in mp1 completed.

At the beginning of the year, AMP delivered all of the new shops and services in national and international terminal mp1. 14 restaurant brands and 10 shops were inaugurated as part of the project launched in 2012 to renew the retail experience at the airport.

Cost: €3m for AMP, including €1.1m in 2013. Concession holder contributions included, a total of over €10m were invested.
**Promotion & Communication**

**Innovations for clients greeted with success**

🔹 **Targeting “destination” markets**
- The FlyProvençal Convention (comprising AMP Marseille’s Tourism and Congress Board, Bouches-du-Rhône Tourisme, and “Marseille-Provence, European Capital of Culture 2013” for the eponymous year), was responsible for promoting Provence in outbound markets. It pulled out all the stops to attract new tourists.

- In March, the www.flyprovence.com website was completely redesigned by AMP. It was enhanced with a new look, promotional films, and applications for reserving transport, accommodation, holidays and tickets.

- In France and in Europe, advertising space was purchased on websites to encourage Internet users to visit www.flyprovence.com. The Convention also communicated via ads in airports operating flights to Marseille-Provence. Messages in local media (radio, press) invited tourists to take advantage of “Culture in Provence 2013”.

- To celebrate the new New York-Marseille flight operated by XL Airways, the FlyProvençal partners - joined for the occasion by the company Ricard – organised a promotional operation in New York in June and July to encourage American tourists to visit Marseille-Provence. There were three key events in Brooklyn and Manhattan:
  - 23 June on 49th Street: a Provençal market, Ricard bars and pétanque pitches plunged New Yorkers into the heart of Provence. Journalists and travel agents were invited.
  - 11 July on West Broadway: Americans visited the pétanque pitch and a FlyProvençal stand.
  - 14 July: pétanque bowled into Brooklyn, where residents learnt about what’s new in destination Marseille-Provence.

All in all, 100,000 flyers were handed out, 130,000 New Yorkers were reached, and over 5,000 e-mail addresses were collected.

🔹 **Targeting our region**
- 2013 marked a turning point. Without detracting from communication strategies out in the field - global communication campaigns, partnerships, and the MP Tour (a bus in AMP colours combing the PACA region, presenting the flights and services on offer) – our presence on social networks was reinforced. Digital communication shifted up a gear.

- From 18,000 fans at the end of 2012, AMP airport’s Facebook page boasted 32,000 at the end of 2013.

Promotion and customer relations are the pillars of Facebook content: announcing what’s new, launching competitions, and engaging in a dialogue with fans by developing real “community management”. According to the iRank charts, AMP has become the Number One French airport outside Paris in terms of presence on social networks. The goal is to extend these efforts to networks such as Twitter, Instagram and YouTube, creating more image and video content in the future.

- For the winter 2013/2014 season, mp²’s website www.mp2.aeroport.fr launched a new search engine with a brand new function: “Which destinations on which days of the week?” The client enters the days of the week on which s/he wishes to travel out and back, and the app. produces a list of direct-flight destinations and their prices.

- The search engine on www.mp.aeroport.fr displays direct flights from three days before to three days after a given date. If there is no direct flight to New York, for example, on the date selected by the client, the direct flight closest to the desired date is immediately suggested.

- In 2013, AMP websites generated 500,000 “trade leads” (clicks on AMP websites to the on-line stores of airlines and travel agencies). In terms of communication and digital positioning in the airport world, AMP is one click ahead.
Client experience

Targeting staff at AMP and the airport community

• Every month, AMP publishes its “mp&vous” (mp & you) newsletter on its Intranet site. Launched in December 2012, it keeps staff up-to-date with what’s happening at the airport and showcases the jobs and the skills in each department. The goal of “mp&vous” is to create a bond and strengthen the feeling of being part of AMP.

• Every year, AMP invites staff to a “Summer Rendez-vous” and a “Winter Rendez-vous”. The “Winter Rendez-vous” in January presents the previous year’s results and the outlook for the year ahead. The “Summer Rendez-vous” at the end of June is held at the MuCEM (Museum of European and Mediterranean Civilisations) in Marseille. The atmosphere is more festive, making the most of Marseille’s latest cultural landmark. Each “Rendez-vous” is attended by about 200 people.

• Every quarter, AMP publishes the magazine FSP (Fenêtres Sur Piste – literally “windows overlooking the runway”), for the entire airport community. It provides information about everything that’s going on at the airport (2,000 copies).

Infrastructures

• In April, AMP delivered the new P7 car park. Almost 900 extra parking spaces are now available for passengers.

Cost: €8.4m, including €4m in 2013.
AMP ECONOMIC ACHIEVEMENTS CANNOT BE DISSOCIATED FROM ITS SOCIAL ACCEPTABILITY, AND THEREFORE FROM BOLD AND RESPONSIBLE BEHAVIOUR IN MATTERS OF THE ENVIRONMENT AND SUSTAINABLE DEVELOPMENT.

Projects and measures taken in 2013 were guided by the airport’s commitment to curbing its impact on the environment.

▶ Reducing noise

• **Decree restricting night traffic: measures implemented since October 2013**

Complying with the wishes of neighbouring communes and resident associations, AMP has pledged to curb particularly noisy aircraft at night. To date, the Airport has instigated three increasingly strict ministerial decrees restricting night traffic (2007, 2011 and 2012). The most recent decree, dated 3 May 2012, includes two stages of new measures to limit such traffic.

The first measures were implemented back in October 2012. And since 27 October 2013, all noisy turbojets, i.e. those with a cumulative margin below 10 EPNdB, are banned between 10pm and 6am.

• **Reducing the number of flights over the Estaque neighbourhood of Marseille**

When implementing air traffic procedures, AMP has always taken great pains to ensure that local residents are inconvenienced as little as possible. It suggested an alternative procedure that avoids flying over built-up neighbourhoods in the Estaque region of Marseille. The DGAC (French Civil Aviation Authority) approved the so-called “visual manoeuvre with prescribed track”, and it was brought into service on 2 May 2013.

The new procedure is used only occasionally, however, as it requires very specific weather conditions. In 2014, the government will suggest new measures that should further reduce the inconvenience caused by noise in these northern neighbourhoods of Marseille.

▶ Curbing greenhouse gas emissions

• **Assessing greenhouse gas emissions**

As required by French law (article 75 of the law called “Grenelle 2” dated 12 July 2010), AMP carried out a greenhouse gas emissions assessment in 2013. It went further than required by the law, taking into account all direct and indirect emissions. An action plan to reduce emissions was drawn up for the coming three years.

• **Continuing to promote public transport**

AMP intensified its policy of promoting public transport with a view to reducing the use of private vehicles to a minimum. Although passenger traffic excluding connecting passengers increased by 0.5% in 2013, the number of passengers using public transport (train or bus) increased by 10.7%. And this trend is set to continue. Growth is due to the marketing strategies deployed by public transport providers and by AMP - which readily finances communication campaigns and provides free services such as the shuttle bus between Vitrolles railway station and the airport.

▶ Preserving water resources

• **Controlling the impact of rainwater**

It is vital to control the impact of rainwater in order to help protect the ecosystems at the Etang de Berre lake. The first phase of an overall investment programme amounting to 6 million euros was completed in 2013. The second phase will last from 2014 to 2016. The project consists in creating new rainwater treatment facilities - basically hydrocarbon separators; the biggest can be up to 18m long, 3m wide and 3m tall.
Reducing our consumption
To reduce its environmental footprint, AMP has to reduce the amount of energy it consumes.
In 2013, water consumption fell by 5.9%, partly thanks to a central water management system for grass and plants that takes climatic data into account. It was brought into service at the end of 2012. The goal for the coming three years is to reduce consumption by a further 3% per year.
For the fourth consecutive year, electricity consumption also went down in 2013 (-4.5%). It is AMP airport’s ambition to reduce its electricity consumption by a further 3% per year, on a comparable basis, over the coming three years.

In short
• Soundproofing aid
AMP granted aid totalling 1,164,900 euros to enable 96 local residents to soundproof homes located near to the airport.

• Waste
AMP continues to collect and sort its waste. The recycling rate for the four main categories of waste (cardboard, scrap iron, wood, plastic film) is 24%. The objective is to gain an extra 1% per year over the next three years.

Infrastructures
• At the end of December, AMP brought a 400-Hz network into service. Twenty-seven distribution points were installed at aircraft stands to enable airlines to power on-board equipment with clean electricity. The new system puts an end to the use of noisy GPUs (Ground Power Units), which emitted 7 times more CO2 than their new, fixed, 400-Hz replacement.
Cost: €3.1m, including €2.4m in 2013.
TO boosted by retail, security tax and services

With +4.2 million euros compared to 2012, TO was up by 3.4%. The surplus was due mainly to the substantial increase in retail TO and security tax plus, to a lesser degree, the continuing diversification of activities, rental income and the “e-chèque” for parking. Retail generated an extra 1.1 million euros (+6%). This sector benefited from the full-year impact of having completely overhauled the retail offering, completed in December 2012.

Diversification activities increased by 29% (+0.7 million euros). The highest increases were recorded by engineering (cf. page 17), offices at the Business Centre, lounge reservations, and fast-track services. Rental revenue (+0.4 million euros) went up as a consequence of aligning prices with charges in light of analyses carried out over the previous two years.

Security tax generated an extra 1.7 million euros. Nevertheless, the increase in TO was stemmed by activities dependent upon traffic levels: aeronautical fees were down by 0.1 million euros (-0.3%), impacted by the drop in the number of commercial aircraft movements (-3.9%) in light of airline optimisation strategies. TO was also impacted by a fall-off in the use of hourly parking facilities.

Operational costs under control

Despite the increase in expenditure linked to security tax (+1.2 million euros), operational costs were kept under control. There were reductions in fees for works (0.5 million euros), in energy consumption (down 2.4% in MWh, saving 0.4 million euros) and in the employment of temps (-0.1 million euros).

Operational costs included an increase of 0.4 million euros in maintenance costs. Whilst AMP strives to add new, high-performance infrastructures, it must also maintain existing facilities. Maintenance went hand-in-hand with increased investment programmes over the past two years.

Trading profit up

EBITDA (Earnings Before Interest, Taxes, Depreciation and Amortization) totalled 35.9 million euros, compared to 34.2 million euros in 2012. Excluding the impact of transferring the concession to the Airport Company (commenced in 2013), earnings amounted to 9 million euros (+10%). Reported net profit for 2013 amounted to 14.3 million euros.

Client receivables are under control, even receding from 43 to 41 days of turnover. Accounts payable also fell significantly after the peak in 2012 corresponding to an intensification of the investments programme. Efforts to reduce our debt continued in 2013: on 31 December, debt equalled less than 10 months’ EBITDA. Thanks to these healthy economic achievements, net liquid assets increased by a further 1.4 million euros, reaching 45.7 million euros. Liquid assets will be vital for financing future investment projects.
From time to time, AMP assesses the wealth generated by its business activities and injected into the region’s economy. The latest survey was carried out in 2013 and pertained to business in 2012; the previous survey was carried out in 2009.

The airport’s total economic impact is now estimated at 4.36 billion euros, representing an increase of 37% compared to 2009 (an extra 1.2 billion euros). Per passenger, that amounts to 526 euros, which is 91.3 euros more than in 2009.

Total economic impact encompasses direct, indirect and induced economic impacts.

Direct impact

A HIVE OF ACTIVITY

The Marseille-Provence Airport site is now home to almost 200 businesses employing 5,600 people.

Direct impact (the weight of the business of firms with premises at the airport) amounts to 570 million euros (164 million euros more (+40.2%) than in 2009). The increase is mainly due to firms located on the airport site increasing their workforces (from 4,900 employees to 5,600). This was very marked in the cargo sector and among the airlines. The increase also reflects the fact that there are more businesses at the airport (167 in 2009; 189 in 2012). Between 2009 and 2012, investments by businesses at the airport increased by more than 70%, and purchases by 26%.

Indirect impact

VISITORS STAY LONGER AND SPEND MORE

Indirect impact is money spent outside the airport by air passengers who do not reside in the region. It is closely linked to the arrival of tourists and business visitors who consume in the region. Between 2009 and 2012, indirect impact increased by 277.5 million euros (+36.1%) – the triple effect of: increased air traffic; longer stays; and an increase in average daily expenditure per passenger.

Average length of stay has increased from 6.4 days to 7.3 days. On average, each passenger spent 105 euros per day in 2012, compared to 84 euros in 2009. Passengers at mp1 spent the most: 111 euros per day compared to 86 euros for passengers at mp². The nationalities that spent the most were the Americans and the Russians.

Induced impact

DRIVING BUSINESS IN THE REGION

Induced impact is the revenue of firms in the region that benefit from activities at the airport. All purchases and investments that would not be made if there were no air passengers are totted up (purchases made by the Conseil Général (county council) for the bus service to the airport, cars bought by self-employed taxi drivers, etc).

Traditionally and for practical reasons, the ACI* assessment method multiplies the sum total of direct and indirect expenditure by a coefficient. The coefficient for Marseille is 1.7.

In 2012, induced impact amounted to 2.745 billion euros, 37.6% more than in 2009.

* The survey was designed by the Airport Council International (ACI), an organisation representing airports all over the world. The same methodology is used by a great number of European airports, allowing for comparisons between similar airports.
**Engineering** is the term for all of the missions, surveys and studies carried out by AMP for other airports as well as participation in operating companies. This long-standing business activity was scaled up in 2010, when changes in our organisational structure enabled us to accept the swelling flow of requests. Engineering is a source of diversification and additional revenue; behind from ADP (Airports de Paris), Marseille-Provence Airport leads this field in France.

**A tried and tested method**
For each mission to be carried out, AMP selects one of its specialists in the field in question (operations, marketing, quality, etc) to guide the client through the project. AMP draws on its organisation and teams to export tried and tested expertise.

**Secondments, training, expert reports: exporting our know-how**
- AMP occasionally sends members of its staff abroad on secondments. For example, the Director of Administration and Finance for the three main airports in the Congo (Brazzaville, Pointe Noire, Ollombo) is a Marseille-Provence Airport employee. The assignment is governed by a contract signed between AMP and AERCO, the company that manages airports in the Congo.
- On the training front, AMP airport’s Operations team hosted a dozen employees from Tahiti Airport in 2013, who had come to enhance their operational skills. Marseille-Provence Airport also hosted several employees from Viracopos/Campinas Airport in Brazil for “Operations Manager” and “Terminal Expert” training, as well as the new General Manager of Libreville Airport (Gabon).

Throughout 2013, expert reports and surveys were carried out for third parties - either on location or from our offices in Marseille.
- In March, the Technical Department carried out a mission at Brazzaville Airport, performing an audit and advising on bird control.
- In April, the Operations Department helped Pointe à Pitre Airport organise a call for tenders from cleaning companies.
- In July 2013, AMP carried out an audit of the information system at Tahiti Airport.
- In September, the Marketing & Communication Department provided a route development study for Abidjan Airport. The Marketing & Communication Department completed further route development missions from Marseille for airports aiming to attract European, American and Middle Eastern airlines.

That’s the turnover generated by AMP in engineering in 2013 (+41.6% on 2012). The margin after deducting overheads is €135k.

**NB**
SEGAP (the company that runs and manages airports), part-owned by the Marseille-Provence CCI (CCIMP) and EGIS Airport Operation, through subsidiaries, manages the three airports in the Congo plus those in Libreville (Gabon) and Abidjan (Ivory Coast).
Marseille-Provence Chamber of Commerce and Industry (CCIMP)
Mandate: 2011-2015

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