MEDCRUISE

The Association of Mediterranean Cruise Ports

Improving cruise port infrastructure in the Med

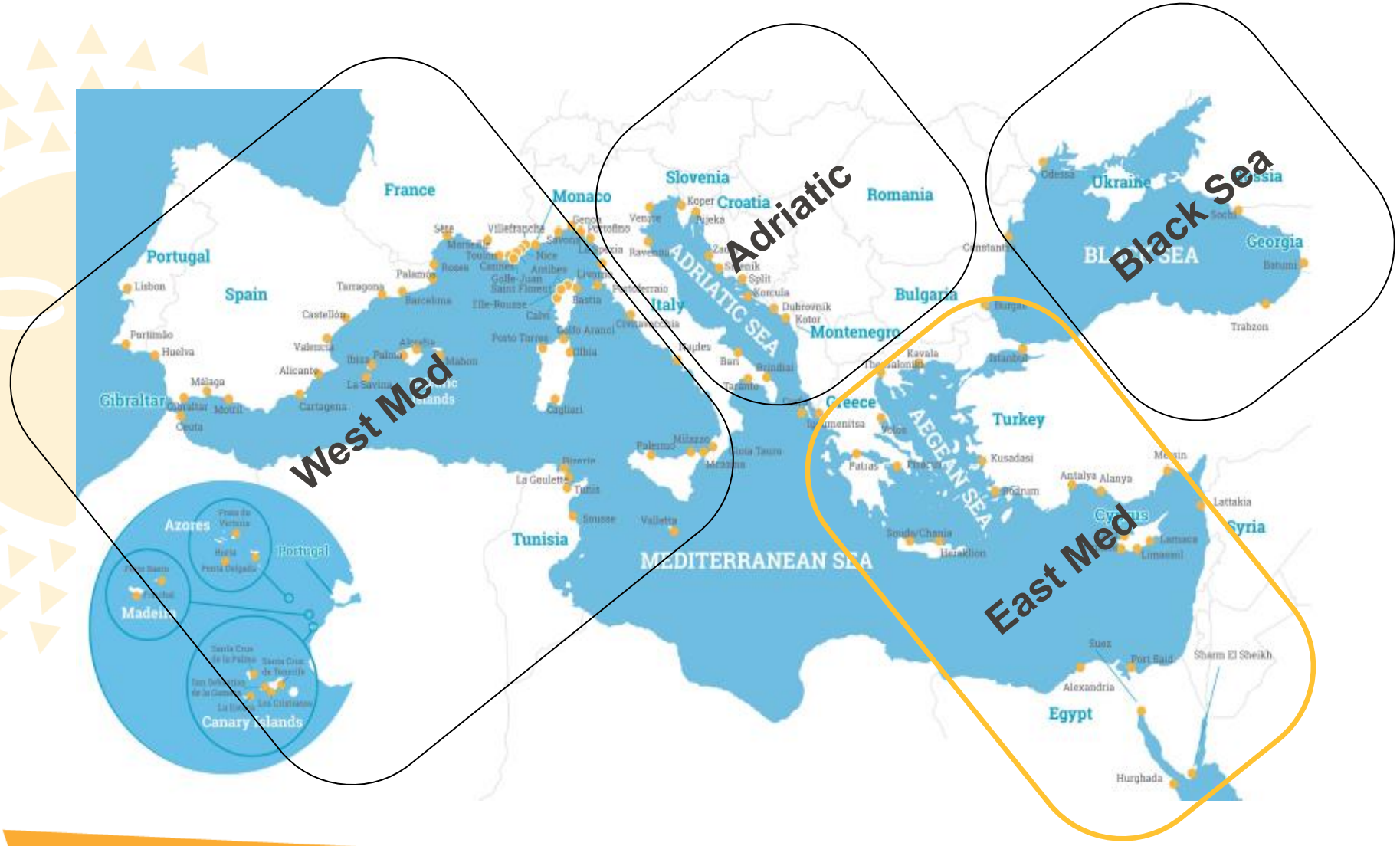
Thanos Pallis

MedCruise Secretary General

#PortsTogether

We are social!

MedCruise: The Association of Mediterranean Cruise Ports (since 1996)



4 regions | 100+ ports | 34 associates

www.medcruise.com

#portstogether

13.467
cruise calls

27,4
million passenger movements

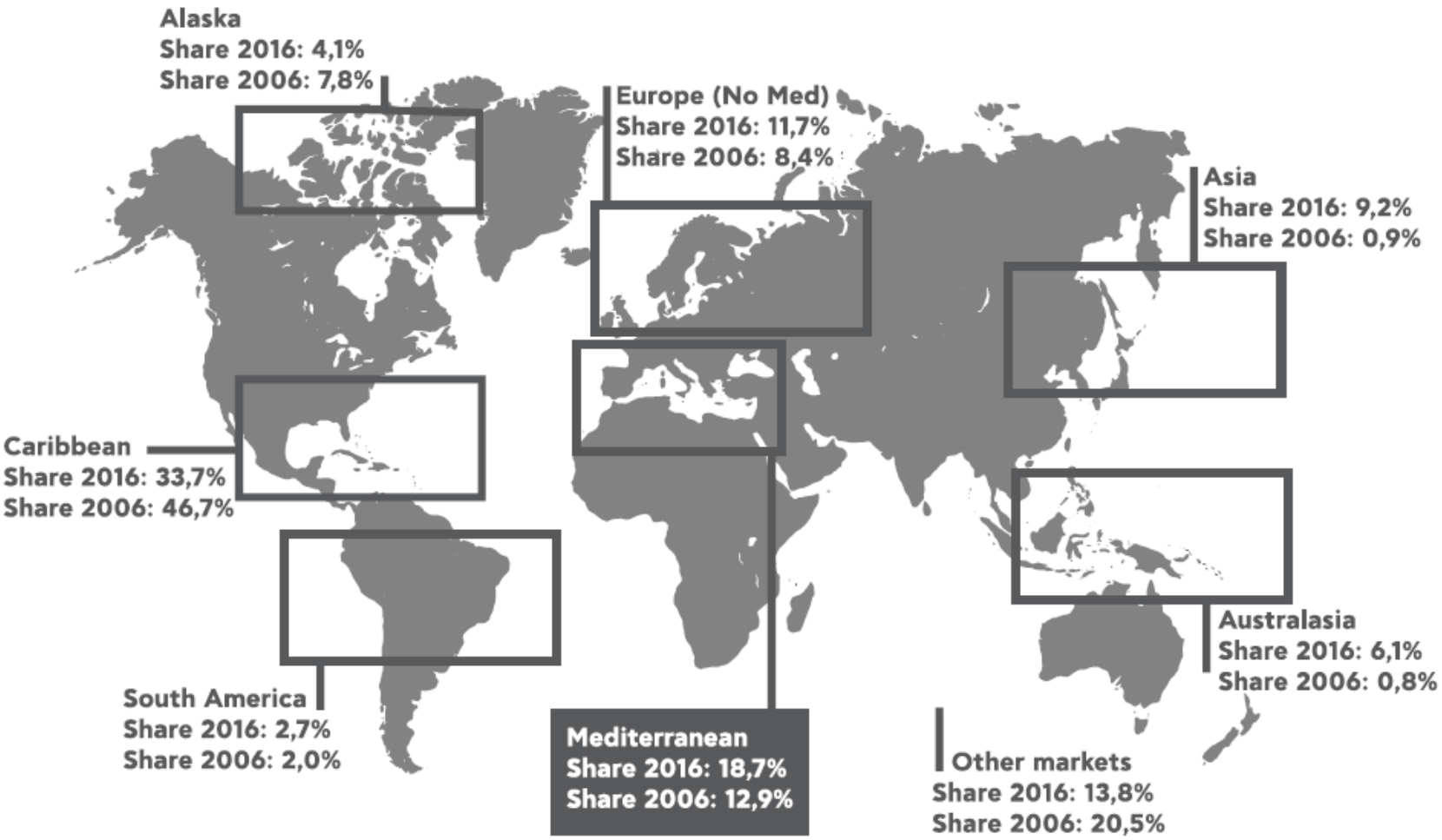
100+ ports

34 associates

Cruise Activities in MedCruise Ports:

STATISTICS 2016

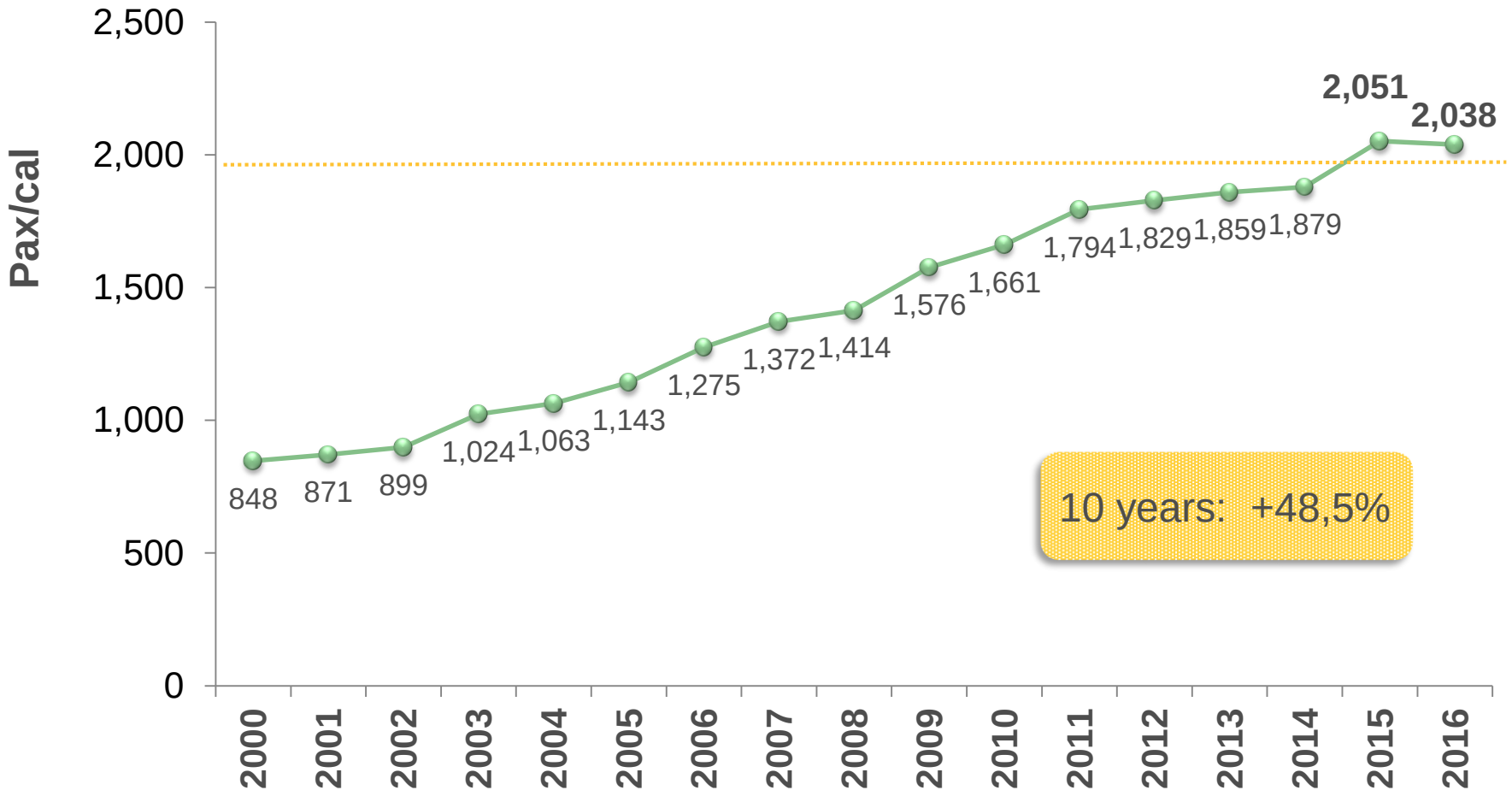
Deployment trends



Source: CLIA Reports, various editions

Capacity Issues

Average Cruise Passengers per Call



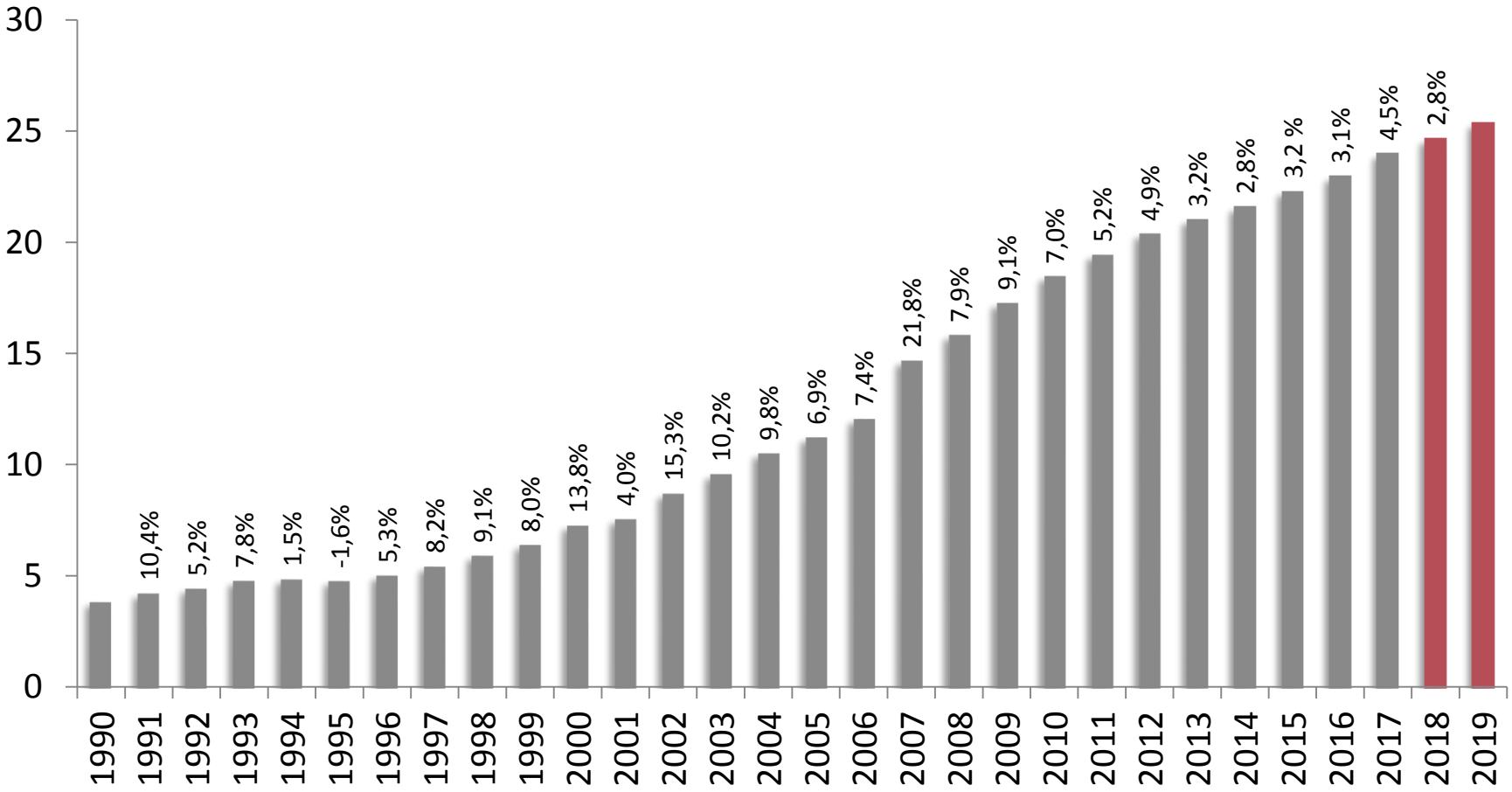
Major MedCruise Ports 2016

Cruise Passenger Movements

Rank 2016	(Rank 2015)	Port	Total Pax 2016	Total Pax 2015	2016/ 2015	Total Pax 2012	2016/ 2012
1	(1)	Barcelona	2.683.594	2.540.302	5,64%	2.408.634	11,42%
2	(2)	Civitavecchia	2.339.676	2.271.652	2,99%	2.393.570	-2,25%
3	(3)	Balearic Islands	1.957.429	1.996.533	-1,96%	1.341.510	45,91%
4	(4)	Venice	1.605.660	1.582.481	1,46%	1.775.944	-9,59%
5	(5)	Marseille	1.597.213	1.451.059	10,07%	890.020	79,46%
6	(6)	Naples	1.306.151	1.269.571	2,88%	1.297.233	0,69%
7	(8)	Piraeus	1.094.135	980.149	11,63%	1.198.047	-8,67%
8	(10)	Genoa	1.017.368	848.227	19,94%	797.239	27,61%
9	(7)	Savona	910.244	982.226	-7,33%	810.097	12,36%
10	(9)	Tenerife Ports	884.173	933.154	-5,25%	885.623	-0,16%
		Total (Major -10)	**15.395.643**	**14.855.354**	**3,64%**	**13.797.917**	**11,58%**

Capacity Issues (maritime-side)

Growth continues

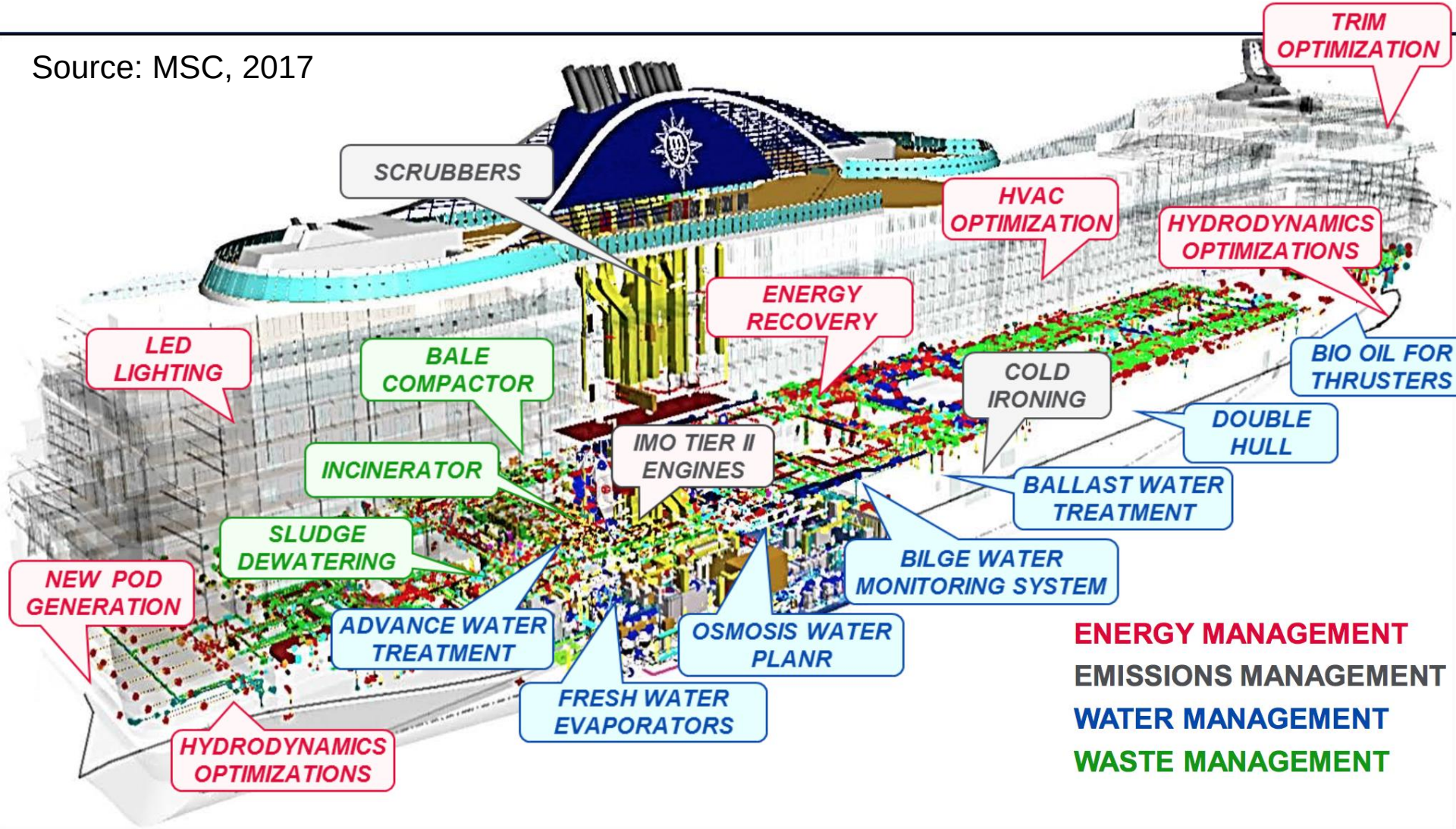


Rapid pace of new construction continues

- Order-book: **90 new cruise ships**
  - 50% increase of berths
  - $60 billion investments
  - 2019: 23 new ships (42,000 berths).
- **Increasing global demand for the cruises is coming from all parts of the industry and will be spread out globally.**
  - *TUI.. AIDA Cruises.. MSC Cruises …. Viking Ocean….. Saga Cruises . Silversea Cruises…Princess Cruises.. Norwegian Cruise Line…. Cunard Line …..*
  - *AIDAnova*, **the industry's first LNG-powered vessel** (also: *Costa Smeralda*).

Seaside and Meraviglia Class – Environmental Initiatives

Source: MSC, 2017



MedCruise - PIANC

MedCruise and PIANC partner to advance prospects of cruise ports

PIANC, the World Association for Waterborne Transport Infrastructure, and **MedCruise** the association of cruise ports in the Mediterranean and its adjoining seas, have signed a Memorandum of Understanding confirming their decision to work in partnership to advance the work.

The main aim of the partnership is to enhance the impact of both Associations in the area of the related maritime transport infrastructure, to co-operate, communicate and collaborate with reference to cruise ports, respecting their individual identities, membership expectations and traditions.

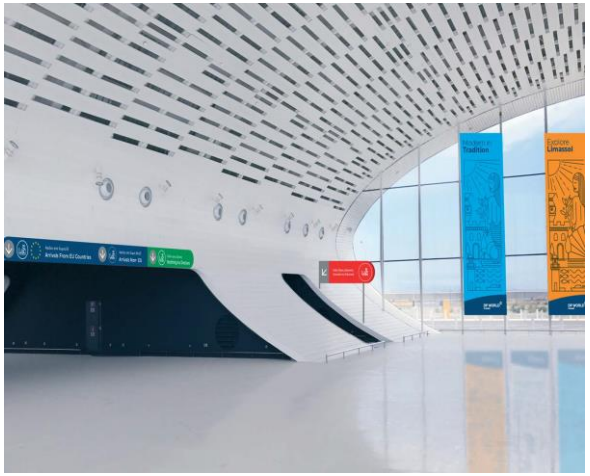
MedCruise and PIANC will support the work of each other through participation in relevant committees, workshops, conferences, and seminars.

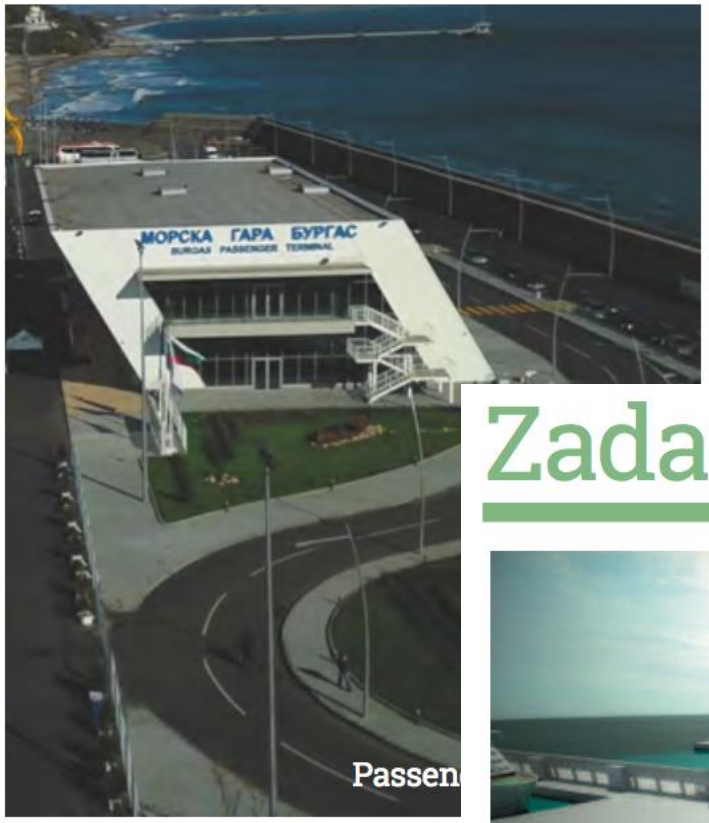
The latest “New Passenger Terminal”
1,600m
berths
11m-16m
drafts
12
14
16
300,000m²
of Land

New terminal in Cyprus

DP WORLD Limassol

- **Opening: Summer 2017**
  - *7 New Passenger Terminal pods*
  - *Internal area of 7000 m²*
  - *24/7 Availability*
  - *Integrated high quality services*
  - *30 meter quay apron*





Zadar

Piraeus

Livorno

The Alto Fondale C
renovated in 2013

Civitavecchia

Cagliari

Cagliari Cruise Port (CCP) officially opened its new cruise terminal on July 21 this year. An investment of €1m, financed by CCP and partly from the European Fund JESSICA (Joint European Support for Sustainable Investment in City Areas), the terminal is located on Rinascita pier at the centre of a 10,000sq mtr area and offering an indoor space of around 1,000sq mtr with ample room for handling luggage for local turnaround operations. The new terminal will be managed by a consortium comprising Royal Caribbean, Venezia Terminal Passeggeri and Aloschi & Bassani who have signed a concession for 15 years.

This year Cagliari is expecting over 100 calls and almost 300,000 passengers, with a 40% rise in passengers in 2017. Costa Pacifica is a weekly caller from March to November and Costa Diadema from May to September while MSC Armonia will call weekly from June to end October. The last call of 2016 is Swan Hellenic's Minerva on Christmas Eve.

MedCruise contact: Valeria Mangiarotti
valeria.mangiarotti@porto.cagliari.it

Messina

Messina is due to sign a contract soon for the design of a new cruise terminal, coming at a time when the port is experiencing good traffic growth with

Barcelona

Modern design for Carnival's new Barcelona terminal for LNG ships

A modern style with straight lines and a minimalist concept

Carnival Corp. & plc's second cruise terminal at the Port of Barcelona—a €30m facility due to open in 2018—is designed to handle its next-generation ships powered by clean-burning LNG.

As part of an agreement signed in July 2015, Carnival Corp. will construct and operate the 12,500-square-meter terminal. Paired with its existing terminal at the port, this represents the company's largest combined terminal investment in Europe.

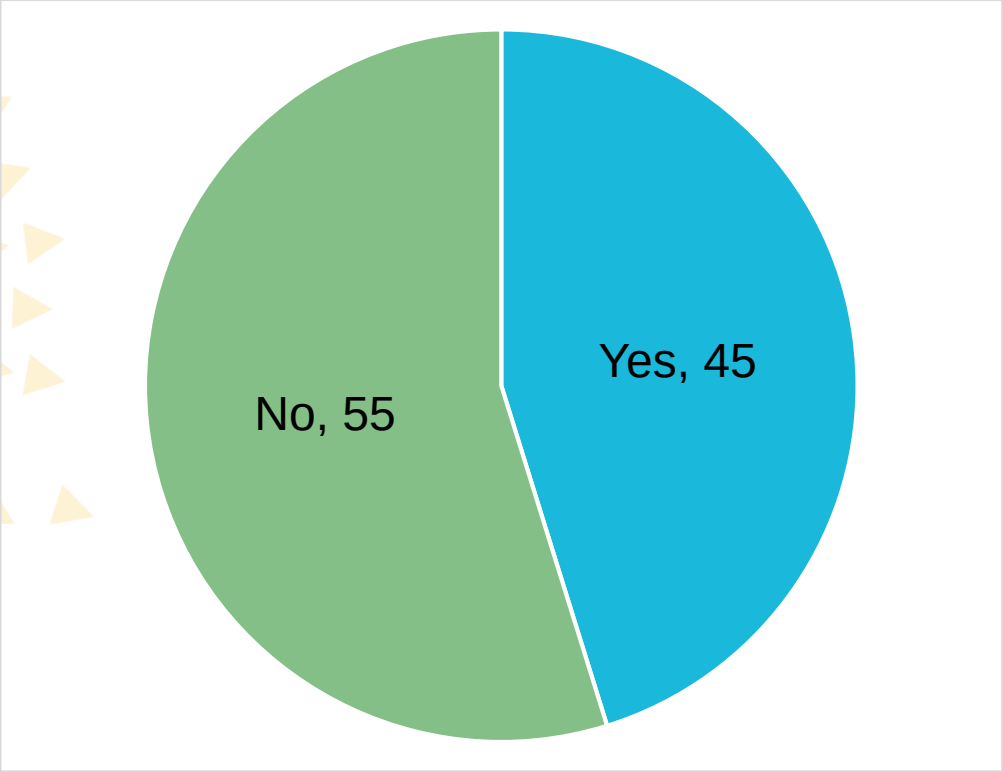
#PortsTogether

Lisbon

Tenerife ports

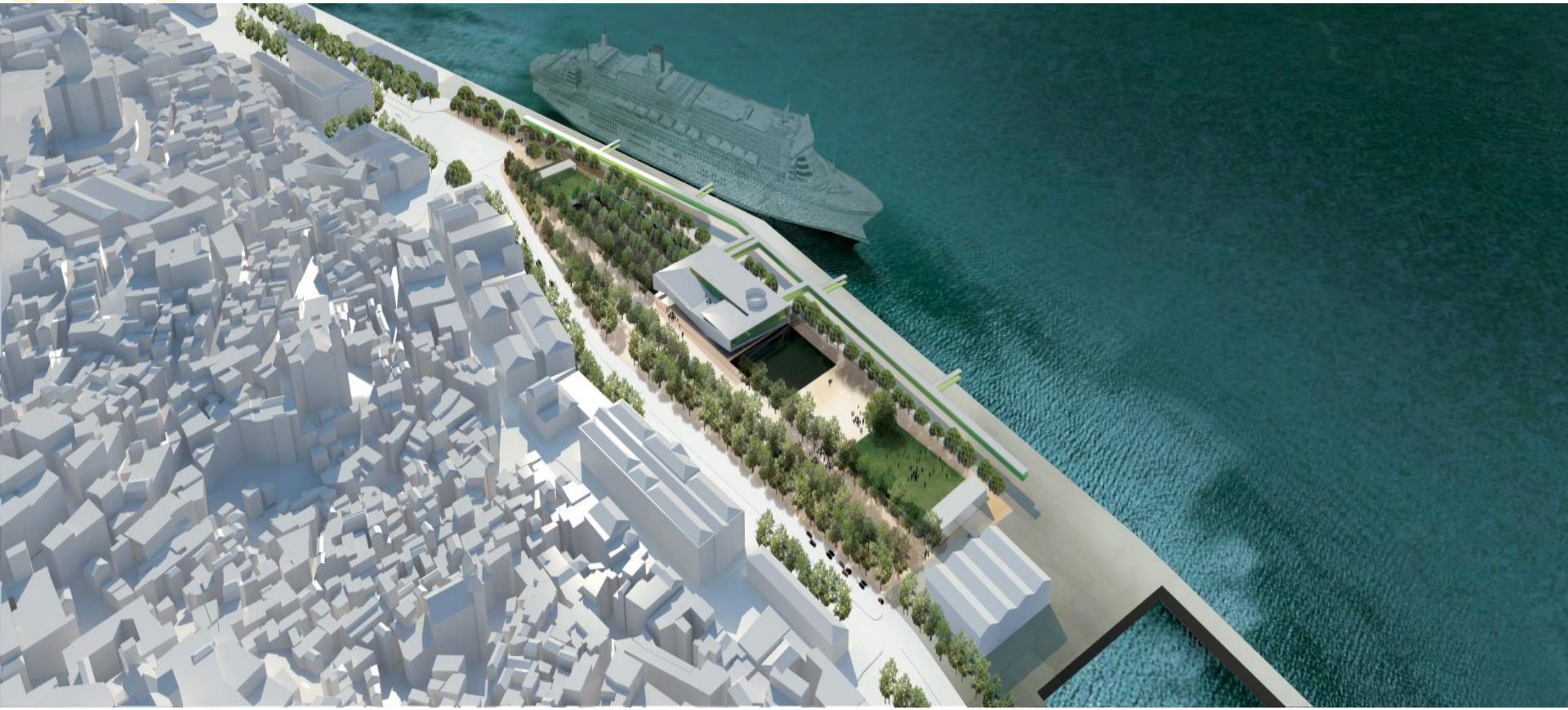
#PortsTogether

Has the cruise port infrastructure benefited by EU contribution? (%)

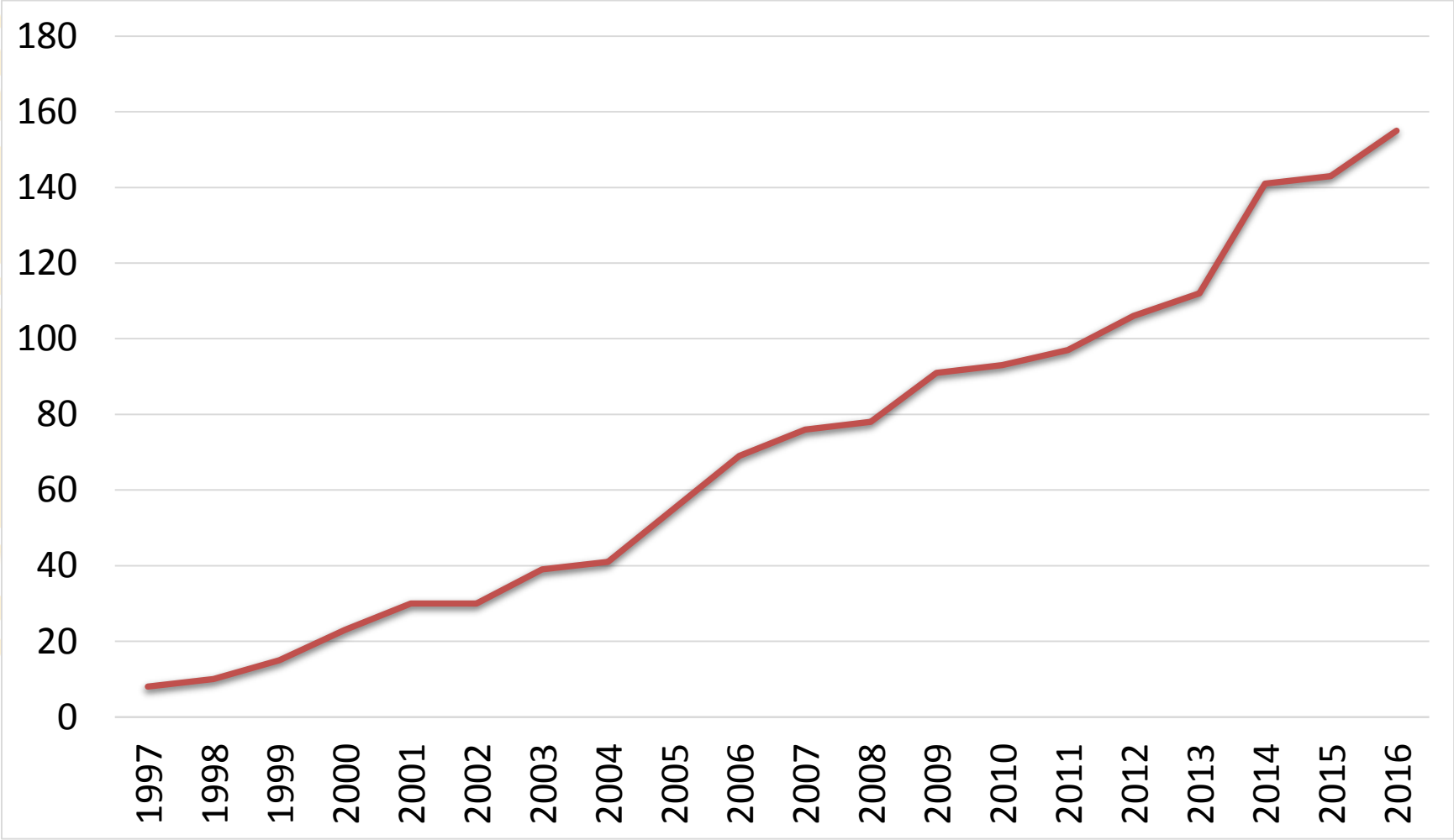


Cruise port development

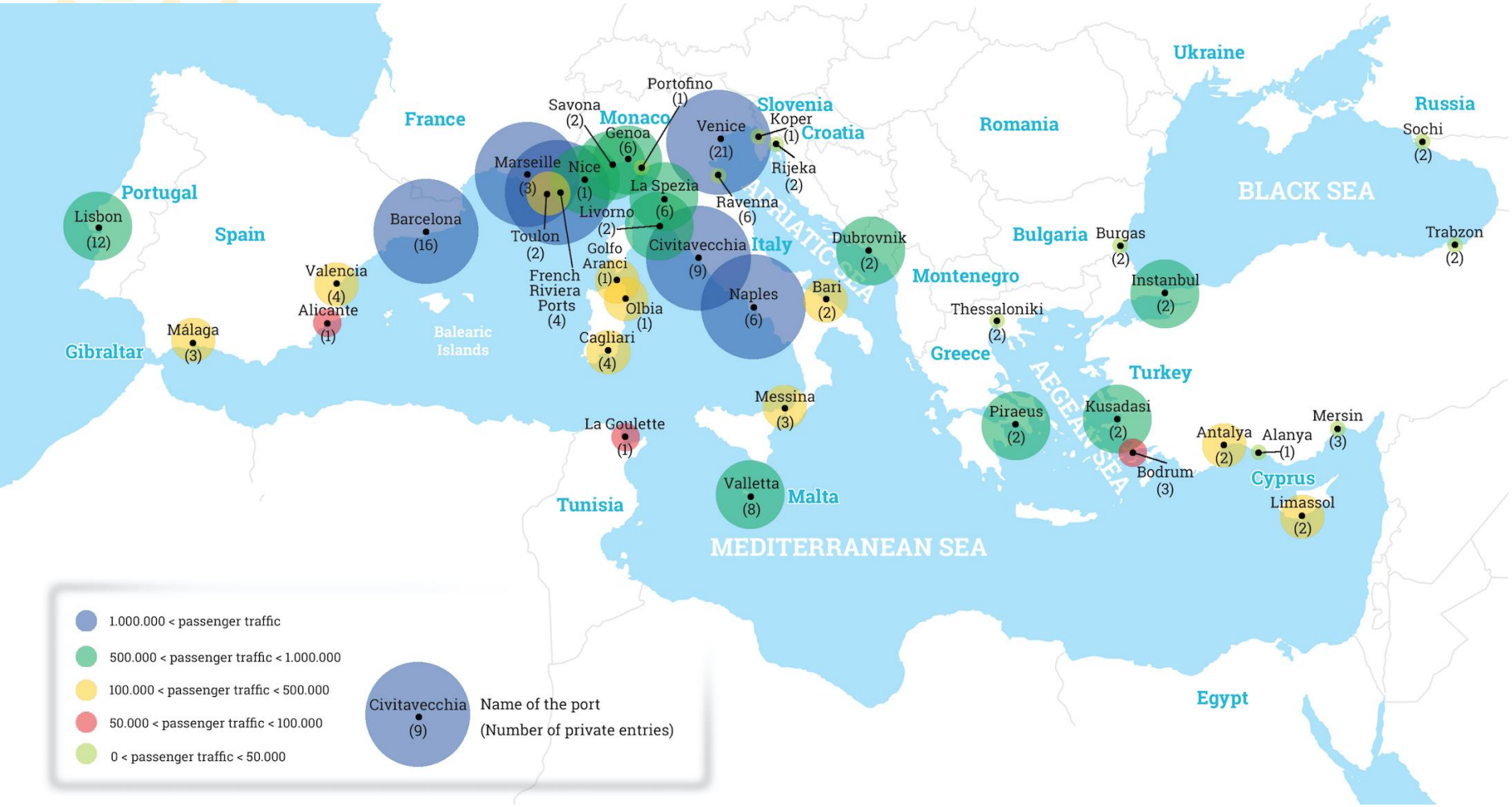
New terminals concessioned to private parties



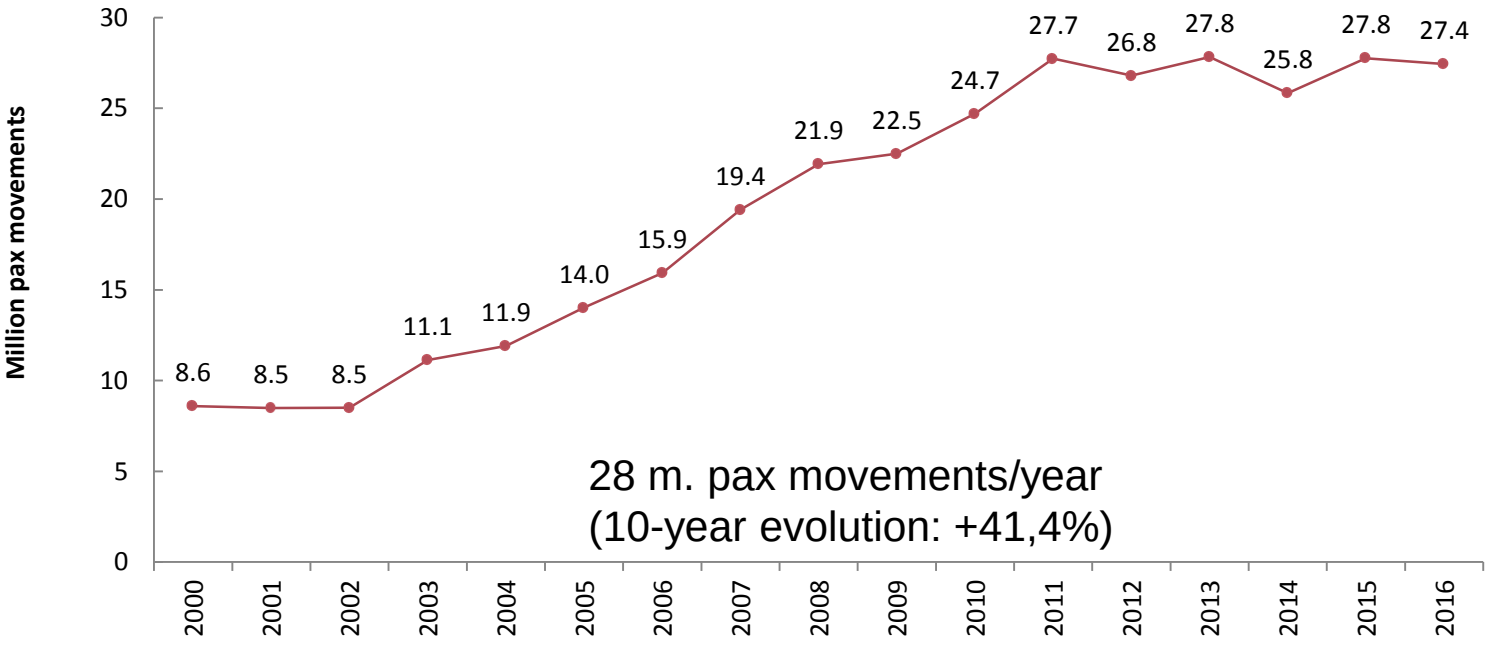
Private entries in cruise terminals in the Med



Private entries in Med cruise terminals



- **133 cruise terminals**
- located in **85 ports**
- governed by **110 port-managing entities**
- in **20 different countries**



Source: MedCruise 2017

Who & Why

Shareholder typology	No of ports	No of terminals
Cruise lines	12	21
Pure (international) cruise terminal operators	19	30
Port companies	10	19
Real estate & infrastructure managers	10	17
Shipping agency, travel operator & logistics company	6	6
Chamber of Commerce	8	15
Coastal Shipping company	4	5
Conglomerate	6	8
Banks, insurance companies & Funds	5	5

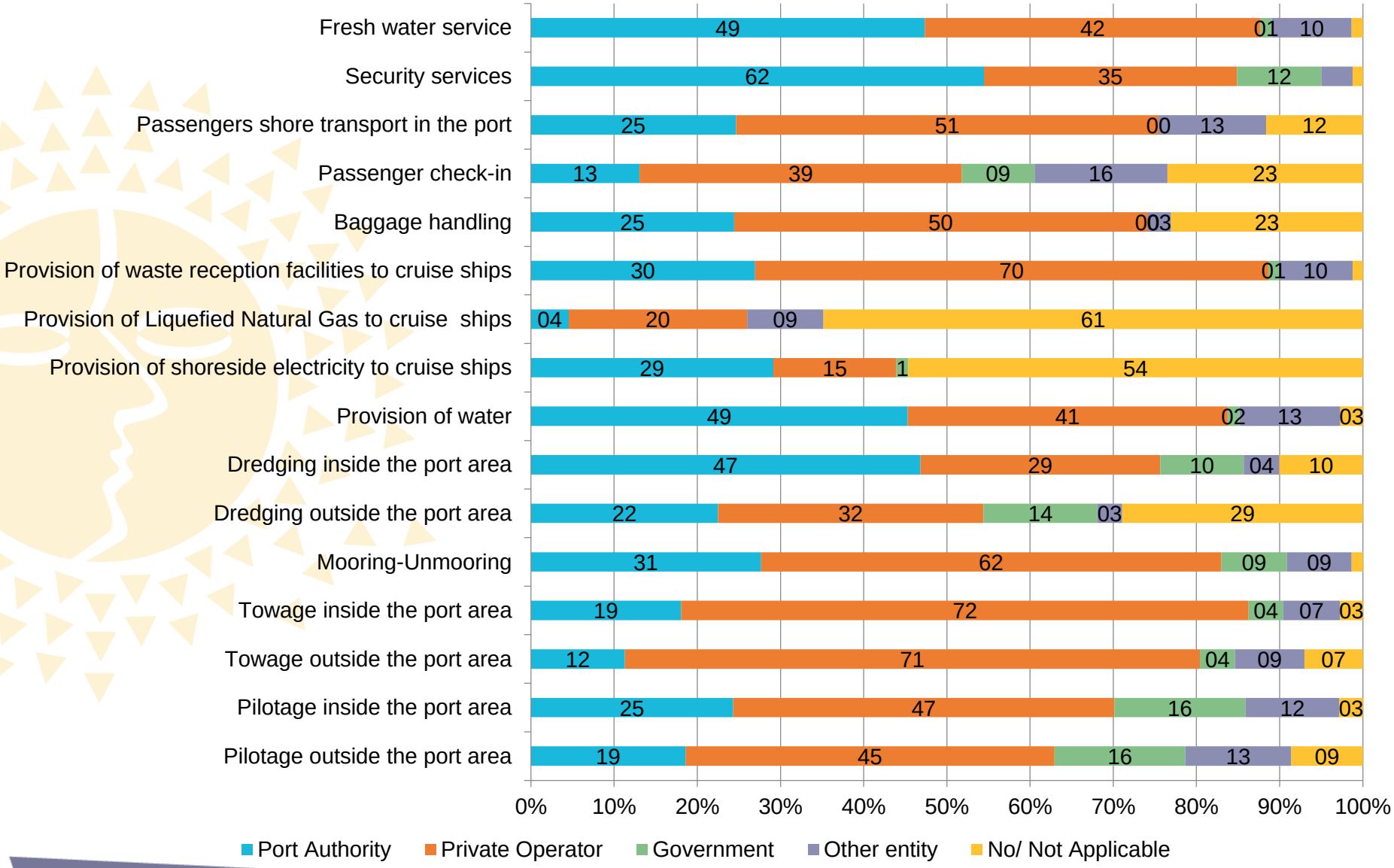
Distribution of private entries /geographic area / port size

	Sample entry		Domestic		Foreign	
	No	*% on column*	*No*	*% on row*	*No*	*% on row*
Distribution per geographic area						
Adriatic	35	22,6%	31	88,6%	4	11,4%
Black Sea	5	3,2%	5	100,0%	0	0,0%
East Med	19	12,3%	12	63,2%	7	36,8%
West Med	96	61,9%	62	64,6%	34	35,4%
Distribution per port size						
Large port (400.000 ≤ pax movements)	108	69,7%	71	65,7%	37	34,3%
Medium size ports (50.000 ≤ pax movements <400.000)	27	17,4%	24	88,9%	3	11,1%
Small port (pax movements < 50.000)	20	12,9%	15	75,0%	5	25,0%
Overall sample	*155*	*100,0%*	*110*	*71,0%*	*45*	*29,0%*

* *pax movements= cruise passenger movements per year.*

Cruise market in the Med: the current picture

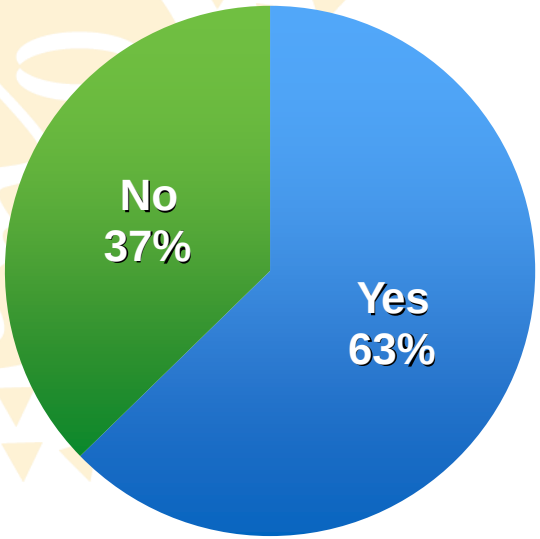
Operating functions (%)



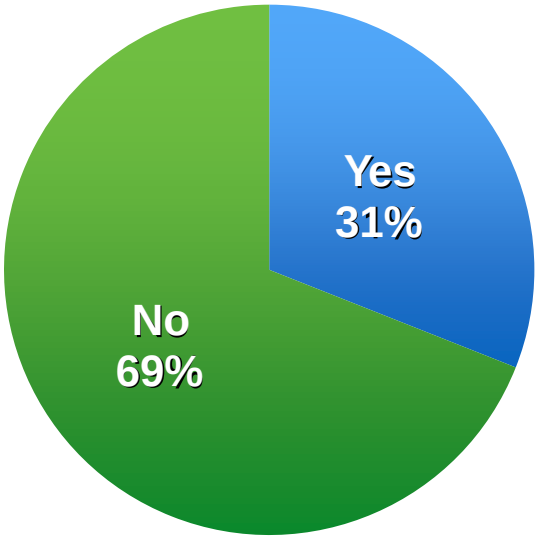
Source: MedCruise

Decisions on investments

Autonomous PA decisions on new investments in capital assets



Autonomous terminal operator decisions on new investments in capital assets



S-Factor: Sustainability

Policy Matters of importance to MedCruise

- **We know that Environmental management is challenging but essential** ("licence to operate and to grow")

- **We work together and commit to actions**
  - **Professional cooperation**
  - **Assisting tools**
  - **Proactive voluntary self-regulation**

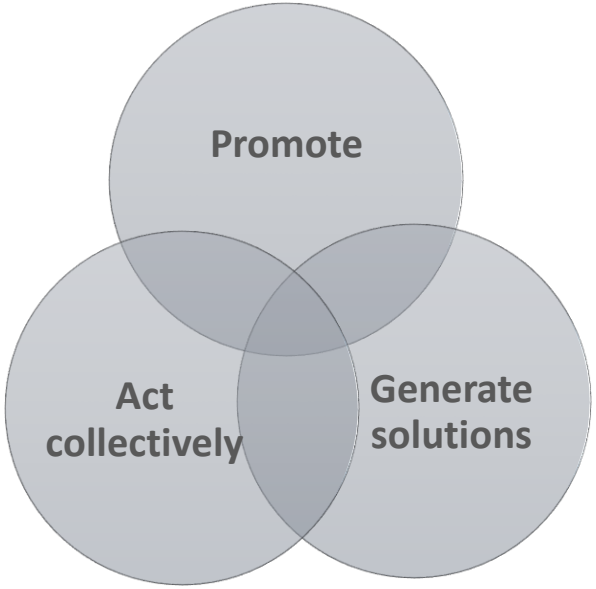


Image does matter

2.300 tons of water in its swimming pools

12.000 plants on board including hundreds of palm trees

We have not *yet* convinced *all* municipalities & local communities

The Economist @TheEconomist · 1h

#Barcelona is on the horns of a tourism dilemma—overcrowding. One solution: cruise control econ.st/1QkOA6L

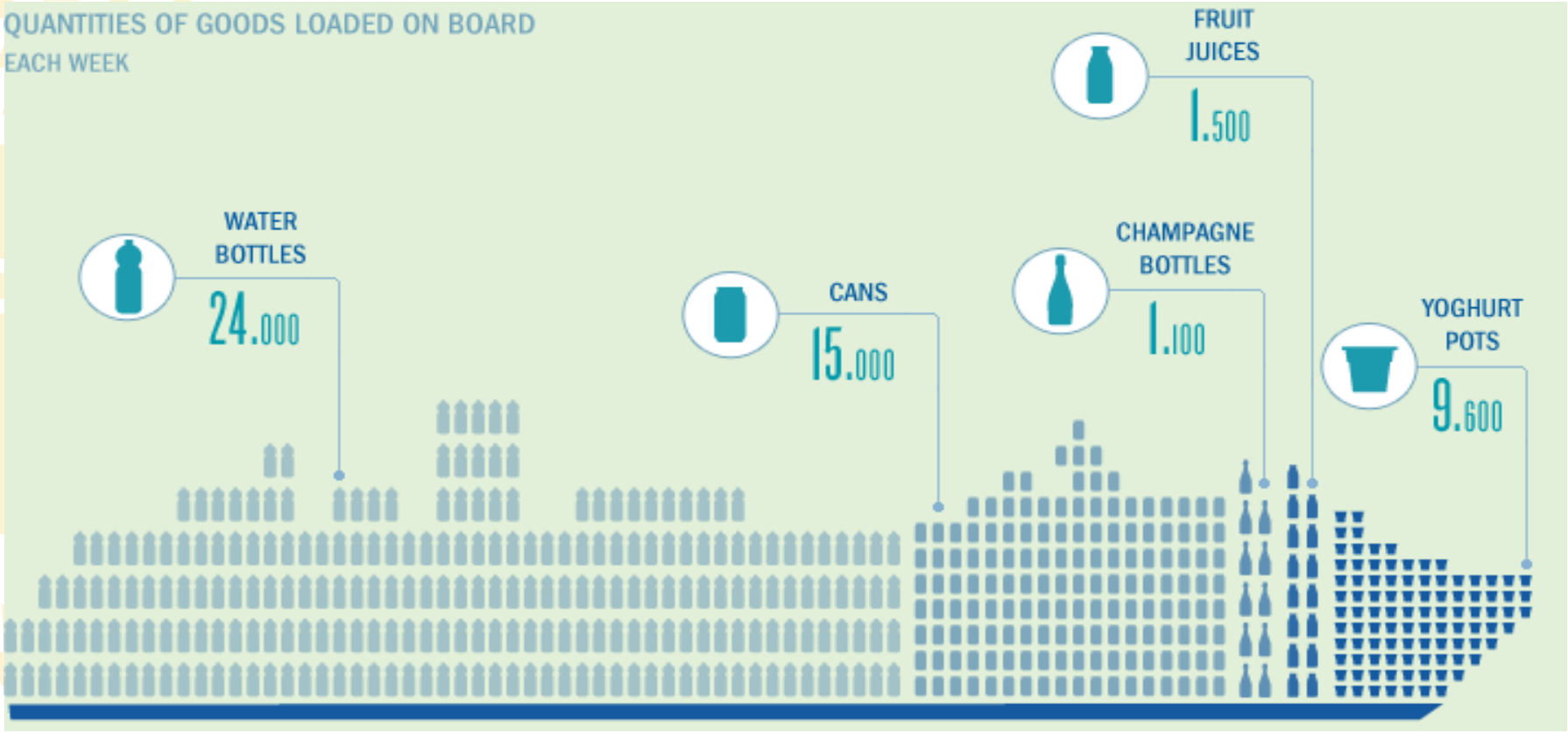
177 140 View photo

Santorini's popularity soars but locals say it has hit saturation point

Greek island draws millions of tourists but residents talk of pressure on infrastructure and divide between haves and have-nots

S-Factor: Sustainability

Policy Matters of importance to MedCruise

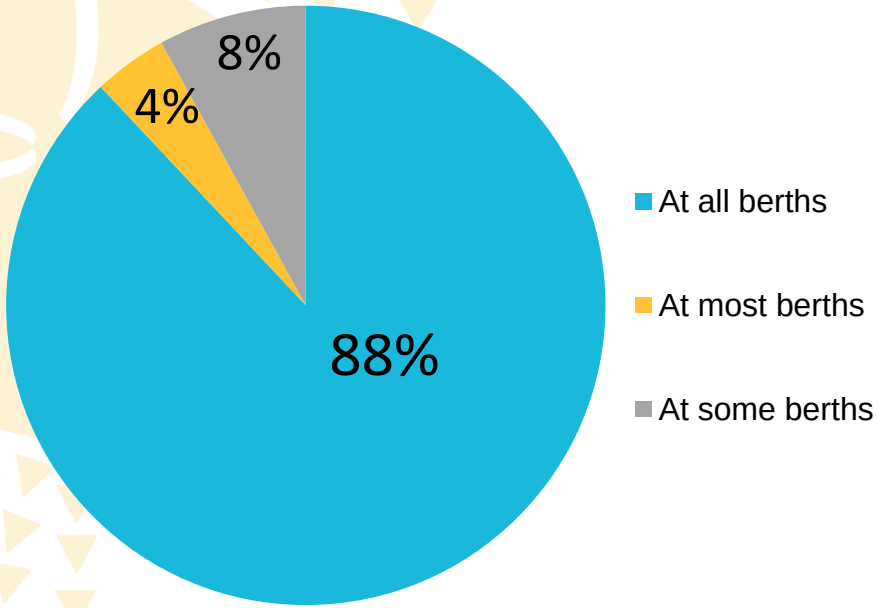


European Directive on waste (Reduction, Re-use, Recycling) and Marpol Annex V. & The need of mapping existing facilities

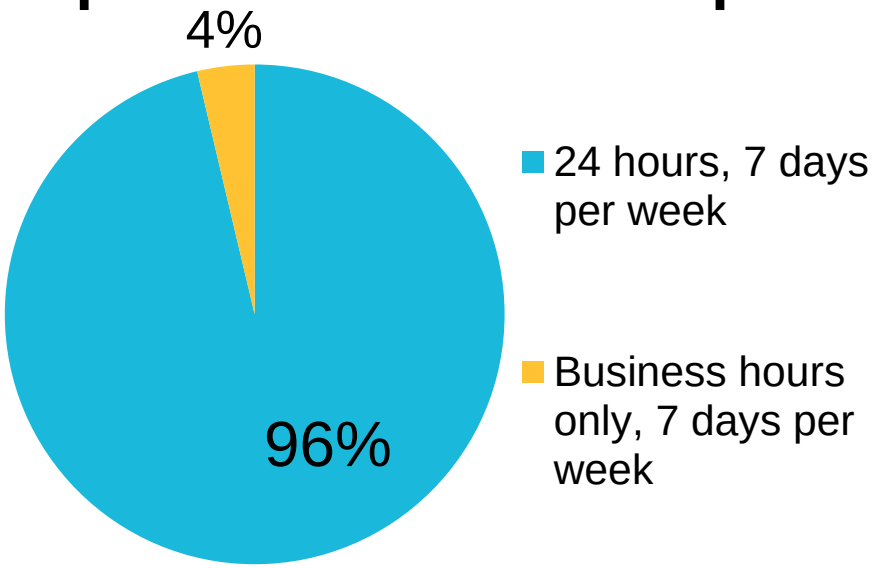
Source: Costa Departments: Fleet Operations and Environmental Management

Waste Reception Services

Location of garbage reception facilities at the port



Working hours of garbage reception facilities at the port



Availability of segregation: 58%

LNG

MEDCRUISE

WG

The Association of Mediterranean Cruise Ports

an event by :

Ports of Toulon Bay

CCI VAR

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Thank you!

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