MEDCRUISE

THE ASSOCIATION
OF MEDITERRANEAN
CRUISE PORTS

CRUISE ACTIVITIES IN MEDCRUISE PORTS: Statistics 2013

A MedCruise Report

Piraeus 2014

CRUISE ACTIVITIES IN MEDCRUISE PORTS: Statistics 2013

A MedCruise Report

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PREFACE

I am pleased to introduce to the MedCruise members and the cruise world the *Cruise activities in MedCruise Ports: Statistics 2013* report.

The report provides a statistical analysis of cruise activities in the Mediterranean region and its adjoining seas in 2013. Based on the annual data of the MedCruise member ports, it details the evolution of cruise in 2013, comparing them with the immediate previous year as well as an analysis of developments in the region the last five years (2009-2013).

In 2013 cruise in the 68 port members of MedCruise for which data are available reached new record levels. **For the first time in history the total passenger movements in MedCruise ports broke the 27 million cruise passengers per year milestone, reconfirming that the Mediterranean and its adjoining seas is a most dynamic region having all the potential to growth further**.

At the time of publication the total number of the members of MedCruise has grown to 70. These ports represent more than 100 port locations in 20 countries. In total this is over 78% of the total cruise passengers movements and 75% of cruise calls in the Mediterranean and adjoining seas. .

Discussions with potential members are at an advanced stage, and more members will be included in forthcoming editions. This is important as ports that are in the process of joining MedCruise represent a further 5% of cruise passenger movement and cruise calls that take place in the Med. **Our association proudly unites the port sector in advancing cruising in the Mediterranean and its adjoining seas.**

The detailed analysis of a database containing the statistics collected in 67 port members for the last five years period (2009-2013) stands as a valuable source of representative information about the cruise market in the region. Due to the special conditions in Egypt and Syria collection of data in these ports had not been completed before the conclusion of the report and thus data for these ports are not included.

This in essence the 5th edition of MedCruise statistics explores the size and evolution of this market over the last year, the trends that the region experienced in the recent past. Beyond the presentation of the data per port, the report contains an analysis of the data per region, examining in detail what happened in West Med, the Adriatic, East Med and the Black Sea. It also contains an analysis per size of the port, information about seasonality of activities, detailed information of major variations from previous years and reports on market concentration.

Cruise activities in MedCruise Ports: Statistics 2013 is an internal production of MedCruise. It was prepared by the MedCruise secretariat with the contribution of data provided by all the members of the association. All the reported data have been collected by port authorities and/or cruise terminal operators where applicable. Those data produced by a third source and used in the report are duly acknowledged.

Published in March 2014, and presented to the cruise world during its annual meeting in Miami, US, I am confident that the publication provides to the industry a point of reference and a mean to understand the past, present and future cruise industry – all of them useful to make the observed growth in the Mediterranean Sea a sustainable one.

Stavros Hatzakos,

MedCruise President

I. INTRODUCTION

1.1 MedCruise

MedCruise is the Association of Mediterranean cruise ports. Its mission is to promote the cruise industry in the Mediterranean and its adjoining seas. The Association assists its members in benefiting from the growth of the cruise industry by providing networking, promotional, and professional development opportunities. **Map 1.1** provides an illustration of the geography of the members of the Association and browses the extent that MedCruise membership spreads in the Med and the broader region.

Map 1.1: MedCruise Ports

A number of studies concluded in the recent past examine among others the financing of cruise ports in the Med, as well as operational and financial issues. These studies have been discussed both internally and jointly with cruise lines during the MedCruise General Assemblies. In the same vein, this annual MedCruise statistical publication furthers the understanding of the present challenges, while it facilitates the adjustment of MedCruise members and associate members to contemporary market structures.

1.2 MedCruise Membership

MedCruise membership has grown in numbers and geographically. Established in Rome on the 11th of June 1996, by a collaborative agreement between 16 ports in seven different countries, the MedCruise membership spreads today in 20 countries, and is located in three different continents, Africa, Asia and Europe (**Table 1.1**). Members in several cases represent more than one port in the same geographical area, thus the total of the ports that have joined the MedCruise family are well above 100.

In total the 70 port members of the Association represent more than 100 ports in the Mediterranean region, including the Black Sea, the Red Sea and the Near Atlantic. Four distinctive regions are identified. These are West Med, Adriatic Sea, East Med and Black Sea (**Table 1.2**). Moreover, 32 associate members, representing other associations, tourist boards and ship/port agents, also share the benefits of the Association (**Table 1.3**).

Table 1.1: Countries represented in MedCruise

Croatia	**Cyprus**	**Egypt**	**France**	**Georgia**
Gibraltar	**Greece**	**Italy**	**Malta**	**Monaco**
Montenegro	**Portugal**	**Romania**	**Russia**	**Slovenia**
Spain	**Syria**	**Tunisia**	**Turkey**	**Ukraine**

Table 1.2: MedCruise Members

WEST MED	Alicante	Azores	Balearic Islands	Barcelona
	Cagliari	Cartagena	Castellón	Ceuta
	Civitavecchia	French Riviera Ports	Genoa	Gibraltar
	Huelva	La Spezia	Lisbon	Livorno
	Madeira Ports	Málaga	Marseille	Messina
	Monaco	Motril-Granada	Naples	North Sardinian Ports
	Palamós	Palermo	Portimao	Portoferraio
	Savona	Sète	Tarragona	Tenerife Ports
	Toulon-Var-Provence	Tunisian Ports	Valencia	Valletta
ADRIATIC	Bari	Brindisi	Corfu	Dubrovnik/Korcula
	Koper	Kotor	Ravenna	Rijeka
	Sibenik	Split	Trieste	Venice
	Zadar			
EAST MED	Alanya	Cyprus Ports	Egyptian Ports	Heraklion
	Igoumenitsa	Kavala	Kusadasi/Bodrum/Antalya	Lattakia
	Mersin	Patras	Piraeus	Souda/Chania
	Thessaloniki	Volos		
BLACK SEA	Batumi	Constantza	Odessa	Rize
	Sevastopol	Sinop	Sochi	

Table 1.3: MedCruise Associate Members

Aloschi & Bassani	BC Tours & Shipping	Cambiaso & Risso	Cemar
CLIA Europe	Cruise Services Monaco	D'Alessandro Travel	Donomis Cruise Services
F.A. Travel	Hugo Trumpy Srl	Idu Shipping & Services	Inflot World Wide Inc (Sochi)
Inflot World Wide Tours (Sevastopol)	Intercruises Shoreside & Port Services	Karavanmar Cruise Services	Karpaten Turism Srl
Kvarner County Tourism Office	La Goulette Cruise Terminal	Livorno Port Authority	Medov Srl
Mercantile Marine Shipping	MH Bland	Navigator Travel & Tourist Services	Patronat de Turisme Costa Brava
Perez y Cia	Salamis Organisation	Samer & Co Shipping - Koper	Samer & Co Shipping - Trieste
Tartus Tour	Transcoma Cruise & Travel	Tura Turizm	Turisme de Barcelona

1.3 An overall picture of Cruise activities in MedCruise members

The total of passengers that visited the MedCruise ports in 2013 reached 27,02 million, breaking all previous records (**Figure 1.1**). The breaking of all records of cruise passenger movements is evidence that cruise in the Mediterranean and its adjoining seas performs remarkably well in a challenging economic climate.

The variation of 2013 total cruise passenger movements in MedCruise members on 2012 was 3,96%, as the total of cruise passenger movements registered in the same ports in 2012, plus those registered in the only cruise call in Lattakia the same year, had been 25.99 million passengers. The presence of a dynamic market in the Mediterranean and its adjoining seas is further illustrated when comparing the total passengers of 2013 with the 21,86 passenger movements that had been registered five years before. The market growth observed within this five years period (2009-2013) stands at 23,6%.

The aforementioned data for the period 2009-2013 refer to a sample that lags from the total 70 port members of MedCruise. In particular, in the case of Lattakia and Egyptian ports, the instability and special conditions that Syria and Egypt experienced in the recent past resulted in the absence of on time data collection for these MedCruise members in all years. In addition, Rize did not report any data.

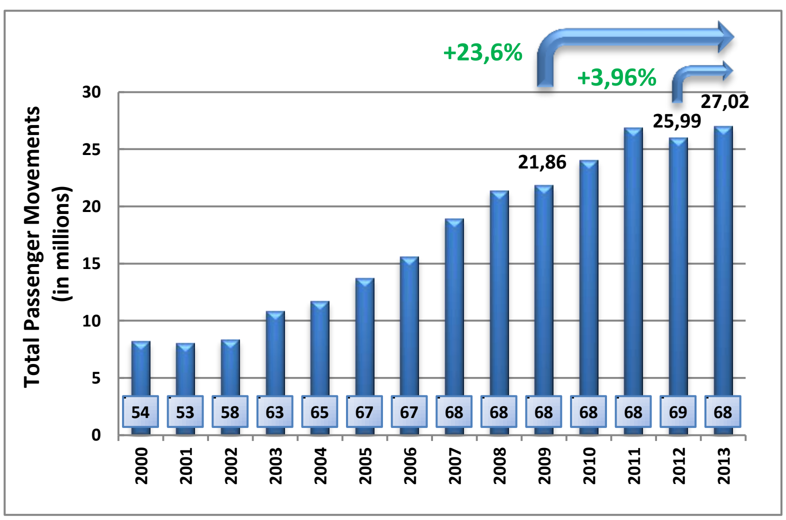
While for reasons of consistency, and therefore for meaningful results, in the subsequent sections of the report analysis will refer to the sample of 67 MedCruise members for which all data for all the last five years are available, the rest of this section provides a presentation of all data collected since 2000.

Looking further back in the past and comparing the data of 2013 with those registered a decade before (2004) two conclusions might be reached.

The first one is brought forward by the comparison of a sample of the passengers that visited the 63 MedCruise port members for which data are available for both years (*all present members except Azores, Batumi, Egyptian ports, Lattakia, Mersin, Rize, Sibenik*).

The 11,57 million passengers that visited these ports in 2004 increased to 25,87 million in 2013, a registered passenger growth of 123,6% within the decade 2004-2013.

Figure 1.1: Cruise Passengers Growth in MedCruise ports (2000-2013)



NOTE: *Missing data since 2009: 2013: Egyptian Ports, Lattakia / 2012: Rize / 2011: Egyptian Ports, Rize / 2010: Egyptian Ports, Rize / 2009: Egyptian Ports, Rize.*

The second major conclusion refers to the progressive strength of the Association itself. A decade ago, in 2004, a total of 39 port members listed in the sample of **Table 1.2** were associated in the 43 members strong MedCruise. That year these 39 MedCruise members registered traffic of 8,95 million passengers. Since then, these ports succeeded to benefit by the rise of cruise activities, and/or have even acted effectively to generate such activities. This is illustrated by the fact that the same sample of 39 ports hosted 20,8 million passengers in 2013.

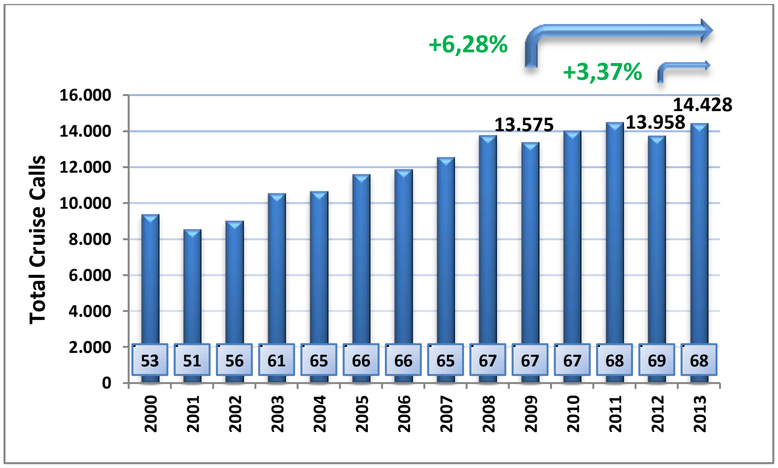
Most importantly, the total of cruise passenger traffic that is represented via MedCruise doubled within the decade 2004-2013. Today, the number of cruise passenger movements that takes place in these ports enhances the meaning of this collaboration, strengthens the voice of MedCruise to represent ports and advances the role of the association in promoting cruise activities in the region.

The total of cruise vessels calls in MedCruise ports in 2013 reached 14.428 (**Figure 1.2**). This represents a growth of 3,37% comparing to 2012 when 13.958 cruise calls took place.

The number of calls in 2013 was only 298 calls shy of the record number of 14.726 calls that took place in 2011 in MedCruise ports.

The growth on a five years basis (2003-2013) stands at 6,28%, as in 2009 13.575 cruise calls took place. Comparing with the registered total passenger numbers of 2013, there is strong evidence of the association of more passengers per cruise call.

Figure 1.2: Cruise Calls Growth in MedCruise ports (2000-2013)

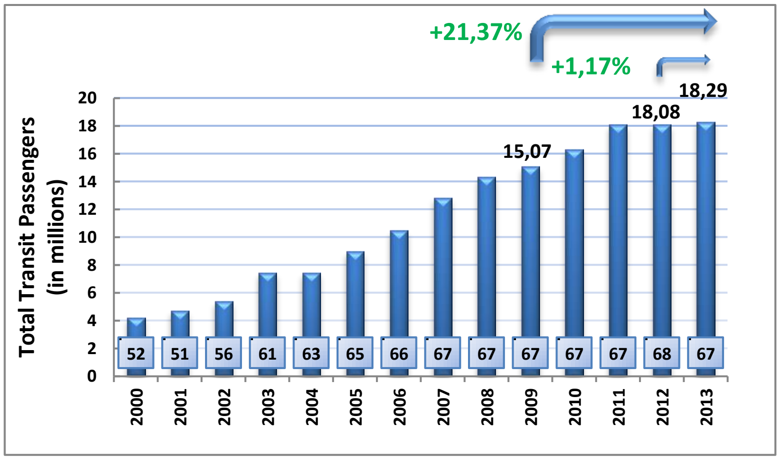


NOTE: *Missing data since 2009: 2013: Egyptian Ports, Lattakia / 2012: Rize / 2011: Egyptian Ports, Rize / 2010: Egyptian Ports, Rize / 2009: Egyptian Ports, Rize.*

The total number of transit passengers that visited the MedCruise ports in 2013 reached the record of 18,29 million passenger movements (**Figure 1.3**). This number equals to a 1,17% increase when comparing to the previous year, with the total of 2012 had been 18,08 million passengers movements.

In the case of transit passenger movements in MedCruise ports, a substantial growth has happened within the most recent five years period (2013/2009). This growth stands at 21,37%, as 15,07 million transit passengers cruised the Mediterranean and its adjoining sees in 2009.

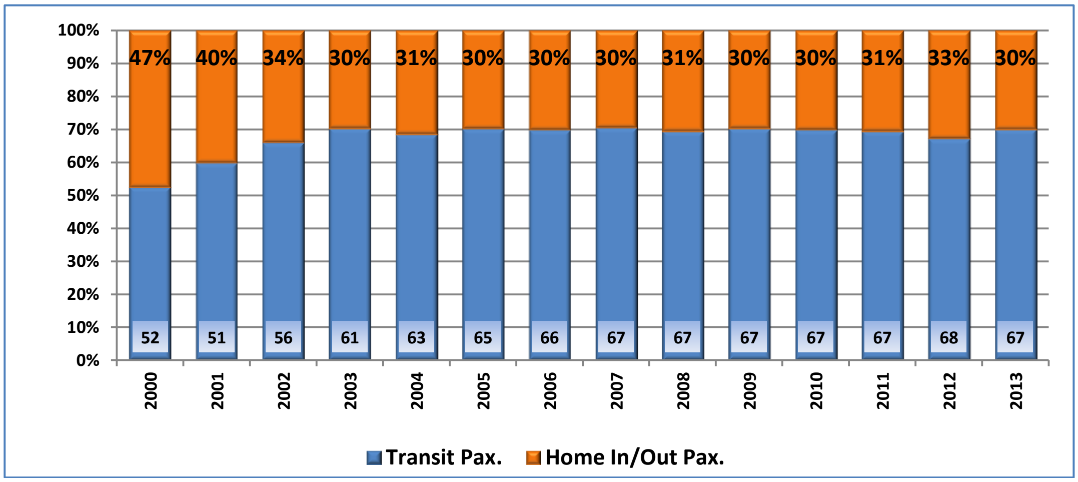
Figure 1.3: Transit Passengers Growth in MedCruise ports (2000-2013)



NOTE: *Missing data since 2009: 2013: Egyptian Ports, Lattakia, Tenerife Ports / 2012: Rize, Tenerife Ports / 2011: Egyptian Ports, Rize, Tenerife Ports / 2010: Egyptian Ports, Rize, Tenerife Ports / 2009: Egyptian Ports, Rize, Tenerife Ports.*

As **Figure 1.4** illustrates the ratio of transit passenger movements and passengers home-porting from MedCruise ports stands at 70/30. This ratio remains stable over time, as it has been precisely the same one observed for a decade – the earlier variation is present due to the different sample of ports included.

Figure 1.4: Distribution of Cruise Passenger movements (2000-2013)



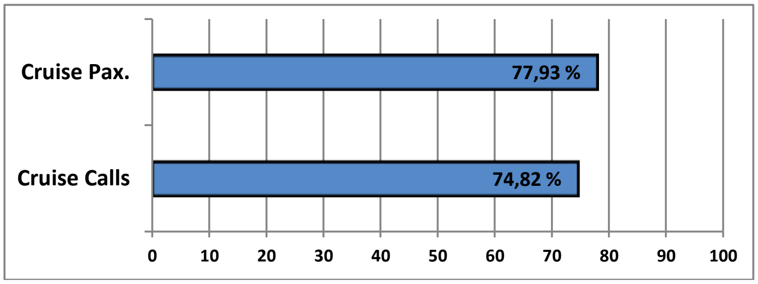
NOTE: *Missing data since 2009: 2013: Egyptian Ports, Lattakia, Tenerife Ports / 2012: Rize, Tenerife Ports / 2011: Egyptian Ports, Rize, Tenerife Ports / 2010: Egyptian Ports, Rize, Tenerife Ports / 2009: Egyptian Ports, Rize, Tenerife Ports.*

Consulting external data, as regards the total passenger and cruise calls traffic in the total of the ports in the Mediterranean and its adjoining seas, it is estimated (**Figure 1.5**) that through its membership MedCruise represents a share of approximately 78% of the total cruise passenger movements in 226 registered ports of any size (i.e. even one cruise call per year), and 75% of the cruise calls that took place in 2013.

At the time of publication, discussions with potential members were at an advanced stage, and expected to conclude by the forthcoming MedCruise General Assembly in May 2014.

The ports that are in the process of joining MedCruise represent more than a further 5% of cruise passenger movements and cruise calls that take place in the Mediterranean and its adjoining seas.

Figure 1.5: Estimated MedCruise ports share of total cruise traffic in the Mediterranean in 2013 (estimated)



Source: *MedCruise members for MedCruise ports; For the total of traffic in the rest of the ports in the Mediterranean and its adjoining seas: Cruise Market Watch (www.cruisemarketwatch.com)*

1.4 Cruise traffic in MedCruise Ports in 2013

Table 1.4 details the data collected by MedCruise member ports as regards cruise traffic that took place in 2013. The data refer to passenger movements, cruise calls, as well as classification of passengers in either home in, home out, or transit. In the Appendix, the reader might find a complete listing of the evolution of these data in the last five years (2009-2013). A detailed analysis of the statistical data for all of them bar one (Rize), based on several dimensions, is provided in the next sections of the present report. In line with the MedCruise constitution, a MedCruise member port might administer or operate multiple ports of the same geographical region. This might occasionally affect to a certain extent specific results of the statistical analysis, for instance rankings or averages.

For reasons of consistency, and therefore for meaningful results, in the subsequent sections the analysis will refer to the sample of 67 MedCruise port members for which all data for all five years are available.

Table 1.4: MedCruise Ports Cruise data (2013)

No	Port	MedCruise Region	Total Pax.	Total Cruise Calls	Home In Pax.	Home Out Pax.	Transit Pax.
1	**Alanya**	East Med	57.454	53	0	0	57.454
2	**Alicante**	West Med	41.860	32	0	0	41.860
3	**Azores**	West Med	87.437	92	230	243	86.964
4	**Balearic Islands**	West Med	1.541.376	699	490.631		1.050.745
5	**Barcelona**	West Med	2.599.232	835	752.248	754.038	1.092.966
6	**Bari**	Adriatic	604.781	171	79.607	85.424	439.750
7	**Batumi**	Black Sea	4.562	20	0	0	4.562
8	**Brindisi**	Adriatic	4.628	15	102	17	4.509
9	**Cagliari**	West Med	146.003	94	2.856	2.875	140.272
10	**Cartagena**	West Med	134.225	115	0	0	134.225
11	**Castellón**	West Med	1.514	3	0	0	1.514
12	**Ceuta**	West Med	4.605	8	0	0	4.605
13	**Civitavecchia**	West Med	2.538.259	959	494.255	495.743	1.548.261
14	**Constantza**	Black Sea	54.614	69	202	186	54.226
15	**Corfu**	Adriatic	744.651	480	35.382	35.353	673.916
16	**Cyprus Ports**	East Med	271.673	255	50.865	50.040	170.768
17	**Dubrovnik/Korcula**	Adriatic	1.136.503	843	12.420	12.420	1.111.663
18	**Egyptian Ports**	East Med	n.a.	n.a.	n.a.	n.a.	n.a.
19	**French Riviera Ports**	West Med	613.218	420	56.523		556.695
20	**Genoa**	West Med	1.050.085	298	322.703	326.579	400.803
21	**Gibraltar**	West Med	278.139	179	0	0	278.139
22	**Heraklion**	East Med	270.020	177	27.719	27.724	214.577
23	**Huelva**	West Med	296	1	0	0	296
24	**Igoumenitsa**	East Med	4.650	14	0	0	4.650
25	**Kavala**	East Med	6.995	14	0	0	6.995
26	**Koper**	Adriatic	65.434	54	28	28	65.378
27	**Kotor**	Adriatic	317.746	387	0	0	317.746
28	**Kusadasi/Bodrum/ Antalya**	East Med	780.804	657	90.060	100.027	583.506
29	**La Spezia**	West Med	213.858	149	865	642	212.351
30	**Lattakia**	East Med	n.a.	n.a.	n.a.	n.a.	n.a.
31	**Lisbon**	West Med	558.040	353	26.386	24.448	507.206
32	**Livorno**	West Med	736.516	420	2.456	2.535	731.525
33	**Madeira Ports**	West Med	482.112	291	1.751	2.224	478.137
34	**Málaga**	West Med	397.416	248	34.224	37.025	326.167
35	**Marseille**	West Med	1.188.031	447	190.634	190.684	806.713
36	**Mersin**	East Med	1.697	4	0	0	1.697
37	**Messina**	West Med	501.316	228	18.880	17.310	465.126

No	Port	MedCruise Region	Total Pax.	Total Cruise Calls	Home In Pax.	Home Out Pax.	Transit Pax.
38	**Monaco**	West Med	249.806	221	18.749	17.160	213.897
39	**Motril-Granada**	West Med	16.809	28	0	0	16.809
40	**Naples**	West Med	1.175.018	440	52.203	58.486	1.064.329
41	**North Sardinian Ports**	West Med	206.140	117	0	0	206.140
42	**Odessa**	Black Sea	91.949	148	4.558	4.831	82.560
43	**Palamós**	West Med	29.775	38	0	0	29.775
44	**Palermo**	West Med	410.999	189	20.812	22.057	368.130
45	**Patras**	East Med	1.264	2	0	0	1.264
46	**Piraeus**	East Med	1.302.581	711	159.757	148.948	993.876
47	**Portimao**	West Med	20.141	42	30	58	20.053
48	**Portoferraio**	West Med	16.828	102	0	0	16.828
49	**Ravenna**	Adriatic	97.041	74	7.627	9.200	80.214
50	**Rijeka**	Adriatic	7.809	221	3.492	3.632	685
51	**Rize**	Black Sea	0	0	0	0	0
52	**Savona**	West Med	939.038	241	332.561	337.470	269.007
53	**Sète**	West Med	11.084	28	3	5	11.076
54	**Sevastopol**	Black Sea	35.000	115	0	0	35.000
55	**Sibenik**	Adriatic	29.784	100	0	0	29.784
56	**Sinop**	Black Sea	6.331	18	0	0	6.331
57	**Sochi**	Black Sea	21.384	49	0	0	21.384
58	**Souda/Chania**	East Med	124.205	47	0	0	124.205
59	**Split**	Adriatic	189.107	225	725	576	187.806
60	**Tarragona**	West Med	1.421	3	0	0	1.421
61	**Tenerife**	West Med	794.151	520	n.a.	n.a.	n.a.
62	**Thessaloniki**	East Med	14.591	18	3	3	14.585
63	**Toulon-Var-Provence**	West Med	385.971	266	14.124*	12.963*	255.824*
64	**Trieste**	Adriatic	70.244	32	27.165	25.132	17.947
65	**Tunisian Ports**	West Med	511.065	201	0	0	511.065
66	**Valencia**	West Med	473.114	223	38.566	35.782	398.766
67	**Valletta**	West Med	477.759	277	51.188	50.846	375.785
68	**Venice**	Adriatic	1.815.823	548	760.806	751.790	303.227
69	**Volos**	East Med	20.227	31	0	0	20.227
70	**Zadar**	Adriatic	34.575	69	818	818	32.939

**Analysis only for Toulon – not for Var Provence ports*

*** In line with the MedCruise constitution, a MedCruise member port might manage, administer or operate multiple ports within the same geographical region.*

II. CRUISE TRENDS

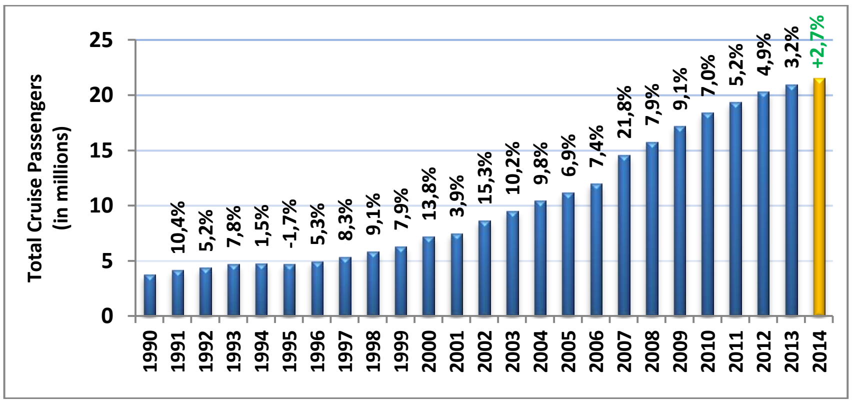
2.1 Trends in the Global Cruise Market

The cruise sector around the globe continued to strengthen in 2013. Given the strong consumer interest in cruising, the expansion of destinations and itineraries, and with the global economy in an ongoing recovery, this trend is expected to continue with stakeholders looking forward to an additional positive year of growth.

According to Cruise Lines International Association (CLIA), the 2013 global passenger numbers are estimated at 21,3 million, with a 2014 forecast expected to reach 21,7 million passengers.

Figure 2.1, based on similar assumptions with CLIA, visualises the global cruise passenger growth over time since 1990, forecasting a 2,7% growth within 2014.

Figure 2.1: Global Cruise Passenger Growth (1990-2014)



Source: *Cruise Market Watch (http://www.cruisemarketwatch.com/growth).*

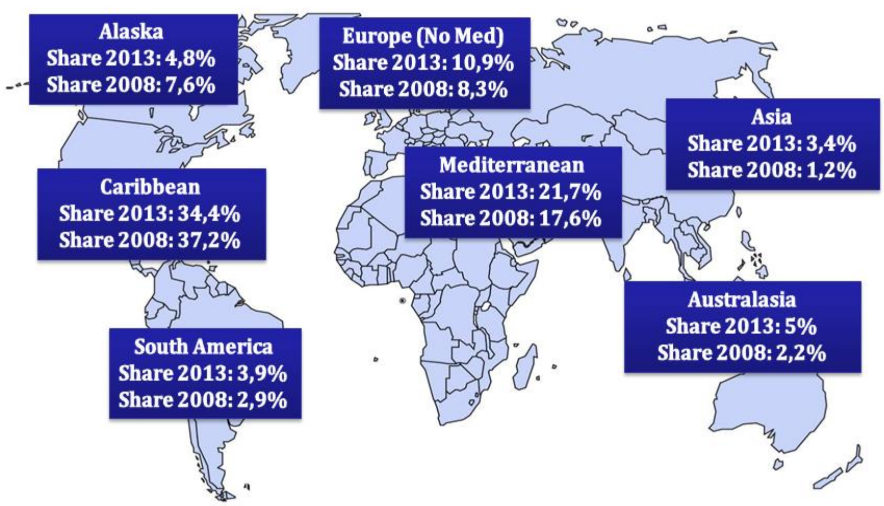
2.2 Deployment of Cruise Fleet

The Mediterranean and its adjoining seas stands as one of the most dynamic cruise regions of the world in recent years.

The deployment patterns around the globe indicate that the share of the Mediterranean increased from 17,6% of the total in 2008 to 21,7% in 2013 (**Figure 2.2**).

The dynamics in the second major region of the world (following Caribbean) indicate, beyond the increased demand for the destinations, that ports and other stakeholders have worked in an effective way to promote cruise activities and satisfactory serve the increasing demand. At the same time, request further efforts in order for this growth to sustain.

Figure 2.2: Global Deployment Shares 2013/2008



Source: *CLIA. 2014 Annual State of the Cruise Industry Report.*

The growing share is further represented in the growing number of passenger nights being available in the region.

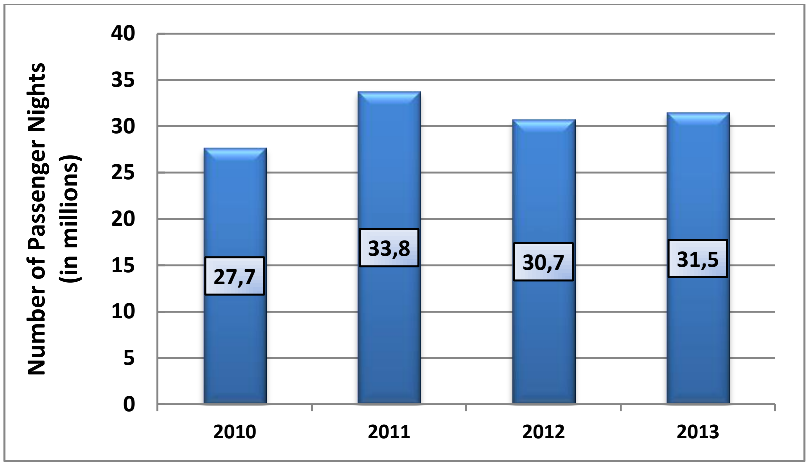
Based on the analysis of the evolution of Mediterranean and Black Sea passenger-nights by G.P. Wild International (**Figure 2.3**), the total of 2013 stands at 32,49 million passenger-nights; with the growth over 2012 being 4,4% and partly reversing the decline measured in 2012 over the peak 33,8 million passenger nights of 2011.

Several headquarters suggest that the increase will continue within 2014 at percentages that will be equivalent with the growth of the overall increase of the demand for cruise services.

Figure 2.4 details the deployment trend as regards the number of cruise vessels operating in the Med, and the number of different cruise itineraries available.

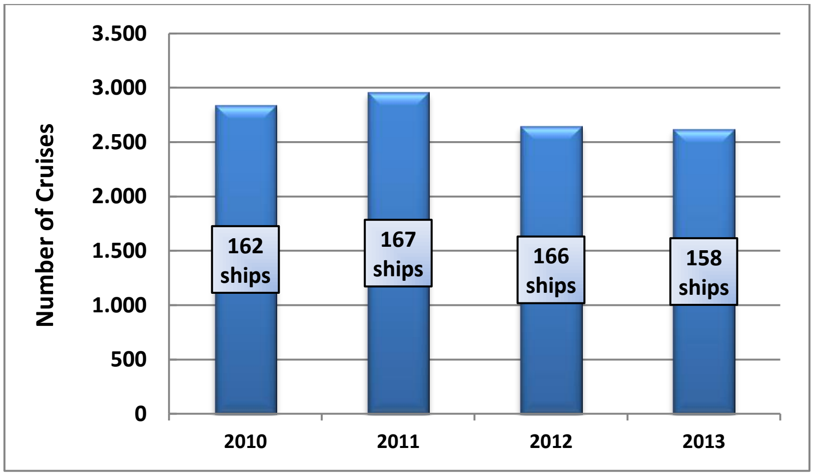
In total, 158 vessels offered services in 2013. This total is eight cruise vessels less comparing to the 166 operating in 2012 and nine less than the 167 of 2011. At the same time the number of different itineraries offered in 2013 were counted to be 2.619, comparing to 2.650 in 2012, and 2.968 in the peak year, in terms of vessels deployment, 2011.

Figure 2.3. Evolution of Pax.-nights in the Med and Black Sea (2010-2013)



Source: *G.P. Wild International (2014). Regional Cruise Market Report; Mediterranean and Northern Europe 2013, UK: G.P. Wild.*

Figure 2.4: Evolution of deployment 2010-2013 (Cruises & Ships)



Source: *G.P. Wild International (2014). Regional Cruise Market Report; Mediterranean and Northern Europe 2013, UK: G.P. Wild.*

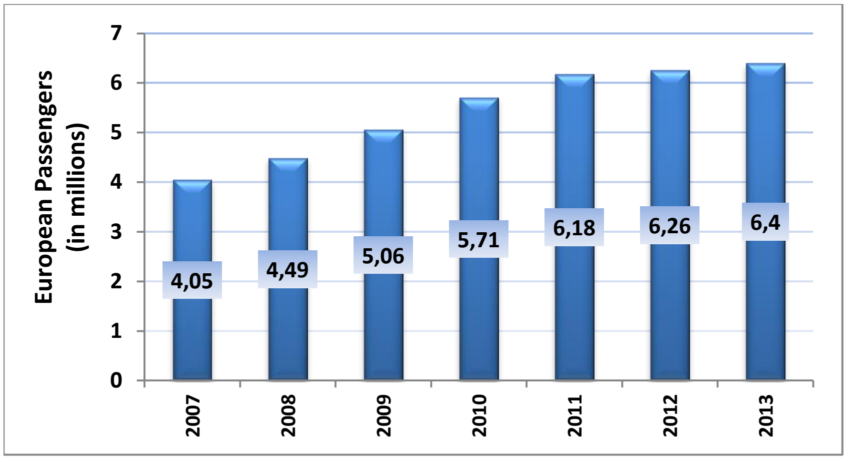
2.3 Cruise Passenger Sourcing

While North America remains the dominant source for cruise passengers (51,7% of the total passenger source share following a 15,1% five year change), other source markets are demonstrating accelerated passenger demand for cruising. The significant growth of internationally sourced passengers includes Europeans (**Figure 2.5**).

In 2013, cruise operators around the globe hosted 6,4 million European cruise passengers, a total that equals 30,1% of the total cruise passengers around the globe.

The UK and Ireland provided 8,1% of the global passenger share, recording a 16,4% growth over the last five years. Germany provided 7,7% (80,5% growth), Italy 4% (26,1% growth) with the other major European passenger sources being Spain with 2,8% of the total (20,7% growth) and France with 2,4%, (67,7% five year change).

Figure 2.5: European-sourced Passenger Growth



Source: CLIA (2013): Contribution of Cruise Tourism to the Economies of Europe, 2013 Edition

2.4 Cruise Ship Growth

The positive signs of the number of cruise ships and berths available go hand in hand with the modernization and growth of the global cruise fleet. According to Seatrade Insider, as of March 2014, the order book stands at 24 ships, and 64.303 berths. This follows the introduction of 167 new ships during the period 2000-2013, whereas 80 new ships had been introduced in the 1990s, and 40 in the 1980s.

2.5 Contribution to the European Economy

According to CLIA Europe estimates, cruise generates more than 15,5 billion euros in direct expenditures throughout Europe. These expenditures are broadly distributed across four major source segments: 43% cruise lines purchases; 23% passenger and crew purchases, 25% shipbuilding; and 9% cruise employees compensation.

Four Mediterranean countries are among the six European countries enjoying the major share of these expenditures. These are Italy, Spain, France and Greece. Whereas four more Med countries in the relevant list of the major-15 countries, all the countries in the Mediterranean and its adjoining seas enjoy the benefits of increased cruise activities in the region.

Table 2.1: Direct Cruise expenditure by Country (2012)

No	Port	Direct Spending (millions euros)	Share of Total
1	**Italy**	4.460	28.8%
2	**Spain**	1.254	8.1%
3	**France**	1.066	6.9%
4	**Greece**	588	3.8%
5	**Portugal**	207	1.3%
6	**Malta**	98	0.6%
7	**Gibraltar**	62	0.4%
8	**Cyprus**	53	0.3%

Source: CLIA (2013): Contribution of Cruise Tourism to the Economies of Europe, 2013 Edition.

***Note**: This section is based on secondary information. Unless otherwise stated, the sources are the publically available data presented and circulated by CLIA Europe.*

III. TRENDS IN THE MEDITTERANEAN AND ITS ADJOINING SEAS

3.1 Evolution of Cruise Traffic

This section provides a statistical analysis of cruise traffic and trends in cruise ports in the Mediterranean Sea and its adjoining seas. The analysis of a consistent sample data recorded in 67 MedCruise port members, representing over 100 ports, and an estimated 77% of cruise calls and 75% of passengers that cruise the region per year, provides an accurate understanding of trends in the specific ports and illustrates the overall trends in the specific region.

The full list of the ports included in this analysis, along with the raw material for 2013 and the five previous years (2009-2013) can be found in the Appendix of the report.

In total, 27.020.784 cruise passenger movements were registered in these 67 MedCruise port members in 2013 (**Table 3.1**). This total represents a variation of 4,22% over the previous year and 23,71% comparing to five years before (2009). A positive sign is the return to growth on a year per year basis. Following a continuous growth per annum, that had reached double digit percentages in 2010 and 2011, the number of cruise passengers in the sampled ports declined by 3,57% in 2012. With the latter being a year that cruise activities in the region were affected, among others, by the Concordia incident that happened in Italy in early 2012, the decline – which had not been observed for many years – seems to be temporary, as the data provide indications for further growth potential.

The number of cruise calls in the Med and its adjoining seas increased in 2013 and reached a total of 14.428. This represents a 3,78% growth comparing to the year before. Cruise calls per year exceeded 14.000 for the first time in 2010, and reached a record high of 14.726 in 2011. A decline by 5,59% took place in 2012. As in the case of total passengers, the latter might also be attributed to the happening of a major incident, that of Concordia that affected the region. With 525 more calls in 2013 comparing to 2012, the growth of cruise calls in the region is reconfirmed. With the pace of cruise calls growth outnumbering that of the passengers movement, it is thus evident that there is a growing trend in the number of passenger visitors per call.

Table 3.1: Evolution of cruise traffic in MedCruise member ports (2009-2013)

Year	Total Pax.	% Variations on previous year	Total Calls	% Variations on previous year	Pax/Call	% Variations on previous year
2013	27.020.784	4,22%	14.428	3,78%	1.873	0,43%
2012	25.925.636	-3,57%	13.903	-5,59%	1.865	2,14%
2011	26.884.436	11,77%	14.726	3,94%	1.826	7,53%
2010	24.053.679	10,13%	14.168	4,65%	1.698	5,23%
2009	21.842.132	2,27%	13.538	-2,95%	1.613	5,37%
2008	21.357.375	-	13.949	-	1.531	-
Variation 2013/2009:		*23,71%*		*6,57%*		*16,08%*

3.2 Major MedCruise Ports

The major ports in the region experienced a 10% growth, which is double the size of the growth when all ports in the region are examined (**Table 3.2**). Growth in half of the major MedCruise ports has been of double digits scale and only in one case negative variation is observed in the listing of major ports. This picture reverses the one that what had been observed in 2012, when six of the 10 biggest European ports had seen lower traffic movements comparing to 2011.

The major four ports in terms of passenger movements retained their ranking for another year. Barcelona remains the top port in the Mediterranean Sea with almost 2,6 million passenger movements, recording an annual 8% growth in 2013. Civitavecchia is ranked second, being the only other port visited in 2013 by more than 2,5 million cruise passengers. While on an annual basis both major ports increased by single digit percentages - Barcelona by 8% and Civitavecchia by 6% - when focusing on the 2009-2013 variation Civitavecchia registers a comparatively higher growth: passenger movements increased from 1,8 million to 2,53, equal to a substantial 41% increase.

Venice stands as the third major in terms of total passenger movements. The number of passengers increased by 2% in 2013. As the city imposed restrictions on cruise vessels weighing over 96.000 tones, and these vessels were banned from sailing down the Giudecca canal from November 2014, it is worth monitoring the effect that this decision will have on the specific port and not least on the broader region of the Adriatic and the Ionian Sea.

Marseille continues to register the most dynamic picture of all MedCruise ports. Consequently, it rises in the rankings of major ports. A remarkable 33% rise of passenger movements within year 2013 alone led Marseille in the 6th position of the major ports in terms of passenger movements, whereas a year ago it was 9th in the respective rankings. The port remains the most dynamic when one compares the evolution that happened in the region the last five years. The 2013/2009 variation of cruise traffic in Marseille equals to an 88% growth.

The second port that rises in the specific ranking is Piraeus. The port experienced a growth of 9% in 2013 that enabled it to regain the 5th position in the ranking of cruise passengers visits. This rise was helped by the fact that Naples experienced a decline of 9% within 2013; as a result the only declining port in the list lost two seats in the ranking.

Table 3.2: Major MedCruise Ports (Total Cruise Passengers, 2013)

Rank 2013	(Rank 2012)	Port	Total Cruise Pax. Movements				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
1	(1)	Barcelona	2.599.232	2.408.634	8%	2.151.465	21%
2	(2)	Civitavecchia	2.538.259	2.393.570	6%	1.802.938	41%
3	(3)	Venice	1.815.823	1.775.944	2%	1.420.980	28%
4	(4)	Balearic Islands	1.541.376	1.341.510	15%	1.237.362	25%
5	(6)	Piraeus	1.302.581	1.198.047	9%	1.221.633	7%
6	(9)	Marseille	1.188.031	890.020	33%	631.000	88%
7	(5)	Naples	1.175.018	1.297.233	-9%	1.154.742	2%
8	(8)	Dubrovnik/Korcula	1.136.503	981.448	16%	901.389	26%
9	(10)	Genoa	1.050.085	797.239	32%	671.468	56%
10	(11)	Savona	939.038	810.097	16%	709.861	32%
		Total (Major -10)	**15.285.946**	**13.893.742**	**10%**	**11.902.838**	**28%**

Savona is the new entry in the top-10, following a considerable annual growth by 16%. This new entry was facilitated by the fact that, in absolute numbers, passenger movements at the port of Livorno declined by from 1,04 million to approximately 736.000 (29%). As a result, based on the 2013 passenger traffic Livorno is ranked 14th when based on 2012 data it had ranked as the 7th major port of MedCruise in terms of total passenger movements.

As regards the 10-major cruise ports in terms of total cruise calls (**Table 3.3**) the setting is more complex. This is not least because the increased cruise passenger movements are associated in too many cases with calls from bigger vessels, rather than with an increase number of calls. In total, five of the major ports experienced a decline in cruise calls, whereas all bar one of the listed in Table 3.3 ports saw the number of passengers increasing.

Civitavecchia retains the top position with 959 calls, despite a decline by 81 calls, or 8%, in 2013. Dubrovnik/Korcula registered a remarkable increase of cruise calls by 28%, rising to the second major port in the relevant list, having more calls from Barcelona. In the latter case, cruise calls increased by 8%. Another port that in 2013 managed a substantial higher number of cruise calls comparing with 2012 is Marseille. Following a record 28% growth the port entered the top-10 in the related ranking.

Cruise calls in Venice followed a negative trend and declined by 17%. This was the major decline of all, with the role of regulatory developments demanding a close monitoring of the trends observed in the specific port. Piraeus was the other port that saw the number of calls at the port declining. In this case though the 7% decline was accompanied by an increase of passenger movements, indicating a structural change of the type of calls. The biggest decline of all major ports was observed in Naples. Following a decline by 17%, Naples lost its place as one of the major ports in terms of cruise calls in the Mediterranean and its adjoining seas.

Table 3.3: Major MedCruise Ports (Cruise Calls, 2013)

Rank 2013	(Rank 2012)	Port	Total Cruise Calls				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
1	(1)	Civitavecchia	959	1.040	-8%	793	21%
2	(6)	Dubrovnik/Korcula	843	659	28%	810	4%
3	(2)	Barcelona	835	774	8%	799	5%
4	(3)	Piraeus	711	763	-7%	877	-19%
5	(7)	Balearic Islands	699	632	11%	630	11%
6	(4)	Kusadasi/Bodrum/Antalya	657	683	-4%	733	-10%
7	(5)	Venice	548	661	-17%	543	1%
8	(8)	Tenerife	520	534	-3%	347	50%
9	(10)	Corfu	480	485	-1%	375	28%
10	(13)	Marseille	447	354	26%	316	41%
		Total (Major -10)	**6.999**	**6.585**	**2%**	**6.223**	**8%**

In the case of home-porting (**Table 3.4**), Venice remains the major port in the region, followed by Barcelona. Both ports registered in 2013 a 5% growth of Home in/out passengers in 2013, exceeding the 1,5 million passenger movements of this category. The trends experienced in these two ports are very similar, both on a year-by-year basis and when the last five year change is under question. Each of the two ports experienced a 28-29% growth of Home in/out passengers the period 2009-2013.

Genoa and Marseille were the ports of the list that experienced the biggest (22%) growth of Home in/out passengers among all major ports. Global Ports, as the operator of Kusadasi/Bodrum/Antalya registered a 14% rise of passengers home-porting from these ports, entering for the first time the list of major 10 home-ports in the Mediterranean region. The company expanded further in 2013 acquired, either alone or in partnership, stakes of ports in different countries.

The number of Home in/out passengers grew by single digits in the other major home-porting ports. The exemptions are two, namely Piraeus, where passengers of this category declined by 6%, and Bari where Home in/out passengers declined by 16%. Notably, the decline trend in the specific two ports is also observed when analyzing the variation of the last five years (2009-2013). Two other cases that experienced decline as regards the particular type of passenger movements are Malaga and Tunisian ports. As a result, these ports are not present in the specific major-10 list of 2013, though they would be listed a year ago. The most notable case is that of Tunisian ports where no home-porting took place in 2013. A year ago they had registered a 1,13 million passengers that used these ports as home-ports, a phenomenon not unrelated to the broader developments in the nearby region.

Table 3.4: Major MedCruise Ports (Home In/Out Pax., 2013)

Rank 2013	(Rank 2012)	Port	Total Home In/Out Pax.				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
1	(1)	Venice	1.512.596	1.444.100	5%	1.170.298	29%
2	(2)	Barcelona	1.506.286	1.438.383	5%	1.180.239	28%
3	(4)	Civitavecchia	989.998	920.612	8%	720.451	37%
4	(5)	Savona	670.031	638.706	5%	571.753	17%
5	(6)	Genoa	649.282	530.872	22%	436.385	49%
6	(7)	Balearic Islands	490.631	466.385	5%	447.853	10%
7	(9)	Marseille	381.318	313.322	22%	175.000	118%
8	(8)	Piraeus	308.705	329.168	-6%	415.260	-26%
9	(12)	Kusadasi/Bodrum/Antalya	190.087	167.424	14%	157	120.975%
10	(11)	Bari	165.031	196.423	-16%	228.259	-28%
		Total (Major -10)	**6.863.965**	**6.445.395**	**6%**	**5.345.655**	**28%**

In the case of transit cruise passengers (**Table 3.5**), Civitavecchia sustains as the major port. Registering a 5% growth in 2013 it became the first ever port in the region hosting more than 1,5 million transit passengers. Five years before, in 2009, it was visited by almost 500.000 passengers less. Dubrovnik/Korcula, and Barcelona that follow in the particular list grew even faster, by 16% and 13% respectively. The former surpassed Barcelona in terms of transit passengers, growing at a faster pace than Barcelona since 2009.

Marseille is the most dynamic case, as transit passengers increased by the remarkable 40%. In absolute numbers, this means that in 2013 the port managed to handle 230.000 transit passengers more than one year before. The two Greek ports that are included in the specific list, Piraeus and Corfu, also recorded double digit growth on an annual basis. When measured on a five-year basis, this change equals to a notable 23% and 50% growth respectively. As a result Corfu, like Marseille, entered for a first time the major-10 ports in transit traffic in the region.

On the other hand, Livorno (-24%) and to a substantially lesser extent Naples (-6%) and Kusadasi/Bodrum/Antalya (-4%) saw a decline of the transit traffic within 2013. The same three ports are also the three ones that experienced a decline of transit passenger movements per year comparing to the levels of such traffic five years ago (2009). Yet, this decline is in all cases of single digit, and only in Naples it reaches the level of 8%.

The two new entries in the list of Table 3.5 replaced Tunisian ports and French Riviera ports. These ports registered declines of 56% and 17% respectively, with 511.065 and 556.695 transit passengers visiting them within 2013. Apparently, in the case of Tunisian ports, the special conditions of the immediate past years in the broader region seem to have affected the volatility of passenger movements in the country’s ports.

Table 3.5: Major MedCruise Ports (Transit Pax., 2013)

Rank 2013	(Rank 2012)	Port	Total Transit Pax.				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
1	(1)	Civitavecchia	1.548.261	1.472.958	5%	1.082.487	43%
2	(6)	Dubrovnik/Korcula	1.111.663	956.816	16%	887.700	25%
3	(4)	Barcelona	1.092.966	970.251	13%	971.226	13%
4	(3)	Naples	1.064.329	1.137.014	-6%	1.154.742	-8%
5	(7)	Balearic Islands	1.050.745	875.125	20%	789.509	33%
6	(8)	Piraeus	993.876	868.879	14%	806.373	23%
7	(13)	Marseille	806.713	576.698	40%	456.000	77%
8	(5)	Livorno	731.525	967.324	-24%	754.965	-3%
9	(11)	Corfu	673.916	591.599	14%	450.505	50%
10	(10)	Kusadasi/Bodrum/ Antalya	583.506	610.367	-4%	619.590	-6%
		Total (Major -10)	**9.657.500**	**9.027.031**	**7%**	**7.973.097**	**21%**

3.3 Major Variations in MedCruise Ports

The following tables portray the major variations when comparing cruise traffic in 2013 and 2012, in terms of total cruise passenger movements (**Table 3.6**), cruise calls (**Table 3.7**), Home in/out (**Table 3.8**) and transit (**Table 3.9**) passengers. With this variation providing a short-term view, each Table is accompanied by data comparing cruise statistics of 2013 with 2009, in order to better understand the medium-term trend.

Aiming to give substance to the analysis, only MedCruise ports having a minimum of 20 cruise calls and/or 10.000 cruise passengers in 2013 have been included in the matrices below; in practice this means the exclusion of Brindisi; Castellón; Ceuta; Huelva; Igoumenitsa; Kavala; Mersin; Patras; Sinop; and Tarragona.

One might see the remarkable variation of trends within a year. La Spezia, and North Sardinian Ports surpassed to over 200.000 total passenger movements in 2013, when they had hosted only 50.239 and 88.672 passenger movements one year before (**Table 3.6**). Sibenik (94%), Thessaloniki (82%) and Cagliari (81%) are also among the five ports with the major growth in 2013. On the other hand two Spanish ports, Alicante (-47%) and Málaga (-39%), and two Italian ones, Livorno (-29%) and the small in size Portoferrraio (-27%) are joined by Split (-23%) in the list of those that have experienced the major negative variation between 2013 and 2012.

Ports excluded given the threshold applied, but would have been included in the list of growing ports are Tarragona (increase from 153 passenger movements in 2012 to 1.421 in 2013); Patras (from 374 to 1.264); Igoumenitsa (from 1.827 to 4.650); and Mersin (from 774 to 1.697).

Turning attention at the longer period, some differences are observed. Four other ports, namely Souda/Chania, Trieste, Ravenna, and Constantza, join La Spezia as those that recorded impressive records. Alicante faced the major difficulties in attracting passenger movements. Two smaller in size ports, Volos and Rijeka also experienced a major negative variation in 2013. Heraklion, and the Tunisian ports that were affected by instability in the broader region, are the other ones that experienced a major negative variation comparing 2013 with the passenger movements they had recorded five years before.

Table 3.6: Total Cruise Passengers - Major Variations 2013/2012 and 2013/2009

Total Cruise Passengers Major variations 2013/2012				
	Port	2013	2012	Var. 2013/2012
+	La Spezia	213.858	50.239	+326%
+	North Sardinian Ports	206.140	88.672	+132%
+	Sibenik	29.784	15.355	+94%
+	Thessaloniki	14.591	8.004	+82%
+	Cagliari	146.003	80.555	+81%
-	Split	189.107	245.451	-23%
-	Portoferraio	16.828	23.099	-27%
-	Livorno	736.516	1.037.849	-29%
-	Málaga	397.416	651.393	-39%
-	Alicante	41.860	78.825	-47%

Total Cruise Passengers Major variations 2013/2009				
	Port	2013	2009	Var. 2013/2009
+	Souda/Chania	124.205	7.720	+1.509%
+	Trieste	70.244	6.314	+1.013%
+	Ravenna	97.041	10.328	+840%
+	La Spezia	213.858	31.021	+589%
+	Constantza	54.614	8.516	+541%
-	Tunisian Ports	511.065	752.246	-32%
-	Heraklion	270.020	401.292	-33%
-	Rijeka	7.809	14.500	-46%
-	Volos	20.227	38.592	-48%
-	Alicante	41.860	96.615	-57%

Table 3.7 presents the major variations as regards cruise calls. In this case North Sardinian ports (117%) top the list while they join La Spezia (107%) as the ones that experienced an over 100% growth of calls within a year. The other three ports that recorded a remarkable growth are all in the Black Sea. With cruise lines including the area in their itineraries more than in past years, Sevastopol (98%), Batumi (82%) and Sochi (81%), saw a major rise of the number of cruise calls in 2013. La Spezia stands at the top of the list when attention turns to the five-year trend. In this case though, the following ports in the list are Sète (250%), Ravenna (185%), Constantza (165%) and Odessa (155%).

Some of the ports that are excluded, given the threshold applied, would have been in the list of ports that experienced the major positive variations in cruise calls. These are Igoumenitsa (recorded an increase from 4 to 14 cruise calls); Tarragona (increase from 1 to 3); and Mersin (increase from 2 to 4).

On the negative site, the list of ports that experienced a decline in 2013 includes Alicante (26%), Trieste (26%), as well as Azores (25%), Rijeka (20%) and Venice (17%). As regards the medium-term, the list of ports that experienced a major negative change since 2009 is rather different. Alicante (48%) remains present in this list, but the other four are Thessaloniki (63%), Tunisian Ports (44%), Heraklion (38%) and Alanya (28%).

Table 3.7: Total Cruise Calls - Major Variations 2013/2012 and 2013/2009

	Total Cruise Calls Major variations 2013/2012			
	Port	2013	2012	Var. 2013/2012
+	North Sardinian Ports	117	54	+117%
+	La Spezia	149	72	+107%
+	Sevastopol	115	58	+98%
+	Batumi	20	11	+82%
+	Sochi	49	27	+81%
-	Venice	548	661	-17%
-	Rijeka	221	276	-20%
-	Azores	92	122	-25%
-	Trieste	32	43	-26%
-	Alicante	32	43	-26%

	Total Cruise Calls Major variations 2013/2009			
	Port	2013	2009	Var. 2013/2009
+	La Spezia	149	33	+352%
+	Sète	28	8	+250%
+	Ravenna	74	26	+185%
+	Constantza	69	26	+165%
+	Odessa	148	58	+155%
-	Alanya	53	74	-28%
-	Heraklion	177	287	-38%
-	Tunisian Ports	201	358	-44%
-	Alicante	32	61	-48%
-	Thessaloniki	18	48	-63%

Table 3.8 illustrates the major variations of Home in/out passengers in MedCruise ports. In this case, Zadar (113%) tops the list followed by French Riviera Ports (68%), Monaco (27%), Messina (23%) and Genoa (22%). As regards the five-year trends, Kusadasi/Bodrum/Antalya and Trieste recorded a most remarkable growth, as five years ago they were not listed as ports with mentionable home-porting traffic. The same can be said for Messina that follows in the list. Valetta (260%) and Marseille (118%) also recorded substantial growth in the number of Home in/out passengers.

Table 3.8: Total Home In/Out Passengers - Major Variations 2013/2012 and 2013/2009

	Total Home In/Out Pax. Major variations 2013/2012			
	Port	2013	2012	Var. 2013/2012
+	Zadar	1.636	769	+113%
+	French Riviera Ports	56.523	33.549	+68%
+	Monaco	35.909	28.280	+27%
+	Messina	36.190	29.413	+23%
+	Genoa	649.282	530.872	+22%
-	Azores	473	1.487	-68%
-	Livorno	4.991	70.525	-93%
-	Alicante	0	286	-100%
-	Kotor	0	1.774	-100%
-	Tunisian Ports	0	1.165.361	-100%

	Total Home In/Out Pax. Major variations 2013/2009			
	Port	2013	2009	Var. 2013/2009
+	Kusadasi/ Bodrum/ Antalya	190.087	157	+120..975%
+	Trieste	52.297	2.630	+1.888%
+	Messina	36.190	9.822	+268%
+	Valletta	102.034	28.324	+260%
+	Marseille	381.318	175.000	+118%
-	Heraklion	55.443	167.119	-67%
-	Livorno	4.991	40.348	-88%
-	Portimao	88	1.250	-93%
-	Koper	56	7.363	-99%
-	Thessaloniki	6	27.976	-100%

On the other side, the list of ports that experienced a decline includes Tunisian Ports, that in 2012 had temporarily benefited and hosted home-porting calls and passengers, Livorno and Azores that maintain a marginal home-porting activity, as well as Kotor, and Alicante that in 2013 ceased to exist as home-ports. As regards the medium-term trend, the list of ports that experienced the major negative variation still includes Livorno (-88%), but the other four that experienced major declines are Thessaloniki that is not offering home-porting any more, the anyway insignificant in terms of home-porting size Koper, Portimao, and the port of Heraklion (-67%).

As for the growth in transit passenger movements which is shown in **Table 3.9**, La Spezia tops the list (323%) followed by North Sardinian Ports (+132%), Sibenik (94%), Thessaloniki (82%) and Cagliari (76%). In the medium-term Souda/Chania recorded the major growth of all, as in essence this did not exist as a home-port in 2009, Ravenna (677%), La Spezia (585%), Constantza (537%) and Trieste (387%) also recorded remarkable positive changes.

Ports excluded given the threshold applied yet recorded high positive variations are Tarragona (increase from 153 transit passenger movements in 2012 to 1.421 in 2013); Patras (from 374 to 1.264); Igoumenitsa (from 1.827 to 4.650) and Mersin (from 774 to 1.697).

On the negative site, the list of ports that experienced a decline in the transit passenger movements includes Alicante (-56%), Málaga (-47%), Livorno (-27%), Portoferraio (-26%) and Split (-24%). While within the five year period the list of ports that experienced the major negative variation contains Alicante (-57%), Volos (-48%), Tunisian Ports (-32%), Cyprus Ports (-24%) and French Riviera Ports (-21%).

Table 3.9: Total Transit Passengers - Major Variations 2013/2012 and 2013/2009

Total Transit Passengers Major variations 2013/2012				
	Port	2013	2012	Var. 2013/ 2012
+	La Spezia	212.351	50.239	+323%
+	North Sardinian Ports	206.140	88.672	+132%
+	Sibenik	29.784	15.355	+94%
+	Thessaloniki	14.585	7.997	+82%
+	Cagliari	41.860	78.539	+76%
-	Split	731.525	967.324	-24%
-	Portoferraio	375.785	509.134	-26%
-	Livorno	16.828	23.099	-27%
-	Málaga	41.860	78.539	-47%
-	Alicante	511.065	1.165.361	-56%

Total Transit Passengers Major variations 2013/2009				
	Port	2013	2009	Var. 2013/ 2009
+	Souda/Chania	124.205	7.720	+1.509%
+	Ravenna	80.214	10.328	+677%
+	La Spezia	212.351	31.021	+585%
+	Constantza	54.226	8.516	+537%
+	Trieste	17.947	3.684	+387%
-	French Riviera Ports	556.695	707.929	-21%
-	Cyprus Ports	170.768	224.747	-24%
-	Tunisian Ports	511.065	752.246	-32%
-	Volos	20.227	38.592	-48%
-	Alicante	41.860	96.615	-57%

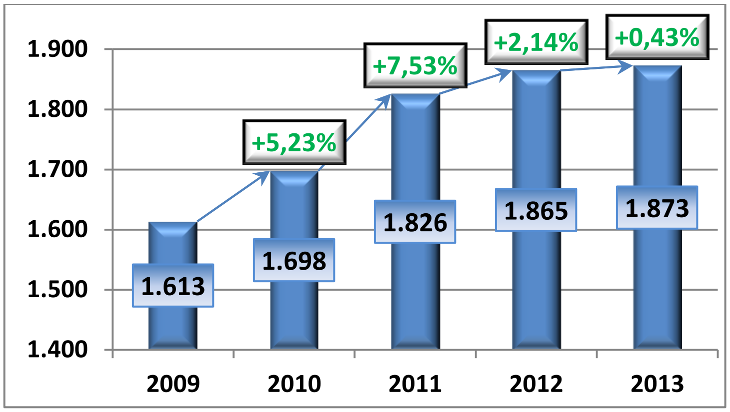
3.4 Passengers per Call

Over the last five years, the average number of passengers per cruise call increased by 16,12% from, 1.613 to 1.873 passengers. Larger cruise ships tend to have lower average labor costs than smaller ships - for example, a 5.000 plus-cruise vessel has one crew member for every 2,6 passengers, while a 2.000 passenger one has one crew member for every 2,1 passengers – leading to the continuous increase of cruise fleet.

The deployment of bigger vessels in the Mediterranean and the adjoining seas is evident, by the continuous increase of the average number cruise passengers that reach a destination via one call alone.

On an annual basis the increase in 2013 comparing to 2012 was of the marginal scale of 0,43%. Yet the deployment of vessels like the Oasis of the Seas in the Mediterranean in 2014 is expected to affect the specific numbers and sustain the overall trend of growing numbers of cruise passengers per visit.

Figure 3.1: Cruise Passengers per Call – Five-year evolution



The overall trend is further evident when focusing on the growth of passengers per call in the 20 MedCruise ports leading this category (**Table 3.10**). Five ports host more than 3.000 pax/call, whereas nine more ports host more than 2.000 pax/call. Savona, used as home-port by Costa, that tops the list with 3.896 pax/call has not seen any major variation either when comparing 2013 with 2012, or when the focus is on the variation between 2013 and 2009. The base of the port seems stable, while the case is different when ports following the list are examined. Bari and Venice have seen an increase of 17,3% and 23,3% respectively within one year alone, whereas Genoa is the only one of those hosting more than 3.000 pax/call that experienced a decline of pax/call in 2013. The latter, however, might be a temporary phenomenon, as the respective numbers of the five-year comparison (24,9%) indicated a growing trend in Genoa as well. The major annual growth in 2013 was observed in Trieste (33,2%) where the average grew from 1.648 to 2.195, and the major decline in Livorno (-21,4%) where the average number of passengers per call declined from 2.232 to 1.754.

An interesting result is reached when comparing the growth of the pax/call in the major-10 ports included in the list with those 10 ports that follow. Evidently, the major-10 ports in terms of pax/call have seen the number of passengers per call growing at a faster pace than in the case of the rest. Comparing the annual variation 2013/12 the top-10 pax/calls increased by 7,33% whereas the rest of the listed in top-20 ports saw a decline of passengers/call by 3,22%. The five-year variation indicates a growth of pax/call in the case of the top-10 that stands at 28,72% when the following 10 ports grew by the comparatively lower 22,95%.

Table 3.10: Cruise Pax/Cruise Call - Major 20

No	Port	Pax/Calls 2013	Pax/Calls 2012	Variation 2013/2012	Pax/Calls 2009	Variation 2013/2009
1	Savona	3.896	3.914	-0,44%	3.837	1,55%
2	Bari	3.537	3.004	17,74%	3.120	13,37%
3	Genoa	3.524	3.743	-5,85%	2.821	24,92%
4	Venice	3.314	2.687	23,33%	2.617	26,63%
5	Barcelona	3.113	3.112	0,03%	2.693	15,60%
6	Naples	2.670	2.462	8,45%	1.884	41,72%
7	Marseille	2.658	2.514	5,73%	1.997	33,10%
8	Souda/Chania	2.643	2.391	10,54%	386	584,72%
9	Tunisian Ports	2.543	2.329	9,19%	2.101	21,04%
10	Civitavecchia	2.647	2.302	6,71%	2.274	1,23%
	Major-10			**7,33%**		**28,72%**
11	Balearic Islands	2.205	2.123	3,86%	1.964	12,27%
12	Messina	2.199	2.344	-6,19%	1.746	25,95%
13	Trieste	2.195	1.648	33,19%	421	421,38%
14	Palermo	2.175	2.272	-4,27%	2.469	-11,91%
15	Piraeus	1.832	1.570	16,69%	1.393	31,51%
16	North Sardinian Ports	1.762	1.642	7,31%	2.061	-14,51%
17	Livorno	1.754	2.232	-21,42%	1.736	1,04%
18	Valletta	1.725	1.936	-10,90%	1.668	3,42%
19	Madeira Ports	1.657	1.751	-5,37%	1.573	5,34%
20	Málaga	1.602	2.223	-27,94%	1.621	-1,17%
	Major-20			**-3,22%**		**22,95%**

3.5 Cruise Traffic Concentration

A parameter worth examining is the extent that cruise traffic is concentrated in few ports alone. Examining the shares of the major-20 MedCruise ports (**Table 3.11**), there are nine ports with passenger traffic that exceed one million passengers per year, with the two major of them, Barcelona and Civitavecchia, hosting more than 2,5 million.

There are also 10 more ports that hosted more than 500.000 passenger movements within 2013. Overall the major-5 ports, in terms of passenger movements had in 2013 a share that stands at 36,23% of the total passenger movements, a share that slightly increased (0,49%) when compared to 2009. The major difference is observed though when looking at the top-10, that increased their share by 2% within five years time hosting 56,57%. The picture is more balanced when looking at top-20 ports, which means that the last 10 of the listed ports have lost their share of passenger movements that they were retaining in 2009.

Table 3.11: Major 20 MedCruise Ports - Cruise Pax. Concentration

No	Port	Total Pax. 2013	Cruise Passengers Concentration				
			2013	2012	2011	2010	2009
1	Barcelona	2.599.232	9,62%	9,29%	9,88%	9,77%	9,85%
2	Civitavecchia	2.538.259	9,39%	9,23%	9,59%	8,08%	8,25%
3	Venice	1.815.823	6,72%	6,85%	6,64%	6,72%	6,51%
4	Balearic Islands	1.541.376	5,70%	5,17%	5,98%	6,43%	5,67%
5	Piraeus	1.302.581	4,82%	4,62%	5,53%	4,76%	5,59%
Major 5 - SUM		**9.797.271**	**36,26%**	**35,17%**	**37,63%**	**35,77%**	**35,87%**
6	Marseille	1.188.031	4,40%	3,43%	3,01%	2,91%	2,89%
7	Naples	1.175.018	4,35%	5,00%	4,83%	4,74%	5,29%
8	Dubrovnik/Korcula	1.136.503	4,21%	3,79%	3,76%	3,89%	4,13%
9	Genoa	1.050.085	3,89%	3,08%	2,97%	3,58%	3,07%
10	Savona	939.038	3,48%	3,12%	3,53%	3,25%	3,25%
Major 10 - SUM		**15.285.946**	**56,57%**	**53,59%**	**55,72%**	**54,13%**	**54,49%**
11	Tenerife Ports	794.151	2,94%	3,42%	3,08%	3,08%	2,66%
12	Kusadasi/Bodrum/ Antalya	780.804	2,89%	3,00%	3,02%	2,75%	2,84%
13	Corfu	744.651	2,76%	2,53%	2,31%	2,48%	2,30%
14	Livorno	736.516	2,73%	4,00%	3,66%	3,42%	3,64%
15	French Riviera Ports	613.218	2,27%	2,71%	2,48%	2,79%	3,41%
16	Bari	604.781	2,24%	2,39%	2,18%	2,11%	2,60%
17	Lisbon	558.040	2,07%	2,02%	1,87%	1,86%	1,90%
18	Tunisian Ports	511.065	1,89%	2,04%	1,17%	3,72%	3,44%
19	Messina	501.316	1,86%	1,69%	1,86%	1,56%	1,16%
20	Madeira Ports	482.112	1,78%	2,29%	2,02%	2,05%	2,00%
Major 20 - SUM		**21.612.600**	**79,99%**	**79,67%**	**79,37%**	**79,96%**	**80,44%**

Cruise calls record a lower level concentration. The 5 ports with most calls per year hosted in 2013 4.047 calls, or 28,05% of the total, which is a slightly lower percentage from what they shared five years before. The picture is similar even when the focus turns on the top-10 ports (46%, or 6.699 calls, took place in these ports in 2013), whereas the share of the top-20 ports decreased in 2013: the 10.106 calls represented 70,04%, almost 2% lower than the share of the same ports in 2009.

Table 3.12: Major 20 MedCruise Ports - Cruise Calls Concentration

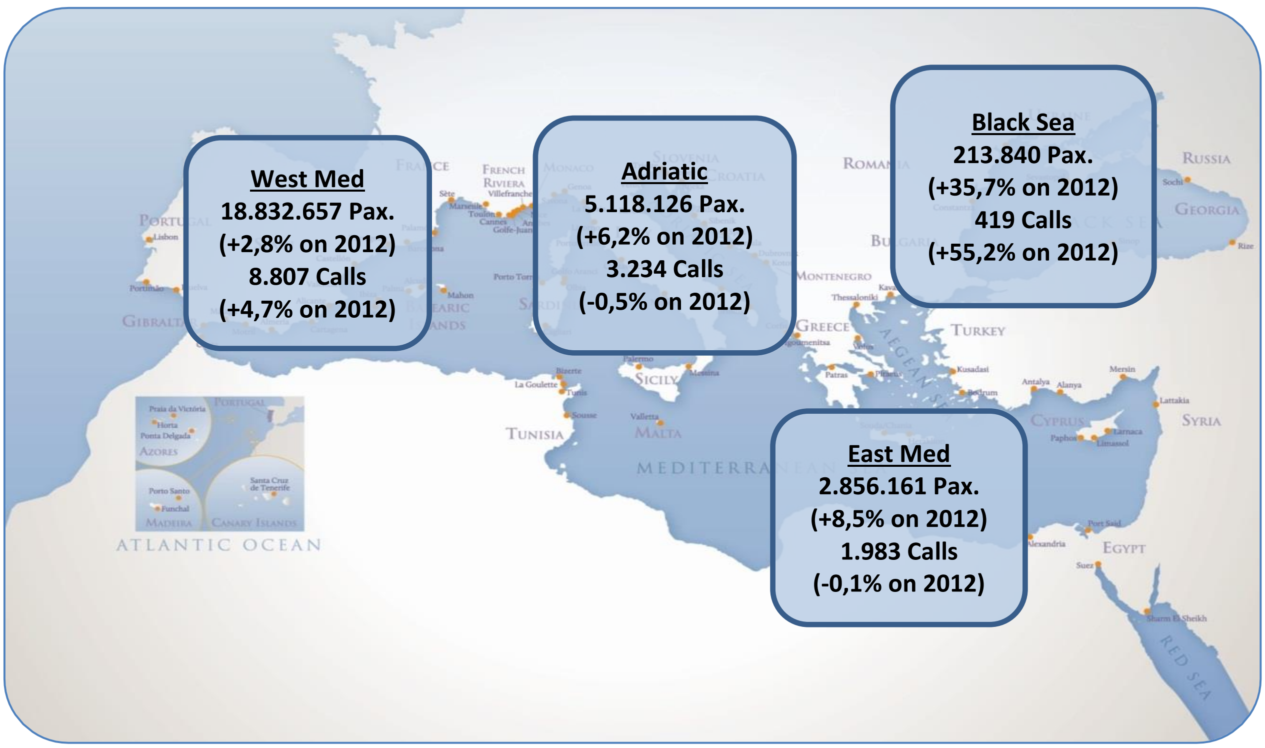
No	Port	Total Calls 2013	Cruise Calls Concentration				
			2013	2012	2011	2010	2009
1	Civitavecchia	959	6,65%	7,59%	6,91%	6,43%	5,94%
2	Dubrovnik/Korcula	843	5,84%	4,81%	4,70%	5,04%	6,07%
3	Barcelona	835	5,79%	5,65%	6,08%	6,01%	5,98%
4	Piraeus	711	4,93%	5,57%	6,46%	5,71%	6,57%
5	Balearic Islands	699	4,84%	4,61%	4,23%	5,17%	4,72%
Major 5 - SUM		**4.047**	**28,05%**	**28,24%**	**28,38%**	**28,36%**	**29,27%**
6	Kusadasi/Bodrum/Antalya	657	4,55%	4,99%	4,88%	4,97%	5,49%
7	Venice	548	3,80%	4,83%	4,51%	4,49%	4,07%
8	Tenerife Ports	520	3,60%	3,90%	3,18%	2,77%	2,60%
9	Corfu	480	3,33%	3,54%	3,13%	3,07%	2,81%
10	Marseille	447	3,10%	2,58%	2,90%	2,39%	2,37%
Major 10 - SUM		**6.699**	**46,43%**	**48,08%**	**46,97%**	**46,05%**	**46,60%**
11	Naples	440	3,05%	3,85%	3,64%	3,84%	4,59%
12	Livorno	420	2,91%	3,40%	3,43%	3,63%	3,43%
13	French Riviera Ports	420	2,91%	2,83%	2,95%	3,54%	3,72%
14	Kotor	387	2,68%	2,50%	2,18%	2,21%	1,95%
15	Lisbon	353	2,45%	2,29%	2,28%	2,14%	2,20%
16	Genoa	298	2,07%	1,56%	1,74%	1,87%	1,78%
17	Madeira Ports	291	2,02%	2,48%	2,13%	2,11%	2,07%
18	Valletta	277	1,92%	2,28%	2,16%	2,00%	1,98%
19	Toulon-Var-Provence	266	1,84%	1,74%	0,58%	1,68%	1,19%
20	Cyprus Ports	255	1,77%	1,80%	3,13%	2,70%	2,43%
Major 20 - SUM		**10.106**	**70,04%**	**72,79%**	**71,18%**	**71,76%**	**71,96%**

IV. ANALYSIS PER MEDCRUISE REGION

4.1 The MedCruise Regions

MedCruise membership spreads in four distinctive areas, each of them having its own dynamics. These are the West Med, the Adriatic, East Med, and the Black Sea respectively. In this section, the report provides an analysis of the statistics per MedCruise region (**Map 4.1**).

Map 4.1: MedCruise Regions & Cruise Traffic by region



Half of the MedCruise members that are included in the sample are located in the West Med region (**Table 4.1**). The total of cruise passenger movements that took place in these ports in 2013 reached 18,83 millions, registering a 2,8% growth on 2012. The number of calls in West Med ports increased by 4,7% comparing to 2012. These numbers represent a share of 69,53% of the total passenger movements that took place in the Med in 2013 and 61,04% of the respective number of cruise calls (**Figure 4.1**).

The region of the Adriatic, where 13 MedCruise members are located, registered in 2013 a total of 5,12 million cruise passenger movements. This equals to a 6,2% growth comparing to 2012. The number of calls in the region decreased by 0,5% comparing to 2012, as 3.234 calls took place within 2013. These numbers represent 19,04% of the total passenger movements of 2013 and 22,31% of the cruise calls that take place annually in MedCruise ports.

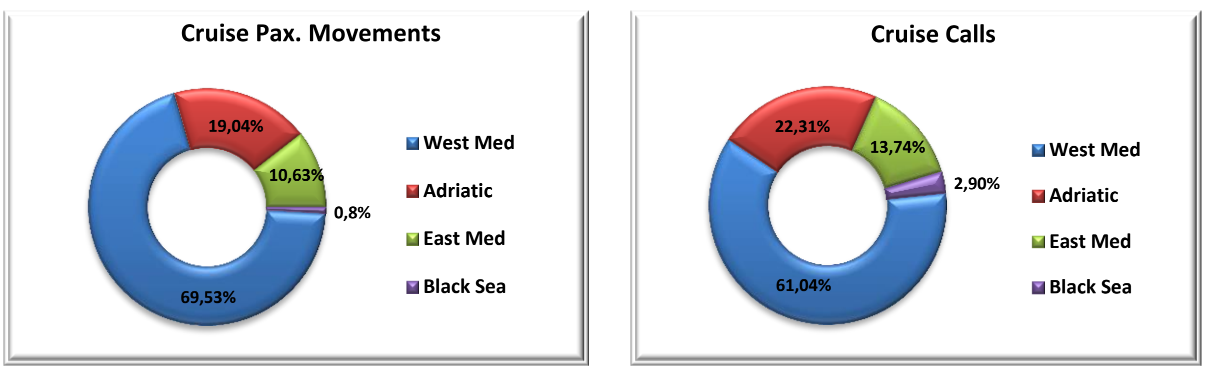
Table 4.1: Total Cruise Traffic 2013

Region	No. of members	Total Cruise Pax.	Total Cruise Calls	Home In/Out Pax.	Transit Pax.
West Med	36	18.832.657	8.807	5.312.051	12.623.475
Adriatic	13	5.118.126	3.219	1.852.562	3.265.564
East Med	12	2.856.161	1.983	655.146	2.193.804
Black Sea	6	213.840	419	9.777	204.063

The third region is East Med, with 12 MedCruise members included in the sample (and two others, namely Egyptian Ports and Lattakia, missing). In total, these ports registered in 2013 a total of 2,86 million cruise passenger movements, a number that equals to a 8,5% growth comparing to 2012. This is the second most dynamic region of the four MedCruise regions. The number of calls in 2013 decreased marginally by 0,1% comparing to 2012 as 1.983 calls were registered. These numbers represent 10,63% of the total passenger movements of 2013 and 13,74% of the cruise calls that take place annually in MedCruise ports.

The Black Sea was the most dynamic region of all in 2013. This is the smallest in size region, as six MedCruise members only are located within it, whereas the total of cruise passenger movements and cruise calls registered in 2013 stand at 213.840 and 429 respectively. However, these numbers represent impressive annual growth of 35,7% in terms of passenger movements and 55,2% in terms of cruise calls. At the time of publication of the report though, social unrest in Ukraine demands a monitoring on whether this trend will sustain in 2014. In total, the Black Sea region represents only 0,8% of the passenger movements and 2,9% of the cruise calls.

Figure 4.1: Cruise Passenger Traffic Shares 2013 per region



4.2 Cruise Traffic evolution per region

Table 4.2 presents the evolution and variation of cruise passenger movements per region the last five years. Black Sea, with a 110% growth remains the most dynamic region when one compares 2013 volumes with those of 2009. The Adriatic follows (38,8%) and West Med (22,5%) comes third. Year 2013 however was one that both regions recorded a slower pace of growth than the East Med. The latter region registered the last five years a 6,5% growth. This is only because East Med managed to register 8,5% growth within 2013. That some parts of the region experienced within these years several cases of social and/or political instability seems to not be irrelevant of the trends observed in the region.

Table 4.2: Total Cruise Passengers per region

Region	Total Cruise Pax. Movements						
	2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
West Med	18.832.657	18.315.662	2,8%	18.899.267	17.238.845	15.372.152	22,5%
Adriatic	5.118.126	4.819.443	6,2%	4.730.153	4.111.186	3.687.208	38,8%
East Med	2.856.161	2.632.912	8,5%	3.116.337	2.568.771	2.681.229	6,5%
Black Sea	213.840	157.619	35,7%	138.679	134.869	101.543	110,6%
Total	**27.020.784**	**25.925.636**	**4,22%**	**26.884.436**	**24.053.671**	**21.842.132**	**23,7%**

Figure 4.2 portrays in retrospect the share of each region as regards the total of cruise passenger movements in the Mediterranean and its adjoining seas. Evidently, the East Med seemingly lost a share of 1,7% within five years, when the ports located in the Adriatic gained in total traffic of 2%.

In the case of cruise calls per region (**Table 4.3**), three of the four regions experienced growing number of calls the last five years. In the case of Baltic Sea the number of calls increased impressively from 183 to 419 calls, a growth of 129%.

A 10% growth was also registered over the five years 2009-2013 in the two other regions, Adriatic (from 2.919 calls to 3.219) and West Med (from 8.001 calls to 8.807). The only region that experienced a decline as regards the total of cruise calls is that of East Med, where the 1.983 calls registered in 2013 are lower comparing to the 2.453 of 2009 (**Figure 4.3**).

Figure 4.2: Cruise Passenger evolution per region

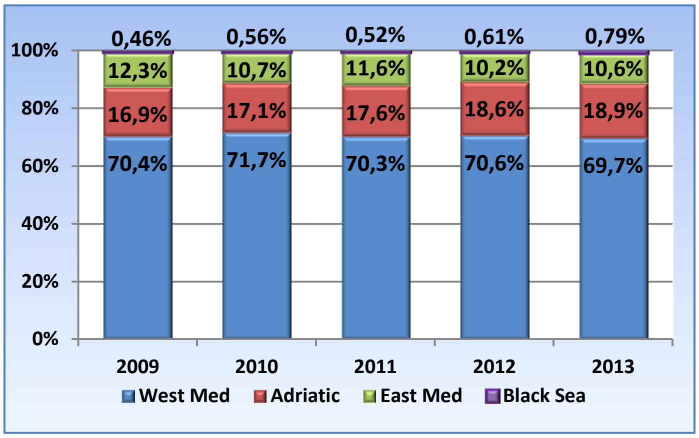


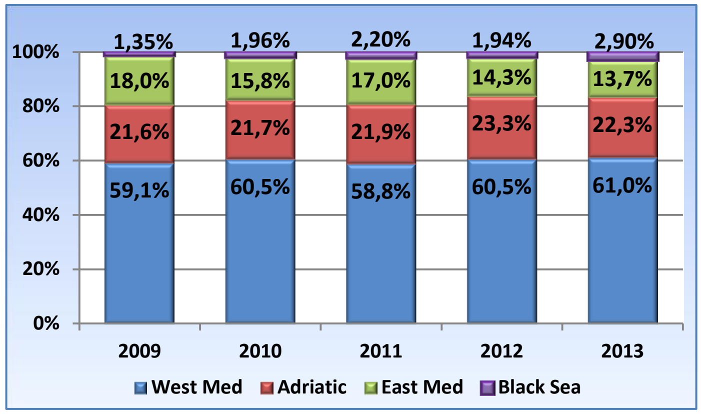
Table 4.3: Total Cruise Calls per region

Region	Total Cruise Calls						
	2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
West Med	8.807	8.414	4,7%	8.431	8.403	8.001	10,1%
Adriatic	3.219	3.234	-0,5%	3.230	3.075	2.919	10,3%
East Med	1.983	1.985	-0,1%	2.509	2.239	2.435	-18,6%
Black Sea	419	270	55,2%	324	277	183	129,0%
Total	**14.428**	**13.903**	**3,8%**	**14.494**	**13.994**	**13.538**	**6,6%**

Due to this 18,8% decline, the share of total calls that take place in East Med stands in 2013 at only 13,7% when five years earlier it was standing at 18%.

All the other three regions have grown their respective shares of total cruise calls, West Med to 61%, Adriatic to 22,3% and Black Sea to 2,90%, as the growth in each of them accelerated at a faster pace than the growth in East Med.

Figure 4.3: Cruise Calls Shares per region



West Med is also the region where most home-porting activities are taking place (**Table 4.4**). Home-port is taking place in 22 different ports in the West Med, with Barcelona recording 1,5 million Home in/out passengers, Civitavecchia standing only two passengers shy of the one million milestone; eight other ports hosting more than 100.000 (these are Savona; Genoa; Balearic Islands; Marseille; Naples; Valletta); and four more ports (Valencia; Malaga; French Riviera Ports; Lisbon) hosting more than 50.000 Home in/out passengers in 2013.

Table 4.4: Total Home In/Out Passengers per region

Region	Home In/Out Pax.						
	2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
West Med	5.312.051	6.347.138	-16,3%	5.495.666	4.714.947	4.168.829	27,4%
Adriatic	1.852.562	1.834.293	1,0%	1.784.366	1.618.911	1.492.520	24,1%
East Med	655.146	634.704	3,2%	696.898	698.475	706.232	-7,2%
Black Sea	9.777	10.448	-6,4%	2.194	2.454	0	-
Total	**7.829.536**	**8.826.583**	**-11,3%**	**7.979.124**	**7.034.787**	**6.367.581**	**23,0%**

Focusing on East Med, the region has in total four home-porting ports. The major one is the port of Piraeus, with over 300.000 Home in/out passengers in 2013 (308.705 in total), Kusadasi/Bodrum/Antalya (190.087 passengers), Cyprus ports (100.905), and Heraklion (55.443). Piraeus saw a decline of Home in/out passengers in 2013 by 20.463 passenger movements. In the five years comparison the losses of Pireaus (-106.555) along with the losses of Heraklion (-111.676) were offset only partially by the rise of Kusadasi/Bodrum/Antalya that did not have any home-porting activities in 2009. As a result the total of Home in/out passengers declined the period 2009-2013 by 7,2%.

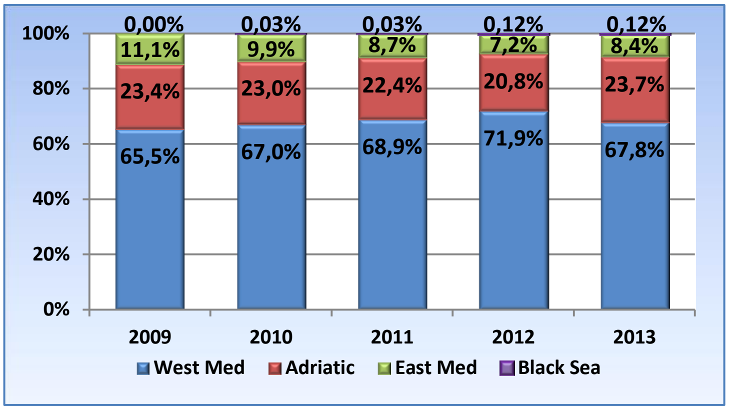
As regards the fourth region, the Black Sea, the cruise passengers that visited its ports in 2013 were transit and there were very just below 10.000 registered Home in/out passenger movements (9.777 passengers), most of them via Odessa (9.389 Home in/out passengers).

Overall, in the absence of home-porting in Tunisian ports – and with the data affected by the fact that the numbers for Egyptian ports are not available – the total of Home in/out passengers recorded in 2013 in the MedCruise ports located in all regions, was lower by 11,3 comparing to the year before. Conversely, the five year trend suggests a growth of 23%.

Figure 4.4 indicates the shares of Home in/out passengers per MedCruise region the last five years (2009-2013).

West Med has seen its share growing from 65,5% to 67,8%. The Adriatic has seen its share remaining stable, the share of 23,4% of 2009 increased to 23,7% in 2013. The region with a declining share is the East Med (from 11,1% to 8,4%), whereas the Baltic Sea started recoding some home-porting activities in 2010, with cruises departing from one of the ports in the region (Odessa) since 2012.

Figure 4.4: Home In/Out Passenger Shares per region



In the case of transit passenger movements (**Table 4.5**), the West Med registered in 2013 a total of 12.632.475 passengers. Despite the 2% decline on 2012, the share of the region as regards the overall transit traffic in the Mediterranean and its adjoining seas increased from 14,6% in 2009 to 17,9% in 2013. Civitavecchia, Barcelona and Naples are the ports recording more transit passengers than others, with each of them hosting more than one million Home in/out per year.

Two other regions, the Adriatic and the East Med recorded similar level of growth in 2013, standing at 9,4% and 9,8% respectively. The trend is also positive when focusing on the last five years evolution. Dubrovnik/Korcula that hosted more than one million transit passengers for the first time ever, Corfu that hosted more than 600.000 and Bari (439.750 transit passengers in 2013) contribute mostly to the remarkable five year positive change of 48,8% of transit passengers in the region.

As regards the East Med, the region hosted in 2013 2,19 million passengers, a 12% of the total transit passengers in all four MedCruise regions. Piraeus, along with the rise of Souda to a cruise port hosting more than 120.000 transit passengers led the region in the positive 9,5% variation between 2009 and 2013. These two cases offset he negative trends of the respective transit passenger movements that was observed in Cyprus ports, Heraklion and Kusadasi/Bodrum/Antalya.

Table 4.5: Total Transit Passengers per region

Region	Transit Pax.						
	2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
West Med	12.623.475	12.884.915	-2,0%	12.575.011	11.783.876	10.768.015	17,2%
Adriatic	3.265.564	2.985.150	9,4%	2.945.787	2.492.275	2.194.688	48,8%
East Med	2.193.804	1.998.208	9,8%	2.419.439	1.870.296	2.002.973	9,5%
Black Sea	204.063	143.900	41,8%	136.485	132.415	101.543	101,0%
Total	**18.286.906**	**18.012.173**	**1,5%**	**18.076.722**	**16.278.862**	**15.067.219**	**21,4%**

Black Sea ports are the ones that experienced the most positive developments of all since 2009 (**Figure 4.5**). In 2013, these ports registered a growth of 41%, led by an increase in Odessa (20.492 more passengers) and Costanza (23.847). True, the size of the region is smaller than those of the rest of the three regions, as it stands at 1% of the total. For the ports in the region however the double of traffic (101%) within the five-year period 2009-2013 represents a more positive trend regarding their potential.

Figure 4.5: Transit Passenger Shares per region

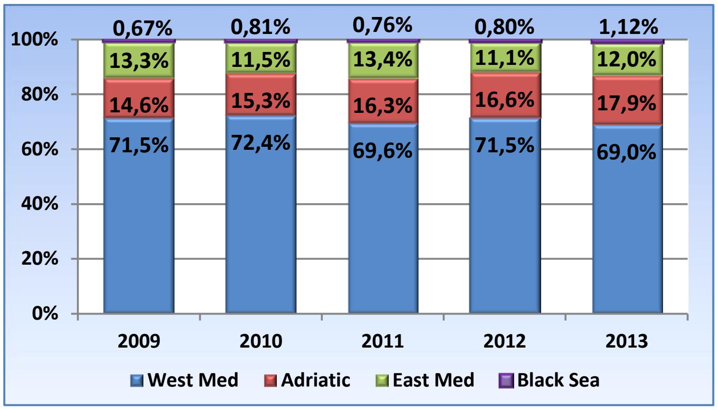


Figure 4.6 establishes two indexes of growth aiming to give a clear picture of the evolution of cruise passenger movements and cruise calls respectively in each of the four MedCruise regions, but also to establish monitoring indexes that are useful in the long-run. As Figure 4.6 indicates, all four regions experienced growth in terms of passenger movements since 2009, with Black Sea experiencing the most remarkable one.

In the case of cruise calls, it is evident that the growth of cruise is associated with the deployment of bigger vessels, as well as with the better utilization of calling vessels. This is even more evident in the East Med, a case where the growth of passenger movements is associated with a declining number of cruise calls.

Figure 4.6: Trends in MedCruise regions: The MedCruise Growth Indexes (2009=100)

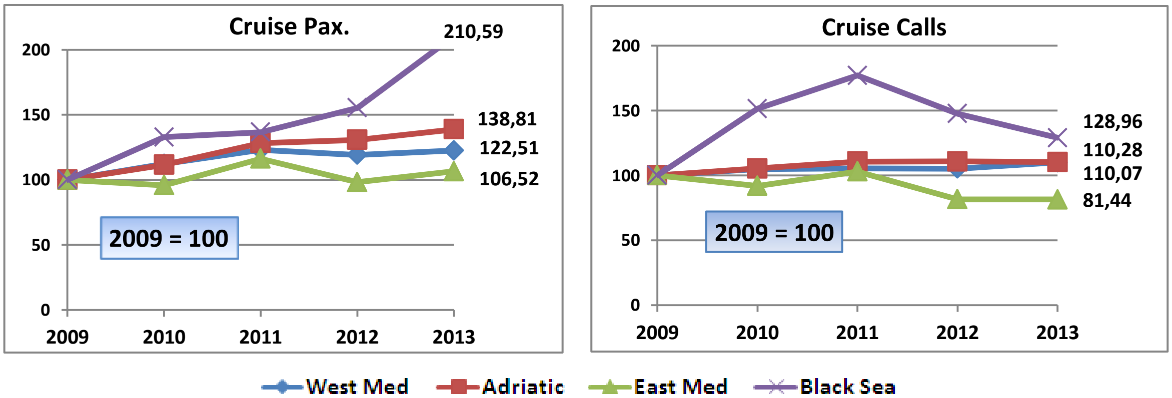
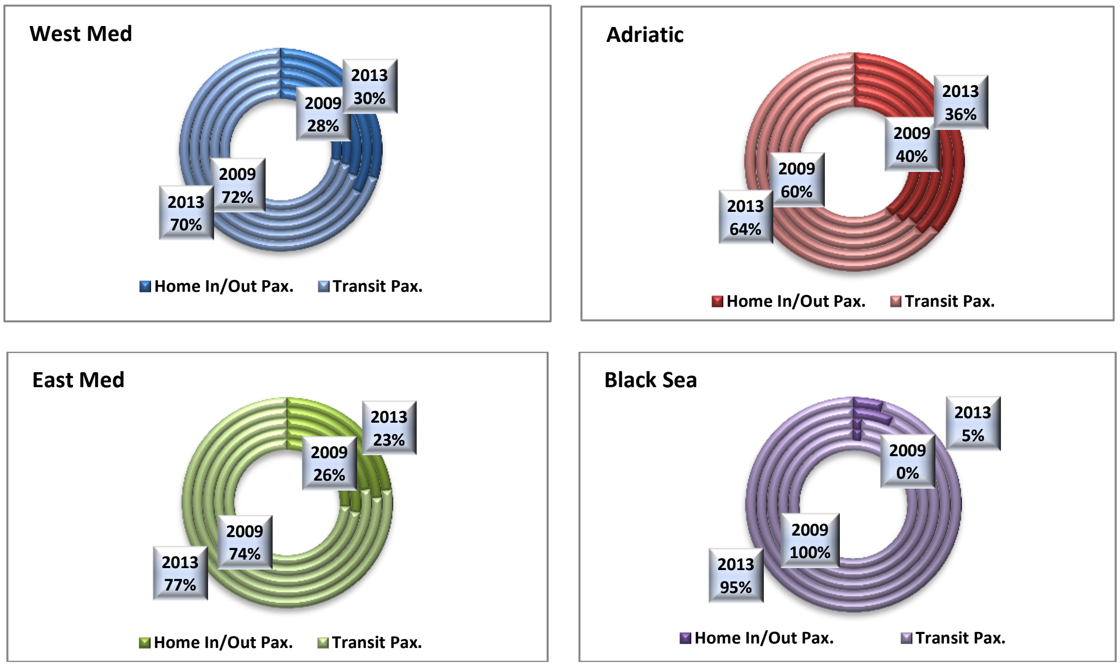


Figure 4.7 provides visualized information of the rate of Home in/out passengers movements and transit passenger movements in each of the four MedCruise regions. Apparently, Home-porting is a major part of the activities taking place in the Adriatic (36% in 2013), the West Med (30%) and the East Med (23%), but not in the Black Sea (5%). It is also noted that comparing the situation recorded in 2013 with the respective shares of 2009, West Med has seen an increase of the relative share of Home in/out passenger movements, whereas Adriatic and East Med experienced relative increase of their transit ones. Baltic Sea is a case that Home in/out passenger movements are a recent phenomenon, thus comparisons are not applicable.

Figure 4.7: Homeporting vs Transit passengers per region



4.3 Major Ports per MedCruise region

In this section the reader might find a presentation of the major ports per region, an overall picture of the variation of passenger movements and cruise calls when comparing the cruise activities of 2013 with those of 2012 as well as the change when comparing 2013 with the cruise activities that had been recorded five years before in 2009.

Table 4.6 presents the three major ports of each region as regards total passenger movements, **Table 4.7** the three major ones as regards cruise calls, whereas **Table 4.8** and **Table 4.9** present information on the leading, in terms of size, ports in each region as regards Home in/out passenger movements and transit passenger movements respectively.

Table 4.6: Major Ports per region: Total Cruise Passenger Movements

Region	No	Port	Total Cruise Pax.				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
West Med	1	Barcelona	2.599.232	2.408.634	7,91%	2.151.465	20,81%
	2	Civitavecchia	2.538.259	2.393.570	6,04%	1.802.938	40,78%
	3	Balearic Islands	1.541.376	1.341.510	14,90%	1.237.362	24,57%
Adriatic	1	Venice	1.815.823	1.775.944	2,25%	1.420.980	27,79%
	2	Dubrovnik/ Korcula	1.136.503	981.448	15,80%	901.389	26,08%
	3	Corfu	744.651	655.764	13,55%	501.764	48,41%
East Med	1	Piraeus	1.302.581	1.198.047	8,73%	1.221.633	6,63%
	2	Kusadasi/Bodrum/Antalya	780.804	777.791	0,39%	619.747	25,99%
	3	Cyprus Ports	271.673	248.356	9,39%	320.467	-15,23%

Region	No	Port	Total Cruise Pax.				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
Black Sea	1	Odessa	91.949	72.516	26,80%	31.550	191,44%
	2	Constantza	54.614	34.010	60,58%	8.516	541,31%
	3	Sevastopol	35.000	23.400	49,57%	35.447	-1,26%

Table 4.7: Major Ports per region: Total Cruise Calls

Region	No	Port	Cruise Calls				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
West Med	1	Civitavecchia	959	1.040	-7,79%	793	20,93%
	2	Barcelona	835	774	7,88%	799	4,51%
	3	Balearic Islands	699	632	10,60%	630	10,95%
Adriatic	1	Dubrovnik/Korcula	843	659	27,92%	810	4,07%
	2	Venice	548	661	-17,10%	543	0,92%
	3	Corfu	480	485	-1,03%	375	28,00%
East Med	1	Piraeus	711	763	-6,82%	877	-18,93%
	2	Kusadasi/Bodrum/ Antalya	657	683	-3,81%	733	-10,37%
	3	Cyprus Ports	255	247	3,24%	325	-21,54%
Black Sea	1	Odessa	148	121	22,31%	58	155,17%
	2	Sevastopol	115	58	98,28%	50	130,00%
	3	Constantza	69	41	68,29%	26	165,38%

Table 4.8: Major Ports per region: Total Home In/Out Pax.

Region	No	Port	HomeIn/Out Pax.				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
West Med	1	Barcelona	1.506.286	1.438.383	4,72%	1.180.239	27,63%
	2	Civitavecchia	989.998	920.612	7,54%	720.451	37,41%
	3	Savona	670.031	638.706	4,90%	571.753	17,19%
Adriatic	1	Venice	1.512.596	1.444.100	4,74%	1.170.298	29,25%
	2	Bari	165.031	196.423	-15,98%	228.259	-27,70%
	3	Corfu	70.735	64.165	10,24%	51.259	38,00%
East Med	1	Piraeus	308.705	329.168	-6,22%	415.260	-25,66%
	2	Kusadasi/Bodrum/Antalya	190.087	167.424	13,54%	157	120.974,52%
	3	Cyprus Ports	100.905	90.511	11,48%	95.720	5,42%
Black Sea	1	Odessa	9.389	10.448	-10,14%	0	-
	2	Constantza	388	0	-	0	-
	3	-	-	-	-	-	-

Table 4.9: Major Ports per region: Total Transit Pax.

Region	No	Port	Transit Pax.				
			2013	2012	Variation 2013/2012	2009	Variation 2013/2009
West Med	1	Civitavecchia	1.548.261	1.472.958	5,11%	1.082.487	43,03%
	2	Barcelona	1.092.966	970.251	12,65%	971.226	12,53%
	3	Naples	1.064.329	1.137.014	-6,39%	1.154.742	-7,83%
Adriatic	1	Dubrovnik/Korcula	1.111.663	956.816	16,18%	887.700	25,23%
	2	Corfu	673.916	591.599	13,91%	450.505	49,59%
	3	Bari	439.750	422.459	4,09%	339.626	29,48%
East Med	1	Piraeus	993.876	868.879	14,39%	806.373	23,25%
	2	Kusadasi/Bodrum/ Antalya	583.506	610.367	-4,40%	619.590	-5,82%
	3	Heraklion	214.577	168.106	27,64%	234.173	-8,37%
Black Sea	1	Odessa	82.560	62.068	33,02%	31.550	161,68%
	2	Constantza	54.226	30.739	76,41%	8.516	536,75%
	3	Sevastopol	35.000	23.400	49,57%	35.447	-1,26%

4.4 Cruise Traffic per country

MedCruise members activities spread in 20 different countries in the Mediterranean and its adjoining seas. **Table 4.10** presents the cruise activities that were registered in the 67 port members per country. Acknowledging that this is not in all cases representative of the total traffic within the country (thus the absolute numbers do not represent country traffic per year), the fact that MedCruise members represent in most cases more than 80% of the total traffic per country allows meaningful conclusions as regards the trends observed in each of these countries.

The picture of the shares of cruise activities per major country is visualised in **Figure 4.8**. Double digit shares of the total cruise activities are observed in two countries, namely Italy (38,96%) and Spain (22,34%). Greece (9.2%), France (8.14%), and Croatia (5.17%) are the other countries that recorded a major share of the total passenger movements in 2013. In terms of cruise calls, Italy (28,26%), Spain (19,08%), Greece (10,35%), and Croatia (10.11%) are the ones having double digit shares and France (8,05%) standing as the fifth in the list of those countries hosting most cruise calls. Home in/out passengers are more concentrated with Italy and Spain retaining 54,39% and 27,36% respectively, with the other ones having a worthy to be mentioned shares including France (5,94%), Greece (5,55%), and Turkey (2.43%). In the case of transit passengers the movements per country are far more balances. There are three countries having double digit shares, these being Italy (34,28%), Spain (16,95%), and Greece (11.23%), with Croatia (10,11%) and France (8,92%) retaining mentionable shares.

Figure 4.8: Cruise Traffic per country in 2013

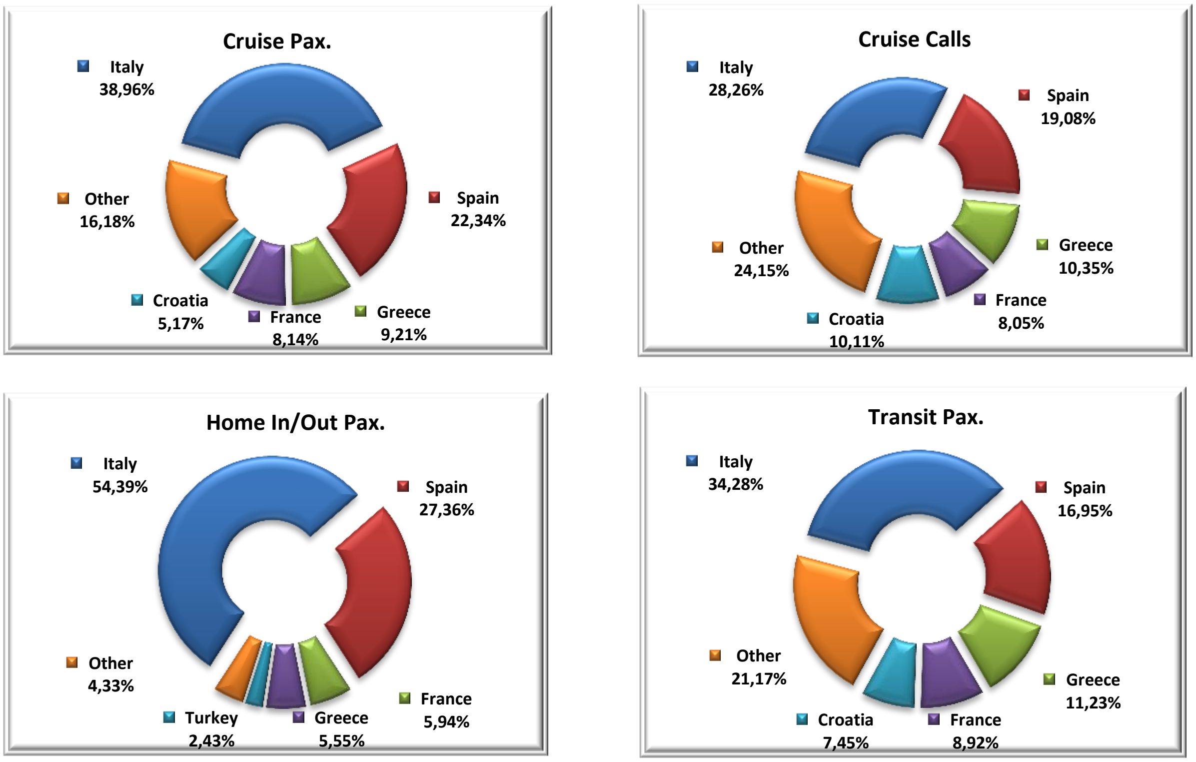


Table 4.10 lists the cruise traffic that was recorded in 2013 per country and the respective variations observed when comparing the last two years traffic. Black Sea countries and Montenegro are leading the way in growth of passenger movements per year, with Malta (-20,9%), Portugal (-7,26%), Gibraltar (-4,62%), Tunisia (-3,34%) and Spain (-1,1%) being the five countries that experienced a negative trend in 2013. The picture in terms of cruise calls is different, as increased passenger movements are in several times associated with the arrival of more passengers per cruise call. Tunisia (-11.45%), Malta (-11,22%), Portugal (-4,07%), and Greece (-0,86%) are the countries that experienced a negative trend in 2013, whereas growth has been most substantial in countries with few calls. From the list of major countries, France is the one that experienced double digit growth in both passenger movements and cruise calls, and Greece the one that registered double digit growth in the case of total passenger movements.

Table 4.10: Cruise Traffic per MedCruise Country in 2013

Country	Total Pax.	Var. 2013/21012	% of total	Cruise Calls	Var. 2013/21012	% of total
Italy	10.526.577	5,78%	38,96%	4.077	4,86%	28,26%
Spain	6.035.794	-1,10%	22,34%	2.753	4,88%	19,08%
Greece	2.489.184	11,87%	9,21%	1.494	-0,86%	10,35%
France	2.198.304	12,92%	8,14%	1.161	16,22%	8,05%
Croatia	1.397.778	9,85%	5,17%	1.458	8,24%	10,11%
Portugal	1.147.730	-7,26%	4,25%	778	-4,07%	5,39%
Turkey	846.286	3,22%	3,13%	732	0,55%	5,07%
Tunisia	511.065	-3,34%	1,89%	201	-11,45%	1,39%
Malta	477.759	-20,90%	1,77%	277	-11,22%	1,92%

Country	Total Pax.	Var. 2013/21012	% of total	Cruise Calls	Var. 2013/21012	% of total
Montenegro	317.746	28,84%	1,18%	387	12,83%	2,68%
Gibraltar	278.139	-4,62%	1,03%	179	3,47%	1,24%
Cyprus	271.673	9,39%	1,01%	255	3,24%	1,77%
Monaco	249.806	7,25%	0,92%	221	19,46%	1,53%
Ukraine	126.949	32,35%	0,47%	263	46,93%	1,82%
Slovenia	65.434	1,52%	0,24%	54	17,39%	0,37%
Romania	54.614	60,58%	0,20%	69	68,29%	0,48%
Russia	21.384	6,49%	0,08%	49	81,48%	0,34%
Georgia	4.562	52,58%	0,02%	20	81,82%	0,14%

4.5 Measuring Market Concentration

In an industry with limited number of providers, it is worth calculating industry concentration. Given the number of firms in a market and their respective market shares, the Herfindahl-Hirschman Index (HHI) measures the size of firms, in relation to an industry and the amount of competition among them. This index consists of the sum of squared market shares of the 50 largest firms (or summed over all the firms if there are fewer than 50) within the industry. The result is proportional to the average market share, weighted by market share. As such, it can range from 0 to 1, moving from a huge number of very small firms to a single monopolistic provider of services. Increases in the HHI generally indicate a decrease in competition and an increase of market power. A HHI index below 0,01 indicates a highly competitive index, below 0,15 indicates an unconcentrated index, between 0,15 to 0,25 indicates moderate concentration, whereas above 0,25 indicates high concentration.

In the case of cruise ports this index provides some interesting findings. When the total of the ports are Mediterranean and its adjoining seas are under examination, the HHI suggests that the market as regards both cruise passenger movements (HHI=0,044) and cruise calls (HHI = 0,031) is unconcentrated. Focusing on the extent of market concentration in each of the regions, this is not always the case. West Med is unconcentrated both in terms of total passenger movements (HHI=0,069) and cruise calls (HHI=0,051), but the picture is different in the case of the other ones. The Adriatic region is a moderate concentrated market (HHI = 0,216) as regards passenger movements, with this concentration declining the last five years. Since 2009 the region moved from a moderately concentrated market as regards cruise calls to an unconcentrated one. East Med is a region representing a highly concentrated market both in the case of passenger movements (HHI=0,303) and cruise calls (HHI=0,264). The Baltic on the other hand is a highly concentrated market as regards passenger movements (HHI=0,288), but a moderate concentrated one (HHI = 0,245) as regards cruise calls.

Table 4.10: HHI (Herfindahl - Hirschman Index) per region

Region	Cruise Passengers			Cruise Calls		
	2013	2012	2009	2013	2012	2009
All 4 regions	0,0442	0,0437	0,0444	0,031667	0,033346	0,034144
West Med	0,0692	0,0659	0,0660	0,051941	0,055645	0,054535
Adriatic	0,2163	0,2183	0,2523	0,149029	0,137238	0,155821
East Med	0,3031	0,2976	0,2946	0,264538	0,288961	0,253848
Black Sea	0,2882	0,2977	0,2516	0,245015	0,283676	0,222192

V. ANALYSIS BY MEDCRUISE PORT SIZE

5.1 Categories of MedCruise ports per size

This section presents an analysis of developments based on the size of MedCruise ports. The 70 port members of MedCruise can be divided in two categories based on the total cruise passenger movements per year, with each of these categories containing an equal number of ports. In practice, these two categories are:

- **Category A**: Ports with more than 130.000 cruise passenger traffic in 2013
- **Category B**: Ports with less than 130.000 cruise passenger traffic in 2013

Major ports (Category A) have both different needs and different growth strategies from the small ones (Category B). The diverse quests and problems of infrastructure, the hosting of dissimilar kind of operations, and, in several times, the different cruise companies to deal with, make worth the examination of the trends within each of these categories in order to understand the dynamics observed in each case.

Figure 5.1 details the list of ports included in Category A (see Appendix V for the list of ports included in each of these categories). In total, 25 of the 35 ports of Category A are located in the West Med. Among the major four ports in terms of passenger movements only one is not a port of West Med. This is Venice, an Adriatic port that stands as the third major port. The other three, Barcelona (2,6 million passenger movements), Civitavecchia (2,5 million) and Balearic Islands are all West Med ports. Only four ports located in East Med can be found in Category A, with Piraeus being the most visited one (1,3 million cruise passenger movements). There is no Black Sea port in this category as all ports in the region recorded less than 130.000 cruise passenger movements in 2013.

Figure 5.1: Category A - MedCruise Ports per region

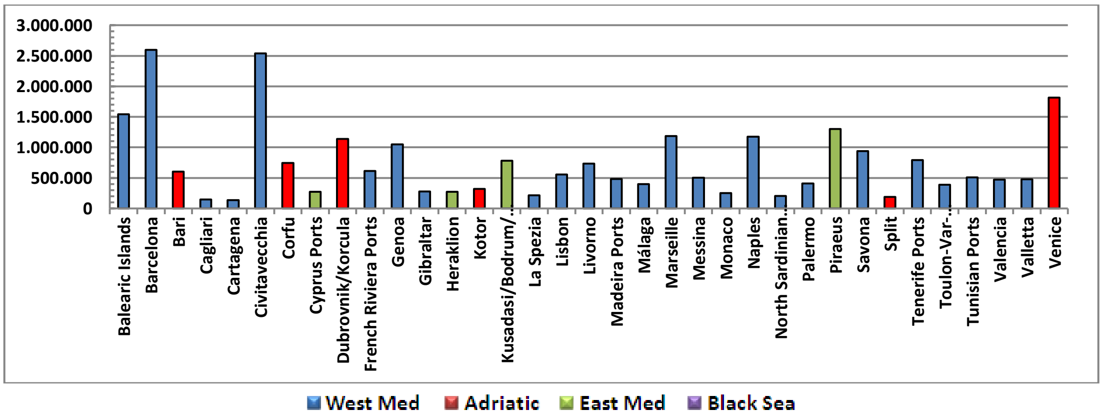
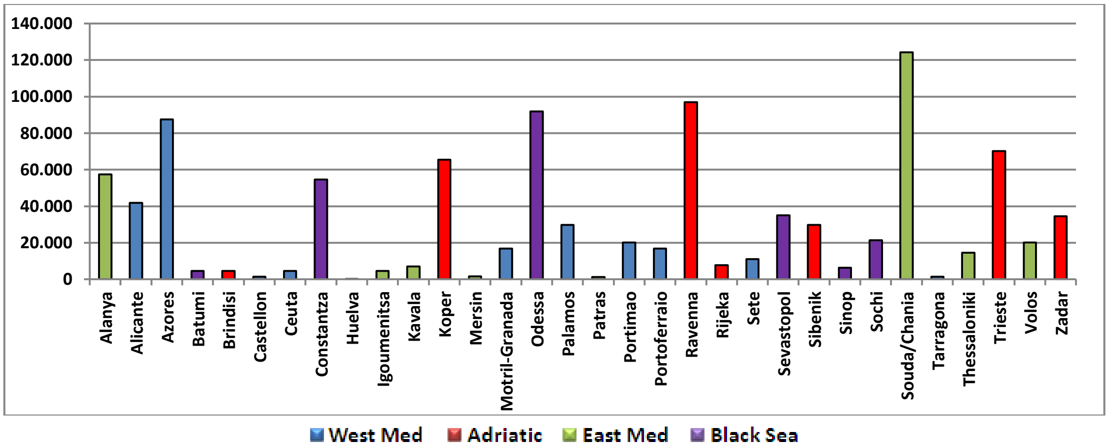


Figure 5.2 details the list of ports included in Category B. Smaller in terms of cruise passenger movements ports are more equally distributed among the four regions. Souda/Chania (124 thousands), Ravenna (97 thousands), Odessa (91 thousands) and Azores (87 thousands), which stand as the four largest ports of Category B are located in East Med, Adriatic, Black Sea and West Med region ports respectively. In total, all Black sea ports are listed in this size category, which also includes 11 West Med ports, seven East Med and six ports located in the Adriatic.

Figure 5.2: Size Category B - MedCruise Ports per region



5.2 Cruise Traffic by size

Table 5.1 presents the major variations as regards total passengers, cruise calls, Home in/out and transit passengers in the case of each of the two size categories. In 2013 Category A ports registered a growth of total passenger movements (4,16%), total calls (4,75%) and transit passengers (1,11%) on 2012.

Category B ports recorded higher growth than Category A ports in all three categories within 2013. Total passenger movements grew by 5,87% total calls grew twice the pace of growth of major ports (10,6%) and transit passengers remarkably higher than the case of big ports in the Med (10,35%). Both Category A and Category B ports experienced decline in Home in/out passengers. In terms of percentages, the observed in Category B ports was double the percent decline observed in the case of Category A ports (22,85% comparing to 11,14%).

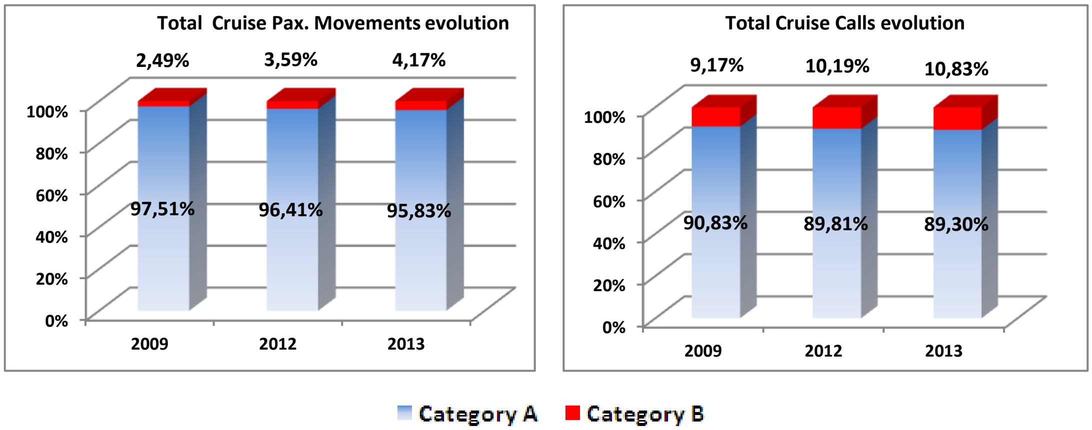
Table 5.1: Cruise Traffic Variations by size

Category		2013	2012	Var. 2013/2012	2009	Var. 2013/2009
Total Pax.	A	26.034.576	24.994.144	4,16%	21.298.081	22,24%
	B	986.208	931.492	5,87%	544.051	81,27%
Total Calls	A	12.884	12.300	4,75%	12.129	6,22%
	B	1.544	1.396	10,60%	1.224	26,14%
Home In/Out Pax.	A	7.741.125	8.711.984	-11,14%	6.311.383	22,65%
	B	88.411	114.599	-22,85%	56.198	57,32%
Transit Pax.	A	17.389.109	17.198.551	1,11%	14.551.390	19,50%
	B	897.797	813.622	10,35%	515.829	74,05%

When the focus is on the five-year trend (2009-2013), all variations are positive and the growth is substantial in all respects. Once more, the most notable increases are observed in the case of Category B ports. Total passengers increase in small ports (81,27%) was four times that of the increase in the case of Category A ports (22,24%), as was the rise of cruise calls (26,14% comparing to 6,22%). The same ratio of growth is present when comparing growth in transit passengers 74,05% comparing to 19,5%) whereas in the case of Home in/out the relationship is 2:1 (57,32% comparing to 22,65%).

As a result of the rising of smaller ports, the share of Category B is increasing Taking for example the total passenger movements (**Figure 5.3**) the share of Category B ports rose from 2,49% in 2009 to 4,17% of the total within 5 years. This is attributed to an increase of the share of small ports in Home in/out passengers from 0,88% to 1,13% and of transit passengers from 3,42% to 4,91% of the total in the region. The share of small ports in terms of total cruise calls also rose from 9,17% to 10,83% within the period 2009-2013.

Figure 5.3: Cruise Traffic Evolution by size



5.3 Variations by Size Category per Region

The growth of ports in each size Category presents several variations. **Table 5.2** details that when the total passenger movements in 2013 and their comparison with 2012 are under examination Category A ports in East Med numbers rose faster than those located in the Adriatic, and at double pace comparing to the big in size ports of the West Med. The picture of the five year evolution (2009-2013) suggests a different trend; big ports located in both the West Med and the Adriatic have grown remarkably faster – the former by 22,89% and the later by 33,61% - comparing to the 2,41% observed in East Med.

The case of Category B ports is different. West med ports of this size category declined in 2013 by 18,83%. At the same time Black Sea ports growth within the same year was 35,67%, in East Med this growth was 19,72% and in the Adriatic 4,80%. The comparison of the five year variation concludes that the West Med small ports declined by 1,87% when the small ports of Adriatic and those of the Black sea tripled and doubled their annual traffic, whereas East Med ports saw an 95,68% saw an increase in total passenger movements.

Table 5.2: Variations by size category per region: Total Pax. movements

Size	Region	% of Total Pax. 2013	Total Pax. 2013	Total Pax. 2012	Variation 2013/2012	Total Pax. 2009	Variation 2013/2009
A	West Med	68,84%	18.600.887	18.030.138	3,17%	15.135.963	22,89%
	Adriatic	17,80%	4.808.611	4.524.112	6,29%	3.598.979	33,61%
	East Med	9,72%	2.625.078	2.439.894	7,59%	2.563.139	2,42%
	Black Sea	0,00%	-	-	-	-	-
B	West Med	0,86%	231.770	285.524	-18,83%	236.189	-1,87%
	Adriatic	1,15%	309.515	295.331	4,80%	88.229	250,81%
	East Med	0,86%	231.083	193.018	19,72%	118.090	95,68%
	Black Sea	0,79%	213.840	157.619	35,67%	101.543	110,59%

As regards total cruise calls (**Table 5.3**), West Med ports of Category A registered a growth of 4,92% within one year. A growth was also observed in the Adriatic by 1,18%, while East Med big ports saw a decline of 2,65% in 2013. Looking at the five year variation (2009-2013) these trends are even more emphatic. West Med big ports and Adriatic ports saw a rise of cruise calls at almost 10% and above 10% respectively, where calls in East Med major ports in 2013 were 18,99% lower than in 2009.

In the case of Category B ports, Black Sea along with East Med ports registered notable growing numbers in 2013. Growth in ports of Category A in these two regions reached 55,19% and 34,56% respectively. On the other hand, the Adriatic Sea small ports saw a decline by 7,53% and West Med ports a marginal decline of 0,43% within the year. In the case of the five year variation Black Sea ports saw a major rise, with cruise calls in West Med ports rising by 21,22%. The Adriatic region grew at the slower pace of 9,28% whereas the East Med located ports experienced a decline of visiting ports by 14,09%

Table 5.3: Variations by size category per region: Total Cruise Calls

Size	Region	% of Total Calls 2013	Total Calls 2013	Total Calls 2012	Variation 2013/2012	Total Calls 2009	Variation 2013/2009
A	West Med	58,43%	8.430	8.035	4,92%	7.690	9,62%
	Adriatic	18,39%	2.654	2.623	1,18%	2.402	10,49%
	East Med	12,48%	1.800	1.849	-2,65%	2.222	-18,99%
B	West Med	2,61%	377	379	-0,53%	311	21,22%
	Adriatic	3,92%	565	611	-7,53%	517	9,28%
	East Med	1,27%	183	136	34,56%	213	-14,08%
	Black Sea	2,90%	419	270	55,19%	183	128,96%

Table 5.4 details the trends per size category as regards the evolution of Home in/out passengers. In this case, as one would expect, the big ports of Category A are dominant, and thus the ones demanding closer consideration. Here the records of 2013 are far more positive for the East Med ports and to a lesser extend the Adriatic. On the contrary, in the case of the West Med, mostly due to the Tunisian case, the Home in/out passengers declined by 16,29%. That the rise in 2012 of the Tunisian Home in/out passenger movements was a temporary phenomenon is a key reason that the five-year period trend suggests a completely different picture, thus the overall trend is rather unclear. Both West Med and the ports in the Adriatic have grown in a very dynamic way between 2009-2013, with that translated to a 27,47% and 21,02% increase respectively. East Med was the region that experienced a decline by 3,41% over the same period.

Table 5.4: Variations by size category per region: Home In/Out Pax.

Size	Region	% of Home In/Out pax. 2013	Home In/Out pax. 2013	Home In/Out pax. 2012	Variation 2013/2012	Home In/Out pax. 2009	Variation 2013/2009
A	West Med	67,84%	5.311.482	6.345.108	-16,29%	4.166.868	27,47%
	Adriatic	22,66%	1.774.503	1.732.179	2,44%	1.466.259	21,02%
	East Med	8,37%	655.140	634.697	3,22%	678.256	-3,41%
B	West Med	0,01%	569	2.030	-71,97%	1.961	-70,98%
	Adriatic	1,00%	78.059	102.114	-23,56%	26.261	197,24%
	East Med	0,00%	6	7	-14,29%	27.976	-99,98%
	Black Sea	0,12%	9.777	10.448	-6,42%	-	-

In the case of Category B the numbers of Home in/out are of an insignificant scale. The Adriatic is a minor exemption, as some home-porting, and inter-porting, is taking place. This type of passenger movements had been on the rise from 2009 (26.261 passengers) until 2012 (102.114). Even though there was a decline by 14,29% in 2013 (78.059 registered Home in/out passengers), the overall five years increase stands at the impressive 197,2%.

Analysing the trends of transit passenger movements in the Category A ports (**Table 5.5**) the data suggest that a minor decline in the biggest (in terms of movement) region of all, which is the West Med. In 2013 the big ports of West Med declined by 1,66%. The case is different in both the Adriatic and the East Med regions. The big ports in these two regions registered in 2013 a growth by just more than 8%. The five-years trend indicates however that Adriatic has been the most dynamic of the three regions (42,26% increase). West Med big ports have grown by 17,64% and East Med ports have done so to a lesser percent that stands at 4,13%.

Interestingly, the changes of transit passenger movement observed in the case of small ports within 2013 suggest a far more volatile market. Ports that hosted in 2013 less than 130.000, and thus are listed in Category B, have experienced double-digit variations. In the case of Black Sea this stands at 41,81% growth, whereas in the Adriatic and the East Med the growth was identical, reach the level of 19,7%. In the case of the West Med the registered decline was 18,45%.

Apparently, a major positive change has occurred in the last five years in small ports in the Mediterranean and its adjoining seas. This has taken place in the Adriatic, were small ports saw respective passenger movements almost tripling (a growth of 273%), the Black Sea, where transit passengers per year in similar ports were doubled (100,96% increase), and the East Med, where such movement almost doubled (95,68% increase). Only in the West Med ports of Category B the change has not been of an impressive magnitude, as transit passengers that visited these ports in the last five were declined by the marginal 1,29%. This minor decline is attributed to the development in 2013 alone.

Table 5.5: Variations by size category per region: Transit Pax.

Size	Region	% of Transit pax. 2013	Transit pax. 2013	Transit pax. 2012	Variation 2013/2012	Transit pax. 2009	Variation 2013/2009
A	West Med	67,77%	12.392.274	12.601.421	-1,66%	10.533.787	17,64%
	Adriatic	16,59%	3.034.108	2.791.933	8,67%	2.132.720	42,26%
	East Med	10,73%	1.962.727	1.805.197	8,73%	1.884.883	4,13%
B	West Med	1,26%	231.201	283.494	-18,45%	234.228	-1,29%
	Adriatic	1,27%	231.456	193.217	19,79%	61.968	273,51%
	East Med	1,26%	231.077	193.011	19,72%	118.090	95,68%
	Black Sea	1,12%	204.063	143.900	41,81%	101.543	100,96%

5.4 Major Variations in MedCruise ports 2013/2012 (per size category & per region)

Categorising MedCruise ports per size category (Category A: big ports; Category B: small ports) and per region (four regions: West Med, Adriatic, East Med, Black Sea), this section presents the ports where the major positive and major negative variation took place in 2013 when comparing (a) to 2012 and (b) to 2009. While the former illustrates the most recent dynamics, the latter portrays the medium term trends in MedCruise ports.

Table 5.6 and **Table 5.7** present the major variations in terms of total passenger movements, **Table 5.8** and **Table 5.9** present the major variations of cruise calls, **Table 5.10** and **Table 5.11** present the major variations in Home in/out passenger movements, and **Table 5.12** and **Table 5.13** the major variations in transit passengers.

The threshold for the preparation of these listings remains the one applied throughout the report (10.000 passenger movements and 20 cruise calls in 2013). Whenever no port qualifies (i.e. there are no Category A Black Sea ports) the respective reference is omitted.

Table 5.6: Major Variations 2013/2012 (per size category/region) - Total Cruise Passengers

Size category		Port	Region	Total Pax. 2013	Total Pax. 2012	Variation 2013/2012
A	+	La Spezia	West Med	213.858	50.239	325,68%
		Kotor	Adriatic	317.746	246.623	28,84%
		Heraklion	East Med	270.020	215.700	25,18%
	-	Málaga	West Med	397.416	651.393	-38,99%
		Split	Adriatic	189.107	245.451	-22,96%
B	+	Motril-Granada	West Med	16.809	10.606	58,49%
		Sibenik	Adriatic	29.784	15.355	93,97%
		Thessaloniki	East Med	14.591	8.004	82,30%
		Constantza	Black Sea	54.614	34.010	60,58%
	-	Alicante	West Med	41.860	78.825	-46,90%
		Rijeka	Adriatic	7.809	9.539	-18,14%
		Souda/Chania	East Med	124.205	129.087	-3,78%

Table 5.7: Major Variations 2013/2009 (per size category/region) - Total Cruise Passengers

Size category		Port	Region	Total Pax. 2013	Total Pax. 2009	Variation 2013/2009
A	+	La Spezia	West Med	213.858	31.021	589,40%
		Kotor	Adriatic	317.746	75.128	322,94%
		Kusadasi/Bodrum/Antalya	East Med	780.804	619.747	25,99%
	-	Tunisian Ports	West Med	511.065	752.246	-32,06%
		Heraklion	East Med	270.020	401.292	-32,71%
B	+	Motril-Granada	West Med	16.809	3.460	385,81%
		Trieste	Adriatic	70.244	6.314	1.013%
		Souda/Chania	East Med	124.205	7.720	1.509%
		Constantza	Black Sea	54.614	8.516	541,31%
	-	Alicante	West Med	41.860	96.615	-56,67%
		Rijeka	Adriatic	7.809	14.500	-46,14%
		Volos	East Med	20.227	38.592	-47,59%

Table 5.8: Major Variations 2013/2012 (per size category/region) - Total Cruise Calls

Size category		Port	Region	Total Calls 2013	Total Calls 2012	Variation 2013/2012
A	+	North Sardinian Ports	West Med	117	54	116,67%
		Dubrovnik/Korcula	Adriatic	843	659	27,92%
		Heraklion	East Med	117	156	13,46%
	-	Naples	West Med	440	527	-16,51%
		Venice	Adriatic	548	661	-17,10%
		Piraeus	East Med	711	763	-6,82%
B	+	Palamós	West Med	38	26	46,15%
		Sibenik	Adriatic	100	84	19,05%
		Alanya	East Med	53	31	70,97%
		Sevastopol	Black Sea	115	58	98,28%
	-	Alicante	West Med	32	43	-25,58%
		Trieste	Adriatic	32	43	-25,58%
		Souda/Chania	East Med	47	54	-12,96%

Table 5.9: Major Variations 2013/2009 (per size category/region) - Total Cruise Calls

Size category		Port	Region	Total Calls 2013	Total Calls 2009	Variation 2013/2009
A	+	La Spezia	West Med	149	33	351,52%
		Kotor	Adriatic	387	260	48,85%
	-	Tunisian Ports	West Med	201	358	-43,85%
		Bari	Adriatic	171	182	-6,04%
		Heraklion	East Med	177	287	-38,33%
B	+	Sete	West Med	28	8	250,00%
		Ravenna	Adriatic	74	26	184,62%
		Souda/Chania	East Med	47	20	135,00%
		Constantza	Black Sea	69	26	165,38%
	-	Alicante	West Med	32	61	-47,54%
		Rijeka	Adriatic	221	254	-12,99%
		Thessaloniki	East Med	18	48	-62,50%

Tale 5.10: Major Variations 2013/2012 (per size category/region) - Home In/Out Pax.

Size category		Port	Region	Home In/Out Pax. 2013	Home In/Out Pax. 2012	Variation 2013/2012
A	+	French Riviera Ports	West Med	56.523	33.549	68,48%
		Split	Adriatic	1.301	1.085	19,91%
		Heraklion	East Med	55.443	47.594	16,49%
	-	Tunisian Ports	West Med	0	1.165.361	-100,00%
		Kotor	Adriatic	0	1.774	-100,00%
		Piraeus	East Med	308.705	329.168	-6,22%
	+	Zadar	Adriatic	1.636	769	112,74%
	-	Alicante	West Med	0	286	-100,00%
		Koper	Adriatic	56	164	-65,85%
		Odessa	Black Sea	9.389	10.448	-10,14%

Table 5.11: Major Variations 2013/2009 (per size category/region) - Home In/Out Pax.

Size category		Port	Region	Home In/Out Pax. 2013	Home In/Out Pax. 2009	Variation 2013/2009
A	+	Messina	West Med	36.190	9.822	268,46%
		Dubrovnik/Korcula	Adriatic	24.840	13.689	81,46%
		Cyprus	East Med	100.905	95.720	5,42%
	-	Livorno	West Med	4.991	40.348	-87,63%
	-	Split	Adriatic	1.301	2.754	-52,76%
	-	Heraklion	East Med	55.443	167.119	-66,82%
	+	Trieste	Adriatic	52.297	2.630	1.888%
	-	Portimao	West Med	88	1.250	-92,96%
		Koper	Adriatic	56	7.363	-99,24%
		Thessaloniki	East Med	6	27.976	-99,98%

Table 5.12: Major Variations 2013/2012 (per size category/region) - Total Transit Passengers

Size category		Port	Region	Total Pax. 2013	Total Pax. 2012	Variation 2013/2012
A	+	La Spezia	West Med	212.351	50.239	322,68%
		Kotor	Adriatic	317.746	244.849	29,77%
		Heraklion	East Med	214.577	168.106	27,64%
	-	Tunisian Ports	West Med	511.065	1.165.361	-56,15%
		Split	Adriatic	187.806	244.366	-23,15%
		Kusadasi/Bodrum/Antalya	East Med	583.506	610.367	-4,40%
B	+	Motril -Granada	West Med	16.809	10.606	58,49%
		Sibenik	Adriatic	29.784	15.355	93,97%
		Thessaloniki	East Med	14.585	7.997	82,38%
		Constantza	Black Sea	54.226	30.739	76,41%
	-	Alicante	West Med	41.860	78.539	-46,70%
		Souda/Chania	East Med	124.205	129.087	-3,78%

Table 5.13: Major Variations 2013/2009 (per size category/region) - Total Transit Passengers

Size category		Port	Region	Total Pax. 2013	Total Pax. 2012	Variation 2013/2012
A	+	La Spezia	West Med	212.351	31.021	584,54%
		Kotor	Adriatic	317.746	75.128	322,94%
		Piraeus	East Med	993.876	806.373	23,25%
	-	Tunisian Ports	West Med	511.065	752.246	-32,06%
		Cyprus Ports	East Med	170.768	224.747	-24,02%
B	+	Motril-Granada	West Med	16.809	3.460	385,81%
		Ravenna	Adriatic	80.214	10.328	676,67%
		Souda/Chania	East Med	124.205	7.720	1.508%
		Constantza	Black Sea	-	-	-
	-	Alicante	West Med	41.860	96.615	-56,67%
		Volos	East Med	20.227	38.592	-47,59%

VI. SEASONALITY ANALYSIS

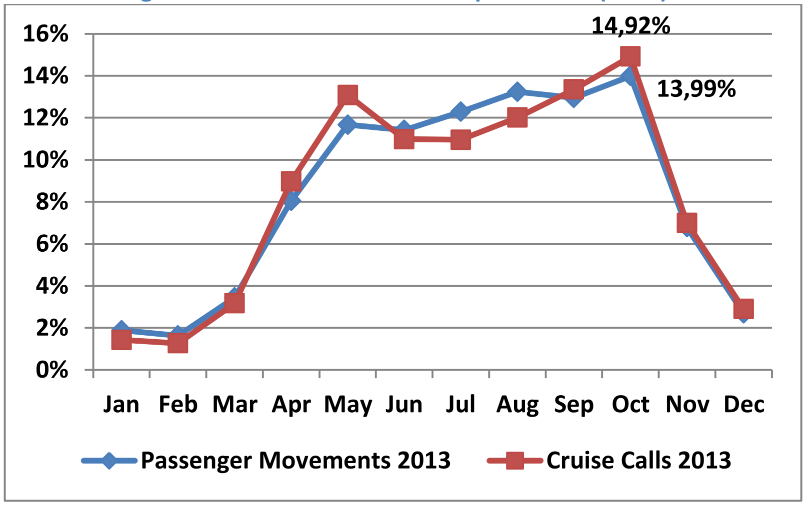
6.1 Seasonality in MedCruise Ports

The seasonality of cruise activities in MedCruise ports is the theme of this section. The focus is on the overall picture of how cruise traffic is distributed on a monthly basis, as well as on trimester basis, along with the variation observed depending on the size or the region where a port is located. The seasonality analysis is based on data provided by 66 MedCruise Ports – as at the time of the analysis relevant monthly data for the ports of Lattakia, Rize, Egyptian Ports, and the Ports of Tenerife were not available.

Figure 6.1 illustrates the shares variation of both passenger movements and cruise calls per month in 2013. The highest share of cruise passenger movements in 2013 was registered in October (14,9%). In 2012, the month when the major percentage of cruise passenger movements was concentrated was August (14%).

Only 6,2% of the total passenger movements, was registered during the winter months, whereas 75,52% of cruise traffic happened during the period May to October.

Figure 6.1: Cruise Traffic Shares per month (2013)



The 12% share of total passenger movements that was registered in May remains at the same level in July, and surges at 14,92% in October. The total monthly cruise traffic data and that of cruise calls appear in **Table 6.1**, along with the respective shares recorded each month.

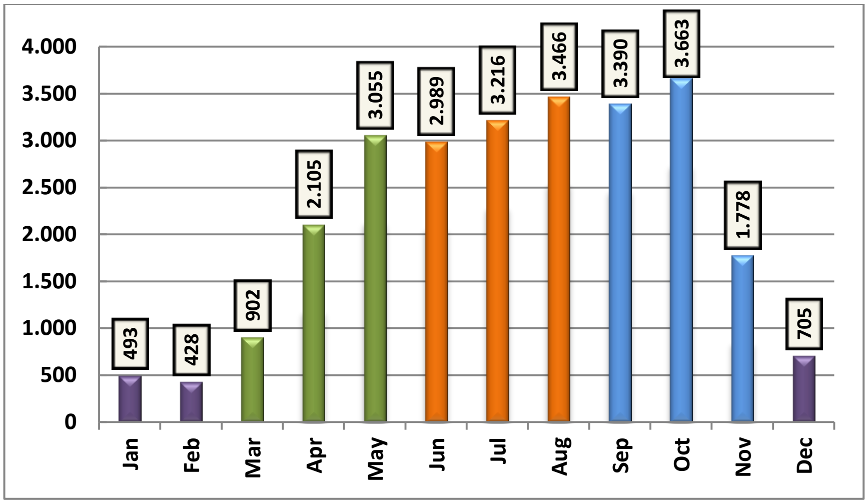
Table 6.1: Total Cruise Traffic per month (2013)

Month	Total Cruise Pax.	% of Total Pax.	Total Cruise Calls	% of Total Calls	Pax/Call
January	493.458	1,88%	196	1,42%	2.518
February	427.829	1,63%	174	1,26%	2.459
March	902.176	3,44%	436	3,17%	2.069
April	2.105.291	8,04%	1.234	8,97%	1.706
May	3.055.410	11,67%	1.800	13,08%	1.697
June	2.989.328	11,41%	1.511	10,98%	1.978
July	3.216.469	12,28%	1.507	10,95%	2.134
August	3.466.197	13,23%	1.653	12,01%	2.097
September	3.389.720	12,94%	1.837	13,35%	1.845
October	3.663.072	13,99%	2.053	14,92%	1.784
November	1.777.694	6,79%	963	7,00%	1.846
December	704.729	2,69%	398	2,89%	1.771

Figure 6.2 visualises the monthly distribution of the total cruise passengers per month in absolute numbers. From May to October more than three million passengers visit the MedCruise ports per month. Less than one million do so per winter month.

The 36,9% of total cruise passenger movements took place during the summer months, while the respective share in 2012 was standing at the higher share of 39,3%.

Figure 6.2: Total Cruise Pax. per month (in thousands; 2013)



At the same time, a slight increase in the share of cruise passenger traffic is observed in the winter months of 2013 in comparison with 2012. While in 2012 the cruise passenger movements were concentrated during the summer months, in 2013 they appear slightly more evenly distributed throughout the year.

The total number of calls (**Figure 6.3**) increased from 436 March to May 1.800. October, (2.053 calls) was the peak month. Less than 1.000 calls happen during January-March as well as during November-December.

The monthly distribution of the 2013 cruise calls follows a similar pattern to the one observed in 2012. 75,29% of the total cruise calls happened within the period May to October. 5,57% of the total, or 768 calls, took place during the winter months.

Figure 6.3: Total Cruise Calls per month (2013)

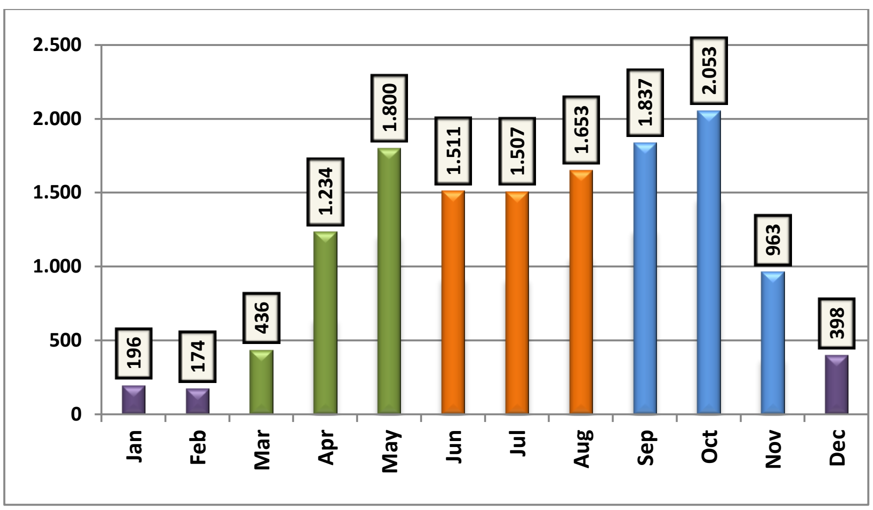
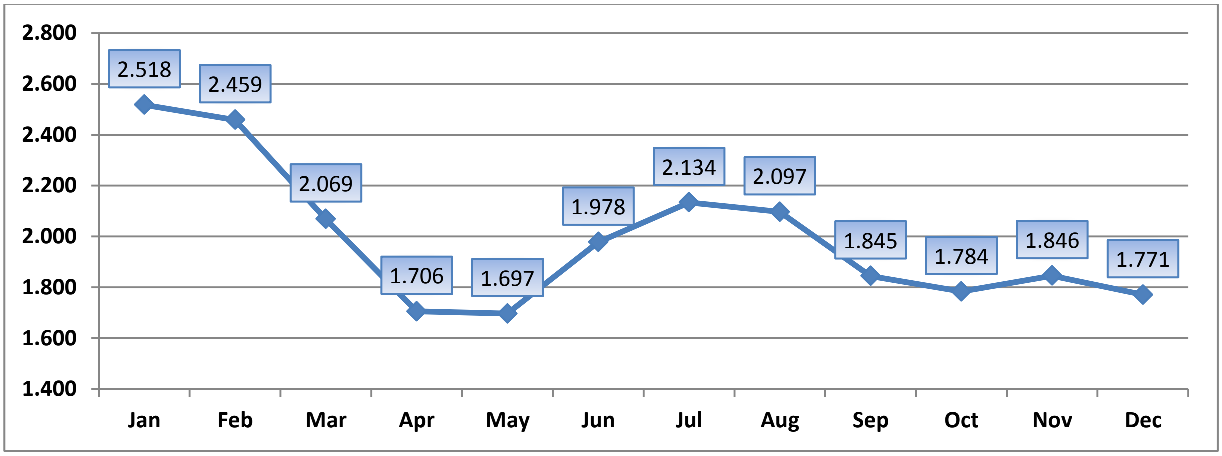


Figure 6.4 presents the average number of passengers per cruise call during each month of the year. January appears as the month of 2013 with the highest rate of passengers per call (2.518 pax/call), followed by February (2.459) and July (2.134). May stands as the month with the lowest registered rate with only 1.697 pax/call, with April registering a similar number of pax (1.706). The variations per month, as expected, are remarkable. In May the number of passengers per call appears to be 48,4% lower compared to the respective number of January.

Figure 6.4 Average Pax/Call per month (2013)



6.2 Seasonality by region

In the four distinctive regions that MedCruise membership spreads (West Med, Adriatic, East Med and Black Sea) the seasonality trends follow in some respects dissimilar distributions (**Table 6.2**). In West Med the cruise traffic is distributed more balanced throughout the year, registering during the winter months an 8,5% share of the total cruise passenger movements standing. In the rest three areas the cruise traffic is concentrated mostly during the second half of the year, in particular from June to November. In the case of Black Sea, no cruise activity is observed during the winter months, and few take place during the trimester March-June. The Adriatic and East Med follow the same patterns as regards the distribution of calls per trimester. That said, the passenger movements in the Adriatic during the winter time (Dec-Feb) are substantially fewer to the ones that take place in East Med.

Table 6.2: Trimester Shares of Cruise Traffic within the MedCruise Regions

Region	Total Passengers				Total Calls			
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	24,41%	34,28%	32,81%	8,50%	28,04%	29,91%	34,72%	7,32%
Adriatic	21,16%	43,57%	34,93%	0,34%	21,05%	40,73%	34,67%	3,55%
East Med	19,30%	41,40%	36,64%	2,67%	21,99%	37,97%	37,62%	2,42%
Black Sea	13,92%	42,65%	43,42%	-	12,79%	46,23%	40,98%	-
Total	**23,15%**	**36,93%**	**33,72%**	**6,21%**	**25,21%**	**33,94%**	**35,26%**	**5,58%**

Region	Home In/Out Passengers				Transit Passengers			
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	24,72%	33,83%	32,85%	8,60%	24,33%	34,12%	32,62%	8,93%
Adriatic	22,03%	43,81%	33,87%	0,29%	20,65%	43,45%	35,53%	0,37%
East Med	21,06%	43,14%	35,32%	0,48%	18,80%	40,81%	37,06%	3,33%
Black Sea	13,64%	49,11%	37,25%	-	13,94%	42,28%	43,78%	-
Total	**23,71%**	**37,17%**	**33,33%**	**5,79%**	**22,87%**	**36,74%**	**33,81%**	**6,58%**

6.3 Seasonality by size

Table 6.3 details the shares of the total cruise traffic that corresponds to each trimester of 2013 within the two different port size categories of MedCruise.

Category A (ports hosting more than 130.000 passenger movements in 2013) recorded a higher share of the annual passenger movements that they host per year during the winter times (6,31%) comparing to the respective share observed in Category B ports (3,59%). In the case of Category A the highest share of the cruise passenger traffic movements (37,1%) was registered during the summer months. In the case of the size Category B autumn proved to be the most popular season since more than 40% of the total passengers that visited the ports belonging to this size category were registered the period September to November. For both size categories the total number of cruise calls reaches its peak to be the autumn, when the level of call concentration stands at 35,16% for Category A ports and at 36,19% for Category B ports. In the case of Home in/out passengers the picture is quite different insofar the concentration during the summer months. Category B ports hosted 50% of their total, still tiny in size, Home in/out traffic during this period of time. On the contrary, for the ports of size category A the shares were distributed more evenly in all semesters bar the winter one.

Table 6.3: Trimester Shares of Cruise Traffic within the two size categories (2013)

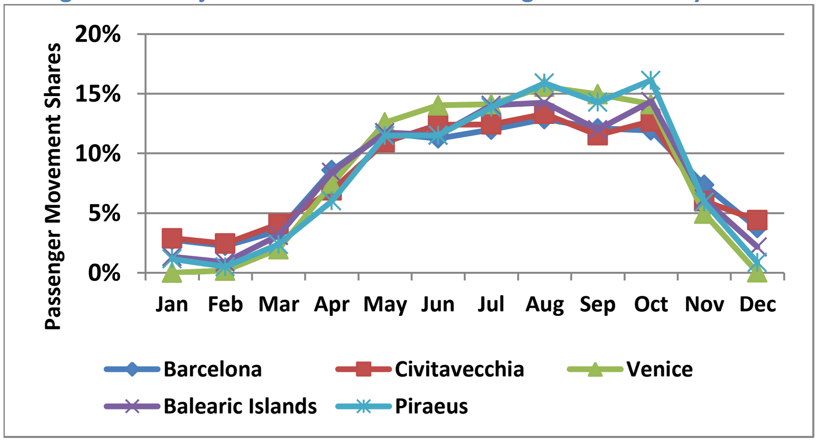
	Size Category	March-May	Jun-Aug	Sept-Nov	Dec-Feb
Cruise Pax.	A	23,17%	37,10%	33,42%	6,31%
	B	22,60%	32,32%	41,48%	3,59%
Cruise Calls	A	25,40%	33,79%	35,16%	5,65%
	B	23,61%	35,26%	36,19%	4,94%
Home In/Out Pax.	A	23,87%	37,03%	33,26%	5,84%
	B	9,97%	48,93%	39,32%	1,79%
Transit Pax.	A	22,82%	37,05%	33,40%	6,73%
	B	23,84%	30,65%	41,73%	3,78%

6.4 Seasonality in Major MedCruise Ports

Seasonality trends in the major five ports in the Mediterranean and its adjoining seas (**Figure 6.5**) do not differ remarkably from that of the total sample.

Some observations are noteworthy however. Barcelona and Civitavechia register passenger movement in January and February and December that exceeds 2% of their total annual traffic, whereas Piraeus and Balearic islands host half this percentage, and Venice records an almost insignificant share.

Figure 6.5: Major 5 MedCruise Ports Passenger - Seasonality 2013



That said, the concentration of traffic in the period May-August (56,32% of the total annual passenger movements) is far more evident in the case of Venice rather than in any other one. Piraeus is the port where concentration of almost half the annual traffic (46,28%) is taking place the trimester August-October.

Table 6.4 presents the MedCruise ports registering the major concentration during spring time. The top two ports of this list, Portimao and Azores, host more than 50% of their annual cruise traffic during this trimester, and six more host more than 30%. In total, 56,55% of the total passenger movements that take place in MedCruise ports in spring months is registered in 10 ports.

Table 6.4: Highest Concentration of passenger movements (March/April/May 2013)

No	Port	% share of the port's total traffic	% share of all MedCruise ports March-May traffic	Total Pax. March-May	Total Calls March-May
1	Portimao	54,77%	10,20%	11.032	22
2	Azores	53,30%	9,18%	46.602	49
3	Alicante	39,14%	5,92%	16.383	13
4	Sète	37,97%	5,38%	4.209	10
5	Zadar	34,57%	4,60%	11.951	20
6	Portoferraio	33,49%	4,54%	5.636	35
7	Motril-Granada	33,47%	4,27%	5.626	9
8	Palermo	33,40%	4,00%	137.277	62
9	Palamós	29,84%	3,92%	8.884	12
10	Savona	29,29%	4,54%	275.048	77
	TOTAL	-	**56,55%**	**522.648**	**309**

** The port of Ceuta was excluded from the ranking given the threshold appliead – only 8 calls in 2013.*

The picture is quite in the case of the movements in the summer (**Table 6.5**). Several ports register more than 40% of their annual cruise passenger traffic during these months, with five of them exceeding the 50% of the total. As a result traffic during the summer months is less concentrated, with the 10 ports with the highest concentration representing only 13,9% of the share of all MedCruise ports in the summer months.

Table 6.5: Highest Concentration of passenger movements (June/July/August 2013)

No	Port	% share of the port's total traffic	% share of all MedCruise ports Jun-Aug traffic	Total Pax. Jun-Aug	Total Calls Jun-Aug
1	Sochi	60,47%	0,13%	12931	24
2	Thessaloniki	56,03%	0,08%	8175	8
3	Rijeka	55,23%	0,04%	4313	119
4	North Sardinian Ports	54,67%	1,17%	112704	56
5	La Spezia	52,34%	1,16%	111930	79
6	Sibenik	51,53%	0,16%	15347	29
7	Trieste	48,03%	0,35%	33736	n.a
8	Toulon-Var-Provence	47,74%	1,91%	184259	120
9	Dubrovnik/Korcula	44,82%	5,27%	509374	351
10	Kusadasi/Bodrum/Antalya	44,60%	3,60%	348262	268
	TOTAL	-	**13,87%**	**1.341.031**	**1.054**

** The port of Patras was excluded given the threshold – only 2 calls in 2013.*

Table 6.6 presents the ports with the highest concentration of the annual traffic in autumn months. Evidently, such concenteration is observed in very small ports, with the 10 ports representing a very small percentage of the total traffic that takes place in the Med during that period. On the other hand, the three autumn months stand as the period when several ports with few calls per year experience most of their movements. Beyond the ones that are listed in the table, several ports with less than 20 calls per year (Huelva; Tarragona; Mersin; Castellón; Igoumenitsa; Kavala; Brindisi; Sinop) saw the majority of these calls taking place from September to November.

Table 6.6: Highest Concentration (September/October/November 2013)

No	Port	% share of the port's total traffic	% share of all MedCruise ports Sep-Nov traffic	Total Pax. Sep-Nov	Total Calls Sep-Nov
1	Volos	75,64%	0,17%	15.299	20
2	Batumi	69,38%	0,04%	3.165	12
3	Trieste	46,95%	0,37%	32.981	n.a.
4	Alicante	46,01%	0,22%	19.258	14
5	Zadar	45,96%	0,18%	15.889	21
6	Odessa	44,68%	0,47%	41.083	54
7	Constantza	43,53%	0,27%	23.774	31
8	Málaga	43,51%	1,96%	172.901	105
9	Koper	43,38%	0,32%	28.387	22
10	Ravenna	43,10%	0,47%	41.825	36
	TOTAL	-	**4,47%**	**394.562**	**315**

* The following ports excluded given the threshold applied: Huelva (one call); Tarragona (3 calls); Mersin (4); Castellón (3); Igoumenitsa (14), Kavala (14); Brindisi (15); Sinop (16).

Winter cruise numbers are quite different (**Table 6.7**) only one MedCruise port member (Madeira ports) registers during these months more than 30% of its annual passenger movements. One more (Cagliari) registers more than 20%. There are eight more port that register more than 10% of their total annual traffic. Notably, 43,78% of the passenger movements take place in the Meditteraean and its adjoining seas during winter months are the 10-ports that present the major concentration of all. Further analysis of winter cruise is detailed in the next section.

Table 6.7: Highest Concentration (December/January/February 2013)

No	Port	% share of the port's total traffic	% share of all MedCruise ports Dec-Feb traffic	Total Pax. Dec-Feb	Total Calls Dec-Feb
1	Madeira Ports	34,43%	10,21%	165.991	95
2	Cagliari	22,31%	2,00%	32.567	12
3	Palermo	19,80%	5,00%	81.366	28
4	Alanya	18,16%	0,64%	10.431	5
5	Azores	16,83%	0,91%	14.716	11
6	Málaga	15,55%	3,80%	61.786	29
7	Savona	12,64%	7,30%	118.669	30
8	Lisbon	10,93%	3,75%	60.967	38
9	Genoa	10,80%	6,97%	113.392	24
10	Tunisian Ports	10,20%	3,20%	52.109	18
	TOTAL	-	**43,78%**	**711.994**	**290**

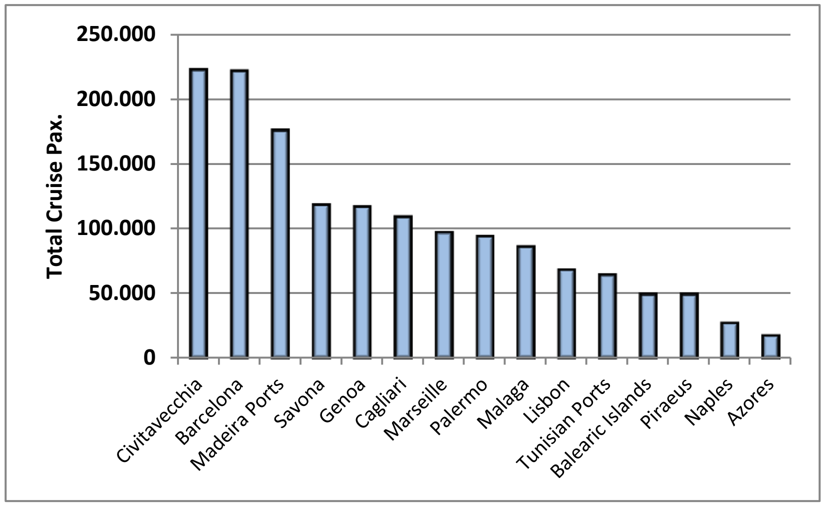
* The port of Ceuta was excluded given the threshold – only 8 calls in 2013.

6.5 Winter Cruise

With the potential of increased winter tourism being at the centre of the attention of several stakeholders, it is worth presenting those ports that recorded the most passenger movements and cruise calls during the winter period that lasted from December 2012 to February 2013 (**Table 6.8**).

The table also provides information on the distribution of passenger movements and cruise calls per month. **Figure 6.6** visualises the total passenger movements in these 15 ports.

Figure 6.6: Major Winter Cruise ports – Total Pax. Winter 2012/13



Out of the 15 major ports during the winter months, the 14 are located in West Med, and only Piraeus in East Med. Civitavecchia tops this list with 223.156 passengers, with Barcelona being the second one with 222.286. Notably while the ports record data of passenger movements that are of less than one thousand movements different, Chivitavecchia reaches this number by double the cruise calls (146) of those happened in Barcelona (71). There are four more ports hosting more than 100.000 passengers, two of them (Madeira Ports and Cagliari) being the ones experiencing substantial movements during winter when comparing with the overall traffic they host per annum.

Table 6.8: Winter Cruise: Major 15 MedCruise Ports (Dec. 2012 / Jan. 2013 / Feb. 2013)

No	Port	Winter 2012/13		Cruise Pax.			Cruise Calls		
		Total Pax.	Total Calls	Dec. 2012	Jan. 2013	Feb. 2013	Dec. 2012	Jan. 2013	Feb. 2013
1	Civitavecchia	223.156	146	87.789	73.425	61.942	111	19	16
2	Barcelona	222.286	71	91.917	71.749	58.620	36	20	15
3	Madeira Ports	176.454	99	82.671	54.624	39.159	49	31	19
4	Savona*	119.062	32	55.000	35.853	28.209	18	8	6
5	Genoa	117.186	25	48.528	36.586	32.072	12	7	6
6	Cagliari	109.559	80	80.555	13.849	15.155	72	4	4
7	Marseille	97.445	25	41.815	32.720	22.910	12	9	4
8	Palermo	94.480	30	33.688	31.844	28.948	12	10	8
9	Malaga	86.580	38	41.478	22.862	22.240	19	10	9
10	Lisbon	68.714	41	35.521	17.162	16.031	21	12	8
11	Tunisian Ports	64.480	16	30.401	17.384	16.695	6	5	5
12	Balearic Islands	49.705	19	15.168	20.823	13.714	8	7	4
13	Piraeus	49.503	17	27.868	15.036	6.599	8	6	3
14	Naples	27.262	12	10.193	9.807	7.262	5	4	3
15	Azores	17.558	13	4.677	8.866	4.015	4	5	4

**Savona data for Dec 2012 are estimation*

There is no winter cruising registered in any of the ports located at the Black Sea, whereas some traffic occurs in the Adriatic - Sibenik, Zadar and Trieste are the only ports in the region registering more than 1% of their total annual cruise traffic during the winter months.

6.6 Seasonality of cruise activities in MedCruise Ports

Table 6.9 presents the seasonality of cruise activities in MedCruise ports based on the shares that each port recorded per trimester, providing a clear picture of the distribution of traffic in each port per period.

Table 6.9: Cruise Pax. shares of MedCruise Ports – Shares per trimester (2013)

	Port	March-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	Alicante	39,14%	7,47%	46,01%	7,39%
	Azores	53,30%	0,00%	29,87%	16,83%
	Balearic Islands	23,29%	39,79%	32,51%	4,41%
	Barcelona	23,78%	36,09%	31,38%	8,74%
	Cagliari	28,86%	16,75%	32,08%	22,31%
	Cartagena	23,67%	33,48%	37,85%	5,00%
	Castellón	21,47%	0,00%	78,53%	0,00%
	Ceuta	47,04%	8,84%	28,93%	15,20%
	Civitavecchia	21,92%	38,14%	30,21%	9,74%
	French Riviera Ports	24,07%	44,50%	30,53%	0,91%
	Genoa	26,57%	32,58%	30,05%	10,80%
	Gibraltar	21,09%	36,99%	34,31%	7,61%
	Huelva	0,00%	0,00%	100,00%	0,00%
	La Spezia	13,96%	52,34%	30,88%	2,82%
	Lisbon	28,35%	19,19%	41,53%	10,93%
	Livorno	22,21%	43,21%	31,03%	3,55%
	Madeira Ports	28,81%	5,46%	31,29%	34,43%
	Málaga	29,06%	11,89%	43,51%	15,55%
	Marseille	27,43%	33,36%	30,49%	8,72%
	Messina	21,81%	40,28%	35,79%	2,12%
	Monaco	21,46%	41,60%	32,38%	4,56%
	Motril-Granada	33,47%	40,32%	26,21%	0,00%
	Naples	20,25%	41,23%	35,72%	2,80%
	North Sardinian Ports	17,28%	54,67%	28,04%	0,00%
	Palamos	29,84%	32,13%	38,04%	0,00%
	Palermo	33,40%	18,38%	28,42%	19,80%
	Portimao	54,77%	4,83%	40,40%	0,00%
	Portoferraio	33,49%	25,24%	41,26%	0,00%
	Savona	29,29%	21,65%	36,42%	12,64%
	Sète	37,97%	40,37%	21,65%	0,00%
	Tarragona	7,74%	6,33%	85,93%	0,00%
	Toulon-Var-Provence	18,80%	47,74%	29,26%	4,20%

	Port	March-May	Jun-Aug	Sept-Nov	Dec-Feb
	Tunisian Ports	27,87%	32,66%	29,28%	10,20%
	Valencia	27,10%	25,60%	42,70%	4,60%
	Valletta	18,03%	38,82%	38,38%	4,77%
Adriatic	Bari	25,35%	41,95%	32,69%	0,00%
	Brindisi	6,81%	23,77%	69,43%	0,00%
	Corfu	19,86%	44,52%	35,20%	0,42%
	Dubrovnik/Korcula	21,34%	44,82%	33,52%	0,32%
	Koper	17,36%	39,25%	43,38%	0,00%
	Kotor	17,19%	44,35%	38,25%	0,21%
	Ravenna	18,27%	38,63%	43,10%	0,00%
	Rijeka	24,95%	55,23%	19,82%	0,00%
	Sibenik	11,01%	51,53%	30,98%	6,48%
	Split	19,06%	41,14%	39,26%	0,54%
	Trieste	2,54%	48,03%	46,95%	2,49%
	Venice	22,03%	43,73%	34,03%	0,21%
	Zadar	34,57%	15,04%	45,96%	4,44%
East-Med	Alanya	24,88%	14,83%	42,14%	18,16%
	Cyprus Ports	20,35%	41,15%	33,61%	4,89%
	Heraklion	17,91%	39,22%	36,03%	6,84%
	Igoumenitsa	8,49%	19,46%	72,04%	0,00%
	Kavala	0,00%	28,83%	71,17%	0,00%
	Kusadasi/Bodrum/Antalya	18,93%	44,60%	36,33%	0,14%
	Mersin	19,68%	0,00%	80,32%	0,00%
	Patras	0,00%	70,41%	29,59%	0,00%
	Piraeus	19,89%	41,28%	36,31%	2,53%
	Souda/Chania	18,98%	44,41%	36,62%	0,00%
	Thessaloniki	1,78%	56,03%	42,19%	0,00%
	Volos	9,41%	14,95%	75,64%	0,00%
Black Sea	Batumi	2,63%	27,99%	69,38%	0,00%
	Constantza	12,91%	43,56%	43,53%	0,00%
	Odessa	16,40%	38,92%	44,68%	0,00%
	Sinop	15,68%	37,77%	46,55%	0,00%
	Sochi	7,67%	61,21%	31,11%	0,00%

APPENDIX I

MedCruise Ports: Total Cruise Passengers 2009-2013

No	Port	Total Cruise Passengers						
		2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
1	Alanya	57.454	36.703	56,5%	42.108	21.924	50.973	12,7%
2	Alicante	41.860	78.825	-46,9%	107.865	75.795	96.615	-56,7%
3	Azores	87.437	102.881	-15,0%	87.009	62.256	50.526	73,1%
4	Balearic Islands	1.541.376	1.341.510	14,9%	1.608.704	1.546.739	1.237.362	24,6%
5	Barcelona	2.599.232	2.408.634	7,9%	2.657.244	2.350.283	2.151.465	20,8%
6	Bari	604.781	618.882	-2,3%	586.848	507.694	567.885	6,5%
7	Batumi	4.562	2.990	52,6%	2.564	3.127	4.127	10,5%
8	Brindisi	4.628	13.507	-65,7%	5.226	28.489	1.745	165,2%
9	Cagliari	146.003	80.555	81,2%	232.118	158.930	112.419	29,9%
10	Cartagena	134.225	83.917	59,9%	88.081	104.294	67.931	97,6%
11	Castellón	1.514	1.292	17,2%	586	1.000	0	-
12	Ceuta	4.605	6.088	-24,4%	4.899	4.220	7.491	-38,5%
13	Civitavecchia	2.538.259	2.393.570	6,0%	2.577.438	1.944.723	1.802.938	40,8%
14	Constantza	54.614	34.010	60,6%	23.878	21.286	8.516	541,3%
15	Corfu	744.651	655.764	13,6%	620.474	596.902	501.764	48,4%
16	Cyprus Ports	271.673	248.356	9,4%	303.086	378.909	320.467	-15,2%
17	Dubrovnik/Korcula	1.136.503	981.448	15,8%	1.009.698	936.115	901.389	26,1%
18	French Riviera Ports	613.218	701.367	-12,6%	666.082	672.235	744.909	-17,7%
19	Genoa	1.050.085	797.239	31,7%	798.521	860.290	671.468	56,4%
20	Gibraltar	278.139	291.620	-4,6%	328.636	305.161	348.199	-20,1%
21	Heraklion	270.020	215.700	25,2%	224.571	305.675	401.292	-32,7%
22	Huelva	296	2.090	-85,8%	650	0	520	-43,1%
23	Igoumenitsa	4.650	1.827	154,5%	156	136	0	-
24	Kavala	6.995	4.323	61,8%	2.708	4.237	8.302	-15,7%
25	Koper	65.434	64.456	1,5%	108.820	37.264	31.021	110,9%
26	Kotor	317.746	246.623	28,8%	189.426	145.185	75.128	322,9%
27	Kusadasi/Bodrum/Antalya	780.804	777.791	0,4%	812.773	662.314	619.747	26,0%
28	La Spezia	213.858	50.239	325,7%	90.408	44.874	31.021	589,4%
29	Lisbon	558.040	522.604	6,8%	502.644	448.497	415.758	34,2%
30	Livorno	736.516	1.037.849	-29,0%	982.928	822.554	795.313	-7,4%
31	Madeira Ports	482.112	593.550	-18,8%	542.789	492.500	435.821	10,6%
32	Málaga	397.416	651.393	-39,0%	638.845	659.123	487.955	-18,6%

No	Port	Total Cruise Passengers						
		2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
33	Marseille	1.188.031	890.020	33,5%	810.490	700.100	631.000	88,3%
34	Mersin	1.697	774	119,3%	416	135	933	81,9%
35	Messina	501.316	438.379	14,4%	500.636	374.441	253.200	98,0%
36	Monaco	249.806	232.921	7,2%	284.914	321.079	235.904	5,9%
37	Motril-Granada	16.809	10.606	58,5%	9.711	2.742	3.460	385,8%
38	Naples	1.175.018	1.297.233	-9,4%	1.297.232	1.139.319	1.154.742	1,8%
39	North Sardinian Ports	206.140	88.672	132,5%	141.632	184.107	234.923	-12,3%
40	Odessa	91.949	72.516	26,8%	68.353	66.010	31.550	191,4%
41	Palamós	29.775	33.400	-10,9%	38.770	27.500	33.554	-11,3%
42	Palermo	410.999	354.499	15,9%	567.049	394.885	478.900	-14,2%
43	Patras	1.264	374	238,0%	2.257	1.059	605	108,9%
44	Piraeus	1.302.581	1.198.047	8,7%	1.485.828	1.145.402	1.221.633	6,6%
45	Portimao	20.141	18.506	8,8%	44.841	33.843	23.588	-14,6%
46	Portoferraio	16.828	23.099	-27,1%	19.273	24.473	14.509	16,0%
47	Ravenna	97.041	100.987	-3,9%	156.374	9.153	10.328	839,6%
48	Rijeka	7.809	9.539	-18,1%	15.120	14.172	14.500	-46,1%
49	Savona	939.038	810.097	15,9%	948.459	780.672	709.861	32,3%
50	Sète	11.084	8.584	29,1%	21.348	5.686	2.787	297,7%
51	Sevastopol	35.000	23.400	49,6%	26.066	16.671	35.447	-1,3%
52	Sibenik	29.784	15.355	94,0%	12.860	11.624	10.269	190,0%
53	Sinop	6.331	4.623	36,9%	4.140	5.266	8.436	-25,0%
54	Sochi	21.384	20.080	6,5%	13.678	22.509	13.467	58,8%
55	Souda/Chania	124.205	129.087	-3,8%	158.118	11.509	7.720	1.508,9%
56	Split	189.107	245.451	-23,0%	181.963	172.378	131.833	43,4%
57	Tarragona	1.421	153	828,8%	752	3.148	3.139	-54,7%
58	Tenerife Ports	794.151	885.623	-10,3%	828.590	740.022	580.566	36,8%
59	Thessaloniki	14.591	8.004	82,3%	11.520	16.036	10.965	33,1%
60	Toulon-Var-Provence	385.971	346.795	11,3%	221.842	310.460	175.240	120,3%
61	Trieste	70.244	70.847	-0,9%	28.251	15.577	6.314	1.012,5%
62	Tunisian Ports	511.065	528.708	-3,3%	313.267	895.403	752.246	-32,1%
63	Valencia	473.114	599.130	-21,0%	378.463	253.743	184.909	155,9%
64	Valletta	477.759	604.014	-20,9%	556.551	493.748	441.913	8,1%
65	Venice	1.815.823	1.775.944	2,2%	1.786.416	1.617.011	1.420.980	27,8%
66	Volos	20.227	11.926	69,6%	72.796	21.435	38.592	-47,6%
67	Zadar	34.575	20.640	67,5%	28.677	19.622	14.052	146,1%

APPENDIX II

MedCruise Ports: Total Cruise Calls 2009-2013

No	Port	Total Cruise Calls						
		2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
1	Alanya	53	31	71,0%	35	30	74	-28,4%
2	Alicante	32	43	-25,6%	58	46	61	-47,5%
3	Azores	92	122	-24,6%	94	60	67	37,3%
4	Balearic Islands	699	632	10,6%	613	723	630	11,0%
5	Barcelona	835	774	7,9%	881	841	799	4,5%
6	Bari	171	206	-17,0%	209	152	182	-6,0%
7	Batumi	20	11	81,8%	8	10	10	100,0%
8	Brindisi	15	36	-58,3%	7	38	7	114,3%
9	Cagliari	94	72	30,6%	152	77	55	70,9%
10	Cartagena	115	76	51,3%	77	77	49	134,7%
11	Castellón	3	2	50,0%	2	2	0	-
12	Ceuta	8	10	-20,0%	10	12	17	-52,9%
13	Civitavecchia	959	1.040	-7,8%	1.002	900	793	20,9%
14	Constantza	69	41	68,3%	43	58	26	165,4%
15	Corfu	480	485	-1,0%	453	430	375	28,0%
16	Cyprus Ports	255	247	3,2%	454	378	325	-21,5%
17	Dubrovnik/Korcula	843	659	27,9%	681	705	810	4,1%
18	French Riviera Ports	420	387	8,5%	427	496	497	-15,5%
19	Genoa	298	213	39,9%	252	261	238	25,2%
20	Gibraltar	179	173	3,5%	187	175	238	-24,8%
21	Heraklion	177	156	13,5%	209	247	287	-38,3%
22	Huelva	1	3	-66,7%	1	0	2	-50,0%
23	Igoumenitsa	14	4	250,0%	1	1	0	-
24	Kavala	14	10	40,0%	10	11	26	-46,2%
25	Koper	54	46	17,4%	78	54	53	1,9%
26	Kotor	387	343	12,8%	316	309	260	48,8%
27	Kusadasi/Bodrum/Antalya	657	683	-3,8%	707	695	733	-10,4%
28	La Spezia	149	72	106,9%	82	44	33	351,5%
29	Lisbon	353	314	12,4%	330	299	294	20,1%
30	Livorno	420	465	-9,7%	497	508	458	-8,3%
31	Madeira Ports	291	339	-14,2%	309	295	277	5,1%
32	Málaga	248	293	-15,4%	311	321	301	-17,6%

No	Port	Total Cruise Calls						
		2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
33	Marseille	447	354	26,3%	420	335	316	41,5%
34	Mersin	4	2	100,0%	2	2	1	300,0%
35	Messina	228	187	21,9%	257	217	145	57,2%
36	Monaco	221	185	19,5%	214	235	189	16,9%
37	Motril-Granada	28	27	3,7%	25	18	16	75,0%
38	Naples	440	527	-16,5%	527	537	613	-28,2%
39	North Sardinian Ports	117	54	116,7%	70	93	114	2,6%
40	Odessa	148	121	22,3%	122	132	58	155,2%
41	Palamós	38	26	46,2%	36	31	32	18,8%
42	Palermo	189	156	21,2%	250	184	194	-2,6%
43	Patras	2	3	-33,3%	3	2	2	0,0%
44	Piraeus	711	763	-6,8%	936	799	877	-18,9%
45	Portimao	42	36	16,7%	59	52	38	10,5%
46	Portoferraio	102	89	14,6%	66	81	59	72,9%
47	Ravenna	74	67	10,4%	79	19	26	184,6%
48	Rijeka	221	276	-19,9%	269	254	254	-13,0%
49	Savona	241	207	16,4%	232	174	185	30,3%
50	Sète	28	20	40,0%	24	16	8	250,0%
51	Sevastopol	115	58	98,3%	111	42	50	130,0%
52	Sibenik	100	84	19,0%	113	109	90	11,1%
53	Sinop	18	12	50,0%	11	8	15	20,0%
54	Sochi	49	27	81,5%	29	27	24	104,2%
55	Souda/Chania	47	54	-13,0%	72	21	20	135,0%
56	Split	225	269	-16,4%	252	257	232	-3,0%
57	Tarragona	3	1	200,0%	2	2	11	-72,7%
58	Tenerife Ports	520	534	-2,6%	461	387	347	49,9%
59	Thessaloniki	18	11	63,6%	19	22	48	-62,5%
60	Toulon-Var-Provence	266	238	11,8%	84	235	159	67,3%
61	Trieste	32	43	-25,6%	21	27	15	113,3%
62	Tunisian Ports	201	227	-11,5%	135	406	358	-43,9%
63	Valencia	223	204	9,3%	203	157	143	55,9%
64	Valletta	277	312	-11,2%	313	280	265	4,5%
65	Venice	548	661	-17,1%	654	629	543	0,9%
66	Volos	31	21	47,6%	61	33	43	-27,9%
67	Zadar	69	59	16,9%	98	92	72	-4,2%

APPENDIX III

MedCruise Ports: Total Home IN/OUT Passengers 2009-2013

No	Port	Total Home In/Out Passengers						
		2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
1	Alanya	0	0	-	0	0	0	-
2	Alicante	0	286	-100,0%	1.682	0	0	-
3	Azores	473	1.487	-68,2%	1.161	603	711	-33,5%
4	Balearic Islands	490.631	466.385	5,2%	587.048	571.209	447.853	9,6%
5	Barcelona	1.506.286	1.438.383	4,7%	1.499.534	1.265.613	1.180.239	27,6%
6	Bari	165.031	196.423	-16,0%	166.690	203.145	228.259	-27,7%
7	Batumi	0	0	-	0	0	0	-
8	Brindisi	119	143	-16,8%	1.007	0	0	-
9	Cagliari	5.731	0	-	0	0	0	-
10	Cartagena	0	0	-	26	10	0	-
11	Castellón	0	0	-	0	0	0	-
12	Ceuta	0	0	-	0	0	0	-
13	Civitavecchia	989.998	920.612	7,5%	972.850	643.772	720.451	37,4%
14	Constantza	388	0	-	0	0	0	-
15	Corfu	70.735	64.165	10,2%	53.909	55.330	51.259	38,0%
16	Cyprus Ports	100.905	90.511	11,5%	91.905	106.678	95.720	5,4%
17	Dubrovnik/Korcula	24.840	24.632	0,8%	24.300	20.026	13.689	81,5%
18	French Riviera Ports	56.523	33.549	68,5%	47.684	44.795	36.980	52,8%
19	Genoa	649.282	530.872	22,3%	562.492	571.582	436.385	48,8%
20	Gibraltar	0	0	-	0	0	0	-
21	Heraklion	55.443	47.594	16,5%	6.756	45.945	167.119	-66,8%
22	Huelva	0	0	-	0	0	0	-
23	Igoumenitsa	0	0	-	0	0	0	-
24	Kavala	0	0	-	0	0	0	-
25	Koper	56	164	-65,9%	5.315	6.409	7.363	-99,2%
26	Kotor	0	1.774	-100,0%	0	0	0	-
27	Kusadasi/Bodrum/Antalya	190.087	167.424	13,5%	143.913	114.657	157	120.974,5%
28	La Spezia	1.507	0	-	0	0	0	-
29	Lisbon	50.834	44.006	15,5%	49.364	52.613	83.873	-39,4%
30	Livorno	4.991	70.525	-92,9%	42.122	46.333	40.348	-87,6%
31	Madeira Ports	3.975	11.889	-66,6%	15.832	9.841	10.388	-61,7%
32	Málaga	71.249	220.217	-67,6%	221.295	239.867	78.020	-8,7%

No	Port	Total Home In/Out Passengers						
		2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
33	Marseille	381.318	313.322	21,7%	264.703	268.451	175.000	117,9%
34	Mersin	0	0	-	0	0	0	-
35	Messina	36.190	29.413	23,0%	38.579	21.862	9.822	268,5%
36	Monaco	35.909	28.280	27,0%	18.887	32.164	24.283	47,9%
37	Motril-Granada	0	0	-	0	0	0	-
38	Naples	110.689	160.219	-30,9%	160.209	164.238	145.258	-23,8%
39	North Sardinian Ports	0	0	-	0	0	0	-
40	Odessa	9.389	10.448	-10,1%	1.588	0	0	-
41	Palamós	0	0	-	0	0	0	-
42	Palermo	42.869	37.109	15,5%	59.013	51.765	66.449	-35,5%
43	Patras	0	0	-	0	0	0	-
44	Piraeus	308.705	329.168	-6,2%	454.284	426.147	415.260	-25,7%
45	Portimao	88	257	-65,8%	587	757	1.250	-93,0%
46	Portoferraio	0	0	-	0	0	0	-
47	Ravenna	16.827	36.313	-53,7%	48.343	0	0	-
48	Rijeka	7.124	9.539	-25,3%	15.120	14.172	14.500	-50,9%
49	Savona	670.031	638.706	4,9%	719.219	603.448	571.746	17,2%
50	Sète	8	0	-	0	0	0	-
51	Sevastopol	0	0	-	0	0	0	-
52	Sibenik	0	0	-	0	0	2	-100,0%
53	Sinop	0	0	-	0	0	0	-
54	Sochi	0	0	-	606	2.454	0	-
55	Souda/Chania	0	0	-	0	0	0	-
56	Split	1.301	1.085	19,9%	0	0	2.754	-52,8%
57	Tarragona	0	0	-	0	0	0	-
58	Tenerife Ports	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
59	Thessaloniki	6	7	-14,3%	40	5.048	27.976	-100,0%
60	Toulon-Var-Provence	27.087	22.483	20,5%	6.618	16.916	14.253	90,0%
61	Trieste	52.297	55.186	-5,2%	18.877	2.000	2.630	1.888,5%
62	Tunisian Ports	0	1.165.361	-100,0%	0	0	0	-
63	Valencia	74.348	118.897	-37,5%	114.981	79.754	97.189	-23,5%
64	Valletta	102.034	94.880	7,5%	111.780	29.362	28.324	260,2%
65	Venice	1.512.596	1.444.100	4,7%	1.448.622	1.312.895	1.170.298	29,2%
66	Volos	0	0	-	0	0	0	-
67	Zadar	1.636	769	112,7%	2.183	4.934	1.766	-7,4%

APPENDIX IV

MedCruise Ports: Total Transit Passengers 2009-2013

No	Port	Total Transit Passengers						
		2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
1	Alanya	57.454	36.703	56,5%	42.108	21.924	50.973	12,7%
2	Alicante	41.860	78.539	-46,7%	106.183	75.795	96.615	-56,7%
3	Azores	86.964	101.394	-14,2%	85.848	61.653	49.815	74,6%
4	Balearic Islands	1.050.745	875.125	20,1%	1.021.656	975.530	789.509	33,1%
5	Barcelona	1.092.966	970.251	12,6%	1.157.710	1.084.670	971.226	12,5%
6	Bari	439.750	422.459	4,1%	420.158	304.549	339.626	29,5%
7	Batumi	4.562	2.990	52,6%	2.564	3.127	4.127	10,5%
8	Brindisi	4.509	13.364	-66,3%	4.219	28.489	1.745	158,4%
9	Cagliari	140.272	80.555	74,1%	232.118	158.930	112.419	24,8%
10	Cartagena	134.225	83.917	59,9%	88.055	104.284	67.931	97,6%
11	Castellón	1.514	1.292	17,2%	586	1.000	0	-
12	Ceuta	4.605	6.088	-24,4%	4.899	4.220	7.491	-38,5%
13	Civitavecchia	1.548.261	1.472.958	5,1%	1.604.588	1.300.951	1.082.487	43,0%
14	Constantza	54.226	30.739	76,4%	23.878	21.286	8.516	536,8%
15	Corfu	673.916	591.599	13,9%	566.565	541.572	450.505	49,6%
16	Cyprus Ports	170.768	157.845	8,2%	211.181	272.231	224.747	-24,0%
17	Dubrovnik/Korcula	1.111.663	956.816	16,2%	985.398	916.089	887.700	25,2%
18	French Riviera Ports	556.695	667.818	-16,6%	618.398	627.440	707.929	-21,4%
19	Genoa	400.803	266.367	50,5%	236.029	288.708	235.083	70,5%
20	Gibraltar	278.139	291.620	-4,6%	328.636	305.161	348.199	-20,1%
21	Heraklion	214.577	168.106	27,6%	217.815	259.730	234.173	-8,4%
22	Huelva	296	2.090	-85,8%	650	0	520	-43,1%
23	Igoumenitsa	4.650	1.827	154,5%	156	136	0	-
24	Kavala	6.995	4.323	61,8%	2.708	4.237	8.302	-15,7%
25	Koper	65.378	64.292	1,7%	103.505	30.855	23.658	176,3%
26	Kotor	317.746	244.849	29,8%	189.426	145.185	75.128	322,9%
27	Kusadasi/Bodrum/Antalya	583.506	610.367	-4,4%	668.860	547.657	619.590	-5,8%
28	La Spezia	212.351	50.239	322,7%	90.408	44.874	31.021	584,5%
29	Lisbon	507.206	478.598	6,0%	453.280	395.884	331.885	52,8%
30	Livorno	731.525	967.324	-24,4%	940.806	776.221	754.965	-3,1%
31	Madeira Ports	478.137	581.661	-17,8%	526.957	482.659	425.433	12,4%
32	Málaga	326.167	431.176	-24,4%	417.550	419.256	409.935	-20,4%

No	Port	Total Transit Passengers						
		2013	2012	Variation 2013/2012	2011	2010	2009	Variation 2013/2009
33	Marseille	806.713	576.698	39,9%	545.787	431.649	456.000	76,9%
34	Mersin	1.697	774	119,3%	416	135	933	81,9%
35	Messina	465.126	408.966	13,7%	462.057	352.579	243.378	91,1%
36	Monaco	213.897	204.641	4,5%	266.027	288.915	211.621	1,1%
37	Motril-Granada	16.809	10.606	58,5%	9.711	2.742	3.460	385,8%
38	Naples	1.064.329	1.137.014	-6,4%	1.137.023	975.081	1.154.742	-7,8%
39	North Sardinian Ports	206.140	88.672	132,5%	141.632	184.107	234.923	-12,3%
40	Odessa	82.560	62.068	33,0%	66.765	66.010	31.550	161,7%
41	Palamós	29.775	33.400	-10,9%	38.770	27.500	33.554	-11,3%
42	Palermo	368.130	317.390	16,0%	508.036	343.120	412.451	-10,7%
43	Patras	1.264	374	238,0%	2.257	1.059	605	108,9%
44	Piraeus	993.876	868.879	14,4%	1.031.544	719.255	806.373	23,3%
45	Portimao	20.053	18.249	9,9%	44.254	33.086	22.338	-10,2%
46	Portoferraio	16.828	23.099	-27,1%	19.273	24.473	14.509	16,0%
47	Ravenna	80.214	64.674	24,0%	108.031	9.153	10.328	676,7%
48	Rijeka	685	0	-	0	0	0	-
49	Savona	269.007	171.391	57,0%	229.240	177.232	138.108	94,8%
50	Sète	11.076	8.584	29,0%	21.348	5.686	2.787	297,4%
51	Sevastopol	35.000	23.400	49,6%	26.066	16.671	35.447	-1,3%
52	Sibenik	29.784	15.355	94,0%	12.860	11.624	10.267	190,1%
53	Sinop	6.331	4.623	36,9%	4.140	5.266	8.436	-25,0%
54	Sochi	21.384	20.080	6,5%	13.072	20.055	13.467	58,8%
55	Souda/Chania	124.205	129.087	-3,8%	158.118	11.509	7.720	1.508,9%
56	Split	187.806	244.366	-23,1%	181.963	172.378	129.079	45,5%
57	Tarragona	1.421	153	828,8%	752	3.148	3.139	-54,7%
58	Tenerife Ports	n.a.	n.a.	-	n.a.	n.a.	n.a.	-
59	Thessaloniki	14.585	7.997	82,4%	11.480	10.988	10.965	33,0%
60	Toulon-Var-Provence	255.824	324.312	-21,1%	215.224	293.544	160.987	58,9%
61	Trieste	17.947	15.661	14,6%	9.374	13.577	3.684	387,2%
62	Tunisian Ports	511.065	1.165.361	-56,1%	313.267	895.403	752.246	-32,1%
63	Valencia	398.766	480.233	-17,0%	263.482	173.989	87.720	354,6%
64	Valletta	375.785	509.134	-26,2%	444.771	464.386	413.589	-9,1%
65	Venice	303.227	331.844	-8,6%	337.794	304.116	250.682	21,0%
66	Volos	20.227	11.926	69,6%	72.796	21.435	38.592	-47,6%
67	Zadar	32.939	19.871	65,8%	26.494	14.688	12.286	168,1%

APPENDIX V

MedCruise Ports per Size Category 2009-2013

MedCruise Ports by Size Category					
Category A (>130.000 pax.)			Category B (≤130.000 pax.)		
No	**Port**	**Cruise Pax. 2013**	**No**	**Port**	**Cruise Pax. 2013**
1	Balearic Islands	1.541.376	1	Alanya	57.454
2	Barcelona	2.599.232	2	Alicante	41.860
3	Bari	604.781	3	Azores	87.437
4	Cagliari	146.003	4	Batumi	4.562
5	Cartagena	134.225	5	Brindisi	4.628
6	Civitavecchia	2.538.259	6	Castellón	1.514
7	Corfu	744.651	7	Ceuta	4.605
8	Cyprus Ports	271.673	8	Constantza	54.614
9	Dubrovnik/Korcula	1.136.503	9	Egyptian Ports	n.a.
10	French Riviera Ports	613.218	10	Huelva	296
11	Genoa	1.050.085	11	Igoumenitsa	4.650
12	Gibraltar	278.139	12	Kavala	6.995
13	Heraklion	270.020	13	Koper	65.434
14	Kotor	317.746	14	Lattakia	n.a.
15	Kusadasi/Bodrum/Antalya	780.804	15	Mersin	1.697
16	La Spezia	213.858	16	Motril-Granada	16.809
17	Lisbon	558.040	17	Odessa	91.949
18	Livorno	736.516	18	Palamós	29.775
19	Madeira Ports	482.112	19	Patras	1.264
20	Málaga	397.416	20	Portimao	20.141
21	Marseille	1.188.031	21	Portoferraio	16.828
22	Messina	501.316	22	Ravenna	97.041
23	Monaco	249.806	23	Rijeka	7.809
24	Naples	1.175.018	24	Rize	0
25	North Sardinian Ports	206.140	25	Sète	11.084
26	Palermo	410.999	26	Sevastopol	35.000
27	Piraeus	1.302.581	27	Sibenik	29.784
28	Savona	939.038	28	Sinop	6.331
29	Split	189.107	29	Sochi	21.384
30	Tenerife Ports	794.151	30	Souda/Chania	124.205
31	Toulon-Var-Provence	385.971	31	Tarragona	1.421
32	Tunisian Ports	511.065	32	Thessaloniki	14.591
33	Valencia	473.114	33	Trieste	70.244
34	Valletta	477.759	34	Volos	20.227
35	Venice	1.815.823	35	Zadar	34.575

NOTE: *Egyptian Ports Cruise Pax. 2012: 63.833; Lattakia Cruise Pax. 2012: 1.459*

The MedCruise Team

The report has been produced by the MedCruise Secretariat based on data provided by the port members of the MedCruise Association.

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MEDCRUISE

THE ASSOCIATION
OF MEDITERRANEAN
CRUISE PORTS