MEDCRUISE

The Association of Mediterranean Cruise Ports

a MedCruise report

Cruise Activities in MedCruise Ports

2017 STATISTICS

Cruise Activities
in MedCruise Ports

2017
STATISTICS

A MedCruise Report

Produced by
Mr. Jordi Caballé, MedCruise Secretary General
Mrs. Kleopatra Arapi, MedCruise Secretariat
Mrs. Aimilia Papachristou, MedCruise Secretariat

Coordinated by:
Mr. Airam Díaz Pastor, MedCruise President
Mrs. Cristina De Gregori, MedCruise Director of Projects and Studies

Published in: Piraeus, Greece
First Published: March 2018

The Association of Mediterranean Cruise Ports

MedCruise Association
10 Akti Miaouli Str., 185 39 Piraeus, Greece
E-mail: secretariat@medcruise.com
Website www.medcruise.com / www.medcruise.cn

Version based on previous editions by Secretariat team.

PREFACE

I am proud to introduce to the cruise world the 2018 edition of the MedCruise statistical report *Cruise Activities in MedCruise ports: Statistics 2017*.

Published in March 2018, this report is first presented to the cruise world during the annual Seatrade Cruise Global meeting –to be held in Fort Lauderdale, US– and provides a well-recognised statistical analysis to the industry. This annual report reveals the previous year cruise activity and the mid-term trends in the Med and its adjoining seas, enabling an understanding of the present and future challenges.

It is an honour, as the President of such a great Association, to thank all members that contributed in making this publication possible and congratulate the MedCruise Secretariat for their excellent contribution in presenting the work of our Association. *Cruise Activities in MedCruise ports: Statistics 2017* is among the flagship publications of MedCruise Association, being one of the studies conducted or commissioned by MedCruise to analyse the cruise industry in the second biggest region of the world.

This report details information on MedCruise membership, and presents annual figures and trends of the four regions that compose our Association –West Med, Adriatic, East Med and Black Sea. It also contains analysis per port size and seasonality, as well as comparisons with data recorded and provided by our members the previous year.

MedCruise memberships welcomed 25,9 million cruise passenger movements and 12.139 cruise calls in 2017. The statistics reveal the positive features in several parts of the Med and the adjoining seas, despite the fact that some ports have experienced a decline due to the economic, social and/or political instability experienced in some regions.

In this report, the Association reveals the strength of being together, ports and associate members, to the wealth of our local communities in order to achieve a sustainable cruise growth. The President, the Board of Directors and the Secretariat support members in their efforts to invest and create more business activities in the MedCruise region and are committed to develop the strategy voted by the MedCruise General Assembly in October 2017 to enhance the Association position in the cruise industry.

Once again, I would like to highlight the extraordinary work that our members have done in 2017 in collaboration with other stakeholders and, above all, encourage them to continue working together and generating new opportunities with MedCruise for the future.

#PortsTogether

Airam Díaz
MedCruise President

MEDCRUISE

The Association of Mediterranean Cruise Ports

MedCruise

Bringing the Med together

The Association of Mediterranean Cruise Ports promotes the cruise industry and unites the ports of 'Mare Nostrum' and its adjoining seas.

www.medcruise.com

Table of Contents

List of Figures and Tables

I. MEDCRUISE STATISTICS

II. CRUISE ACTIVITY TRENDS

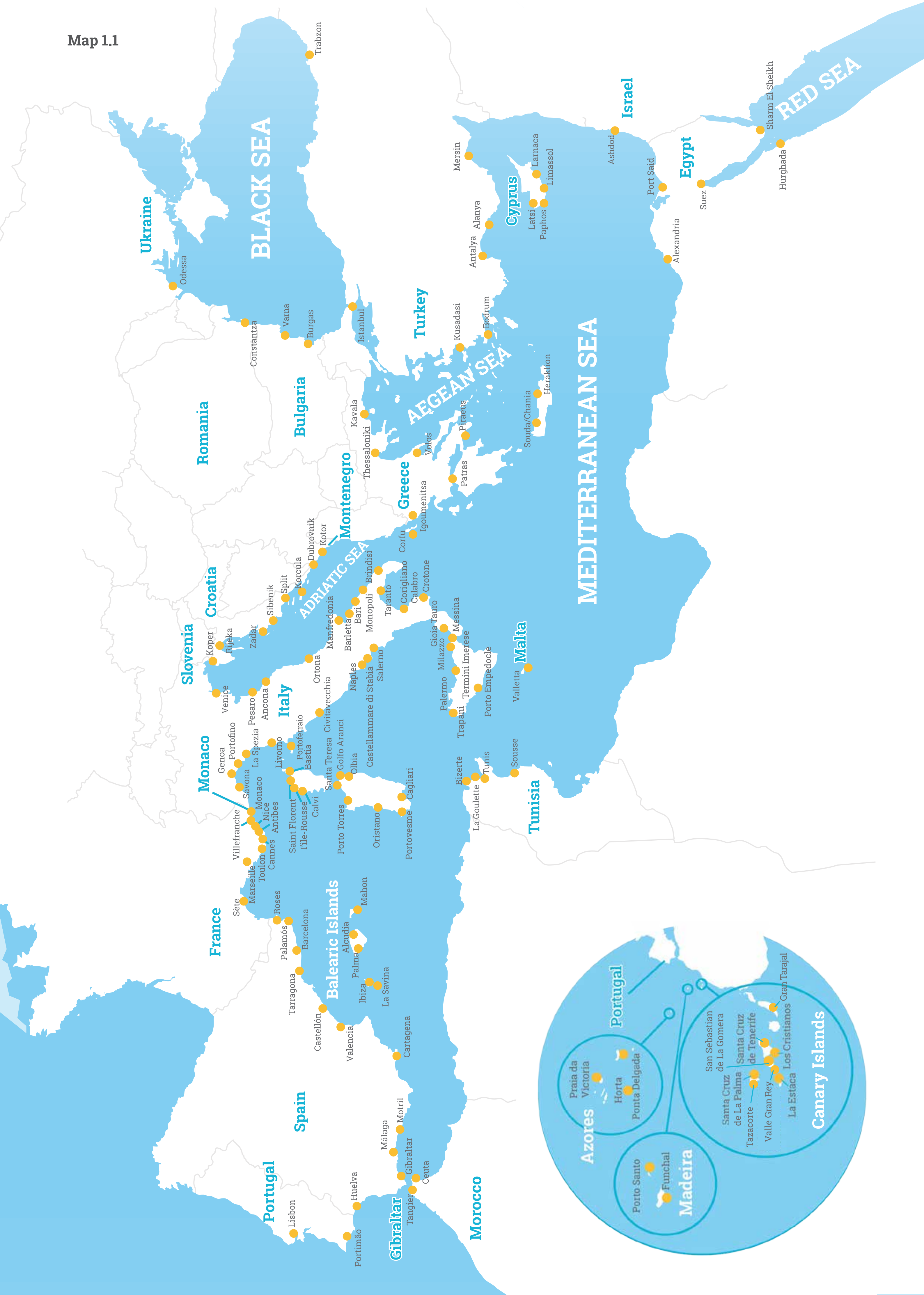
III. TRENDS IN THE MEDITERRANEAN AND ITS ADJOINING SEAS

IV. ANALYSIS PER MEDCRUISE REGION

V. ANALYSIS PER MEDCRUISE PORT SIZE

VI. SEASONALITY ANALYSIS

Map 1.1


BLACK SEA
MEDITERRANEAN SEA
AEGEAN SEA
ADRIATIC SEA
RED SEA
Ukraine
Romania
Bulgaria
Turkey
Cyprus
Israel
Egypt
Greece
Montenegro
Croatia
Slovenia
Italy
Monaco
France
Spain
Portugal
Gibraltar
Morocco
Tunisia
Malta
Balearic Islands
Azores
Madeira
Canary Islands
Trabzon
Odessa
Constantza
Varna
Burgas
Istanbul
Kavala
Thessaloniki
Volos
Piraeus
Patras
Kusadasi
Bodrum
Heraklion
Souda/Chania
Mersin
Alanya
Antalya
Larnaca
Limassol
Latsi
Paphos
Ashdod
Port Said
Alexandria
Suez
Sharm El Sheikh
Hurghada
Igoumenitsa
Corfu
Kotor
Dubrovnik
Korcula
Split
Sibenik
Zadar
Rijeka
Koper
Venice
Ancona
Pesaro
Ortona
Manfredonia
Barletta
Bari
Monopoli
Brindisi
Taranto
Corigliano Calabro
Crotone
Gioia Tauro
Messina
Milazzo
Termini Imerese
Palermo
Trapani
Porto Empedocle
Valletta
Naples
Castellammare di Stabia
Salerno
Civitavecchia
Portoferraio
Livorno
La Spezia
Portofino
Genoa
Savona
Monaco
Nice
Antibes
Cannes
Villefranche
Toulon
Marseille
Sète
Bastia
Saint Florent
l'île-Rousse
Calvi
Santa Teresa
Golfo Aranci
Olbia
Porto Torres
Oristano
Cagliari
Portovesme
Bizerte
La Goulette
Tunis
Sousse
Roses
Palamós
Barcelona
Tarragona
Castellón
Valencia
Cartagena
Mahon
Alcudia
Palma
Ibiza
La Savina
Motril
Málaga
Gibraltar
Ceuta
Tangier
Huelva
Portimão
Lisbon
Praia da Victoria
Horta
Ponta Delgada
Porto Santo
Funchal
San Sebastian de La Gomera
Santa Cruz de Tenerife
Santa Cruz de La Palma
Tazacorte
Valle Gran Rey
Los Cristianos
La Estaca
Gran Tarajal

MedCruise Statistics

1.1 MedCruise is the Association of Mediterranean cruise ports and its adjoining seas since 1996.

MedCruise mission is to promote the cruise industry and assist its members in benefiting from the growth of the cruise industry by providing networking, promotional, and professional development opportunities. The Association not only assists its member ports, but also their partners who have enrolled in MedCruise as associate members.

Today, the association has grown to 70 members from 20 countries and 3 continents representing more than 100 ports around the Mediterranean region, including the Black Sea, the Red Sea, and the Near Atlantic; plus 32 associate members, representing associations, tourist boards, ship/port agents, and other cruise industry companies.

Among the objectives of MedCruise are to promote the Mediterranean area as a cruise destination; increase the efficiency of cruise member ports by exchanging information on industry developments and best practices; formulate common positions on questions of common interest; develop good relations among all cruise industry; and provide its members marketing, networking, and professional development tools and forums.

Since 2014, MedCruise is a member of the Network of Cruise and Ferry Ports, set up within the European Sea Ports Organisation (ESPO), and member of the EU Ports Forum since last year, among other EU initiatives.

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 Mediterranean and its adjoining seas.

The Association serves ports of different sizes from diverse regions, countries, and cultures in one of the most dynamic cruise regions in the world – a region that offers multiple opportunities for cruising.

1.2 The Report

The annual MedCruise statistical report "Cruise activities in MedCruise ports: Statistics 2017" is among the flagship publications of the Association, as it details the actual picture of cruise activities in the Mediterranean and its adjoining seas over the past year, it reveals the trends and enables the understanding of the present challenges. It also facilitates the adjustment of MedCruise ports and associate members to contemporary market structures.

With cruise being a dynamic industry that demonstrates a remarkable capacity for growth and change, this report also provides an authoritative and most useful database and analysis of the trends in the second biggest region of the world, the Med and its adjoining seas.

MedCruise statistical report forms part of a series of studies conducted or commissioned by MedCruise that examine issues relevant to cruise ports. By advancing information exchanges on industry developments, organisation, administration and management and promoting best practices, these studies increase the efficiency of MedCruise member ports and associate members. Benchmarking and sharing of knowledge on several topics, including operational, regulatory and financial issues, are core parts of the life of the Association. These studies are also discussed jointly with cruise lines during the MedCruise General Assemblies - allowing MedCruise membership to better understand the findings, identify the responses, and enjoy the most benefits possible.

The present edition of "*Cruise activities in MedCruise ports: Statistics 2017*" has been prepared by the Secretariat, and analyses the statistical data recorded and reported by the members of the Association.

1.3 MedCruise Membership

MedCruise membership continues to grow in numbers, while it also expands geographically. Today, it spreads in 20 countries and three different continents: Africa, Asia, and Europe **(Table 1.1)**.

3 continents 20 countries

Table 1.1: Countries represented in MedCruise

Bulgaria	Israel	Romania
Croatia	Italy	Slovenia
Cyprus	Malta	Spain
Egypt	Monaco	Tunisia
France	Montenegro	Turkey
Gibraltar	Morocco	Ukraine
Greece	Portugal	

The Association currently has 70 members, representing more than 100 ports in the Mediterranean region, including the Black Sea, the Red Sea and the Near Atlantic. Four distinctive regions are identified within the broader region. These are West Med, Adriatic Sea, East Med, and Black Sea **(Table 1.2)**.

4 regions 100+ ports

Table 1.2: MedCruise Port Members

WEST MED			ADRIATIC SEA
Azores	Gioia Tauro	Palermo	Ancona
Balearic Islands	Huelva	Portimao	Bari / Brindisi
Barcelona	La Spezia	Portoferraio	Corfu
Bastia / N.Corsica	Lisbon	Portofino	Dubrovnik
Canarian Ports	Livorno	Sardinian Ports	Koper
Cartagena	Madeira Ports	Sete	Kotor
Castellon	Malaga	Tangier	Rijeka
Ceuta	Marseille	Tarragona	Sibenik
Civitavecchia	Messina	Tenerife Ports	Split
Costa Brava Cruise Ports	Monaco	Toulon-Var Provence	Taranto
French Riviera Ports	Motril-Granada	Tunisian Ports	Venice
Genoa / Savona	Naples / Salerno /	Valencia	Zadar
Gibraltar	Castellamare di Stabia	Valletta	

EAST MED		BLACK SEA
Alanya	Kusadasi / Bodrum / Antalya	Burgas
Ashdod	Mersin	Constantza
Cyprus Ports	Patras	Odessa
Egyptian Ports	Piraeus	Trabzon
Heraklion	Souda / Chania	Varna
Igoumenitsa	Thessaloniki	
Istanbul	Volos	
Kavala		

32 associate members

In many cases, members are entities that manage and represent more than one port in the same region, which reflects the organisational heterogeneity of port governance and organisation. The total amount of ports that make up the MedCruise family are well above 100.

Moreover, 32 associate members, representing tourist boards, ship agents, port agents as well as other cruise-related-companies, also share the benefits of being part of the MedCruise family. MedCruise is in the process of a major upgrade of its associate members program, aiming to increase the prospect of the respective destinations. The list of the Associate members as of 1st January 2018 is detailed in **Table 1.3**.

Table 1.3: MedCruise Associate Members

ASSOCIATE MEMBERS		
Alfaship	Iberoservice	Patronat de Turisme Costa Brava
Allegra Montenegro	Intercruises	Perez y Cia
Bermello Ajamil & Partners Europe (B&A)	Kuoni Destination Management	Salamis Shipping
Cemar	Kvarner County Tourism Office	Samer & Co Shipping
Council of Sant Carles de la Rapita	Kyriakakis Travel S.A.	SNEAL
County Port Authority of Dubrovnik	La Goulette Cruise Terminal	Transcoma Cruise & Travel
Cruise Services Monaco	Mediterranean Unique Experience	Tura Turizm
D'Alessandro Travel	Medov S.r.l	Turisme de Barcelona
Donomis Cruise Services	MH Bland	Var Provence Cruise Club
DP World Limassol	MMS	World Synergy Travel
Hugo Trumpy Srl	Navigator Travel & Tourist Services	

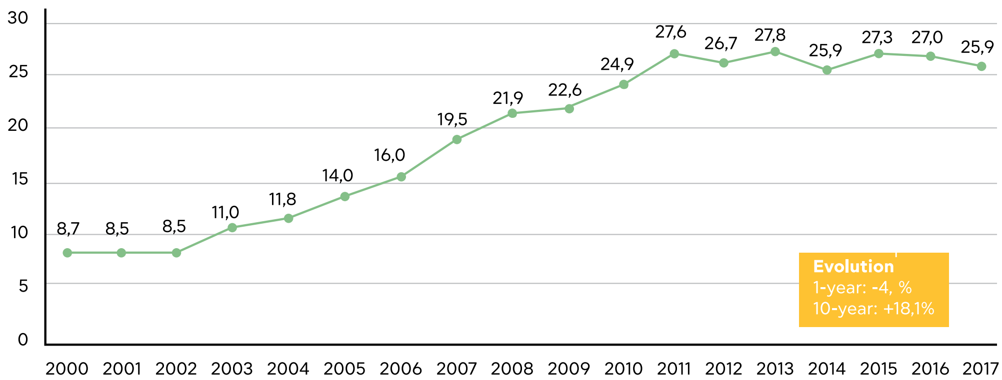
An active program for cruise ports partners

1.4 Evolution of Cruise Activity in MedCruise ports

The total number of cruise passenger visits at MedCruise ports during 2017 reached 25,9 million. This figure has decreased 4,1% compared to the previous year – the cruise passenger movements that took place in 2016 at the same ports were 27 million **(Figure 1.1)**.

Despite of this decrease, long-term trends show that cruise activities in the Mediterranean and its adjoining seas are performing quite well, reaching an increase up to 18,3% in cruise passenger movements for the last 10 years period (2008-2017).

Figure 1.1: Cruise Passenger Movements in MedCruise ports (2000-2017)



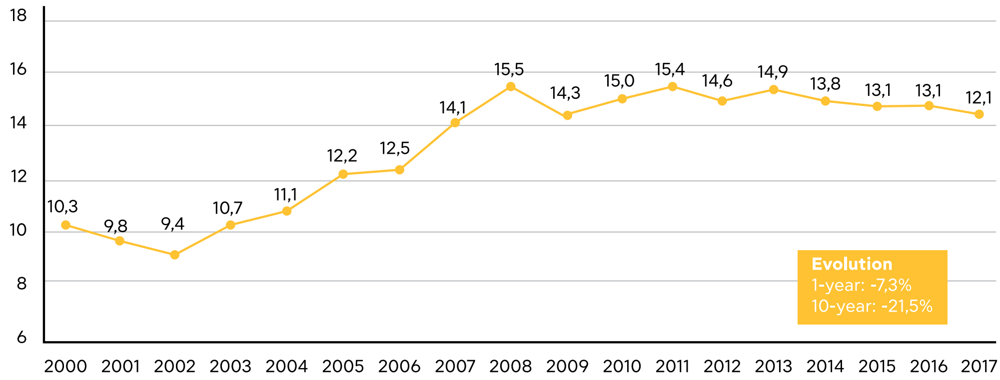
25,9 million pax

The total of cruise ship calls in MedCruise ports in 2017 reached 12.139 **(Figure 1.2)**. This figure means a 7,3% decrease compared to the 13.099 cruise calls recorded in 2016. The number of cruise calls recorded in 2017 was also much lower than the calls of 2008, representing a decrease of 21,5%.

Cruise vessels are becoming bigger in size since the beginning of the century, which makes deterministic insofar as the number of cruise calls is concerned even when comparing long-term trend. It is also evident that the industry lead to a continuous slowing down of the number of cruise ship calls per year, even though passenger movements per year increase.

Figure 1.2: Cruise Calls in MedCruise ports (2000-2017)

12.139 cruise calls

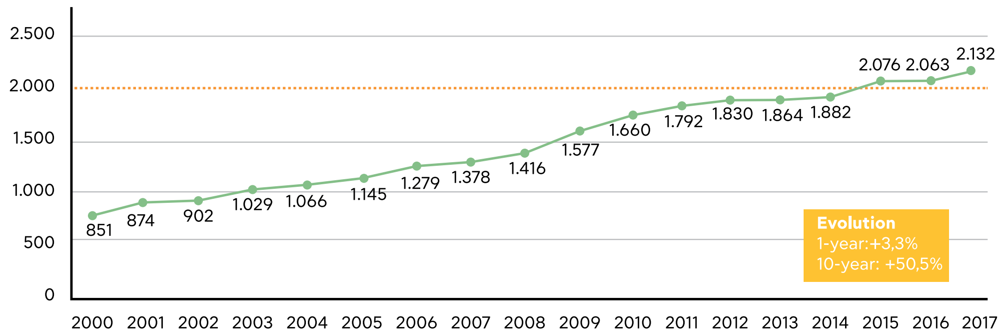


This trend is further illustrated when comparing the total number of cruise calls with the total passenger movements in 2017 in the MedCruise members **(Figure 1.3)**.

Year 2017 was the third successive year that the average number of passengers per cruise call in the Med and its adjoining seas was higher than 2.000. The average number of passengers per call has remained quite constant for the last three years, yet the 50,5% growth of the last decade is quite remarkable.

Figure 1.3: Average Pax/Call in MedCruise ports (2000-2017)

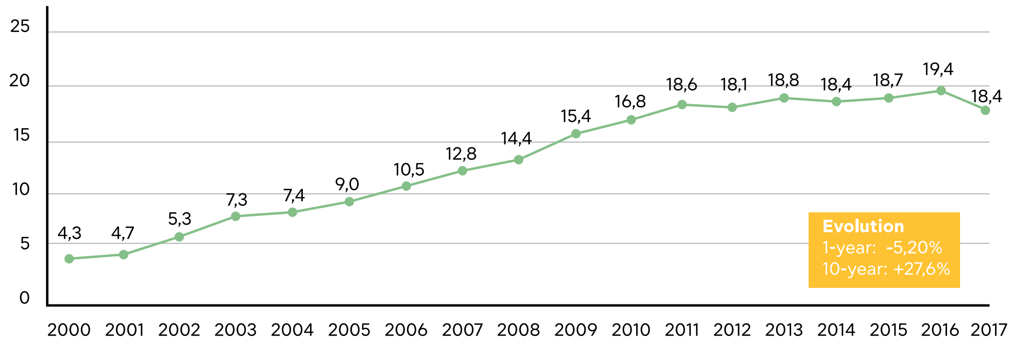
2.132 cruise pax per call



The total number of transit passengers hosted by MedCruise ports in 2017 was 18,4 million, which means a decrease of 5,1% compared to the cruise passenger movements of the previous year - 2016 was a record year as regards the transit passenger movements in the region **(Figure 1.4)**.

A substantial growth of passenger movements happened within the last decade: the 10-year growth stands at 27,6%. In the beginning of the century this number was standing at 4,3 million passenger movements, a fact that confirms the growth that cruise activities in the Med have experienced since then.

Figure 1.4: Transit Cruise Passengers in MedCruise ports (2000-2017)



18,4 million transit pax

The ratio of transit passengers to passengers home-porting from MedCruise member ports stands at 71/29. This ratio remains stable over time, as it is almost the same throughout the last 10 years.

Ratio of transit vs home-port pax: 71/29

1.5 Cruise passenger movements in MedCruise Ports in 2017

Table 1.4 presents an overview of cruise traffic recorded at each MedCruise member port in 2017 and the annual variation comparing to 2016. In 25 MedCruise port members, the recorded cruise passenger visits increased over the past year. 7 other member ports retained the levels of cruise passengers that they had recorded the year before, whereas 42 members faced challenges in retaining in 2017 the numbers of cruise passenger movements hosted in 2016.

In 2017, MedCruise Ports hosted 25,9m cruise pax

Table 1.5 details the data recorded at each MedCruise member port as regards cruise traffic hosted in 2017. These data refer to passenger movements, classification of passengers in either home in, home out or transit, as well as cruise calls. In the **Appendix**, the reader might find a complete listing of the evolution of these data since 2013.

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.

Table 1.4

MedCruise ports cruise traffic overview in 2017

Alanya Turkey 12.189 *(+31,5%)*	**Ancona** Italy 52.086 *(- 5,1%)*	**Antalya** Turkey 39.995 *(- 11,9%)*	**Ashdod** Israel 46.757 *(- 3,2%)*	**Azores** Portugal 135.783 *(+7,8%)*	**Balearic Islands** Spain 2.110.663 *(+7,8%)*
Barcelona Spain 2.712.247 *(+1,1%)*	**Bari** Italy 397.588 *(- 0,8%)*	**Bastia/ North Corsica** France 31.661 *(+70,8%)*	**Bodrum** Turkey 30.876 *(- 49,6%)*	**Brindisi** Italy 108.925 *(+1.966,9%)*	**Burgas** Bulgaria 1.925 *(- 67,0%)*
Cagliari Italy 424.305 *(+65,8%)*	**Canarian Ports** Spain 4.346 *(- 25,7%)*	**Cartagena** Spain 236.412 *(+25,9%)*	**Castellon** Spain 411 *(- 62,5%)*	**Ceuta** Spain 17.003 *(- 11,7%)*	**Civitavecchia** Italy 2.204.336 *(- 5,8%)*
Constantza Romania 1.891 *(+72,6%)*	**Corfu** Greece 679.681 *(- 9,2%)*	**Costa Brava Cruise Ports** Spain 45.176 *(+77,1%)*	**Cyprus Ports** Cyprus 123.397 *(- 12,7%)*	**Dubrovnik** Croatia 748.918 *(- 10,0%)*	**Egyptian Ports** Egypt 9.835 *(n.a.)*
French Riviera Ports France 693.351 *(+23,2%)*	**Genoa** Italy 925.188 *(- 9,1%)*	**Gilbratar** 404.995 *(+0.2%)*	**Gioia Tauro** Italy 4.141 *(- 69,9%)*	**Heraklion** Greece 181.693 *(-23,9%)*	**Huelva** Spain 6.571 *(- 67,3%)*
Igoumenitsa Greece 9.088 *(- 19,2%)*	**Istanbul** Turkey - *(n.a.)*	**Kavala** Greece 3.226 *(- 46,6%)*	**Koper** Slovenia 72.175 *(- 8,6%)*	**Kotor** Montenegro 541.017 *(+0,8%)*	**Kusadasi** Turkey 118.448 *(- 65,9%)*
La Spezia Italy 454.954 *(- 10,4%)*	**Lisbon** Portugal 521.042 *(- 0,3%)*	**Livorno** Italy 698.780 *(- 13,5%)*	**Madeira Ports** Portugal 540.593 *(+3,5%)*	**Malaga** Spain 510.607 *(+15,3%)*	**Marseille** France 1.487.313 *(- 6,9%)*

Messina Italy 390.196 *(+4,6%)*	**Monaco** 168.017 *(- 9,4%)*	**Montril-Granada** Spain 4.111 *(- 10,0%)*	**Naples** Italy 927.458 *(- 29,0%)*	**N. Sardinian Ports** Italy 133.035 (-36,8%)	**Odessa** Ukraine 1.636 *(+31,7%)*
Palermo Italy 459.229 *(- 10,0%)*	**Patras** Greece 952 *(+28,1%)*	**Piraeus** Greece 1.055.559 *(- 3,5%)*	**Portimao** Portugal 29.859 *(+53,0%)*	**Portoferraio** Italy 29.463 *(- 31,1%)*	**Portofino** Italy 35.203 *(+77,0%)*
Rijeka Croatia 12.656 *(- 8,8%)*	**Savona** Italy 854.443 *(- 6,1%)*	**Sete** France 47.377 *(+99,1%)*	**Sibenik** Crotia 27.718 *(+125,8%)*	**Souda/Chania** Greece 128.067 *(- 13,4%)*	**Split** Croatia 232.244 *(- 15,7%)*
Tangier Morocco 23.550 *(- 75,8%)*	**Taranto** Italy 8.546 *(n.a.)*	**Tarragona** Spain 51.393 *(+266,8%)*	**Tenerife Ports** Spain 964.337 *(+9,1%)*	**Thessaloniki** Greece 2.424 *(- 87,2%)*	**Toulon-Var Provence** France 239.023 *(- 34,1%)*
Trabzon Turkey 206 *(- 54,4%)*	**Tunisian Ports** Tunisia 5.316 *(+602,4%)*	**Valencia** Spain 411.317 *(+1,6%)*	**Valletta** Malta 778.596 *(+14,0%)*	**Varna** Bulgaria 791 *(- 28,7%)*	**Venice** Italy 1.427.812 *(- 11,1%)*
Volos Greece 7.618 *(- 79,7%)*	**Zadar** Croatia 137.667 *(+0,9%)*				

MedCruise Ports in total hosted
25,9 million cruise pax *(- 4,1%)*

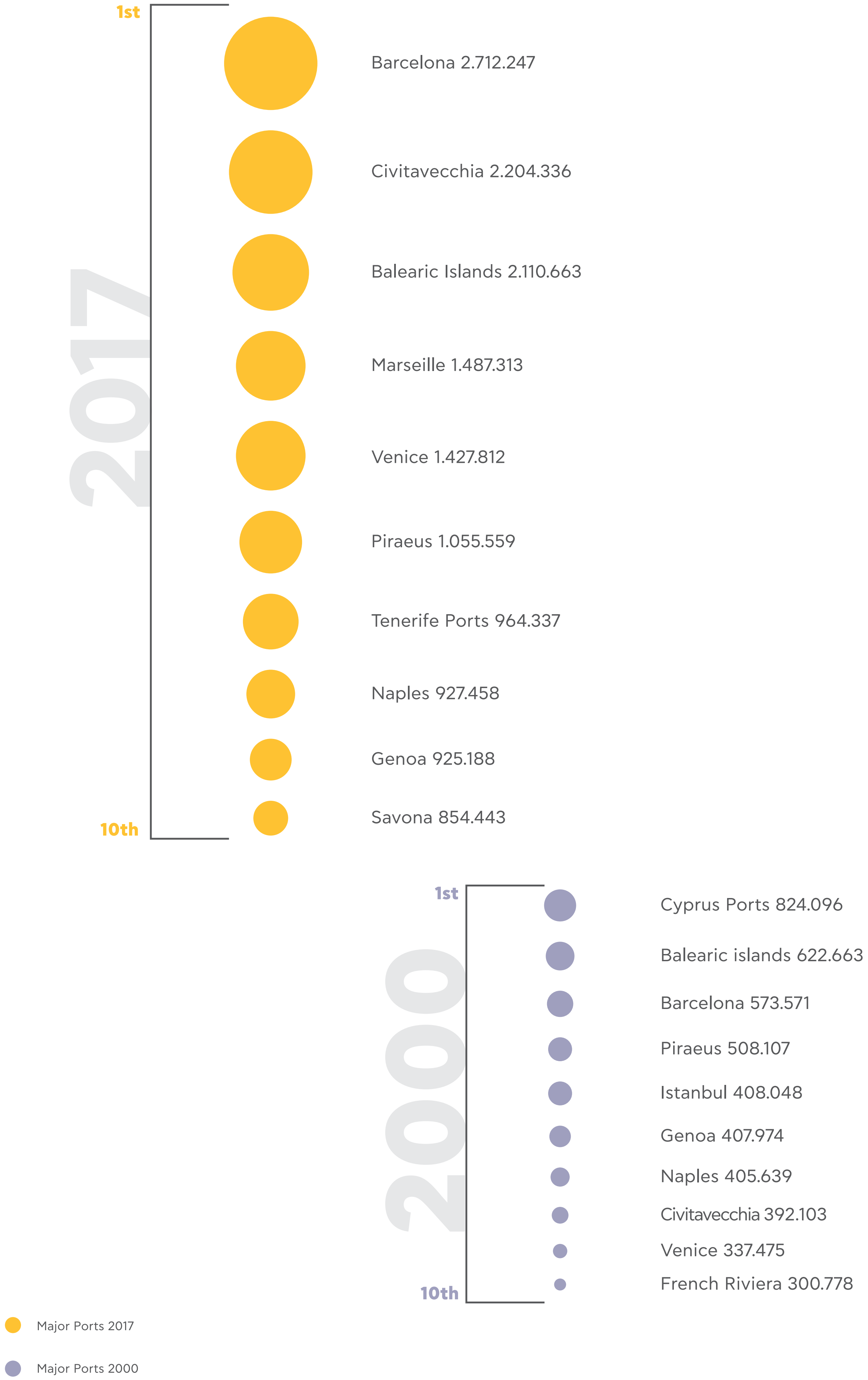
Table 1.5

MedCruise Ports Cruise Traffic data 2017

No	Port	MedCruise Region	Total Pax.	Total Calls	Home in Pax.	Home out Pax.	Transit Pax.
1	Alanya	East Med	12.189	22	0	0	12.189
2	Ancona	Adriatic	52.086	28	5.552	5.566	40.968
3	Antalya	East Med	39.995	12	18.778	18.455	2.762
4	Ashdod	East Med	26.757	21	215	161	26.381
5	Azores	West Med	135.783	152	774	782	134.227
6	Balearic Islands	West Med	2.110.663	819	737.810		1.372.853
7	Barcelona	West Med	2.712.247	778	719.871	720.512	1.271.864
8	Bari	Adriatic	397.588	143	80.064	84.096	233.428
9	Bastia/North Corsica	West Med	31.661	73	0	0	31.661
10	Bodrum	East Med	30.876	23	18	5	30.853
11	Brindisi	Adriatic	108.925	43	10.809	12.033	86.083
12	Burgas	Black Sea	1.925	2	0	0	1.925
13	Cagliari	West Med	424.305	161	9.621	10.717	403.967
14	Canarian ports	West Med	4.346	3	0	0	4.346
15	Cartagena	West Med	236.412	151	0	133	236.279
16	Castellón	West Med	411	1	0	0	411
17	Ceuta	West Med	17.003	10	0	0	17.003
18	Civitavecchia	West Med	2.204.336	729	426.839	423.154	1.354.343
19	Constantza	Black Sea	1.891	3	0	0	1.891
20	Corfu	Adriatic	679.681	410	35.032	34.883	609.766
21	Costa Brava Cruise Ports	West Med	45.176	46	0	0	45.176
22	Cyprus Ports	East Med	123.397	113	23.263	48.079	52.055
23	Dubrovnik	Adriatic	748.918	539	34.075	34.030	680.813
24	Egyptian Ports*	East Med	9.835	7	0	0	9.835
25	French Riviera Ports	West Med	693.351	374	47.920		645.430
26	Genoa	West Med	925.188	212	269.351	271.241	384.596
27	Gibraltar	West Med	404.995	235	0	0	404.995
28	Gioia Tauro**	West Med	4.141	6	0	0	4.141
29	Heraklion	East Med	181.693	131	9.297	9.577	162.819
30	Huelva	West Med	6.571	6	0	0	6.571
31	Igoumenitsa	East Med	9.088	8	0	0	9.088
32	Istanbul	East Med	0	0	0	0	0
33	Kavala	East Med	3.226	6	0	0	3.226
34	Koper	Adriatic	72.175	68	0	0	72.175

No	Port	MedCruise Region	Total Pax.	Total Calls	Home in Pax.	Home out Pax.	Transit Pax.
35	Kotor	Adriatic	541.017	430	670	694	539.653
36	Kusadasi	East Med	118.448	130	8.610	11.047	98.791
37	La Spezia	West Med	454.954	215	4.786	4.038	446.130
38	Lisbon	West Med	521.042	330	28.690	30.225	462.127
39	Livorno	West Med	698.780	341	5.030	4.681	689.069
40	Madeira Ports	West Med	540.593	293	1.363	1.695	537.535
41	Málaga	West Med	510.607	299	68.089	69.964	372.554
42	Marseille	West Med	1.487.313	444	207.156	207.724	1.072.433
43	Messina	West Med	390.196	172	10.502	10.030	369.664
44	Monaco	West Med	168.017	166	11.575	12.183	144.259
45	Motril-Granada	West Med	4.111	31	0	0	4.111
46	Naples	West Med	927.458	336	60.004	53.251	814.133
47	North Sardinian Ports	West Med	133.035	98	0	0	133.035
48	Odessa	Black Sea	1.636	12	99	154	1.383
49	Palermo	West Med	459.229	154	37.076	38.100	384.053
50	Patras	East Med	952	2	0	0	952
51	Piraeus	East Med	1.055.559	576	165.634	166.977	722.948
52	Portimao	West Med	29.859	71	326	188	29.345
53	Portoferraio	West Med	29.463	112	0	0	29.463
54	Portofino	West Med	35.203	79	0	0	35.203
55	Rijeka	Adriatic	12.656	15	0	0	12.656
56	Savona	West Med	854.443	187	258.307	260.543	335.593
57	Sète	West Med	47.377	44	49	14	47.314
58	Sibenik	Adriatic	27.718	109	0	0	27.718
59	Souda/Chania	East Med	128.067	84	782	0	127.285
60	Split	Adriatic	232.244	234	0	0	232.244
61	Tangier	West Med	23.550	27	0	0	23.550
62	Taranto	Adriatic	8.546	7	0	0	8.546
63	Tarragona	West Med	51.393	37	7.065	7.173	37.155
64	Tenerife Ports	West Med	964.337	533	66.986	71.090	826.261
65	Thessaloniki	East Med	2.424	4	1	2	2.421
66	Toulon-Var Provence	West Med	239.023	107	1.945	1.462	235.616
67	Trabzon	Black Sea	206	1	103	103	0
68	Tunisian Ports	West Med	5.317	6	0	0	5.317
69	Valencia	West Med	411.317	203	42.128	30.067	339.122
70	Valletta	West Med	778.596	342	107.913	108.116	562.610
71	Varna	Black Sea	791	1	0	1	790
72	Venice	Adriatic	1.427.812	466	614.823	611.648	201.341
73	Volos	East Med	7.618	9	0	0	7.618
74	Zadar	Adriatic	137.667	104	325	411	136.931

* *Cruise traffic in Egyptian Ports refers only to Alexandria Port.*
** *Cruise traffic in Gioia Tauro port member is hosted by the ports of Crotone and Corigliano Calabro.*



1st
2017
Barcelona 2.712.247
Civitavecchia 2.204.336
Balearic Islands 2.110.663
Marseille 1.487.313
Venice 1.427.812
Piraeus 1.055.559
Tenerife Ports 964.337
Naples 927.458
Genoa 925.188
Savona 854.443
10th
1st
2000
Cyprus Ports 824.096
Balearic islands 622.663
Barcelona 573.571
Piraeus 508.107
Istanbul 408.048
Genoa 407.974
Naples 405.639
Civitavecchia 392.103
Venice 337.475
French Riviera 300.778
10th
Major Ports 2017
Major Ports 2000

CRUISE ACTIVITY TRENDS

2.1 Trends in the Global Cruise Market

Cruise activities have been growing every year for the last two decades, recording an admirable growth since then. The global growth rate of the cruise industry has remained stable, despite of economic cycles and uncertain political climates.

Cruise industry continued to strengthen in 2017 again. The number of single passengers that took a cruise vacation within year 2017 has risen up to 25,2 million, which means a 4,1% increase compared to the previous year.

Figure 2.1 shows the global cruise passenger growth since 1990. Only one decrease –and a smooth one– has been recorded between 1990 and 2017, it was back in 1995. On the other hand, in 2002 and 2007 there were increases of 15,3% and 21,8%, respectively. The number of single cruise passengers in 2017 was 4,1% higher than the number of passengers that cruised the previous year and more than double compared to 2006, when 12 million passengers cruised.

Figure 2.1: Global Cruise Passenger Growth (1990-2018)

Source: *Cruise Market Watch*

According to the latest UNWTO World Tourism Barometer (Jan 2018), *'international tourist arrivals grew by a remarkable 7% in 2017 [...] and is expected to continue in 2018 at a rate of 4%-5%'*.

Mediterranean destinations led the mentioned worldwide growth, recording extraordinary results with 8% more international arrivals than in 2016. Africa and Asia, the other two continents where MedCruise members are located, also recorded increases, 8% and 6% growth, respectively.

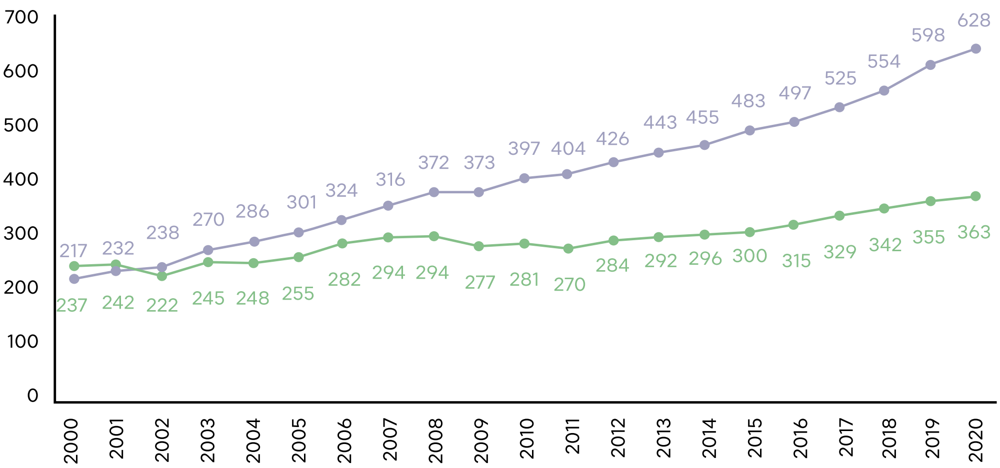
Cruise Lines International Association (CLIA), in its 2018 State of the Cruise Industry Outlook, revealed in December 2017, is projecting stronger growth for the cruise industry in 2018. CLIA expects 27,2 million passengers to cruise within 2018, while Cruise Market Watch **(Figure 2.1)**, expects 26 million.

2.2 Global Cruise fleet

According to the Cruise Industry News Annual Report, a fleet of 329 cruise vessels was deployed worldwide in 2017, having a passenger capacity of 525 million berths **(Figure 2.2)**, and a fleet of more than 340 cruise vessels is expected to be deployed in 2018, with a passenger capacity of more than 550,000 berths.

The major fleet renewal has been a core foundation of the continuous growth of the cruise industry. The order book suggests that 2018 will be another busy year for cruise ship industry, with ship sizes ranging from 300-passenger vessels to 4.500-passengers. The number of vessels is expected to continue growing

Figure 2.2: Global Cruise Fleet 2000-2020 (Ships & Berths)



Source of data: *Cruise Industry News 2016- 2017 Annual Report*

2.3 Deployment of Cruise Fleet

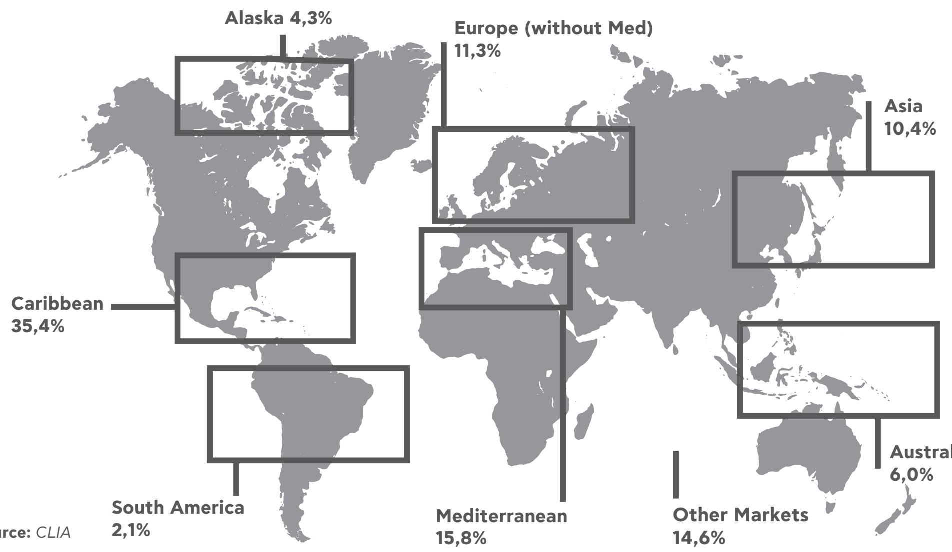
The Mediterranean and its adjoining seas has been one of the most dynamic cruise regions of the world in recent times. The patterns of cruise fleet deployment around the globe the past 15 years indicate that the share of the Med increased from 11,5% of the total cruise fleet deployed in 2003, to 12,9% in 2006, and to 15,8% in 2017 **(Figure 2.3)**. As a result, the Med stands today as the second biggest cruising region of the world, following Caribbean. Combined, the two major cruise regions, Caribbean and the Med, host 51,2% of the global cruise fleet capacity.

Cruise activities are more distributed worldwide compared to a decade before. There is a true sign of the globalisation of the cruise activities, evidently demonstrated in the rise of some regions of the world such as Asia, where cruise fleet deployment share has grown from 0,9% in 2006 to 10,4% in 2017.

The Med: Second biggest cruise region in the world

15,8% of the global cruise fleet is deployed in the Med

Figure 2.3: Global Deployment Shares 2017



Source: *CLIA*

As regards the share of cruise activities in the Med, the positive long-term trends are combined, however, with a less encouraging short-term trend. The fleet deployed in the Med in the record year 2013 was 21,7% of the globally deployed fleet. As demonstrated by the trends in the two cruise regions that experienced a continuous growth over that period (Asia, Australasia), deployment patterns are shifting speedily.

According to data collected by Cruise Industry News, a total of 46 different cruise lines out of the less than 60 existing brands, offered cruises in the Med in 2016. The number of vessels deployed by each of them and the respective deployed capacity are illustrated in **Table 2.1**.

Table 2.1: 2016 Cruise Passenger Capacity in the Mediterranean

Company	Ships	Capacity	% Market
Costa	11	721.404	19,0%
MSC	10	706.352	18,6%
Royal Caribbean	9	326.794	8,6%
Norwegian	4	238.200	6,3%
AIDA	6	233.144	6,1%
Thomson	5	189.496	5,0%
Celestyal	3	162.290	4,3%
P&O	7	157.320	4,1%
Celebrity	5	151.698	4,0%
TUI	5	120.768	3,2%
Princess	3	102.804	2,7%
Holland America	5	88.742	2,3%
Mano	2	87.000	2,3%
Pullmantur	1	72.832	1,9%
Carnival	1	70.848	1,9%
CDF	2	69.774	1,8%
Oceania	5	52.056	1,4%
Cunard	2	50.552	1,3%
Windstar	5	22.608	0,6%
Seabourn	3	20.700	0,5%
Silversea	3	19.924	0,5%
Viking	2	19.530	0,5%
Regent	3	18.700	0,5%
Crystal	2	12.388	0,3%
Azamara	2	11.798	0,3%
Disney	1	10.500	0,3%
Abou Merhi	1	9.000	0,2%
Star Clippers	2	7.898	0,2%
Phoenix Reisen	3	6.864	0,2%
Fred Olsen	4	5.779	0,2%
Swan Hellenic	2	5.540	0,1%
Ponant	2	5.091	0,1%
FTI	1	4.700	0,1%
SeaDream	2	4.400	0,1%
V/Antiquity	1	4.348	0,1%
Saga	2	3.924	0,1%
Hapag-Lloyd	2	3.912	0,1%
Plantours	1	1.600	0,1%
Sea Cloud	2	1.204	0,1%
Lindblad	2	930	0,0%
Cruise Maritime	1	550	0,0%
Paul Gaugin	1	440	0,0%
Total	**136**	**3.804.402**	**100%**

Source: *Cruise Industry News 2016- 2017 Annual Report*

2.4 Contribution to the Global Economy

The estimated direct global spending by cruise industry–cruise lines, passengers, and crew– totaled $57,9 billion in 2016 (see **Table 2.2**), according to 2016 Global Economic Impact Study by CLIA. These direct expenditures were derived by three sources: cruise lines, cruise passengers, and crew members. Passengers purchased pre- and post-cruise vacations and shore excursions as well as retail goods; crew members also purchased retail goods and services; while cruise lines purchased goods and services related to cruise and port operations.

Passengers spent $16,4% billion, accounting for 28% of total cruise sector direct expenditures; crew spent $1,4 billion, the 2,4% of the total; and cruise lines spent $40,2 billion, which represents the 69% of the total estimated direct global expenditures by the cruise industry.

Table 2.2: Direct Cruise Sector Expenditures in billion US$ (2016)

Category	Global	Regional markets			
		USA	Rest of N.America	Europe (EU+3)	Rest of the World
Home Port Pax	8,81	3,40	0,63	1,98	2,80
Transit Pax	7,58	0,65	2,98	2,33	1,62
Pax Total	16,39	4,05	3,61	4,31	4,42
Crew	1,40	0,34	0,53	0,16	0,37
Cruise Lines*	40,15	17,30	1,40	16,22	5,24
Total	**57,93**	**21,69**	**5,53**	**20,69**	**10,03**
Percent Change from 2015	7,1%	8,9%	2,9%	5,1%	22,6%

Source: *CLIA (2017). The Contribution of the International Cruise Industry to the Global Economy in 2016.*

Total cruise industry contribution analysis consists of direct, indirect, and induced economic contribution. Where direct contribution refers to expenditures generated by cruise lines, cruise passengers, and crew members **(Table 2.2)**; indirect contribution results from the demand of goods and services generated by direct contribution; and induced contribution refers to the expenditures generated by the employees of the cruise lines and their suppliers.

$57,9 billion direct global spending by cruise industry

$20,7 billion direct spending by cruise industry in Europe

As pointed before, direct contribution by cruise industry totaled $57,9 billion, while indirect and induced contribution generated an additional $68 billion; which means that combining the direct, indirect, and induced contributions, cruise tourism generated $125,96 billion output **(Table 2.3)**.

Table 2.3: Total Cruise Sector Economic Contribution (2016)

Category	Global	Regional markets			
		USA	Rest of N.America	Europe (EU+3)	Rest of the World
Output (in billion US$)	125,96	47,76	10,00	50,15	18,05
Share of Global		*37,9%*	*7,9%*	*39,8%*	*14,3%*
Income (in billion US$)	41,09	20,57	2,02	12,32	6,18
Share of Global		*50,1%*	*4,9%*	*30,0%*	*15,0%*
Employment (in US$)	1.021.681	389.432	99.125	381.426	151.697
Share of Global		*38,1%*	*9,7%*	*37,3%*	*14,9%*
Percent Change from 2015					
Output	7,6%	4,5%	1,6%	8,1%	19,2%
Income	7,7%	6,7%	3,8%	5,9%	16,6%
Employment	6,8%	5,0%	4,7%	5,8%	16,3%

Source: *CLIA (2017). The Contribution of the International Cruise Industry to the Global Economy in 2016.*

2.5 Cruise Passenger Sourcing

North America remains the dominant source for cruise passengers, with 50,5% of the total passenger source share in 2016. Other source markets are also demonstrating accelerated passenger demand for cruising; for the record the share of North Americans stood at 57,6% in 2010. The significant growth of internationally sourced passengers includes Europeans (**Figure 2.4**). Since 2011, more than six million citizens depart from a European country on an annual basis to enjoy a cruise.

In 2016, the latest year for which data are available, cruise operators around the globe hosted 6,7 million European cruise passengers, a total that equals 27,0% of the passengers that cruised the specific year. This corresponds to a 1,4% annual increase in European sourced cruise passengers, despite the fact that at the same time cruise continues expanding in new source markets, in particular the Asian one, and the traditional North American source markets have in recent times enjoyed better economic conditions than the European economy.

The growing markets in Asia in general and China in particular have been the centre of attention for the cruise lines that are banking on a potential million passengers market. Given the size of the population, and the potential numbers of passengers that small numbers of penetration would result in, it is also targeted by other stakeholders, including cruise ports, as a future source market.

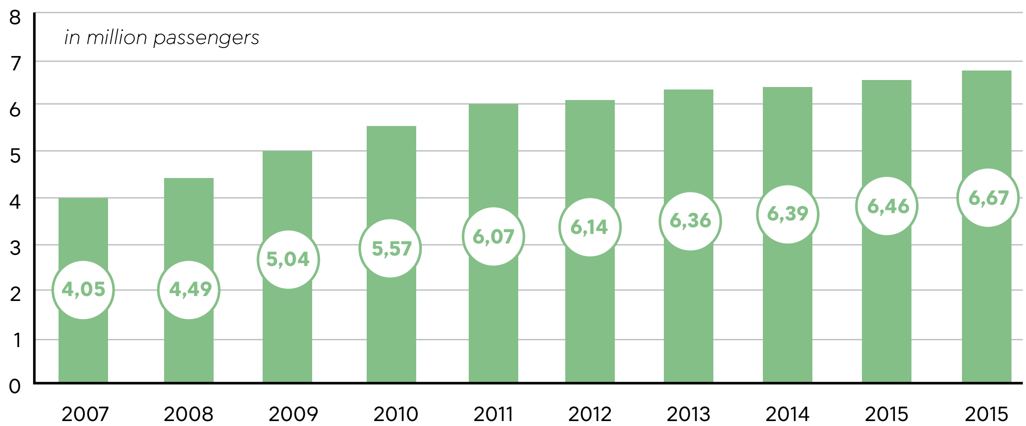
MedCruise has already embarked on making its member ports known, campaigning to generate interest of Asian people for cruising in the respective regions (for more information: www.medcruise.cn). At the same time MedCruise has embarked in a strategic partnership with the European branch of the Association of Cruise Lines – CLIA Europe – aiming to educate travel agents in promoting cruising in Europe and the Mediterranean and its adjoining seas in particular (for more information: www.cruiseexperts.org).

27,0% of global cruise pax come from Europe (6,7 million in 2016)

50,5% of global cruise pax come from North America

MedCruise works to turn Asia into a major source market for cruising the Med

Figure 2.4: European-sourced Passenger Growth (2007-2016)



Source: *CLIA (2016). Statistics and Markets Europe; CLIA (2014). The Global contribution of Cruise Tourism 2013. September 2014.*

TRENDS IN THE MEDITERRANEAN AND ITS ADJOINING SEAS

3.1 Evolution of Cruise Traffic (2013-2017)

This section provides the analysis of cruise passenger movements and cruise ship calls in the ports of MedCruise members.

This analysis is based on data recorded by MedCruise port members, which represents a sample of an estimated 80% of cruise calls and 78% of passengers that cruise the Mediterranean and its adjoining seas per year. Therefore, this analysis provides an accurate understanding of the cruise activity trends in the second biggest cruise region of the world.

The full list of ports included in this analysis, along with the raw material for passenger movements and cruise calls for 2017 as well as for the five previous years (2013-2017) can be found in the **Appendix** of this report.

In total, 25.915.573 cruise passenger movements were registered in MedCruise ports in 2017 **(Table 3.1)**, which means a 4,1% decrease of passenger movements compared to the previous year.

The 5-year-variation of **cruise passenger movements** represents also a decrease when relating the number recorded in 2017 with 2013; i.e., cruise ports in the Med and its adjoining seas hosted 6,5% less passenger movements than in 2013.

Nevertheless, the scale of cruise passengers has exceeded 27 million movements per year three times during the last five years; being 2013 the first time ever that this total exceeded the 27 million movements.

25.915.573 cruise passenger movements were registered in MedCruise port members in 2017.

Annual variation: 4,1% less cruise passenger movements than in 2016.

Three out of the last five years with more than 27 million passengers movements recorded in the Med and its adjoining seas.

Table 3.1: Evolution of cruise traffic in MedCruise ports (2013-2017)

Year	Total Pax	Annual Growth	Total Calls	Annual Growth	Pax/ Call	Annual Growth
2017	25.915.573	-4,12%	12.139	-7,33%	2.132	3,32%
2016	27.028.895	-0,85%	13.099	-0,21%	2.063	-0,64%
2015	27.260.071	5,51%	13.127	-4,33%	2.077	10,28%
2014	25.836.882	-6,77%	13.721	-7,58%	1.883	0,89%
2013	27.711.850	3,88%	14.847	1,98%	1.866	1,86%
2012	26.677.171		14.559		1.832	
Variation 2017/2013		**-6,48%**		**-18,24%**		**14,22%**

3.2 Major MedCruise Ports

2017: The major Mediterranean cruise port, Barcelona, reaches an all time record, hosting more than 2,7 passenger movements.

2015: Two ports hosted more than 2,5 million passenger movements for the 2nd time in history- the first time was 2013.

2008: The first time that a single Med port hosted more than 2 million passengers.

2003: The first time that a single Med port hosted more than 1 million passengers.

The 10 major MedCruise ports –in terms of cruise passengers– hosted a total of 14,7 million passenger movements in 2017 **(Table 3.2)**.

Barcelona, Civitavecchia, and Tenerife Ports were the only three ports –included in this specific major 10 list– that recorded a growth of cruise passenger movements comparing to the previous year; being Tenerife the one that reached the highest growth (9,1%), and climbing from the 10th to the 7th position in the major 10 list MedCruise ports. In the case of the two other ports that increased cruise passenger movements, Barcelona has grown 1,1% and remains at top of the list, while Balearic Islands increased a gorgeous 7,8% to consolidate the third position.

The major three ports, in terms of passenger movements, retained their ranking for another year. Barcelona remains the top port in the Mediterranean Sea. Hosting 2,7 million passenger movements in 2017, Barcelona recorded an annual growth of 1,1% comparing to the previous year. In the last five years Barcelona experienced a rise of cruise passengers by 4,4%.

Civitavecchia and Balearic Islands remained as the only other cruise ports in the Med that hosted more than two million cruise passenger movements in 2017, despite that the annual variation has decreased by 5,8% in the former. When focusing on the 2017-2013 variation, Civitavecchia has experienced a decline of 13,2%. Yet it has to be noted that the base year was a particular strong year for the port –as in 2010 it was hosting 'just' 1,9 million passengers.

For a third successive year, the third biggest cruise port in the Med was Balearic Islands, where the increase of the cruise passenger movements was remarkable, following a marginal decrease in 2016. The 5-year growth is even more remarkable, as it stands at 36,9%.

Marseille rises at the fourth major cruise port position in terms of total passenger movements, despite that the cruise passengers moved via this port in 2017 decreased 6,9%, after two years of growth. Venice now stands at the fifth position, due to a 11,1% decrease comparing to 2016 cruise passenger movements. Piraeus rises a position and stands as the 6th major port, even experiencing a decrease of 3,5%.

Tenerife has registered the most dynamic growth of all MedCruise ports. The port managed to increase by 9,1% compared to 2016, and 21,4% since 2013. As a result, it sustains the seventh position in the ranking of major ports, rising three positions and hosting near one million passenger movements.

Naples, which stands as the eighth largest port in the Med, had returned to decrease in 2017 after two years of green figures. The port of Genoa, which re-joined the major-10 list in 2015, and the port of Savona have both lost a position in the 2017 ranking, registering a decrease of passenger movements by 9,1% and 6,1%, respectively.

Table 3.2: Major MedCruise Port Members (Cruise Pax Movements, 2017)

Rank 2017	(Rank 2016)	Port	Total Pax 2017	Total Pax 2016	2017/ 2016	Total Pax 2013	2017/ 2013
1	(1)	Barcelona	2.712.247	2.683.594	1,07%	2.599.232	4,35%
2	(2)	Civitavecchia	2.204.336	2.339.676	-5,78%	2.538.259	-13,16%
3	(3)	Balearic Islands	2.110.663	1.957.429	7,83%	1.541.376	36,93%
4	(5)	Marseille	1.487.313	1.597.213	-6,88%	1.188.031	25,19%
5	(4)	Venice	1.427.812	1.605.660	-11,08%	1.815.823	-21,37%
6	(7)	Piraeus	1.055.559	1.094.135	-3,53%	1.302.581	-18,96%
7	(10)	Tenerife Ports	964.337	884.173	9,07%	794.151	21,43%
8	(6)	Naples	927.458	1.306.151	-28,99%	1.175.018	-21,07%
9	(8)	Genoa	925.188	1.017.368	-9,06%	1.050.085	-11,89%
10	(9)	Savona	854.443	910.244	-6,13%	939.038	-9,01%
Total (Major -10)			**14.669.356**	**15.395.643**	**-4,72%**	**14.943.594**	**-1,84%**

Focusing on the 10 major ports in terms of cruise calls per year **(Table 3.3)**, these MedCruise ports hosted 5.724 cruise calls in 2017. This total is 384 calls less than the number of calls recorded in 2016, and 28 less than in 2015.

Only three out of 10 ports listed in **Table 3.3** saw the number of cruise calls increasing within 2017 comparing to 2016. They are the same three ports that increased the number of passenger movements mentioned above.

Balearic Islands reached the top position of this ranking with 819 calls in 2017. This equals to a rise by 77 calls, or 10,4% comparing to 2016. Barcelona goes right below on the list, following an increase by 20 calls (2,6%).

Following a decline of 12,5% and 104 calls, Civitavecchia has dropped to the third place in this ranking, after being at the very top for two years in a row.

Piraeus has returned to the fourth position despite decreasing by 7,8% and Dubrovnik loses one position due to its 15,7% decrease, and now stands as the fifth major port in terms of cruise calls.

Tenerife Ports (1,7%) rises one position and Venice (-11,9%) drops one, standing at the sixth and seventh position, respectively. Marseille, Kotor, and Corfu also rise a position despite decreasing 46, 57, and 71 calls, respectively; closing the 10 major ports list in terms of cruise calls.

It has to be noted though that while the number of calls has implications in the operations of the hosting cruise ports, it does not necessarily imply a negative trend in the number of hosted cruise passengers and cruise activities.

Table 3.3: Major MedCruise Port Members (Cruise Calls, 2017)

Rank 2017	(Rank 2016)	Port	Total Calls 2017	Total Calls 2016	2017/ 2016	Total Calls 2013	2017/ 2013
1	(3)	Balearic Islands	819	742	10,38%	699	17,17%
2	(2)	Barcelona	778	758	2,64%	835	-6,83%
3	(1)	Civitavecchia	729	833	-12,48%	959	-23,98%
4	(5)	Piraeus	576	625	-7,84%	711	-18,99%
5	(4)	Dubrovnik	539	639	-15,65%	843	-36,06%
6	(7)	Tenerife Ports	533	524	1,72%	520	2,50%
7	(6)	Venice	466	529	-11,91%	548	-14,96%
8	(9)	Marseille	444	490	-9,39%	447	-0,67%
9	(10)	Kotor	430	487	-11,70%	387	11,11%
10	(11)	Corfu	410	481	-14,76%	480	-14,58%
Total (Major -10)			**5.724**	**6.108**	**-6,29%**	**6.429**	**-10,97%**

In total, 46 cruise ports recorded home-porting activities in 2017. The 10 biggest of them hosted, in aggregate, a total of 6,4 million home in/out passengers, a number that stands 3,6% lower than the 6,7 million hosted in 2016 (Table 3.4).

Barcelona remains as the most popular cruise home-port in the Med, despite its 7,4% decrease, and hosting 1,4 million passengers. Venice also remains at the second position after hosting 1,2 million passengers and being the fifth major port in the region in 2017.

The third major port, Civitavecchia, recorded a minor growth in 2017 (0,4%). The most positive situation as regards home-porting was observed in Balearic Islands, which registered a 22,9% annual growth, and now stands at the fourth position. Genoa decreased by 10,8% and Savona by 10,1%, standing now at fifth and sixth position, respectively.

Marseille remains at the seventh position despite decreasing 14,8% and Piraeus decreases 5,7%, after a huge growth in 2016, to remain at the eighth position of the 10 major MedCruise home-ports list.

Higher numbers of passengers embarking to a cruise or disembarking from it were observed in Valetta and Bari in 2017. Valetta almost doubled home in/out passenger compared to the year before (88,2%), and Bari recorded a remarkable increase of 50,4%.

Comparing with five years earlier, the picture is marginally less positive. The 6,4 million passengers that used the 10 major home-porting ports in the Med and its adjoining seas in 2017 were 4,9% less comparing to the 6,8 million passengers of 2013; with the latter year being the second year that home in/out passengers in the Med exceeded the 6 million threshold. The most remarkable growth the last five years was recorded in Valletta (111,7%), Balearic Islands (50,4%), Marseille (8,8%), and Piraeus (7,7%).

Table 3.4: Major MedCruise Port Members (Home In/Out Pax, 2017)

Rank 2017	(Rank 2016)	Port	Home In/Out Pax 2017	Home In/Out Pax 2016	2017/ 2016	Home In/Out Pax 2013	2017/ 2013
1	(1)	Barcelona	1.440.383	1.555.819	-7,42%	1.506.286	-4,38%
2	(2)	Venice	1.226.471	1.408.066	-12,90%	1.512.596	-18,92%
3	(3)	Civitavecchia	849.993	847.009	0,35%	989.998	-14,14%
4	(5)	Balearic Islands	737.810	600.181	22,93%	490.631	50,38%
5	(4)	Genoa	540.592	606.278	-10,83%	649.282	-16,74%
6	(6)	Savona	518.850	577.145	-10,10%	670.031	-22,56%
7	(7)	Marseille	414.880	486.964	-14,80%	381.318	8,80%
8	(8)	Piraeus	332.611	352.663	-5,69%	308.705	7,74%
9	(10)	Valletta	216.029	114.731	88,29%	102.034	111,72%
10	(11)	Bari	164.160	109.137	50,42%	165.031	-0,53%
Total (Major -10)			**6.441.779**	**6.657.993**	**-3,25%**	**6.775.912**	**-4,93%**

The listing of the major ports in terms of transit cruise passengers **(Table 3.5)** details a 4,4% decrease in the case of the major ports in the Med and its adjoining seas.

Balearic Islands returned to the top of the list of the major cruise ports in terms of transit passengers after one year, as recorded a growth of 1,2%. The number of visiting cruise passengers in Balearic Islands was 1,4 million transit passengers per year. Comparing to five years before (2013), Balearic Islands hosted 30,7% or 315.000 more transit passengers in 2017.

Following a 9,3% decrease comparing to 2016, Civitavecchia hosted, in 2017, 1,4 million transit passengers and stands as the second most popular cruise port.

Barcelona registered 44.000 more transit passengers comparing to 2016 and, as a result, it stands at the third position, while Marseille decreases by 3,4% and stands at the fifth one with 1,1 million transit passengers.

The number of visiting passengers in Tenerife Ports Ports has grown by 2,0% or 16.000 more transit passengers, standing now at the fifth position.

The following four ports standing at positions from 6th to 9th on the list of 10 major ports in terms of transit passengers, have declined compared to 2016 as follows: Naples 30,1%, Piraeus 2,5%, Livorno 13,7%, and Dubrovnik 10,8%. While French Riviera, that closes the top 10, has recorded a growth of 23,9% or 125.000 more passengers.

The 10 major Med ports in terms of transit passengers hosted significantly more passenger movements (9,5 million) than those they had hosted five years earlier back in 2013 (9,0 million). This has been the result of the increase in the major ports of call. Marseille is the port that tops the list in terms of percentage growth within these five years (32,9%). It is followed by Balearic Islands that recorded a 30,7% increase, Barcelona (16,4%), and French Riviera (16,0%). Instead, Civitavecchia, Naples, Piraeus, Livorno, and Dubrovnik, have seen the number of transit passengers lowering over the same period. A comparison of aggregates is not available, as in the case of Tenerife Ports the records of pre-2016 years are not available.

2015: Five ports hosted more than 1.000.000 transit passenger movements for the 2nd time in history - the first time was in 2013.

2007: The first time that a single Med port (Naples) hosted more than 1.000.000 million transit passengers.

2000: Balearic Islands topped the list hosting 355.566 transit cruise passengers. It would rank as 20th biggest port in the Med in 2016.

Table 3.5: Major MedCruise Port Members (Transit Pax, 2017)

Rank 2017	(Rank 2016)	Port	Total Pax 2017	Total Pax 2016	2017/ 2016	Total Pax 2013	2017/ 2013
1	(2)	Balearic Islands	1.372.853	1.357.248	1,15%	1.050.745	30,66%
2	(1)	Civitavecchia	1.354.343	1.492.667	-9,27%	1.548.261	-12,52%
3	(4)	Barcelona	1.271.864	1.127.775	12,78%	1.092.966	16,37%
4	(5)	Marseille	1.072.433	1.110.249	-3,41%	806.713	32,94%
5	(6)	Tenerife Ports	826.261	810.049	2,00%	n.a.	n.a.
6	(3)	Naples	814.133	1.164.041	-30,06%	1.064.329	-23,51%
7	(9)	Piraeus	722.948	741.472	-2,50%	993.876	-27,26%
8	(7)	Livorno	689.069	798.661	-13,72%	731.525	-5,80%
9	(8)	Dubrovnik	680.813	763.561	-10,84%	1.111.663	-38,76%
10	(13)	French Riviera	645.430	520.962	23,89%	556.695	15,94%
		Total (Major -10)	**9.450.147**	**9.886.685**	**-4,42%**	**8.956.773**	**5,51%**

3.3 Major Variations in MedCruise Ports

This chapter tables show the major variations when comparing cruise traffic, in terms of total cruise passenger movements **(Table 3.6)**, cruise calls **(Table 3.7)**, home in/out passengers **(Table 3.8)**, and transit passengers **(Table 3.9)**. In order to better understand the trends, these tables provide both a short-term view by comparing data recorded in 2017 to 2016, as well as a medium term perspective by comparing cruise passengers and cruise call statistics of 2017 with those of 2013.

Aiming to give substance to the analysis (i.e. avoiding to present massive percentage growth or decline when changes of a single vessel and/or a handful difference of hosted passengers number occurs), the analysis of variations refers only to MedCruise ports having a minimum of 20 cruise calls and/or 10.000 cruise passengers in 2017.

The ports that have not reached any of these thresholds and have been excluded from the analysis of variations are Burgas, Canarian ports, Castellón, Constantza, Gioia Tauro, Huelva, Igoumenitsa, Istanbul, Kavala, Odessa, Patras, Taranto, Thessaloniki, Trabzon, Tunisian Ports, Varna and Volos.

Remarkable variations of the total passenger movements hosted by each port in the Med were observed within just one year **(Table 3.6)**. In 2017, five of the smaller ports, namely Brindisi, Tarragona, Sibenik, Sète, and Costa Brava Cruise Ports, enjoyed growth of cruise passenger visits at impressive extends.

Examining the trend of the last five years (2013-2017), the list of ports that experienced major growth includes four smaller ports, Brindisi, Tarragona, and Sète (already mentioned above), and Ceuta as well as Zadar which has recorded an impressive growth of 298% during last five years and, since 2016, has become a large port.

Table 3.6: Total Cruise Passengers - Major Variations 2017/2016 and 2017/2013

Total Cruise Passengers Major variations 2017/2016

Port	2017	2016	Var. 2017/2016
Brindisi	108.925	5.270	1966,89%
Tarragona	51.393	14.013	266,75%
Sibenik	27.718	12.276	125,79%
Sète	47.377	23.791	99,14%
Costa Brava Cruise Ports	45.176	25.505	77,13%

Total Cruise Passengers Major variations 2017/2013

Port	2017	2013	Var. 2017/2013
Tarragona	51.393	1.421	3516,68%
Brindisi	108.925	4.628	2253,61%
Sète	47.377	11.084	327,44%
Zadar	137.667	34.575	298,17%
Ceuta	17.003	4.605	269,23%

Table 3.7 presents the major variations observed in 2017 as regards the number of cruise calls per year. Bastia/North Corsica (217,4%) and Brindisi (207,1%) top the list of ports that enjoyed the biggest positive variations when comparing 2017 calls with those of the previous year. Alanya, Tarragona, and Portimao are also included in the list recording a growth of near 70%.

When examining the longer period trends, three of the 'small' cruise ports, Tarragona, Brindisi, and Portimao, top the rankings of ports that hosted substantial more calls in 2017 than those hosted back in 2013. The other two ports that recorded a remarkable growth since 2013 are Souda/Chania (84 in 2017 comparing to 47 in 2013), and Cagliari (161 in 2017 comparing to 94 in 2013).

Table 3.7: Total Cruise Calls - Major Variations 2017/2016 and 2017/2013

Total Cruise Calls Major variations 2017/2016

Port	2017	2016	Var. 2017/ 2016
Bastia/ North Corsica	73	23	217,39%
Brindisi	43	14	207,14%
Alanya	22	13	69,23%
Tarragona	37	22	68,18%
Portimao	71	43	65,12%

Total Cruise Calls Major variations 2017/2013

Port	2017	2016	Var. 2017/ 2013
Tarragona	37	3	1133,33%
Brindisi	43	15	186,67%
Souda/Chania	84	47	78,72%
Cagliari	161	94	71,28%
Portimao	71	42	69,05%

Table 3.8 illustrates the major variations of home in/out passengers in MedCruise ports. In this case, Brindisi that continued to re-establish home-port activities after a difficult period, tops the list. Tarragona and Heraklion are also present in the list of those ports that doubled home-porting activities in 2017, yet in order to have the overall picture one needs to consider that in 2014 Heraklion had recorded approximately 24.000 home in/out passengers and back in 2010 it had hosted 46.000 home in/out passengers. Cagliari –that almost tripled the home in/out passengers compared to last year– and Valleta –that almost doubled last year's figure– are the other two MedCruise ports with major variation in terms of home in/out passengers comparing 2017 to 2016.

Only MedCruise ports having a minimum of 3.000 home in/out cruise passengers in 2017 have been included in the matrix below; 27 ports hosted no home in/out cruise passengers in 2017 (see Appendix), while another 13 ports hosted less than 3.000 passengers.

Comparing the records of 2017 with the data that had been recorded in 2013, the picture is almost the same when comparing 2017 to 2016; only Dubrovnik is new on the list and it appears instead of Heraklion. The other four ports mentioned above (Brindisi, Tarragona, Cagliari, and Valletta) as the major home in/out annual variation are also the ones that recorded the major variations in the 5-year-term analysis.

Table 3.8: Total Home In/Out Passengers - Major Variations 2017/2016 and 2017/2013

Total Home In/Out Passengers Major variations 2017/2016

Port	2017	2016	Var. 2017/ 2016
Brindisi	22.842	7	n/d
Tarragona	14.238	1.842	672,96%
Heraklion	18.874	7.302	158,48%
Cagliari	20.338	8.456	140,52%
Valletta	216.029	114.731	88,29%

Total Home In/Out Passengers Major variations 2017/2013

Port	2017	2013	Var. 2017/ 2013
Brindisi	22.842	119	n/d
Tarragona	14.238	0	n/d
Cagliari	20.338	5.731	254,88%
Dubrovnik	68.105	24.840	174,17%
Valletta	216.029	102.034	111,72%

As for the growth in transit passenger movements, which is detailed in **Table 3.9**, Brindisi tops the list of major positive annual variation. It is followed by Tarragona, Antalya, Sibenik, and Sète.

Rijeka and Zadar are also in the list of major positive variations with reference to the medium-term trends in the number of transit passengers.

Table 3.9: Total Transit Passengers - Major Variations 2017/2016 and 2017/2013

Total Transit Passengers Major variations 2017/2016

Port	2017	2016	Var. 2017/2016
Brindisi	86.083	5.263	1535,63%
Tarragona	37.155	12.171	205,27%
Antalya	2.762	929	197,31%
Sibenik	27.718	12.276	125,79%
Sète	47.314	23.763	99,11%

Total Transit Passengers Major variations 2017/2013

Port	2017	2013	Var. 2017/2013
Tarragona	37.155	1.421	2514,71%
Brindisi	86.083	4.509	1809,14%
Rijeka	12.656	685	1747,59%
Sète	47.314	11.076	327,18%
Zadar	136.931	32.939	315,71%

3.4 Passengers per Call

2017: 3 years in a row hosting more than 2.000 Pax/call in the MedCruise ports in average.

2016: 16 ports hosted more than 2.000 pax/call. Only 11 ports had done so in 2014.

2015: The (average) number of hosted cruise passengers per call surpassed for the first time in history 2.000 pax.

2010: The average pax/call was less than 1.000 in 33 ports. In 2015 this dropped to 22 ports.

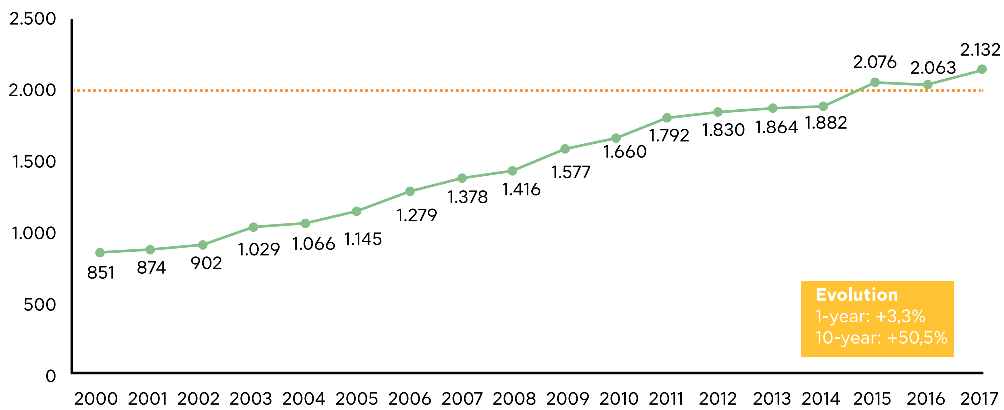
2003: The average pax/call exceeded 1.000 for the first time.

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

In 2017, the average number of hosted cruise passengers per cruise call was 2.132. A year before, in 2016, this average had surpassed for the second time in history 2.000 passengers, standing at 2.063 passengers. Even though the standard deviation from this average is significant, thus a note of caution essential, this is a milestone in all respects. In 2014, this average was standing at 1.882 passengers per call.

The increase within the last decade is even more impressive. In 2006 each cruise call in the Med was resulting in 1.279 passenger movements on average. Within 10 years, the average number of passengers per call increased by 50,5% **(Figure 3.1)**.

Figure 3.1: Average Pax/Call in MedCruise ports (2000-2017)



This average is not similar in all ports in the Med and its adjoining seas **(Figure 3.2)**. In seven cruise ports the average number of passengers per call exceeds 3.000. In 12 more ports the average is higher than 2.000, i.e. exceeds the average pax/call observed in the Med. In 28 more ports this average stands between 1.000 and 2.000 pax/call, and in the rest 26 ports this average is less than 1.000 pax/call. 43,1% of all ports of the sample host more than 1.500 passengers per cruise call.

Figure 3.2: Cruise Pax per Call: MedCruise Port Classification Overview 2017

>3000 pax/call

Antalya
Barcelona
Civitavecchia
Genoa, Marseille
Savona, Venice

2000 - 3000 pax/call

Balearic Islands, Bari, Brindisi
Cagliari, La Spezia, Livorno
Messina, Naples, Palermo
Toulon-Var Provence
Valencia, Valletta

43,10% >1500 Pax/Call

56,90% <1500 Pax/Call

< 1000 pax/call

Alanya, Azores, Bastia/North Corsica, Burgas
Castellón, Constantza, Costa Brava Cruise Ports
Gioia Tauro, Kavala, Kusadasi, Motril-Granada
Odessa, Patras, Portimao, Portoferraio, Portofino
Rijeka, Sibenik, Split, Tangier, Thessaloniki
Trabzon, Tunisian Ports, Varna, Volos

1000 - 2000 pax/call

Ancona, Ashdod, Bodrum, Canarian ports, Cartagena, Ceuta, Corfu, Cyprus Ports
Dubrovnik, French Riviera Ports, Gibraltar, Heraklion, Huelva, Igoumenitsa, Koper
Kotor, Lisbon, Madeira Ports, Málaga, Monaco, North Sardinian Ports, Piraeus, Sète
Souda/Chania, Taranto, Tarragona, Tenerife Ports, Zadar

Table 3.10 focuses on the growth of passengers per call in the 20 MedCruise ports that maintain the highest passengers/call ratio. For the first time in history the average size of call in any port in the Med had exceeded the 4.000 passengers average in 2015. In fact this had happened to the ports of Genoa and the neighboring Savona. This was the case also in 2017, though the respective averages where marginally larger in Savona and slightly smaller in Genoa.

Other five ports hosted more than 3.000 passengers/call in 2017 and other 11 ports hosted more than 2.000 passengers/call.

Savona tops the list with 4.569 pax/call following a 6,9% annual increase of passengers/call, or 17,3% when the focus is on the variation between vessels calling at the port in 2017 comparing to five years earlier. As mentioned, Genoa is the only other port where the average number of visiting passengers per call exceeds 4.000, following a 6,4% annual growth and 23,9% growth within the last five years.

Table 3.10: Cruise Pax/Cruise Call - Major 20

No	Port	Pax Calls 2017	Pax/Calls 2016	Variation 2017/2016	Pax/Calls 2013	Variation 2017/2013
1	Savona	4.569	4.273	6,92%	3.896	17,27%
2	Genoa	4.364	4.102	6,38%	3.524	23,85%
3	Barcelona	3.486	3.540	-1,53%	3.113	11,99%
4	Marseille	3.350	3.260	2,77%	2.658	26,04%
5	Antalya	3.333	2.838	17,45%	2.397	39,04%
6	Venice	3.064	3.035	0,95%	3.314	-7,53%
7	Civitavecchia	3.024	2.809	7,66%	2.647	14,24%
8	Palermo	2.982	2.931	1,72%	2.175	37,13%
9	Bari	2.780	2.765	0,57%	3.537	-21,39%
10	Naples	2.760	2.649	4,19%	2.670	3,36%
Total (Major -10)		**3.371**	**3.220**	**4,69%**	**2.993**	**12,64%**
11	Cagliari	2.577	2.638	-2,31%	2.205	16,87%
12	Balearic Islands	2.533	376	572,94%	309	721,03%
13	Brindisi	2.277	2.154	5,67%	1.725	31,99%
14	Valletta	2.269	1.674	35,56%	2.199	3,18%
15	Messina	2.234	1.304	71,32%	1.451	53,95%
16	Toulon-Var Provence	2.116	2.405	-12,03%	1.435	47,43%
17	La Spezia	2.049	2.005	2,22%	1.754	16,86%
18	Livorno	2.026	2.236	-9,40%	2.122	-4,50%
19	Valencia	1.860	1.615	15,20%	1.659	12,13%
20	Ancona	1.854	1.732	7,03%	1.460	26,97%
Total (Major -20)		**2.775**	**2.517**	**10,26%**	**2.312**	**20,02%**

3.5 Cruise Traffic Concentration

Examining the shares of the top-20 MedCruise ports **(Table 3.11)** provides useful insights on the extent that cruise passenger traffic is concentrated in few MedCruise ports only, or the trend for any concentration to increase.

Six ports hosted in 2017 passenger traffic that exceeds one million passenger movements per year. In 2014, this total stood at eight ports. The two major of them, Barcelona and Civitavecchia, host more than two million passengers for another year. The third one, Balearic Islands is now above the two million passengers per year milestone for first time. There are also 16 more ports that hosted more than 500.000 passenger movements within 2017, i.e. all those listed in Table 3.11; one less than in 2016. Evidently the growth of cruise is reaching a number of different ports in all different regions and countries of the Mediterranean and its adjoining seas.

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

No	Port	Total Pax 2017	Cruise Pax Shares 2017	2016	2015	2014	2013
1	Barcelona	2.712.247	10,48%	9,93%	9,32%	9,15%	9,38%
2	Civitavecchia	2.204.336	8,52%	8,66%	8,33%	8,28%	9,16%
3	Balearic Islands	2.110.663	8,16%	7,24%	7,32%	6,14%	5,56%
4	Marseille	1.487.313	5,75%	5,91%	5,32%	5,08%	4,29%
5	Venice	1.427.812	5,52%	5,94%	5,81%	6,71%	6,55%
Major 5 -SUM		**9.942.371**	**38,42%**	**37,68%**	**36,10%**	**35,36%**	**34,94%**
6	Piraeus	1.055.559	3,73%	3,27%	3,42%	3,25%	2,87%
7	Tenerife Ports	964.337	3,58%	4,83%	4,66%	4,31%	4,24%
8	Naples	927.458	3,57%	3,76%	3,11%	3,19%	3,79%
9	Genoa	925.188	3,30%	3,37%	3,60%	3,94%	3,39%
10	Savona	854.443	3,01%	2,53%	2,45%	2,00%	1,72%
Major 10 -SUM		**14.669.356**	**55,61%**	**55,44%**	**53,35%**	**52,06%**	**50,95%**
11	Valletta	778.596	2,70%	2,99%	2,56%	2,42%	2,66%
12	Dubrovnik	748.918	2,68%	2,08%	2,00%	2,31%	2,21%
13	Livorno	698.780	2,63%	2,77%	2,37%	2,60%	2,69%
14	French Riviera Ports	693.351	2,09%	1,99%	1,62%	1,20%	1,15%
15	Corfu	679.681	2,09%	1,93%	2,13%	1,84%	1,74%
16	Kotor	541.017	2,01%	1,93%	1,88%	1,94%	2,01%
17	Madeira Ports	540.593	1,97%	1,64%	1,54%	1,58%	1,43%
18	Lisbon	521.042	1,77%	1,89%	2,01%	2,06%	1,48%
19	Málaga	510.607	1,76%	1,88%	2,45%	1,87%	0,77%
20	Palermo	459.229	1,64%	0,95%	0,97%	0,32%	0,53%
Total (Major -20)		**20.841.170**	**76,96%**	**75,48%**	**72,88%**	**70,20%**	**67,62%**

In aggregate, the major-5 ports in terms of passenger movements had in 2017 a share standing at 38,4% of the total passenger movements in the Med and its adjoining seas. This is almost 1% higher than the share of the major-5 cruise ports a year before. When focusing on the major-20 ports, the share remains near 77,0% in 2017. The growth of cruising observed in the Med within the 21st century has spread proportionally in all ports of different size. When one concentrates in developments over the last five years though, it is evident that major cruise ports have grown their share of the total traffic, i.e. the major 20 ports had hosted 67,6% of the traffic in 2013, while in 2017 they hosted 77,0%.

Cruise calls in the Med and its adjoining seas record a lower level of concentration than the accommodated passenger movements **(Table 3.12)**. The major-5 ports hosted in 2017 3.441 calls, which corresponds to 28,4% of the total annual cruise calls; major-10 ports hosted 45,8% and major-20 climbed at 68,1% (8.723 calls). There were six ports that hosted over 500 cruise calls per year in 2017, while the total of ports that hosted more than 300 cruise calls stood at 15. Comparing to the previous years since 2013, these shares do not seem to record a significant difference.

Table 3.12: Major 20 MedCruise Ports - Cruise Calls Concentration

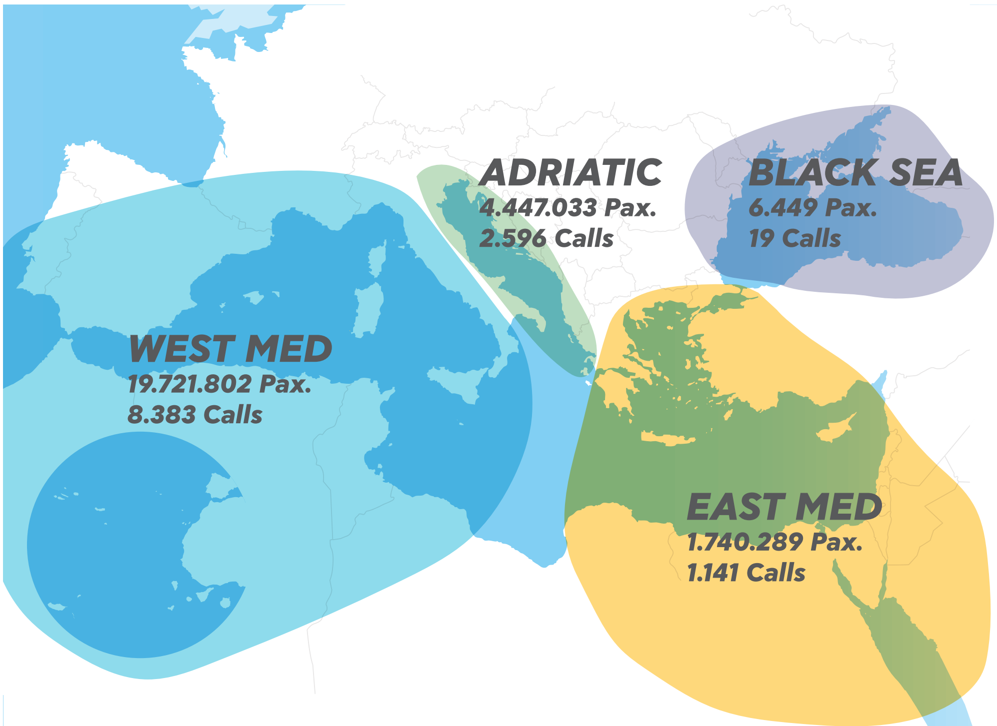
		Total Calls	Cruise Calls Shares				
No	**Port**	**2017**	**2017**	**2016**	**2015**	**2014**	**2013**
1	Balearic Islands	819	6,75%	5,66%	6,00%	4,94%	4,71%
2	Barcelona	778	6,41%	5,79%	5,71%	5,59%	5,62%
3	Civitavecchia	729	6,01%	6,36%	6,05%	6,07%	6,46%
4	Piraeus	576	4,75%	4,77%	4,73%	4,42%	4,79%
5	Dubrovnik	539	4,44%	4,88%	3,62%	5,48%	5,68%
Major 5 -SUM		**3.441**	**28,35%**	**27,46%**	**26,11%**	**26,50%**	**27,26%**
6	Tenerife Ports	533	3,84%	4,04%	3,97%	3,56%	3,69%
7	Venice	466	3,66%	3,74%	3,37%	3,62%	3,01%
8	Marseille	444	3,54%	3,72%	3,13%	2,57%	2,61%
9	Kotor	430	3,38%	3,67%	3,10%	2,88%	3,23%
10	Corfu	410	3,08%	2,48%	2,61%	2,69%	2,83%
Major 10 -SUM		**5.724**	**45,84%**	**45,11%**	**42,29%**	**41,82%**	**42,63%**
11	French Riviera Ports	374	2,81%	3,08%	2,81%	2,49%	2,83%
12	Valletta	342	2,77%	3,76%	3,39%	2,91%	2,96%
13	Livorno	341	2,72%	2,37%	2,33%	2,32%	2,38%
14	Naples	336	2,46%	1,93%	1,77%	1,65%	1,67%
15	Lisbon	330	2,41%	2,27%	2,38%	2,08%	1,96%
16	Málaga	299	1,94%	1,71%	1,55%	1,32%	1,21%
17	Madeira Ports	293	1,93%	2,18%	1,99%	1,70%	1,52%
18	Gibraltar	235	1,77%	1,61%	1,33%	1,85%	1,00%
19	Split	234	1,75%	1,89%	1,51%	1,52%	2,01%
20	La Spezia	215	1,67%	1,38%	1,33%	1,42%	1,50%
Total (Major -20)		**8.723**	**68,07%**	**67,30%**	**62,68%**	**61,08%**	**61,66%**

SEASONALITY ANALYSIS

4.1 The MedCruise Regions

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

Map 4.1: Cruise Traffic by MedCruise Region in 2017



19,7m pax in the West Med

4,4m pax in the Adriatic

1,7m pax in the East Med

6.000+ pax in the Black Sea

A total of 40 MedCruise members are located in the West Med region **(Table 4.1)**. The cruise passenger movements that took place in these ports in 2017 reached 19,7 millions. And the number of cruise calls in this region was 8.617. This is the biggest region of the four MedCruise regions in terms of the share of cruise activities hosted, as West Med ports accommodated 76,1% of the total passenger movements that took place in the Med and a 69,1% share of the respective number of cruise calls.

Table 4.1: Total Cruise Traffic 2017

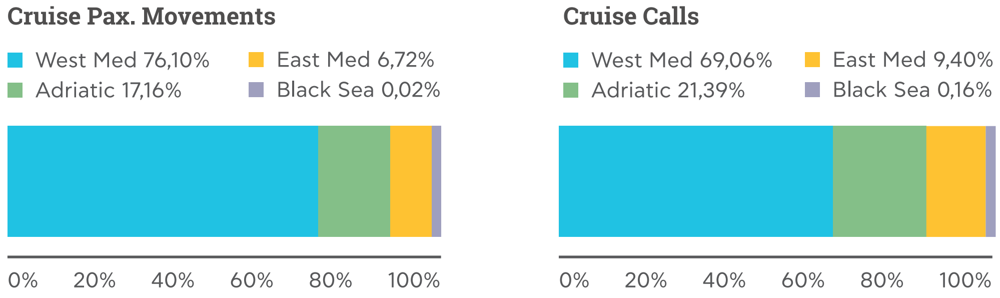
Region	No. of members	Total Cruise Pax.	Total Cruise Calls	Home In/Out Pax.	Transit Pax.
West Med	40	19.721.802	8.383	5.468.259	14.253.515
Adriatic	13	4.447.033	2.596	1.564.711	2.882.322
East Med	15	1.740.289	1.141	480.901	1.259.388
Black Sea	5	6.449	19	460	5.989

The number of cruise ports that are located in the Adriatic Sea is 13. This is the third biggest cruise region in terms of number of members, but the second biggest MedCruise region in terms of cruise activity, hosting 17,2% of the total passenger movements and 21,4% of the total cruise calls in the Med and its adjoining seas **(Figure 4.1)**.

There are 15 MedCruise member ports located in the East Med. Based on the 2017 data, these East Med ports share 6,7% of the passenger movements and 9,4% of the cruise calls that take place in the Med and its adjoining seas within this year. In particular, these ports registered, in 2017, a total of 1,7 million cruise passenger movements. The annual number of calls in the East Med ports declined during 2017 to 1.141.

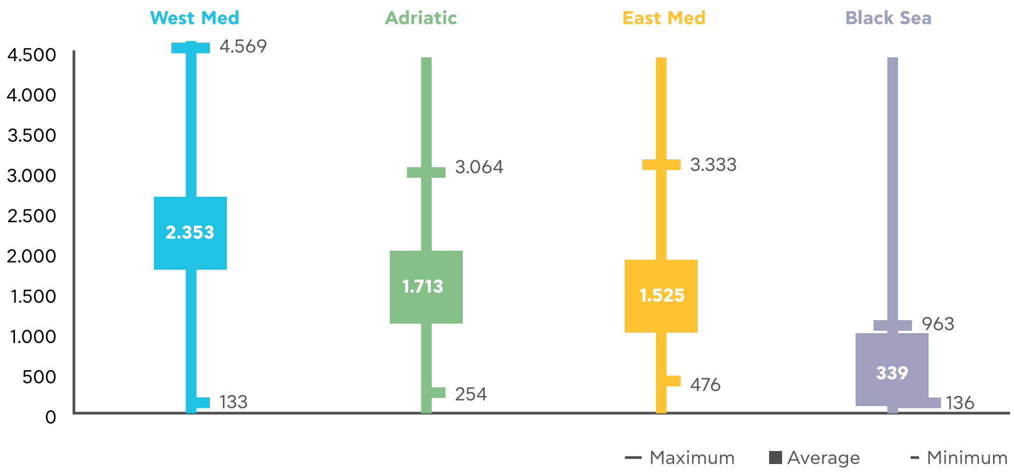
The Black Sea is the smallest distinctive geographical port region as regards the magnitude of cruise activities. This region represented in 2017 only 0,02% of the annual passenger movements and 0,2% of the annual cruise calls that took place in the area under examination. Cruise activities in the Black Sea recorded a severe decline for a third successive year; with cruise lines planning their itineraries well in advance – typically somewhere between 2-3 years and 18 months – the difficult political, economic and social conditions observed in the region in past years have had an impact on the records of 2017 as well. MedCruise has intensified its efforts to support the strategy of these ports to regain cruise activities, among others by hosting international gathering of cruise stakeholders in its member ports located in the Black Sea.

Figure 4.1: Cruise Passenger Traffic Shares 2017 per region



The four sub-regions have distinctive features as regards the type of cruise vessels that are deployed in each of them **(Figure 4.2)**. Larger cruise ships are deployed in the West Med, where the average number of cruise passengers per call stands at 2.353. As expected the standard deviation from this number is remarkable, with the maximum average cruise passengers/call recorded in Savona standing at 4.569 passengers. The Adriatic is the region where the second highest average of passengers/call is recorded (1.713), with the maximum observed at an Adriatic port being 3.064 passengers. Cruise ships deployed in the East Med are even smaller, i.e. 1.525 passengers/call, with Antalya port recording an average of 3.333 passengers/call. The region where the smaller cruise ships of all are deployed is the Black Sea (average 339 passengers per call).

Figure 4.2: Average Cruise Passengers/Call 2017 per region



4.2 Cruise traffic evolution per region

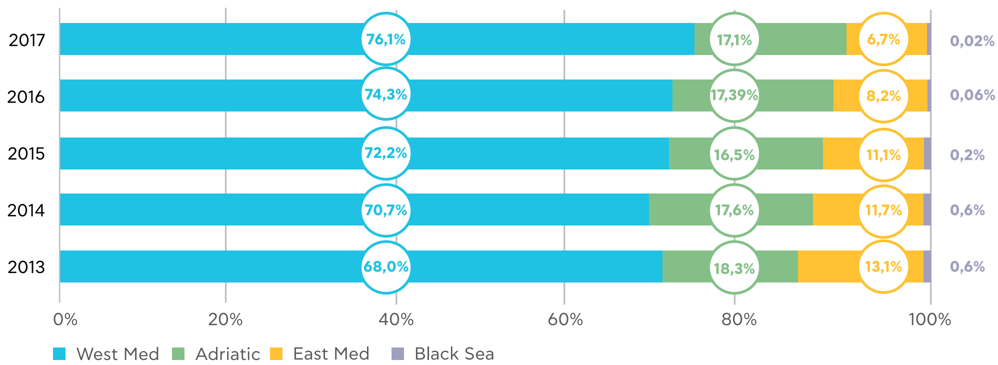
Table 4.2 details the evolution and variation of cruise passenger movements, providing a picture of both short and mid-term trends. Following a 4,6% growth since 2013, the West Med stands as the most dynamic region of all (Figure 4.3). The change in the Adriatic Sea ports was lower, with the variation of cruise passenger movements since 2013 standing at -12,1%. Nonetheless, the Adriatic Sea is the second major cruise region in the Med.

The East Med ports accommodated within 2017 a total of cruise passenger movements that was 21,6% less than in 2013. The same would be said for the Black Sea region as well. In 2014, the Black Sea was standing as the most dynamic region of all, a fact that created the background for return to growth and expectations once a durable stable external environment might help cruise activities to re-emerge in the near future. In 2017, though, only 6.449 cruise passenger movements were registered in the region. Following a 58,5% annual drop in 2017 (the third year of major decline) cruise activities in the Black Sea evaporated.

Table 4.2: Total Cruise Passenger Movements per region

Region	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
West Med	19.721.802	120.091.740	-1,84%	18.860.380	4,57%
Adriatic	4.447.033	4.701.180	-5,41%	5.060.779	-12,13%
East Med	1.740.289	2.220.427	-21,62%	3.626.426	-52,01%
Black Sea	6.449	15.548	-58,52%	164.265	-96,07%
Total	**25.915.573**	**27.028.895**	**-4,12%**	**27.711.850**	**-6,48%**

Figure 4.3: Cruise Pax. Movements Evolution per region



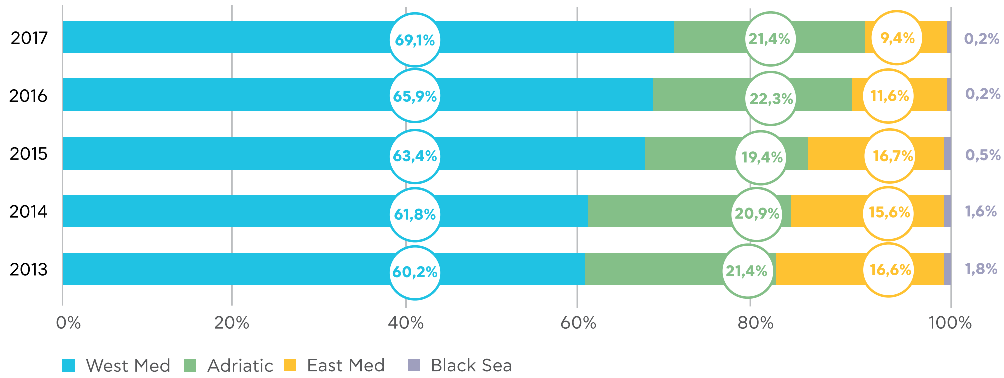
As regards the total number of cruise calls per region **(Table 4.3)**, the evolution of the four sub-regions was negative. In the West Med the total of calls in 2017 was 2,9% less than in 2016. An even more notable decline was recorded in the Adriatic, where the number of cruise vessel calls in 2017 was 11,1% less compared to the year before. The number of calls also declined substantially in the East Med (-25,03%), and almost eliminated in the Black Sea, where only 19 cruise calls happened in 2017. As a result, a total of 12.139 calls took place in 2017 among MedCruise ports, a number that is 7,3% less than in 2016.

Looking at the 5-year trend, the number of calls declined in all four regions as well. The decline in the case of the West Med ports was 6,3% and 18,4% in the case of the Adriatic ports. A very significant decrease has been recorded in the case of the East Med (-53,7%) and, even more significant, in the Black Sea (-92,8%). Following these developments, the share of cruise calls in West Med ports increased in the last five years from 60,2% of calls in the Med to 69,1%, the percentage of the Adriatic remained almost stable (21,4%), while East Med –from 16,6% in 2013 to 9,4% in 2017– and the Black Sea –from 1,8% in 2013 to 0,2% in 2017– have seen their respective shares of the total cruise calls in the Med declining **(Figure 4.4)**.

Table 4.3: Total Cruise Calls per region

Region	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
West Med	8.383	8.634	-2,91%	8.942	--6,25%
Adriatic	2.596	2.919	-11,07%	3.181	-18,39%
East Med	1.141	1.522	-25,03%	2.462	-53,66%
Black Sea	19	24	-20,83%	262	-92,75%
Total	**12.139**	**13.099**	**-7,33%**	**14.847**	**-18,24%**

Figure 4.4: Cruise Calls Evolution per region



The West Med is the region where most home-porting activities are happening **(Table 4.4)**. Home-porting activities in 22 different ports in the West Med total 5,5 million passengers in 2017, 1,1% more than in 2016. Barcelona alone hosted more than 1,4 million home-porting passenger movements and four other ports hosted between 500.000-850.000 such movements (Civitavecchia, Balearic Islands, Genoa, and Savona). Six other ports that are located in the Adriatic region registered 1,6 million home in/out passengers within 2017, with Venice alone hosting 1,2 million of such passengers.

Five additional home-porting ports are located in the East Med, where Piraeus was hosting the vast majority of the home-porting traffic in 2017 (332.000 passengers). As regards the Black Sea, most of the cruise passengers that visited these ports in 2017 were transit passengers, as even the few cruises that had used the region for home-porting in 2015 were not repeated neither in 2016 nor in 2017.

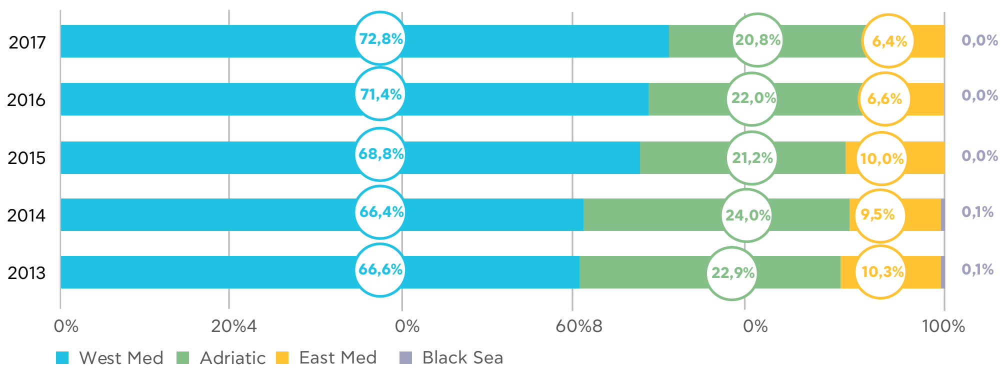
Table 4.4: Total Home In/Out Passengers per region

Region	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
West Med	5.468.259	5.406.968	1,13%	5.312.051	2,94%
Adriatic	1.564.711	1.670.358	-6,32%	1.825.566	-14,29%
East Med	480.901	497.748	-3,38%	824.242	-41,66%
Black Sea	460	463	-0,65%	10.982	-95,81%
Total	**7.514.331**	**7.575.537**	**-0,81%**	**7.972.841**	**-5,75%**

The total of home in/out passenger movements recorded in 2017 in the cruise ports in the Med and its adjoining seas that are members of MedCruise was just 0,8%, less than the respective movements that had happened a year before. The medium-term trend is also marginally negative, as the ports of the sample hosted, in 2017, 5,8% less home-porting passengers than in 2013. In absolute numbers, 7,5 million passengers embarked or concluded a cruise at a port in the Med, whereas this total was 8,0 in 2013.

Figure 4.5 illustrates the shares of home in/out passengers per MedCruise region since 2013. Within this period the share of the West Med increased by 6,1% to 72,8% of the total. This occurred at the expense of the home-porting traffic in the Adriatic and the East Med. The share of the Adriatic lowered from 22,9% to 20,8% of the total. The share of East Med, declined from 10,3% in 2013 to 6,4% in 2017. The Black Sea started recording some home-porting activities in 2012, yet today the region hosts a tiny share of less than 0,1%.

Figure 4.5: Home In/Out Passengers Evolution per region



West Med ports registered in 2017 a total of 14,3 million transit passenger movements **(Table 4.5)**. Following this 2,6% decrease comparing to 2016. The share of the region in terms of transit traffic increased to 77,5% of the total, comparing to a share that equalled to 67,2% five years before **(Figure 4.6)**.

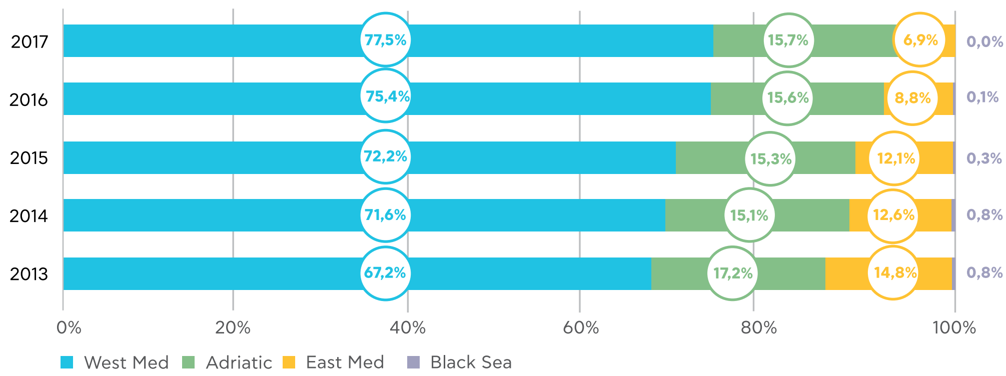
Cruise ports located in Adriatic also recorded a decrease of transit cruise passengers in 2017. The decline was 4,9% as the Adriatic ports hosted 2,9 million transit passengers comparing to 3 million the year before. Comparing to 2013, transit passengers increased by 10,9% and the share of the Adriatic lowered to 15,7% of the total transit passengers in the Med and its adjoining seas comparing to 17,2% five years before. The number of transit passengers in East Med ports in 2017 was 26,9% less than in 2016, and 54,9% less than in 2013. The Black Sea ports have seen extensively lower numbers of passengers cruising the region in 2017, with the 5.989 transit passengers traffic standing 96,1% lower than in 2013.

In total, on an annual basis transit passengers in the Med and its adjoining seas decreased in 2017 by 5,2% and equal to 18.401.214 passengers. Comparing to 2013 the decline stands at 2,3%.

Table 4.5: Total Transit Passengers per region

Region	2017	2018	Variation 2017/2018	2013	Variation 2017/2013
West Med	14.253.515	14.631.760	-2,59%	12.651.238	12,66%
Adriatic	2.882.322	3.030.821	-4,90%	3.235.213	-10,91%
East Med	1.259.388	1.722.309	-26,88%	2.794.973	-54,94%
Black Sea	5.989	15.085	-60,30%	153.283	-96,09%
Total	**18.401.214**	**19.399.975**	**-5,15%**	**18.834.707**	**-2,30%**

Figure 4.6: Transit Passengers Evolution per region



4.3 The MedCruise Growth Indexes (MEDGRI)

19,7m pax in the West Med

4,4m pax in the Adriatic

1,7m pax in the East Med

6.000+ pax in the Black Sea

In order to facilitate the monitoring of cruise activity trends in the Mediterranean and its adjoining seas, MedCruise established two indexes aiming to give a clear picture of the evolution of cruise passenger movements and cruise calls respectively, in each of the four MedCruise regions, as well as in the Med as a whole, since 2010.

MEDGRIpax (Figure 4.7) is the index that monitors the annual trend of cruise passenger movements in the Med and in each of the four regions in terms of passenger movements. The index has 2010 as the basis year (MEDGRIpax=100). **Figure 4.7** presents the evolution since the base year, illustrating the imbalanced nature of this growth. Following a setback in 2014 (MEDGRIpax = 104) the index returned to higher levels in 2016 (MEDGRIpax = 109) and declined again in 2017 (MEDGRIpax = 104).

Looking at regional trends Black Sea ports that had experienced the most remarkable growth of all regions in 2013 and 2014, returned in 2015 to half the levels of 2010 and to just 6 in 2017. The index is also lower (52) in the case of East Med region compared to the previous year (66). The two other regions continue to host more cruisers than those they were hosting in 2010, with the respective 2017 values of MEDGRIpax standing at 105 in the Adriatic and at 114 in the West Med case.

MEDGRIcalls monitors the annual trend of cruise calls in the Med, and in each of the four regions, having again 2010 as the basis year (MEDGRIcalls = 100). The evolution of MEDGRIcalls, which is illustrated in **Figure 4.7**, is associated with the size of the deployed vessels, as well as with the better utilisation of calling vessels. Cruise passenger numbers in the Med and its adjoining seas are more than in the past, but the number of vessels is lower than those of 2010 in all regions. In two regions though, the West Med and the Adriatic, the number of calls remains stable; a 2017 MEDGRIcalls= 96 was recorded in the West Med and a MEDGRIcalls= 84 in the Adriatic). In East Med, the decline of the number of cruise calls is comparatively bigger than that of the decline of cruise passenger movements, as in 2017 MEDGRIcalls=38. Black Sea ports had seen in previous years the size of visiting cruise ships increasing, but in 2015, 2016, and 2017 this trend reversed and the number of calls was minimal.

Figure 4.7: Trends in MedCruise regions: The MedCruise Growth Indexes (2010=100 MedCruise Growth Indexes - MEDGRI)

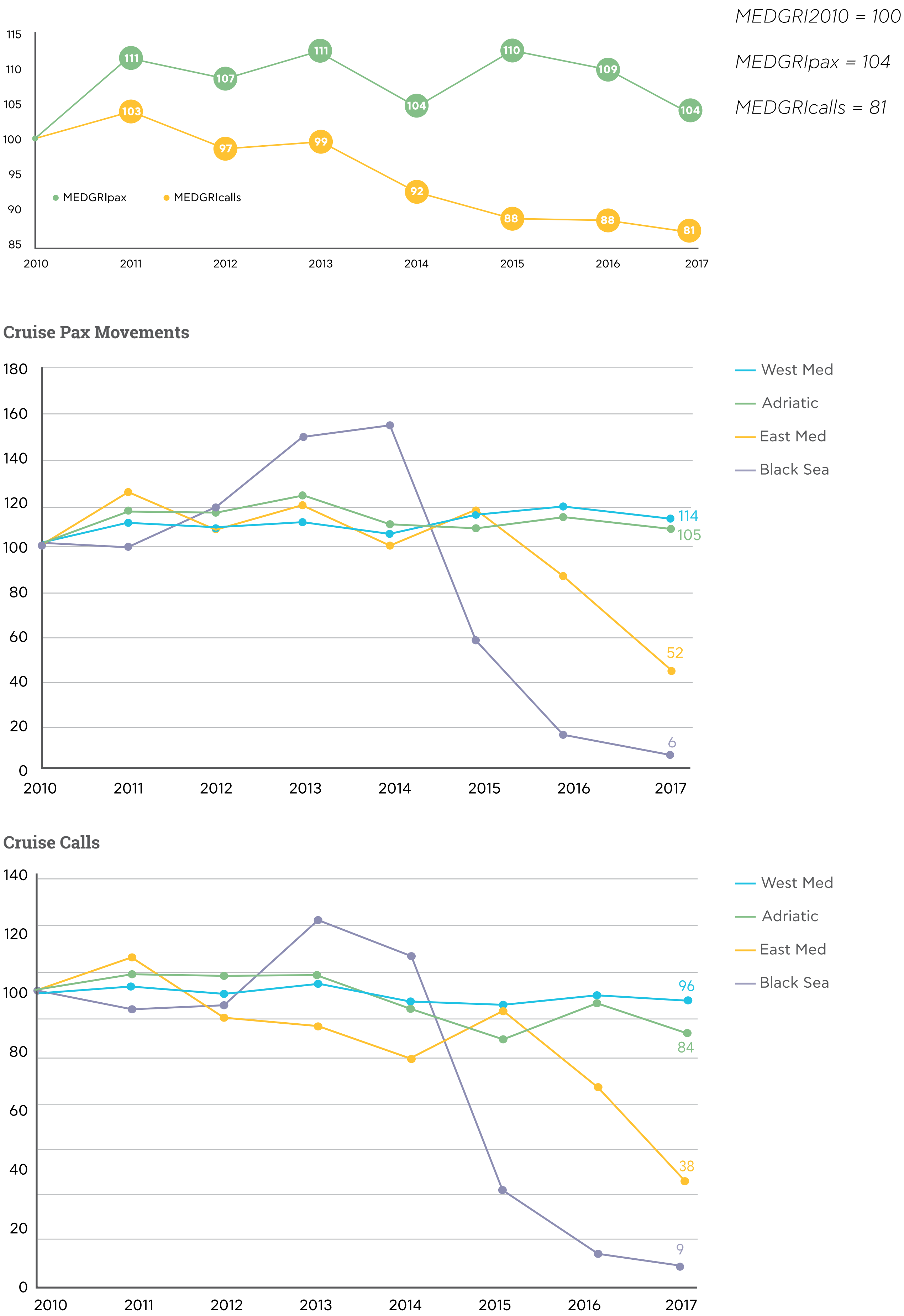
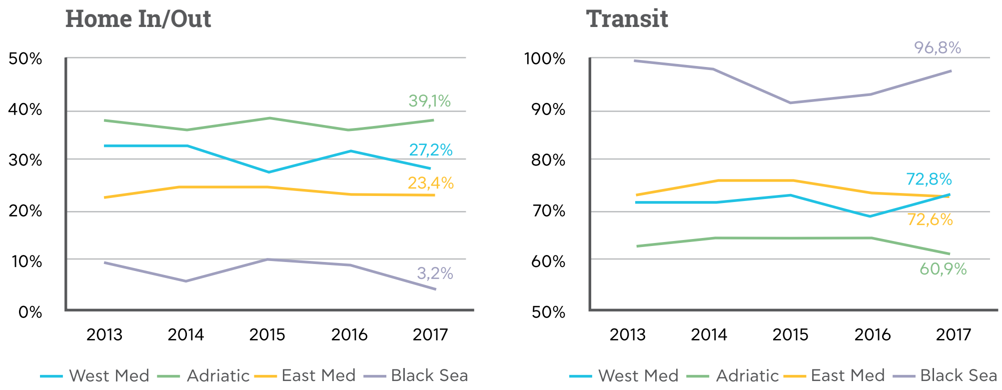


Figure 4.8 provides visualised information on the evolution of home in/out shares per region, as well as those of the transit passenger movements comparing to the total of the cruise passengers recorded in each of the four MedCruise regions per year. Evidently, a major part of cruise activities taking place in the Adriatic (39,1% in 2017), the East Med (23,4%) and the West Med (27,2%), are home-porting activities. The respective percentage of the Black Sea was 3,2% in 2017.

Figure 4.8: Home In/Out vs Transit Passenger Shares Evolution per region



4.4 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 activities of 2017 with those of 2016, as well as a similar comparison with the passenger movements and calls that had been recorded in 2013.

Table 4.6 presents the three major ports of each region as regards total passenger movements and **Table 4.7** the three major ones as regards cruise calls, both compared to the previous year and the 5-year-term variation. Black Sea ports are excluded from this analysis as none of them recorded in 2017 more than 10.000 pax or 20 cruise calls.

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

Region	No	Port	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
West Med	1	Barcelona	2.712.247	2.683.594	1,07%	2.599.232	4,35%
	2	Civitavecchia	2.204.336	2.339.676	-5,78%	2.538.259	-13,16%
	3	Balearic Islands	2.110.663	1.957.429	7,83%	1.541.376	36,93%
Adriatic	1	Venice	1.427.812	1.605.660	-11,08%	1.815.823	-21,37%
	2	Dubrovnik	748.918	831.730	-9,96%	1.136.503	-34,10%
	3	Corfu	679.681	748.914	-9,24%	744.651	-8,72%
East Med	1	Piraeus	1.055.559	1.094.135	-3,53%	1.302.581	-18,96%
	2	Heraklion	181.693	238.780	-23,91%	270.020	-32,71%
	3	Souda/Chania	128.067	147.915	-13,42%	124.205	3,11%

Table 4.7: Major Ports per region: Total Cruise Calls

Region	No	Port	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
West Med	1	Balearic Islands	819	742	10,38%	699	17,17%
	2	Barcelona	778	758	2,64%	835	-6,83%
	3	Civitavecchia	729	833	-12,48%	959	-23,98%
Adriatic	1	Dubrovnik	539	639	-15,65%	843	-36,06%
	2	Venice	466	529	-11,91%	548	-14,96%
	3	Kotor	430	487	-11,70%	387	11,11%
East Med	1	Piraeus	576	625	-7,84%	711	-18,99%
	2	Heraklion	131	165	-20,61%	177	-25,99%
	3	Kusadasi	130	278	-53,24%	451	-71,18%

Table 4.8 and **Table 4.9** present information on the leading ports, in terms of size, in each region as regards home in/out passenger movements and transit passenger movements, respectively.

In the West Med, Barcelona hosted 1.440 thousand home in/out passengers, which is more than any other port in the entire Med, and Civitavecchia accommodated almost 850.000 home in/out passengers.

In the Adriatic, Venice, the second major port of all in the Med and its adjoining seas as regards the hosting of passengers embarking and disembarking a cruise, hosted 1,2 million home in/out passengers within a year.

The major East Med homeport is Piraeus (332.611 home in/out passengers in 2017), followed by Cyprus ports (71.342 home in/out passengers). Piraeus registered a significant rise of home-porting activities in 2016 (24,1%), but declined in 2017 by 5,7%. Cyprus ports experienced a growth of home-porting activities in 2017 compared to those of 2016 (22,7%).

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

Region	No	Port	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
West Med	1	Barcelona	1.440.383	1.555.819	-7,42%	1.506.286	-4,38%
	2	Civitavecchia	849.993	847.009	0,35%	989.998	-14,14%
	3	Balearic Islands	737.810	600.181	22,93%	490.631	50,38%
Adriatic	1	Venice	1.226.471	1.408.066	-12,90%	1.512.596	-18,92%
	2	Bari	164.160	109.137	50,42%	165.031	-0,53%
	3	Corfu	69.915	70.864	-1,34%	70.735	-1,16%
East Med	1	Piraeus	332.611	352.663	-5,69%	308.705	7,74%
	2	Cyprus Ports	71.342	58.163	22,66%	100.905	-29,30%
	3	Antalya	37.233	44.476	-16,29%	151.973	-75,50%

Following a major rise of transit passengers for a third successive year, Balearic Ports joined Civitavecchia and Barcelona as the ports accommodating more transit passengers than any other port in the West Med **(Table 4.9)**. Each of these three ports hosted more than 1,2 million transit passengers per year.

Dubrovnik sustains as the major port of the Adriatic region in terms of transit passengers. This is despite the fact that the transit passengers that visited Dubrovnik in 2017 were 10,8% less than those visiting the port a year earlier. Corfu hosted just over 600.000 transit passengers in 2017 and Kotor recorded a marginal increase (0,8%).

Piraeus, Heraklion, and Souda/Chania are the leading ports in East Med, which hosted 722.000, 162.000, and 127.000 transit passengers in 2017, respectively.

Table 4.9: Major Ports per region: Total Transit Passengers

Region	No	Port	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
West Med	1	Balearic Islands	1.372.853	1.357.248	1,15%	1.050.745	30,66%
	2	Civitavecchia	1.354.343	1.492.667	-9,27%	1.548.261	-12,52%
	3	Barcelona	1.271.864	1.127.775	12,78%	1.092.966	16,37%
Adriatic	1	Dubrovnik	680.813	763.561	-10,84%	1.111.663	-38,76%
	2	Corfu	609.766	678.050	-10,07%	673.916	-9,52%
	3	Kotor	539.653	535.232	0,83%	317.746	69,84%
East Med	1	Piraeus	722.948	741.472	-2,50%	993.876	-27,26%
	2	Heraklion	162.819	231.478	-29,66%	214.577	-24,12%
	3	Souda/Chania	127.285	147.915	-13,95%	124.205	2,48%

4.5 Cruise Traffic per country

MedCruise members spread in 20 different countries in the Mediterranean and its adjoining seas. **Table 4.10** presents the cruise activities that were registered per country. The fact that MedCruise members represent in most cases more than 80% of the total cruise activities per country allows meaningful conclusions on the trends observed. It is acknowledged though this is not in all cases the total traffic within the country, as the numbers of reporting might not always correspond to the total of cruise ports in the respective country.

Figure 4.9 pictures the shares of cruise activities per major country. Double-digit shares of the total cruise activities happening in the Med and its adjoining seas are recorded in Italy (36,8%) and Spain (27,3%), while France (9,7%), Greece (8,0%), Portugal (4,7%), and Croatia (4,5%) follow with single-digit percentages.

As regards the number of cruise calls, the share of Italy is 28,7% of the total calls, Spain 24,0%, and Greece 10,1%. The other major (in terms of cruise calls per year) countries are France (8,6%), Croatia (8,2%), and Portugal (7,0%).

Home in/out passenger shares concentrate in Italy and Spain, with the two countries hosting 47,7% and 33,8% of the total, respectively. France (6,2%), and Greece (5,6%) also register notable shares of home-porting activities in the Med.

Transit passenger movements per country are a bit more balanced. Italy (32,4%), Spain (24,6%), and France (11,0%) host double-digit shares, while Greece (8,9%), Portugal (6,3%), and Croatia (5,9%) retain significant shares as well.

Figure 4.9: Cruise Traffic per MedCruise Country (2017)

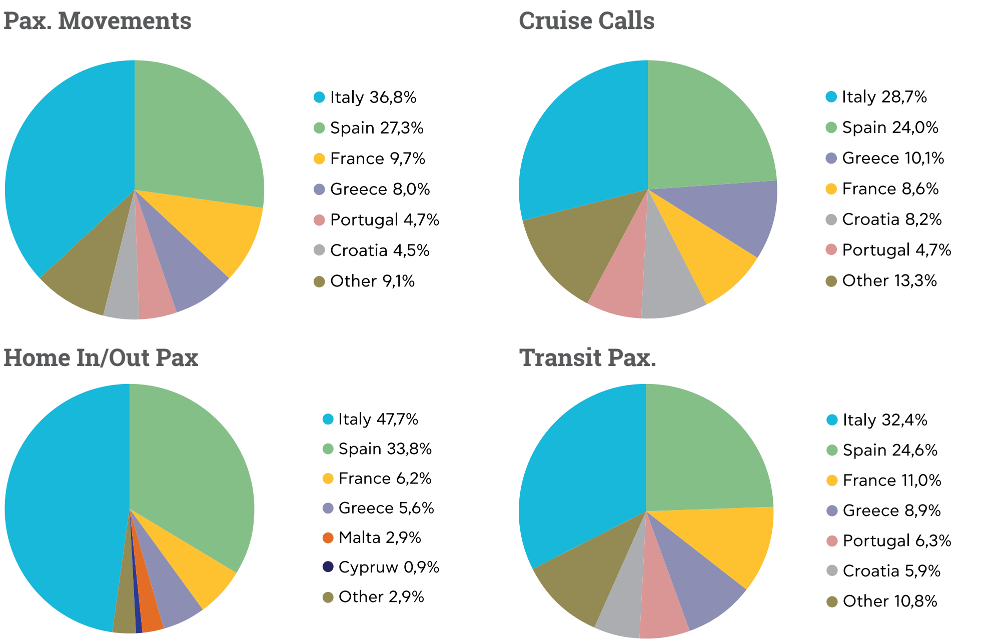


Table 4.10 lists the cruise passenger movements that were recorded in 2017 per country and the respective variations observed when comparing these data with those of previous years. Tunisia (602,4%), Ukraine (31,7%), Malta (14,0%), Spain (6,4%) and Portugal (3,1%), are the countries that registered the most significant growth of annual passenger movements in 2017 comparing to the previous year.

The evolution of cruise traffic is quite different when comparing the variation of traffic since 2013. Montenegro saw their cruise passenger numbers increasing by 70,3%, while in Malta such activities were almost doubled within the 5-year period. Gibraltar also hosted 45,6% more activities in 2017, with the increase of cruise passenger movements also being remarkable in Spain (18,0%), France (11,5%), Slovenia (10,3%), and Portugal (6,9%). In the other countries the size of cruise activities decreased in 2017 comparing to that they had recorded five years before.

Table 4.10: Cruise Passenger Movements per MedCruise Country

Country	2017	% Share in 2017	2016	Variation 2017/2016	2013	Variation 2017/2013
Italy	9.535.688	36,80%	10.381.551	-8,15%	10.494.569	-9,14%
Spain	7.074.594	27,30%	6.651.111	6,37%	5.994.886	18,01%
France	2.498.725	9,64%	2.564.945	-2,58%	2.241.596	11,47%
Greece	2.068.308	7,98%	2.300.473	-10,09%	2.489.184	-16,91%
Portugal	1.227.277	4,74%	1.190.404	3,10%	1.147.730	6,93%
Croatia	1.159.203	4,47%	1.269.993	-8,72%	1.397.778	-17,07%
Malta	778.596	3,00%	682.970	14,00%	477.759	62,97%
Montenegro	541.017	2,09%	536.644	0,81%	317.746	70,27%
Gibraltar	404.995	1,56%	404.005	0,25%	278.139	45,61%
Turkey	201.714	0,78%	500.330	-59,68%	1.530.888	-86,82%
Monaco	168.017	0,65%	185.392	-9,37%	249.806	-32,74%
Cyprus	123.397	0,48%	141.358	-12,71%	271.673	-54,58%
Slovenia	72.175	0,28%	78.923	-8,55%	65.434	10,30%
Israel	26.757	0,10%	27.632	-3,17%	88.364	-69,72%
Morocco	23.550	0,09%	97.311	-75,80%	0	n.d.
Tunisia	5.317	0,02%	757	602,38%	511.065	-98,96%
Bulgaria	2.716	0,01%	6.942	-60,88%	8.670	-68,67%
Romania	1.891	0,01%	6.912	-72,64%	54.614	-96,54%
Ukraine	1.636	0,01%	1.242	31,72%	91.949	-98,22%

Considering the annual variation of cruise calls per country **(Table 4.11)**, Tunisia (200,0%), Ukraine (140,0%), Portugal (9,6%), Spain (8,3%), Malta (7,9%), and Gibraltar (4,9%) are the countries that in 2017 saw the number of calls hosted increasing comparing to 2016. In the other countries, the number of cruise calls declined, in some of them –i.e. Bulgaria, Rumania, Morocco, and Turkey– to extensive levels.

The medium-term trends of the number of cruise calls per country indicate that Gibraltar (31,3%), Slovenia (25,9%), and Malta (23,5%) are the countries that within the period 2013-2017 experienced major increases in the number of calls. Montenegro, Portugal, and Spain are the other three countries that, in 2017, accommodated higher numbers of calls comparing to 2013. In the other countries, the number of calls per annum was lower in 2017 than in 2013. Unquestionably, the larger size of cruise vessels deployed has had an impact on these trends that affect all cruise regions of the globe including the Med and its adjoining seas.

Table 4.11: Cruise Calls per MedCruise Country

Country	2017	% Share in 2017	2016	Variation 2017/2016	2013	Variation 2017/2013
Italy	3.489	28,74%	3.948	-11,63%	14.113	-15,17%
Spain	2.917	24,03%	2.694	8,28%	2.722	7,16%
Greece	1.230	10,13%	1.453	-15,35%	1.494	-17,67%
France	1.042	8,58%	1.152	-9,55%	1.253	-16,84%
Croatia	1.001	8,25%	1.160	-13,71%	1.458	-31,34%
Portugal	846	6,97%	772	9,59%	778	8,74%
Montenegro	430	3,54%	487	-11,70%	387	11,11%
Malta	342	2,82%	317	7,89%	277	23,47%
Gibraltar	235	1,94%	224	4,91%	179	31,28%
Turkey	188	1,55%	396	-52,53%	1.146	-83,60%
Monaco	166	1,37%	181	-8,29%	221	-24,89%
Cyprus	113	0,93%	135	-16,30%	255	-55,69%
Slovenia	68	0,56%	69	-1,45%	54	25,93%
Morocco	27	0,22%	66	-59,09%	0	n.d.
Israel	21	0,17%	22	-4,55%	75	-72,00%
Ukraine	12	0,10%	5	140,00%	148	-91,89%
Tunisia	6	0,05%	2	200,00%	201	-97,01%
Bulgaria	3	0,02%	8	-62,50%	17	-82,35%
Romania	3	0,02%	8	-62,50%	69	-95,65%

ANALYSIS PER MEDCRUISE PORT SIZE

5.1 Categories of MedCruise ports per size

This section presents an analysis of cruise traffic developments based on the size of MedCruise port members. The 73 MedCruise ports are divided in two categories based on the total cruise passenger movements per year. Category A contains 36 ports, while Category B includes 37.

These two categories are:

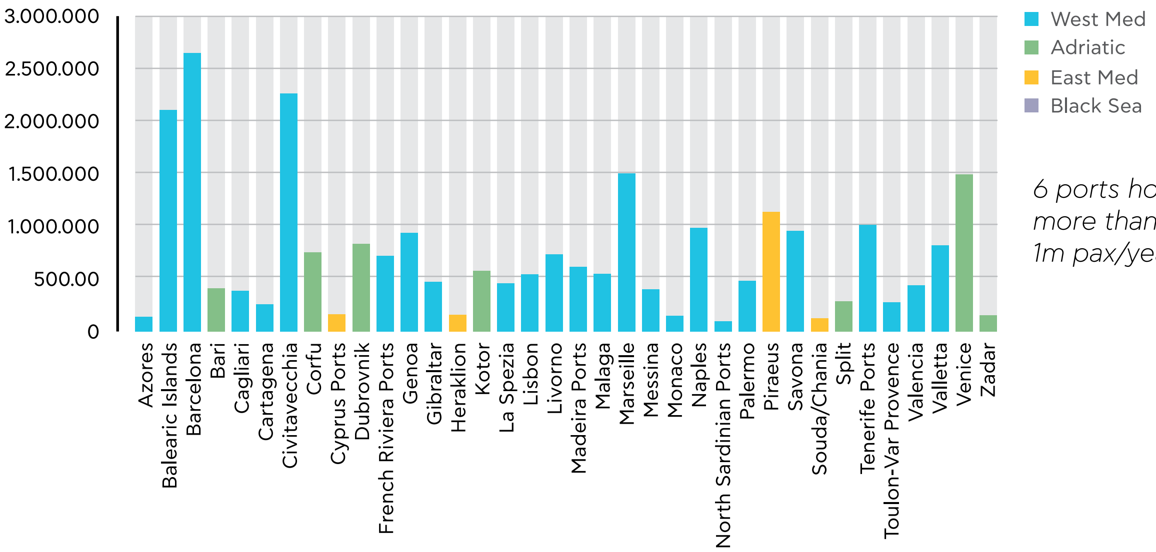
Category A:	Port members with more than 120.000 cruise passenger traffic in 2017
Category B:	Port members with less than 120.000 cruise passenger traffic in 2017

Half of MedCruise ports host more than 120.000 pax/year

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

Figure 5.1 details the list of MedCruise port members included in Category A (see also the Appendix for the list of ports included in each of these categories).

Figure 5.1: Category A - MedCruise Ports per region

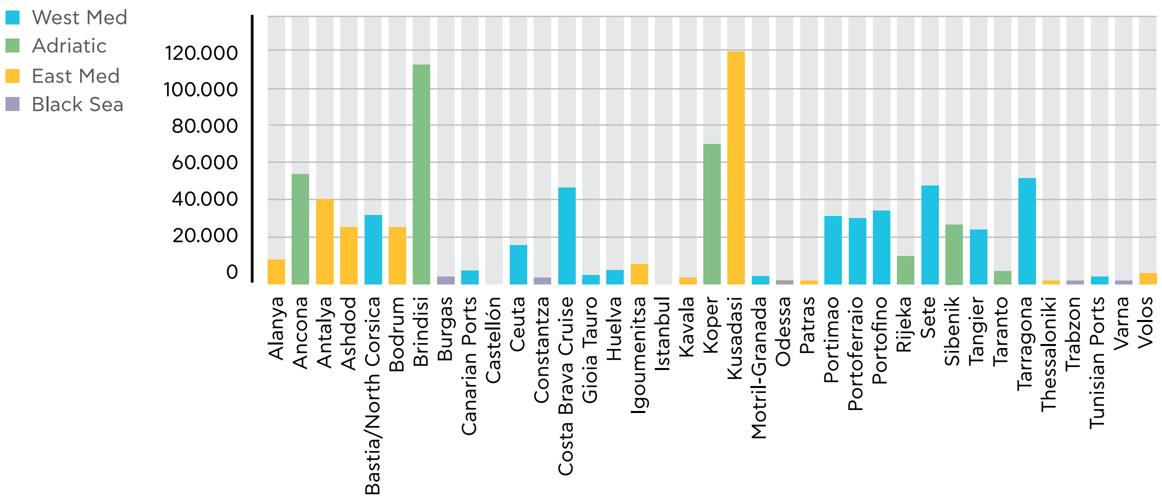


6 ports host more than 1m pax/year

In total, 25 of the 36 ports of Category A are located in the West Med. In terms of passenger movements hosted per year, among the major five ports only one is not a port of West Med. This is Venice, an Adriatic port that stands as the fourth major port (1,4 million passenger movements). The other four, Barcelona (2,7 million in 2017), Civitavecchia (2,2 million in 2017), Balearic Islands (2,1 million in 2017), and Marseille (1,5 million in 2017) are all West Med ports. Seven ports located in the Adriatic are part of this group. Only four ports located in the East Med can be found in Category A, with Piraeus being the only one that hosted more than 1 million passenger movements in 2017. There is no Black Sea port in this category as all ports in the region recorded less than 120.000 passenger movements in 2017.

Figure 5.2 details the list of ports included in Category B. The geographical distribution of this group of ports in the four regions is more balanced. All Black sea ports are listed in this size category. The list also includes 15 West Med ports, 11 East Med and six ports located in the Adriatic. The three larger cruise ports of Category B are located in two different regions. These are Kusadasi (118.448 passengers) in the East Med, and Brindisi (108.925 passengers) and Koper (72.175 passengers) in the Adriatic.

Figure 5.2: Category B - MedCruise Ports per region



5.2 Categories of MedCruise ports per 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 2017, Category A ports registered a decline of total passenger movements by 3,4%, of home in/out passengers by 1,0%, and of transit passengers by 4,1%. In terms of cruise calls Category A ports experienced a decrease by 6,7%.

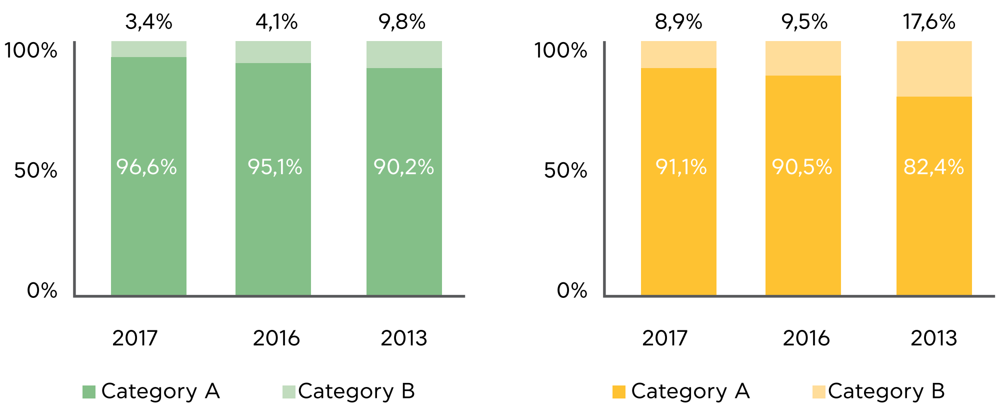
Table 5.1: Cruise Traffic Variations by size category

Category		2017	2016	Variation 2017/2016	2013	Variation 2017/2013
Total Pax.	A	25.039.863	25.923.190	-3,41%	24.988.924	0,20%
	B	875.710	1.105.705	-20,80%	2.722.926	-67,84%
Cruise Calls	A	11.061	11.852	-6,67%	12.234	-9,59%
	B	1.078	1.247	-13,55%	2.613	-58,74%
Home In/ Out Pax.	A	7.407.804	7.482.565	-1,00%	7.553.147	-1,92%
	B	106.527	92.972	14,58%	419.694	-74,62%
Transit Pax.	A	17.632.031	18.387.612	-4,11%	16.538.646	6,61%
	B	769.183	1.012.363	-24,02%	2.296.061	-66,50%

Category B ports recorded a significant decrease in 2017 as regards cruise passenger movements (-20,8%), cruise calls (-13,6%), and transit passengers (-24,0%). However, the home in/out passengers hosted in these ports in 2017 where 14,6% more than a year before.

As **Figure 5.3** shows, the share of Category B ports remains a minor share of the total cruise passengers that visit the Mediterranean and its adjoining seas. Taking for example the cruise passenger movements that happened in 2017, the share of Category B ports barely touches the 3,4% of the total; one year earlier this percentage was 4,1%, but developments that took place mostly in East Med and the Black Sea have resulted in a significant decrease of cruise activities over the last year. Five years earlier this percentage was standing at a notably higher level of 9,8% (2013). As regards the total cruise calls hosted per year, the share of Category B ports proves to be higher, as it exceeds 8,8% of the total calls of 2017. This share had been almost a double digit one a year earlier (9,5% in 2016) and even higher (17,6%) five years before.

Figure 5.3: Cruise Traffic Evolution by size category



5.3 Variations by Size Category per Region

Table 5.2 details the distribution of the total passenger movements hosted in 2017 by the ports of each size category per region. It also compares these records with the respective records of past years.

The picture of the evolution since 2013 suggests that Category A ports located in the West Med have seen the total cruise passenger traffic growing by 6,7%. However, passenger movements in these ports decreased by 1,9% in 2017 comparing to the respective numbers of 2016. Category A ports located in the Adriatic hosted, in 2017, 14,0% less passengers as they did five years ago. In the case of the East Med, the records of 2017 stand lower than five years before (-24,4%). There are no cruise ports hosting more than 120.000 passengers per year in the Black Sea.

The case of Category B ports is quite different, as smaller in terms of traffic cruise ports have experienced a decline of the cruise passengers that they host per year. West Med ports of this size category experienced a 50,1% traffic drop in 2017 compared to 2013, but with the passenger movements standing 2,7% higher than the passenger movements of 2016. The five-year variation in the case of Adriatic is very positive by 29,7%. Notably the variation is even bigger when one compares also the last two years (70,7%).

In the other two cases though, Black Sea and the East Med, the records of 2017 have been exceptionally low for second year in a row. The cruise passengers recorded in the East Med ports of the sample are more than 340.000 less than a year before. Of similar levels is the drop in the Black Sea ports. In 2017, these ports registered just 6.449 passengers.

Table 5.2: Variations by size category per region: Total Passenger movements

Size Category	Region	% of Total 2017	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
A	West Med	74,81%	119.386.220	19.765.066	-1,92%	18.177.259	6,65%
	Adriatic	16,07%	4.164.927	4.535.936	-8,18%	4.843.186	-14,00%
	East Med	5,74%	1.488.716	1.622.188	-8,23%	1.968.479	-24,37%
B	West Med	1,29%	335.582	326.674	2,73%	683.121	-50,88%
	Adriatic	1,09%	282.106	165.244	70,72%	217.593	29,65%
	East Med	0,97%	251.573	598.239	-57,95%	1.657.947	-84,83%
	Black Sea	0,02%	6.449	15.548	-58,52%	164.265	-96,07%

As regards cruise calls **(Table 5.3)**, West Med ports of Category A hosted, in 2017, 7.831 calls, or 64,5% of the total calls in the Med and its adjoining seas. The number of calls in the case of these West Med ports decreased within a year by 4,0%, and comparing to 2013 by 5,9%. In percentage terms, the annual variation of calls in Adriatic and East Med Category A ports, has been of equal magnitude. Category A Adriatic ports in 2017 hosted 13,2% less calls than a year before and Category A East Med ports hosted 10,6% less calls than in 2016.

Category B ports located in the West Med and the Adriatic registered in 2017 more calls than the previous year by 16,5% and 13,5%, respectively. In the other two regions, the number of calls in smaller ports declined; on annual basis this variation was -53,6% in the East Med and in the Black Sea -20,8%. Over the last five years small ports in all regions recorded a decline of cruise calls.

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

Size Category	Region	% of Total 2017	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
A	West Med	64,51%	7.831	8.160	-4,03%	8.321	-5,89%
	Adriatic	19,16%	2.326	2.681	-13,24%	2.723	-14,58%
	East Med	7,45%	904	1.011	-10,58%	1.190	-24,03%
B	West Med	4,55%	552	474	16,46%	621	-11,11%
	Adriatic	2,22%	270	238	13,45%	458	-41,05%
	East Med	1,95%	237	511	-53,62%	1.272	-81,37%
	Black Sea	0,16%	19	24	-20,83%	262	-92,75%

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. These ports recorded almost 99% of passengers of this type. Thus, they are the ones demanding closer consideration. 5,5 million home in/out passengers within 2017 visited Category A West Med ports, a number that equals 72,6% of the total home in/out passengers in the Med. Another 20,4% (1,5 million passengers) is hosted in the Adriatic Category A ports and the rest 5,6% (423.609 passengers) in the biggest East Med ports. The records of 2017 are positive in the case of East Med (1,3%) and in the West Med (1,0%), but negative in the Adriatic (-7,8%). Looking at the mid-term trends though the levels of 2017 home in/out traffic in the West Med were higher than in 2013 by 2,7%; and lower in the Adriatic and in the East Med by 13,8% and 8,9% decline, respectively.

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

Size Category	Region	% of Total 2017	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
A	West Med	72,57%	5.453.444	5.405.033	0,90%	5.311.955	2,66%
	Adriatic	20,37%	1.530.751	1.659.404	-7,75%	1.776.139	-13,82%
	East Med	5,64%	423.609	418.128	1,31%	465.053	-8,91%
B	West Med	0,20%	14.815	1.935	665,63%	96	15332,29%
	Adriatic	0,45%	33.960	10.954	210,02%	49.427	-31,29%
	East Med	0,76%	57.292	79.620	-28,04%	359.189	-84,05%
	Black Sea	0,01%	460	463	-0,65%	10.982	-95,81%

Analysing the mid-term trend of transit passenger movements in the case of Category A ports **(Table 5.5)**, a sizeable increase (16,4%) took place in the biggest (in terms of passenger movements) region of all, which is the West Med. In 2017, however, the large ports of West Med hosted 2,6% less transit passenger movements comparing to the immediate past year. This totals 75,7% of the total recorded throughout the Med and its adjoining seas. Transit passengers decreased in the Adriatic in 2017 compared to 2016 by 8,4% and 14,1% comparing 2017 to 2013. Same situation happened in the East Med Category A ports where the annual variation stood at -11,5% and the five-annual-term at -29,2%.

The changes of transit passenger movements observed in the case of smaller ports indicate the presence of a volatile market. Ports that hosted in 2017 less than 120.000 cruise passengers have experienced double-digit variations on an annual basis in Adriatic (increase by 60,8%), East Med (decrease by 62,5%), and Black Sea (decrease by 60,3%). They also did so when comparing traffic changes to five years before. In the case of the West Med ports of this category, in 2017, transit passengers were only 1,2%, less than a year before, but 53,0% less than five years before.

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

Size Category	Region	% of Total 2017	2017	2016	Variation 2017/2016	2013	Variation 2017/2013
A	West Med	75,72%	13.932.748	14.307.021	-2,62%	11.968.173	16,41%
	Adriatic	14,32%	2.634.176	2.876.531	-8,43%	3.067.047	-14,11%
	East Med	5,79%	1.065.107	1.204.060	-11,54%	1.503.426	-29,15%
B	West Med	1,74%	320.767	324.739	-1,22%	683.065	-53,04%
	Adriatic	1,35%	248.146	154.290	60,83%	168.166	47,56%
	East Med	1,06%	194.281	518.249	-62,51%	1.291.547	-84,96%
	Black Sea	0,03%	5.989	15.085	-60,30%	153.283	-96,09%

Meet MedCruise

#PortsTogether

Alanya | Ancona | Ashdod | Azores
Balearic Islands | Barcelona | Bari/Brindisi
Bastia/North Corsica | Burgas
Canarian Ports | Cartagena | Castellon
Ceuta | Civitavecchia | Constantza | Corfu
Costa Brava Cruise Ports | Cyprus Ports
Dubrovnik | Egyptian Ports
French Riviera Ports | Genoa/Savona
Gibraltar | Gioia Tauro | Heraklion
Huelva | Igoumenitsa | Istanbul | Kavala
Koper | Kotor | Kusadasi/Antalya/Bodrum
La Spezia | Lisbon | Livorno | Madeira Ports
Malaga | Marseille | Mersin | Messina
Monaco | Motril-Granada
Naples/Salerno/Castellammare di Stabia
Odessa | Palermo | Patras | Piraeus
Portimao | Portoferraio | Portofino | Rijeka
Sardinian Ports | Sete | Sibenik
Souda/Chania | Split | Tangier | Taranto
Tarragona | Tenerife Ports | Thessaloniki
Toulon-Var Provence | Trabzon
Tunisian Ports | Valencia | Valletta
Varna | Venice | Volos | Zadar

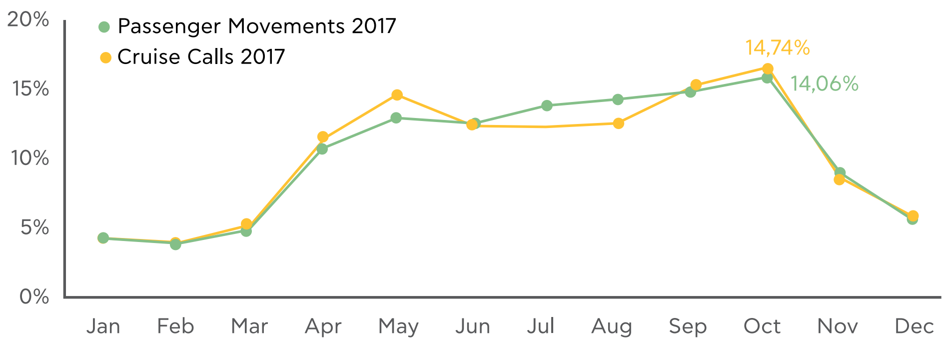
SEASONALITY ANALYSIS

6.1 Seasonality in MedCruise Ports

The seasonality of cruise activities in MedCruise ports is the theme of this section of the report. The focus is on how cruise traffic is distributed on a monthly and seasonal basis. The report also discusses the observed variations depending on the size or the region where a port is located.

Figure 6.1 illustrates the shares of passenger movements and cruise calls per month in 2017. The highest share of cruise passenger movements in 2017 was recorded in October (14,1%). Notably, the same happened in the years 2013-2016 as well, as October hosted around 14% of the cruise traffic in these years. In 2012, the month when the major percentage of passenger movements concentrated had been August (14,0%).

Figure 6.1: Cruise Passenger Shares per month (2017)



October 2017: Busiest cruise month (14,1% of total pax)

As regards cruise calls, the highest share was also registered in October (14,8%). A year earlier, October 2016 had hosted 14,4% of the total annual calls, being also the most populated month of the year. September 2017 was the second busiest month of last year, with 12,9% of annual passenger movements and 13,2% of annual cruise calls recorded during this month **(Table 6.1)**.

Table 6.1: Total Cruise Traffic per month in 2017

Month	Total Cruise Pax	% of Total Cruise Pax	Total Cruise Calls	% of Total Cruise Calls	Pax/Call
January	585.842	2,26%	266	2,19%	2.202
February	522.749	2,02%	237	1,95%	2.206
March	740.719	2,86%	392	3,23%	1.890
April	2.308.613	8,91%	1.177	9,70%	1.961
May	2.905.156	11,21%	1.553	12,79%	1.871
June	2.763.468	10,66%	1.272	10,48%	2.173
July	3.126.904	12,07%	1.276	10,51%	2.451
August	3.201.749	12,35%	1.313	10,82%	2.438
September	3.351.555	12,93%	1.605	13,22%	2.088
October	3.644.332	14,06%	1.789	14,74%	2.037
November	1.799.593	6,94%	839	6,91%	2.145
December	964.893	3,72%	420	3,46%	2.297

May to October: 73,3% of total visits

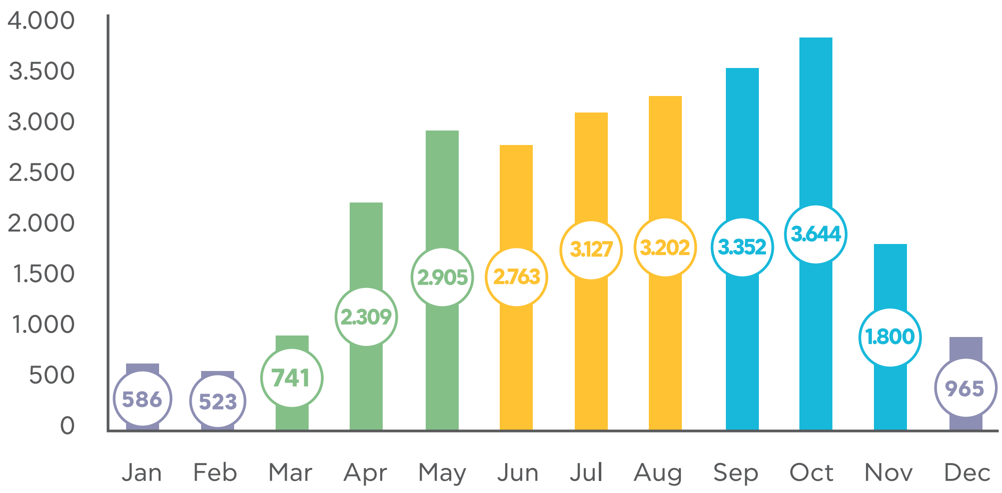
Each month of the May-October period hosts, in a most balanced way, passenger movement shares of 10-14%. In total, 73,3% of the 2017 cruise passenger movements happened during the specific six-months period. The share of the total passenger movements registered during the three winter months (January, February, December) of 2017 was 8,0%, whereas in 2016 the respective share equals to 7,4% of the total annual movements.

Figure 6.2 visualises the monthly distribution of the total cruise passenger movements per month that took place in the Med and its adjoining seas in 2017. July, August, September and October are the months when MedCruise ports recorded more than three million passenger movements on a monthly basis.

In April, May and June 2017 this total ranged between 2 and 3 million, while 1,8 million passenger movements were recorded in November. In March 2017 MedCruise ports hosted 740.000 passenger movements, recording a considerable decrease comparing to the one million of 2016. Less than one million passenger movements happened also per winter month of 2017, following the exact same trend as in previous years.

In 2017, the 35,1% of the total cruise passenger movements took place during the three summer months, while in 2016 the same percentage stood at 36,4%. The respective share of 2015 stood at 37,2%, while for both 2014 and 2013 this percentage reached 35,4%, which is considerably lower than the one of summer 2012 when almost 40% of the annual cruise traffic took place.

Figure 6.2: Total Cruise Pax. per month (in thousands; 2017)



Detailing the total number of cruise calls per month, **(Figure 6.3)** reveals the presence of a 'regular season' that starts in April, with 1.177 calls, and reaches its peak in October with almost 1.800 calls – this period hardly includes November, when less than 850 calls are recorded. Around 400 calls happened in March, while numbers for December are quite similar. The cruise calls recorded during the other two months of the winter, namely January and February, stand at 266 and 237 respectively. The monthly distribution of 2017 cruise calls stands as a regular pattern, given that a similar one was observed in the recent past as well.

Figure 6.3: Total Cruise Calls per month (2017)

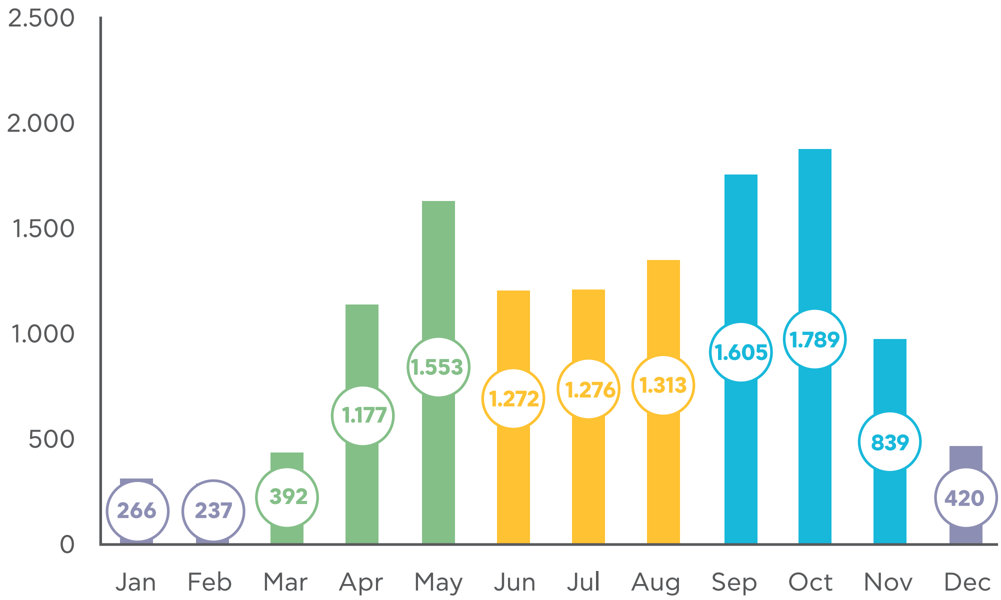
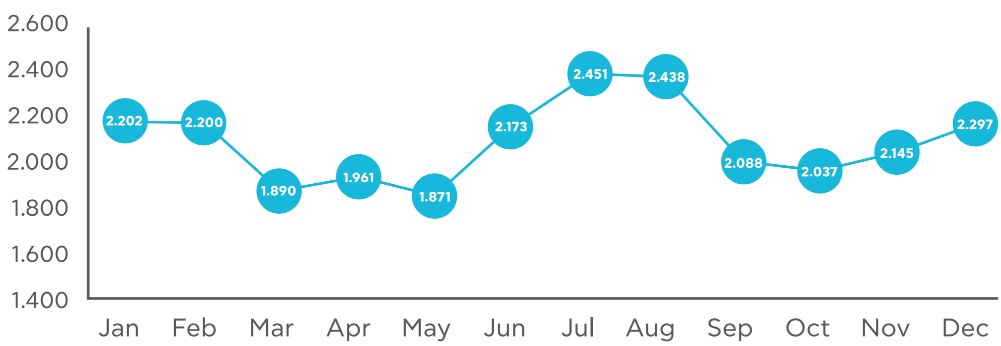


Figure 6.4 presents the average number of passengers per cruise call during each month of the year. The variations per month, as expected, are significant. In July the number of passengers per call appears to be 31,0% higher compared to the respective ratio of May. July is the month of 2017 with the highest rate of passengers per call (2.451), followed by August (2.438) and December (2.297). The lowest rates are registered in May (1.871) and March (1.890).

Interestingly, this picture is rather different comparing to the one observed one year before, as December was the month of 2016 with the lowest rate of passengers/call (1.785), followed by May (1.796) and April (1.812).

Figure 6.4: Average Pax/Call per month (2017)



July 2017: Highest pax per call rate (2.451)

6.2 Seasonality by region in 2017

The seasonality trends observed in each of the four distinctive regions in which MedCruise membership spreads (West Med, Adriatic, East Med, Black Sea) follow in certain respects dissimilar distributions **(Table 6.2)**.

In West Med the cruise traffic is distributed in a more balanced way throughout the year. Cruise activities during the winter months correspond to a 10,0% share of the total cruise passenger movements in the region, while 34,0% takes place during the summer. In the Adriatic and the East Med cruise traffic is concentrated mostly during the second half of the year, in particular the period commencing in June and ending in November. In absolute numbers the passenger movements in the Adriatic during the winter months (Dec-Feb) did not exceed 70.000, corresponding to a minimal 1,5% of the total traffic taking place in the region on an annual basis.

Traditionally, the Black Sea demonstrates higher concentration of cruise passenger movements during the autumn months; however, in absolute numbers this high percentage of 2017 (42,4%) corresponds to no more than 2.800 passengers.

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

	Total Passenger Movements				Total Calls			
Region	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	23,50%	32,60%	33,95%	9,95%	27,15%	28,22%	35,17%	9,46%
Adriatic	19,59%	45,32%	33,55%	1,54%	20,26%	41,33%	34,01%	4,39%
East Med	25,61%	37,15%	34,78%	2,45%	27,70%	36,20%	34,71%	1,40%
Black Sea	39,39%	18,17%	42,44%	0,00%	21,05%	47,37%	31,58%	0,00%
Total	**22,98%**	**35,08%**	**33,94%**	**8,00%**	**25,72%**	**31,81%**	**34,87%**	**7,60%**

	Home In/Out Passengers				Transit Passengers			
Region	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	23,56%	33,41%	34,26%	8,77%	23,48%	32,29%	33,83%	10,40%
Adriatic	19,38%	45,61%	33,27%	1,74%	19,71%	45,16%	33,70%	1,44%
East Med	24,93%	41,86%	32,50%	0,71%	25,88%	35,36%	35,65%	3,12%
Black Sea	7,17%	66,52%	26,30%	0,00%	41,86%	14,46%	43,68%	0,00%
Total	**22,77%**	**36,49%**	**33,94%**	**6,79%**	**23,06%**	**34,51%**	**33,94%**	**8,50%**

6.3 Seasonality by size in 2017

Table 6.3 details the shares of the total cruise traffic that correspond to each trimester of 2017 within the two different port size categories of MedCruise.

Category A ports (i.e., ports hosting more than 120.000 passenger movements in 2017) recorded a higher share of annual passenger movements hosted during the winter times (8,2%) comparing to the respective share observed in Category B ports (1,7%). One year earlier, in 2016, these percentages had been quite similar with Category A ports recording 7,6% and Category B ports no less than 1,5%.

In the case of Category A ports the highest share of the cruise passenger traffic movements (34,9%) was registered during the summer months. Summer also proved to be the most popular season for size Category B ports, since 40,2% of total passenger movements were registered from June to August.

As regards cruise calls, in Category A ports the number of calls reaches its peak in autumn, as 35,0% of total calls occurred during these months. In the smaller in size Category B this peak happens during the summer months when 36,5% of the total cruise calls take place.

Focusing on the different types of passenger movements, the picture is quite balanced during the summer and autumn trimesters for ports of both categories. During each of these trimesters around one third of the total cruise passenger movements takes place. The only exception is the case of transit passengers in smaller ports, where a high concentration is observed during the autumn months (40,6%). Given the low levels of cruise passenger movements registered this year in Category B ports during winter months, it is no surprising that almost no home-porting activity (0,06%) took place in the particular ports during this period of time.

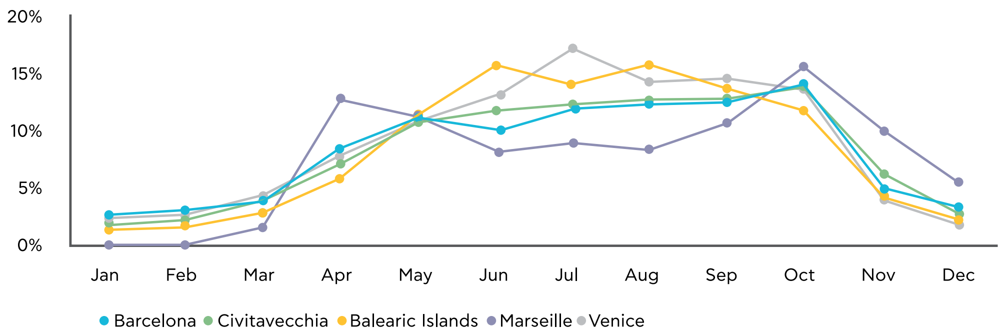
Table 6.3: Trimester Shares of Cruise Traffic within the two size categories

	Size Category	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Cruise Pax Movements	A	22,95%	34,91%	33,92%	8,22%
	B	23,64%	40,16%	34,48%	1,72%
Cruise Calls	A	25,74%	31,35%	34,98%	7,93%
	B	25,51%	36,46%	33,77%	4,27%
Home In/Out Pax	A	22,65%	36,49%	33,97%	6,89%
	B	31,12%	36,75%	32,08%	0,06%
Transit Pax	A	23,08%	34,24%	33,90%	8,78%
	B	22,60%	40,64%	34,81%	1,95%

6.4 Seasonality of cruise activity in MedCruise Ports

Seasonality trends in the major five ports in the Med **(Figure 6.5)** do not differ remarkably from that of the total sample. Civitavecchia, Balearic Islands and Venice register in January, February and December movements that do not exceed 4% of their total annual traffic. Whereas Barcelona is also close to these numbers, Marseille records a slightly higher share of passenger movements during winter months, while at the same time having a significantly lower share during the months from May to September. The concentration of traffic in the period May-September is far more evident in Venice and Balearic Islands (71,5% and 71,0% respectively of the total traffic) rather than in any other major port.

Figure 6.5: Major 5 MedCruise Ports Cruise Pax Seasonality 2017



Seasonality patterns of 5 major ports

Table 6.4 presents those MedCruise ports registering the major concentration of their cruise activities during spring time. The top port of this list is Canarian Ports, which host almost 67% of their annual cruise traffic during this trimester. Antalya and Tangier also benefit from spring months cruising, as within this period the former hosts 66,4% of the total of its annual passenger movements, and the latter 60,4%. Two Black Sea ports, Constantza and Burgas host more than 58% of their annual movements during spring months, while in aggregate no more than 177.639 passenger movements or 3,0% of the total movements that take place in MedCruise ports during this period are recorded in the 10 most concentrated ports.

Table 6.4: Highest Concentration of Passenger Movements (March/April/May 2017)

No	Port	Region	Size	% share of the port's total traffic	% share ofall MedCruise ports trimester traffic	Total Pax Mar-May	Total Calls Mar-May
1	Canarian ports	West Med	B	66,80%	0,05%	2.903	2
2	Antalya	East Med	B	66,35%	0,45%	26.536	7
3	Tangier	West Med	B	60,36%	0,24%	14.215	11
4	Constantza	Black Sea	B	59,97%	0,02%	1.134	1
5	Burgas	Black Sea	B	58,96%	0,02%	1.135	1
6	Alanya	East Med	B	51,28%	0,10%	6.250	5
7	Azores	West Med	A	46,72%	1,07%	63.438	79
8	Cyprus Ports	East Med	A	33,71%	0,70%	41.592	35
9	Bastia/N. Corsica	West Med	B	33,32%	0,18%	10.551	27
10	Portimao	West Med	B	33,11%	0,17%	9.885	20
	Total			-	**3,00%**	**177.639**	**188**

The picture is quite different in the case of the cruise passenger movements that take place during the summer months **(Table 6.5)**. All ten major ports in this category register more than 50% of their annual cruise passenger traffic during these months. The 238.847 passenger movements of the 10 most concentrated ports represent 2,6% of the share of all MedCruise ports during the summer months.

Table 6.5: Highest Concentration of Passenger Movements (June/July/August 2017)

No	Ports	Region	Size	% share of the port's total traffic	% share of all MedCruise ports trimester traffic	Total Pax Jun-Aug	Total Calls Jun-Aug
1	Castellón	West Med	B	100,00%	0,00%	411	1
2	Trabzon	Black Sea	B	100,00%	0,00%	206	1
3	Ancona	Adriatic	B	65,37%	0,37%	34.050	14
4	Ceuta	West Med	B	58,83%	0,11%	10.003	5
5	North Sardinian Ports	West Med	A	58,55%	0,86%	77.898	45
6	Tarragona	West Med	B	54,94%	0,31%	28.235	16
7	Patras	East Med	B	53,99%	0,01%	514	1
8	Odessa	Black Sea	B	53,30%	0,01%	872	7
9	Zadar	Adriatic	A	51,88%	0,79%	71.427	46
10	Portoferraio	West Med	B	51,70%	0,17%	15.231	45
	Total			-	**2,63%**	**238.847**	**181**

Table 6.6 presents the ports with the highest concentration of their annual cruise traffic in autumn months. Evidently, this concentration is observed in smaller ports as all 10 ports included in the list form Category B ports (less than 120.000 passengers per year). The sum of the movements happening in these 10 ports represents a very small percentage of the total movements that takes place in the Med during autumn. The list reveals an additional feature of cruise activities in the Med and its adjoining seas: the three autumn months is the period when several ports with comparatively fewer calls per year experience most of their movements.

Table 6.6: Highest Concentration of Passenger Movements (September/October/November 2017)

No	Port	Region	Size	% share of the port's total traffic	% share of all MedCruise ports trimester traffic	Total Pax Sep-Nov	Total Calls Sep-Nov
1	Varna	Black Sea	B	100,00%	0,01%	791	1
2	Thessaloniki	East Med	B	97,52%	0,03%	2.364	3
3	Kavala	East Med	B	90,70%	0,03%	2.926	4
4	Ashdod	East Med	B	67,71%	0,21%	18.116	13
5	Huelva	West Med	B	64,54%	0,05%	4.241	3
6	Motril-Granada	West Med	B	52,59%	0,02%	2.162	15
7	Volos	East Med	B	50,12%	0,04%	3.818	5
8	Rijeka	Adriatic	B	46,88%	0,07%	5.933	8
9	Patras	East Med	B	46,01%	0,00%	438	1
10	Costa Brava Cruise Ports	West Med	B	42,15%	0,22%	19.041	18
	Total			-	**0,68%**	**59.830**	**71**

Cruise numbers during the three winter months are quite different insofar as the concentration in specific ports is concerned **(Table 6.7)**. Tunisian Ports is the MedCruise port member registering the highest concentration during these months (83,1%). Tenerife, Madeira and Canarian Ports are the ones to follow with shares standing at 39,1%, 33,9% and 33,2% respectively. Impressively, in the case of Tenerife Ports the 377.000 passenger movements that are registered during this period represent 18,2% of the total trimester traffic in MedCruise ports.

The other seven ports of the list host shares of the range 11% to 21% of their total annual traffic during the months under examination. In total, 44,0% of the passenger movements that take place in the Mediterranean and its adjoining seas during winter months happen in the 10 ports presenting the major concentration.

Table 6.7: Highest Concentration of Passenger Movements (December/January/February 2017)

No	Port	Region	Size	% share of the port's total traffic	% share of all MedCruise ports trimester traffic	Total Pax Dec-Feb	Total Calls Dec-Feb
1	Tunisian Ports	West Med	B	83,13%	0,21%	4.420	5
2	Tenerife Ports	West Med	A	39,09%	18,18%	377.000	225
3	Madeira Ports	West Med	A	33,92%	8,84%	183.345	98
4	Canarian ports	West Med	B	33,20%	0,07%	1.443	1
5	Palermo	West Med	A	20,92%	4,63%	96.081	26
6	Azores	West Med	A	15,96%	1,05%	21.674	17
7	Gioia Tauro	West Med	B	14,63%	0,03%	606	1
8	Tangier	West Med	B	14,46%	0,16%	3.405	2
9	Genoa	West Med	A	13,15%	5,87%	121.703	24
10	Savona	West Med	A	11,98%	4,94%	102.330	22
Total				-	**43,98%**	**912.007**	**421**

The **Appendix** 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 three months period during the year 2017.

A GREAT PROGRAMME FOR ASSOCIATES

Alfaship
Allegra Montenegro
Bermello
Ajamil & Partners Europe (B&A)
Cemar
Council of Sant Carles de la Rapita
County Port Authority of Dubrovnik
Cruise Services Monaco
D'Alessandro Travel
Donomis Cruise Services
DP World Limassol
Hugo Trumpy Srl
Iberoservice
Intercruises Shoreside & Port Services
Kuoni Destination Management
Kvarner County Tourism Office
Kyriakakis Travel S.A.
La Goulette Cruise Terminal
Mediterranean Unique Experience
Medov Srl
MH Bland
MMS
Navigator Travel & Tourist Services
Patronat de Turisme Costa Brava
Perez y Cia
Salamis Organisation
Samer & Co Shipping
Scandinavian Near East Agency (SNEAL)
Transcoma Cruise & Travel
Tura Turizm
Turisme de Barcelona
Var Provence Cruise Club
World Synergy Travel

APPENDIX I

MedCruise Ports: Total Cruise Passenger Movements 2013-2017

No	Port	2017	2016	Variation 2017/2016	2015	2014	2013	Variation 2017/2013
1	Alanya	12.189	9.272	31,46%	22.321	19.092	57.454	-78,78%
2	Ancona	52.086	54.901	-5,13%	39.277	37.220	109.492	-52,43%
3	Antalya	39.995	45.405	-11,91%	171.117	175.274	167.794	-76,16%
4	Ashdod	26.757	27.632	-3,17%	33.419	40.780	88.364	-69,72%
5	Azores	135.783	125.904	7,85%	141.846	95.765	87.437	55,29%
6	Balearic Islands	2.110.663	1.957.429	7,83%	1.996.533	1.587.064	1.541.376	36,93%
7	Barcelona	2.712.247	2.683.594	1,07%	2.540.302	2.364.292	2.599.232	4,35%
8	Bari	397.588	400.875	-0,82%	368.281	561.602	604.781	-34,26%
9	Bastia/North Corsica	31.661	18.533	70,84%	53.024	57.927	43.292	-26,87%
10	Bodrum	30.876	61.261	-49,60%	70.038	33.407	29.551	4,48%
11	Brindisi	108.925	5.270	1966,89%	151.922	25.450	4.628	2253,61%
12	Burgas	1.925	5.833	-67,00%	7.575	41.763	5.673	-66,07%
13	Cagliari	424.305	255.873	65,83%	263.247	81.844	146.003	190,61%
14	Canarian ports	4.346	5.853	-25,75%	1.421	4.396	952	356,51%
15	Cartagena	236.412	187.843	25,86%	151.195	137.985	134.225	76,13%
16	Castellón	411	1.095	-62,47%	366	130	1.514	-72,85%
17	Ceuta	17.003	19.251	-11,68%	1.613	2.432	4.605	269,23%
18	Civitavecchia	2.204.336	2.339.676	-5,78%	2.271.652	2.140.039	2.538.259	-13,16%
19	Constantza	1.891	6.912	-72,64%	31.856	69.910	54.614	-96,54%
20	Corfu	679.681	748.914	-9,24%	647.346	672.368	744.651	-8,72%
21	Costa Brava Cruise Ports	45.176	25.505	77,13%	40.800	38.612	29.775	51,72%
22	Cyprus Ports	123.397	141.358	-12,71%	173.309	183.507	271.673	-54,58%
23	Dubrovnik	748.918	831.730	-9,96%	830.684	894.216	1.136.503	-34,10%
24	Egyptian Ports	9.835	n.a.	-	n.a.	n.a.	n.a.	-
25	French Riviera Ports	693.351	562.929	23,17%	546.199	595.685	613.218	13,07%
26	Genoa	925.188	1.017.368	-9,06%	848.227	824.109	1.050.085	-11,89%
27	Gibraltar	404.995	404.005	0,25%	344.140	299.923	278.139	45,61%
28	Gioia Tauro	4.141	13.758	-69,90%	13.868	3.320	2.590	59,88%
29	Heraklion	181.693	238.780	-23,91%	219.805	242.951	270.020	-32,71%
30	Huelva	6.571	20.071	-67,26%	4.788	0	296	2119,93%
31	Igoumenitsa	9.088	7.623	19,22%	3.090	3.096	4.650	95,44%
32	Istanbul	0	36.708	-100,00%	589.314	589.353	683.598	-100,00%
33	Kavala	3.226	6.042	-46,61%	12.783	13.087	6.995	-53,88%
34	Koper	72.175	78.923	-8,55%	57.893	58.970	65.434	10,30%
35	Kotor	541.017	536.644	0,81%	442.029	309.322	317.746	70,27%
36	Kusadasi	118.448	347.232	-65,89%	567.291	553.231	583.459	-79,70%
37	La Spezia	454.954	507.531	-10,36%	667.446	483.564	213.858	112,74%

No	Port	2017	2016	Variation 2017/2016	2015	2014	2013	Variation 2017/2013
38	Lisbon	521.042	522.497	-0,28%	512.128	500.872	558.040	-6,63%
39	Livorno	698.780	807.935	-13,51%	697.955	626.356	736.516	-5,12%
40	Madeira Ports	540.593	522.483	3,47%	580.348	475.955	482.112	12,13%
41	Málaga	510.607	442.931	15,28%	419.121	409.298	397.416	28,48%
42	Marseille	1.487.313	1.597.213	-6,88%	1.451.059	1.311.284	1.188.031	25,19%
43	Messina	390.196	373.199	4,55%	327.702	319.750	501.316	-22,17%
44	Monaco	168.017	185.392	-9,37%	259.325	200.039	249.806	-32,74%
45	Motril-Granada	4.111	4.570	-10,04%	6.481	19.589	16.809	-75,54%
46	Naples	927.458	1.306.151	-28,99%	1.269.571	1.113.762	1.175.018	-21,07%
47	North Sardinian Ports	133.035	210.386	-36,77%	238.256	166.985	206.140	-35,46%
48	Odessa	1.636	1.242	31,72%	6.563	8.506	91.949	-98,22%
49	Palermo	459.229	510.078	-9,97%	546.884	531.712	410.999	11,73%
50	Patras	952	743	28,13%	1.090	745	1.264	-24,68%
51	Piraeus	1.055.559	1.094.135	-3,53%	980.149	1.055.556	1.302.581	-18,96%
52	Portimao	29.859	19.520	52,97%	14.786	14.634	20.141	48,25%
53	Portoferraio	29.463	42.752	-31,08%	37.486	27.365	16.828	75,08%
54	Portofino	35.203	19.894	76,95%	30.696	21.579	22.749	54,75%
55	Rijeka	12.656	13.874	-8,78%	9.082	9.026	7.809	62,07%
56	Savona	854.443	910.244	-6,13%	982.226	1.018.794	939.038	-9,01%
57	Sète	47.377	23.791	99,14%	20.555	9.918	11.084	327,44%
58	Sibenik	27.718	12.276	125,79%	17.562	12.693	29.784	-6,94%
59	Souda/Chania	128.067	147.915	-13,42%	96.612	33.304	124.205	3,11%
60	Split	232.244	275.651	-15,75%	271.445	184.062	189.107	22,81%
61	Tangier	23.550	97.311	-75,80%	121.608	105.306	0	-
62	Taranto	8.546	0	-	314	582	446	1816,14%
63	Tarragona	51.393	14.013	266,75%	11.600	1.894	1.421	3516,68%
64	Tenerife Ports	964.337	884.173	9,07%	933.154	840.268	794.151	21,43%
65	Thessaloniki	2.424	18.876	-87,16%	26.356	19.720	14.591	-83,39%
66	Toulon-Var Provence	239.023	362.479	-34,06%	240.833	341.128	385.971	-38,07%
67	Trabzon	206	452	-54,42%	2.280	17.118	9.032	-97,72%
68	Tunisian Ports	5.317	757	602,38%	53.780	440.433	511.065	-98,96%
69	Valencia	411.317	404.783	1,61%	371.374	372.975	473.114	-13,06%
70	Valletta	778.596	682.970	14,00%	668.277	517.594	477.759	62,97%
71	Varna	791	1.109	-28,67%	3.159	20.939	2.997	-73,61%
72	Venice	1.427.812	1.605.660	-11,08%	1.582.481	1.733.839	1.815.823	-21,37%
73	Volos	7.618	37.445	-79,66%	67.096	57.825	20.227	-62,34%
74	Zadar	137.667	136.462	0,88%	74.660	53.791	34.575	298,17%

APPENDIX II

MedCruise Ports: Total Cruise Calls 2013-2017

No	Port	2017	2016	Variation 2017/2016	2015	2014	2013	Variation 2017/2013
1	Alanya	22	13	69,23%	34	23	53	-58,49%
2	Ancona	28	34	-17,65%	24	20	66	-57,58%
3	Antalya	12	16	-25,00%	55	65	70	-82,86%
4	Ashdod	21	22	-4,55%	32	34	75	-72,00%
5	Azores	152	121	25,62%	138	90	92	65,22%
6	Balearic Islands	819	742	10,38%	788	678	699	17,17%
7	Barcelona	778	758	2,64%	749	767	835	-6,83%
8	Bari	143	145	-1,38%	148	147	171	-16,37%
9	Bastia/North Corsica	73	23	217,39%	90	94	92	-20,65%
10	Bodrum	23	44	-47,73%	92	82	136	-83,09%
11	Brindisi	43	14	207,14%	60	22	15	186,67%
12	Burgas	2	4	-50,00%	5	27	5	-60,00%
13	Cagliari	161	110	46,36%	97	54	94	71,28%
14	Canarian ports	3	4	-25,00%	1	5	1	200,00%
15	Cartagena	151	120	25,83%	108	109	115	31,30%
16	Castellón	1	2	-50,00%	2	1	3	-66,67%
17	Ceuta	10	13	-23,08%	4	8	8	25,00%
18	Civitavecchia	729	833	-12,48%	794	833	959	-23,98%
19	Constantza	3	8	-62,50%	25	92	69	-95,65%
20	Corfu	410	481	-14,76%	407	395	480	-14,58%
21	Costa Brava Cruise Ports	46	37	24,32%	37	36	38	21,05%
22	Cyprus Ports	113	135	-16,30%	167	223	255	-55,69%
23	Dubrovnik	539	639	-15,65%	475	752	843	-36,06%
24	Egyptian Ports	7	n.a.	-	n.a.	n.a.	n.a.	-
25	French Riviera Ports	374	325	15,08%	343	369	420	-10,95%
26	Genoa	212	248	-14,52%	198	209	298	-28,86%
27	Gibraltar	235	224	4,91%	204	181	179	31,28%
28	Gioia Tauro	6	13	-53,85%	12	6	7	-14,29%
29	Heraklion	131	165	-20,61%	170	160	177	-25,99%
30	Huelva	6	17	-64,71%	6	0	1	500,00%
31	Igoumenitsa	8	7	14,29%	6	13	14	-42,86%
32	Istanbul	0	42	-100,00%	331	331	408	-100,00%
33	Kavala	6	18	-66,67%	22	26	14	-57,14%
34	Koper	68	69	-1,45%	49	45	54	25,93%
35	Kotor	430	487	-11,70%	411	353	387	11,11%
36	Kusadasi	130	278	-53,24%	513	458	451	-71,18%
37	La Spezia	215	211	1,90%	175	254	149	44,30%

No	Port	2017	2016	Variation 2017/2016	2015	2014	2013	Variation 2017/2013
38	Lisbon	330	311	6,11%	306	319	353	-6,52%
39	Livorno	341	403	-15,38%	369	341	420	-18,81%
40	Madeira Ports	293	297	-1,35%	312	285	291	0,69%
41	Málaga	299	253	18,18%	233	227	248	20,56%
42	Marseille	444	490	-9,39%	442	497	447	-0,67%
43	Messina	172	223	-22,87%	160	165	228	-24,56%
44	Monaco	166	181	-8,29%	209	182	221	-24,89%
45	Motril-Granada	31	21	47,62%	27	30	28	10,71%
46	Naples	336	493	-31,85%	445	399	440	-23,64%
47	North Sardinian Ports	98	130	-24,62%	149	98	117	-16,24%
48	Odessa	12	5	140,00%	13	32	148	-91,89%
49	Palermo	154	174	-11,49%	200	221	189	-18,52%
50	Patras	2	2	0,00%	3	2	2	0,00%
51	Piraeus	576	625	-7,84%	621	606	711	-18,99%
52	Portimao	71	43	65,12%	47	34	42	69,05%
53	Portoferraio	112	118	-5,08%	112	101	102	9,80%
54	Portofino	79	57	38,60%	80	56	67	17,91%
55	Rijeka	15	15	0,00%	7	247	221	-93,21%
56	Savona	187	213	-12,21%	231	279	241	-22,41%
57	Sète	44	36	22,22%	31	24	28	57,14%
58	Sibenik	109	106	2,83%	83	93	100	9,00%
59	Souda/Chania	84	86	-2,33%	59	38	47	78,72%
60	Split	234	286	-18,18%	261	233	225	4,00%
61	Tangier	27	66	-59,09%	88	87	0	-
62	Taranto	7	0	-	2	3	2	250,00%
63	Tarragona	37	22	68,18%	11	3	3	1133,33%
64	Tenerife Ports	533	524	1,72%	506	513	520	2,50%
65	Thessaloniki	4	23	-82,61%	35	31	18	-77,78%
66	Toulon-Var Provence	107	278	-61,51%	124	257	266	-59,77%
67	Trabzon	1	3	-66,67%	10	31	28	-96,43%
68	Tunisian Ports	6	2	200,00%	15	175	201	-97,01%
69	Valencia	203	181	12,15%	174	195	223	-8,97%
70	Valletta	342	317	7,89%	306	302	277	23,47%
71	Varna	1	4	-75,00%	10	35	12	-91,67%
72	Venice	466	529	-11,91%	521	488	548	-14,96%
73	Volos	9	46	-80,43%	57	53	31	-70,97%
74	Zadar	104	114	-8,77%	96	77	69	50,72%

APPENDIX III

MedCruise Ports: Total Home In/Out Passengers 2013-2017

No	Port	2017	2016	Variation 2017/2016	2015	2014	2013	Variation 2017/2013
1	Alanya	0	0	-	0	0	0	-
2	Ancona	11.118	10.896	2,04%	6.676	9.110	42.128	-73,61%
3	Antalya	37.233	44.476	-16,29%	161.505	164.387	151.973	-75,50%
4	Ashdod	376		-	0	285	306	22,88%
5	Azores	1.556	1.182	31,64%	1.787	833	473	228,96%
6	Balearic Islands	737.810	600.181	22,93%	553.928	606.549	490.631	50,38%
7	Barcelona	1.440.383	1.555.819	-7,42%	1.363.754	1.222.487	1.506.286	-4,38%
8	Bari	164.160	109.137	50,42%	85.314	152.056	165.031	-0,53%
9	Bastia/North Corsica	0	0	-	0	0	0	-
10	Bodrum	23	72	-68,06%	1.045	366	1.174	-98,04%
11	Brindisi	22.842	7	326214,29%	20.899	48	119	19094,96%
12	Burgas	0	0	-	2	0	0	-
13	Cagliari	20.338	8.456	140,52%	16.536	133	5.731	254,88%
14	Canarian ports	0		-	0	0	0	-
15	Cartagena	133	186	-28,49%	0	0	0	-
16	Castellón	0	0	-	0	0	0	-
17	Ceuta	0	0	-	0	0	0	-
18	Civitavecchia	849.993	847.009	0,35%	868.143	730.938	989.998	-14,14%
19	Constantza	0	0	-	667	5.049	388	-100,00%
20	Corfu	69.915	70.864	-1,34%	69.926	71.881	70.735	-1,16%
21	Costa Brava Cruise Ports	0	0	-	0	0	0	-
22	Cyprus Ports	71.342	58.163	22,66%	66.120	76.892	100.905	-29,30%
23	Dubrovnik	68.105	68.169	-0,09%	61.797	24.790	24.840	174,17%
24	Egyptian Ports	0	n.a.	-	n.a.	n.a.	n.a.	-
25	French Riviera Ports	47.920	41.967	14,18%	55.302	34.791	56.523	-15,22%
26	Genoa	540.592	606.278	-10,83%	565.687	571.463	649.282	-16,74%
27	Gibraltar	0	90	-100,00%	583	0	0	-
28	Gioia Tauro	0	21	-100,00%	147	0	0	-
29	Heraklion	18.874	7.302	158,48%	3.344	23.925	55.443	-65,96%
30	Huelva	0	0	-	0	0	0	-
31	Igoumenitsa	0	0	-	0	0	0	-
32	Istanbul	0	16.252	-100,00%	203.135	148.297	168.790	-100,00%
33	Kavala	0	0	-	0	0	0	-
34	Koper	0	51	-100,00%	82	47	56	-100,00%
35	Kotor	1.364	1.412	-3,40%	2.921	0	0	-
36	Kusadasi	19.657	18.046	8,93%	37.650	36.389	36.940	-46,79%
37	La Spezia	8.824	7.402	19,21%	96.881	40.280	1.507	485,53%

No	Port	2017	2016	Variation 2017/2016	2015	2014	2013	Variation 2017/2013
38	Lisbon	58.915	47.632	23,69%	42.536	41.465	50.834	15,90%
39	Livorno	9.711	9.274	4,71%	4.181	2.088	4.991	94,57%
40	Madeira Ports	3.058	2.775	10,20%	3.721	3.421	3.975	-23,07%
41	Málaga	138.053	92.246	49,66%	32.492	74.170	71.249	93,76%
42	Marseille	414.880	486.964	-14,80%	503.325	506.412	381.318	8,80%
43	Messina	20.532	18.027	13,90%	17.068	19.951	36.190	-43,27%
44	Monaco	23.758	26.225	-9,41%	29.563	33.093	35.909	-33,84%
45	Motril-Granada	0	0	-	0	0	0	-
46	Naples	113.255	142.137	-20,32%	126.672	99.423	110.689	2,32%
47	North Sardinian Ports	0	0	-	0	0	0	-
48	Odessa	253	9	2711,11%	15	44	9.389	-97,31%
49	Palermo	75.176	72.034	4,36%	65.582	65.935	42.869	75,36%
50	Patras	0	0	-	0	0	0	-
51	Piraeus	332.611	352.663	-5,69%	284.241	256.196	308.705	7,74%
52	Portimao	514	44	1068,18%	238	1.130	88	484,09%
53	Portoferraio	0	0	-	0	0	0	-
54	Portofino	0	0	-	0	0	0	-
55	Rijeka	0	0	-	0	9.026	7.124	-100,00%
56	Savona	518.850	577.145	-10,10%	647.364	668.473	670.031	-22,56%
57	Sète	63	28	125,00%	149	2.817	8	687,50%
58	Sibenik	0	0	-	0	0	0	-
59	Souda/Chania	782	0	-	0	0	0	-
60	Split	0	879	-100,00%	0	330	1.301	-100,00%
61	Tangier	0		-	0	0	0	-
62	Taranto	0	0	-	0	0	0	-
63	Tarragona	14.238	1.842	672,96%	11	0	0	-
64	Tenerife Ports	138.076	74.124	86,28%	n.a.	n.a.	n.a.	-
65	Thessaloniki	3	774	-99,61%	51	161	6	-50,00%
66	Toulon-Var Provence	3.407	12.186	-72,04%	21.257	28.974	27.087	-87,42%
67	Trabzon	206	452	-54,42%	0	0	0	-
68	Tunisian Ports	0	0	-	0	0	0	-
69	Valencia	72.195	60.963	18,42%	63.142	73.907	74.348	-2,90%
70	Valletta	216.029	114.731	88,29%	140.512	93.581	102.034	111,72%
71	Varna	1	2	-50,00%	5	6	1.205	-99,92%
72	Venice	1.226.471	1.408.066	-12,90%	1.364.044	1.509.097	1.512.596	-18,92%
73	Volos	0	0	-	0	0	0	-
74	Zadar	736	877	-16,08%	1.064	1.763	1.636	-55,01%

APPENDIX IV

MedCruise Ports: Total Transit Passengers 2013-2017

No	Port	2017	2016	Variation 2017/2016	2015	2014	2013	Variation 2017/2013
1	Alanya	12.189	9.272	31,46%	22.321	19.092	57.454	-78,78%
2	Ancona	40.968	44.005	-6,90%	32.601	28.110	67.364	-39,18%
3	Antalya	2.762	929	197,31%	9.612	10.887	15.821	-82,54%
4	Ashdod	26.381	27.262	-3,23%	33.129	40.495	88.058	-70,04%
5	Azores	134.227	124.722	7,62%	140.059	94.932	86.964	54,35%
6	Balearic Islands	1.372.853	1.357.248	1,15%	1.442.605	980.515	1.050.745	30,66%
7	Barcelona	1.271.864	1.127.775	12,78%	1.176.548	1.141.805	1.092.966	16,37%
8	Bari	233.428	291.738	-19,99%	282.967	409.546	439.750	-46,92%
9	Bastia/North Corsica	31.661	18.533	70,84%	53.024	57.927	43.292	-26,87%
10	Bodrum	30.853	61.189	-49,58%	68.993	33.041	27.667	11,52%
11	Brindisi	86.083	5.263	1535,63%	131.023	25.402	4.509	1809,14%
12	Burgas	1.925	5.833	-67,00%	7.573	41.763	5.673	-66,07%
13	Cagliari	403.967	247.417	63,27%	246.711	81.711	140.272	187,99%
14	Canarian ports	4.346	5.853	-25,75%	1.421	4.396	952	356,51%
15	Cartagena	236.279	187.657	25,91%	151.195	137.985	134.225	76,03%
16	Castellón	411	1.095	-62,47%	366	130	1.514	-72,85%
17	Ceuta	17.003	19.251	-11,68%	1.613	2.432	4.605	269,23%
18	Civitavecchia	1.354.343	1.492.667	-9,27%	1.403.509	1.409.101	1.548.261	-12,52%
19	Constantza	1.891	6.912	-72,64%	31.189	64.861	54.226	-96,51%
20	Corfu	609.766	678.050	-10,07%	577.420	600.487	673.916	-9,52%
21	Costa Brava Cruise Ports	45.176	25.505	77,13%	40.800	38.612	29.775	51,72%
22	Cyprus Ports	52.055	83.195	-37,43%	107.189	106.615	170.768	-69,52%
23	Dubrovnik	680.813	763.561	-10,84%	768.887	869.426	1.111.663	-38,76%
24	Egyptian Ports	9.835	n.a.	-	n.a.	n.a.	n.a.	-
25	French Riviera Ports	645.430	520.962	23,89%	490.897	560.894	556.695	15,94%
26	Genoa	384.596	375.711	2,36%	282.540	252.646	400.803	-4,04%
27	Gibraltar	404.995	403.915	0,27%	343.557	299.923	278.139	45,61%
28	Gioia Tauro	4.141	13.737	-69,86%	13.721	3.320	2.590	59,88%
29	Heraklion	162.819	231.478	-29,66%	216.461	219.026	214.577	-24,12%
30	Huelva	6.571	20.071	-67,26%	4.788	0	296	2119,93%
31	Igoumenitsa	9.088	7.623	19,22%	3.090	3.096	4.650	95,44%
32	Istanbul	0	20.456	-100,00%	386.179	441.056	514.808	-100,00%
33	Kavala	3.226	6.042	-46,61%	12.783	13.087	6.995	-53,88%
34	Koper	72.175	78.872	-8,49%	57.811	58.923	65.378	10,40%
35	Kotor	539.653	535.232	0,83%	439.108	309.322	317.746	69,84%
36	Kusadasi	98.791	329.186	-69,99%	529.641	516.842	540.018	-81,71%
37	La Spezia	446.130	500.129	-10,80%	570.565	443.284	212.351	110,09%

No	Port	2017	2016	Variation 2017/2016	2015	2014	2013	Variation 2017/2013
38	Lisbon	462.127	474.865	-2,68%	469.592	459.407	507.206	-8,89%
39	Livorno	689.069	798.661	-13,72%	693.774	624.268	731.525	-5,80%
40	Madeira Ports	537.535	519.708	3,43%	576.627	472.534	478.137	12,42%
41	Málaga	372.554	350.685	6,24%	386.629	335.128	326.167	14,22%
42	Marseille	1.072.433	1.110.249	-3,41%	947.734	804.872	806.713	32,94%
43	Messina	369.664	337.512	9,53%	310.634	299.799	465.126	-20,52%
44	Monaco	144.259	159.167	-9,37%	229.761	166.946	213.897	-32,56%
45	Motril-Granada	4.111	4.570	-10,04%	6.481	19.589	16.809	-75,54%
46	Naples	814.133	1.164.041	-30,06%	1.142.899	1.014.339	1.064.329	-23,51%
47	North Sardinian Ports	133.035	210.386	-36,77%	238.256	166.985	206.140	-35,46%
48	Odessa	1.383	1.233	12,17%	6.548	8.462	82.560	-98,32%
49	Palermo	384.053	438.044	-12,33%	481.302	465.777	368.130	4,33%
50	Patras	952	743	28,13%	1.090	745	1.264	-24,68%
51	Piraeus	722.948	741.472	-2,50%	695.908	799.360	993.876	-27,26%
52	Portimao	29.345	19.476	50,67%	14.548	13.504	20.053	46,34%
53	Portoferraio	29.463	42.752	-31,08%	37.486	27.365	16.828	75,08%
54	Portofino	35.203	19.894	76,95%	30.696	21.579	22.789	54,47%
55	Rijeka	12.656	13.874	-8,78%	9.082	0	685	1747,59%
56	Savona	335.593	333.099	0,75%	334.862	350.321	269.007	24,75%
57	Sète	47.314	23.763	99,11%	20.406	7.101	11.076	327,18%
58	Sibenik	27.718	12.276	125,79%	17.562	12.693	29.784	-6,94%
59	Souda/Chania	127.285	147.915	-13,95%	96.612	33.304	124.205	2,48%
60	Split	232.244	274.772	-15,48%	271.445	183.732	187.806	23,66%
61	Tangier	23.550	97.311	-75,80%	121.608	105.306	0	-
62	Taranto	8.546	0	-	314	582	446	1816,14%
63	Tarragona	37.155	12.171	205,27%	11.589	1.894	1.421	2514,71%
64	Tenerife Ports	826.261	810.049	2,00%	n.a.	n.a.	n.a.	-
65	Thessaloniki	2.421	18.102	-86,63%	26.305	19.559	14.585	-83,40%
66	Toulon-Var Provence	235.616	350.293	-32,74%	219.576	312.154	255.824	-7,90%
67	Trabzon	0	0	-	2.280	17.118	9.032	-100,00%
68	Tunisian Ports	5.317	757	602,38%	53.780	440.433	511.065	-98,96%
69	Valencia	339.122	343.820	-1,37%	308.232	299.068	398.766	-14,96%
70	Valletta	562.610	568.239	-0,99%	527.765	424.013	375.785	49,72%
71	Varna	790	1.107	-28,64%	3.154	20.933	1.792	-55,92%
72	Venice	201.341	197.594	1,90%	218.437	224.742	303.227	-33,60%
73	Volos	7.618	37.445	-79,66%	67.096	57.825	20.227	-62,34%
74	Zadar	136.931	135.584	0,99%	73.596	52.028	32.939	315,71%

APPENDIX V

Seasonality of cruise activities in MedCruise Ports
(Cruise Pax Shares of MedCruise Ports per region – Shares per trimester in 2017)

Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Azores	46,72%	2,62%	34,70%	15,96%
Balearic Islands	18,71%	46,20%	30,08%	5,01%
Barcelona	23,54%	33,92%	33,54%	8,99%
Bastia/North Corsica	33,32%	46,50%	20,17%	0,00%
Cagliari	23,55%	42,11%	32,68%	1,65%
Canarian ports	66,80%	0,00%	0,00%	33,20%
Cartagena	28,53%	31,77%	36,96%	2,74%
Castellón	0,00%	100,00%	0,00%	0,00%
Ceuta	3,45%	58,83%	27,31%	10,40%
Civitavecchia	22,62%	36,02%	33,04%	8,32%
Costa Brava Cruise Ports	11,28%	46,57%	42,15%	0,00%
French Riviera Ports	21,45%	48,94%	28,98%	0,63%
Genoa	22,76%	30,33%	33,76%	13,15%
Gibraltar	28,15%	34,68%	34,15%	3,02%
Gioia Tauro	15,99%	28,37%	41,00%	14,63%
Huelva	29,17%	6,29%	64,54%	0,00%
La Spezia	24,37%	38,42%	29,75%	7,45%
Lisbon	26,92%	21,93%	41,33%	9,82%
Livorno	20,55%	44,57%	31,74%	3,14%
Madeira Ports	23,71%	4,31%	38,07%	33,92%
Málaga	29,89%	23,46%	38,98%	7,67%
Marseille	27,07%	24,54%	36,62%	11,77%
Messina	17,94%	38,77%	40,05%	3,25%
Monaco	26,99%	36,68%	31,41%	4,93%
Motril-Granada	31,09%	8,83%	52,59%	7,49%
Naples	21,04%	41,39%	33,42%	4,15%
North Sardinian Ports	16,72%	58,55%	24,72%	0,00%
Palermo	20,55%	29,73%	28,80%	20,92%
Portimao	33,11%	22,61%	39,42%	4,86%
Portoferraio	21,54%	51,70%	26,77%	0,00%
Portofino	22,74%	49,39%	27,88%	0,00%
Savona	32,06%	20,74%	35,23%	11,98%
Sète	10,89%	48,18%	40,93%	0,00%
Tangier	60,36%	8,03%	17,15%	14,46%
Tarragona	3,25%	54,94%	41,81%	0,00%
Tenerife Ports	20,90%	2,78%	37,23%	39,09%
Toulon-Var Provence	24,90%	36,68%	35,73%	2,69%
Tunisian Ports	16,87%	0,00%	0,00%	83,13%
Valencia	25,14%	29,20%	40,31%	5,35%
Valletta	23,90%	32,13%	34,42%	9,56%

Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Ancona	1,46%	65,37%	33,17%	0,00%
Bari	17,59%	42,53%	35,74%	4,14%
Brindisi	23,00%	46,40%	30,61%	0,00%
Corfu	21,08%	45,80%	32,68%	0,44%
Dubrovnik	19,63%	46,92%	33,34%	0,10%
Koper	24,89%	42,44%	32,30%	0,37%
Kotor	20,95%	44,60%	32,37%	2,07%
Rijeka	9,78%	43,34%	46,88%	0,00%
Sibenik	12,17%	49,34%	33,95%	4,55%
Split	18,12%	38,03%	39,03%	4,82%
Taranto	28,48%	42,82%	28,70%	0,00%
Venice	19,90%	45,14%	33,29%	1,67%
Zadar	15,00%	51,88%	32,76%	0,36%

Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Alanya	51,28%	18,87%	29,85%	0,00%
Antalya	66,35%	0,00%	33,65%	0,00%
Ashdod	31,43%	0,50%	67,71%	0,36%
Bodrum	19,25%	48,13%	32,62%	0,00%
Cyprus Ports	33,71%	24,09%	35,18%	7,02%
Egyptian Ports	52,44%	0,00%	47,56%	0,00%
Heraklion	24,62%	31,43%	38,28%	5,68%
Igoumenitsa	26,80%	46,21%	26,98%	0,00%
Istanbul	-	-	-	-
Kavala	0,00%	9,30%	90,70%	0,00%
Kusadasi	28,51%	39,70%	31,79%	0,00%
Patras	0,00%	53,99%	46,01%	0,00%
Piraeus	23,46%	41,13%	33,17%	2,24%
Souda/Chania	21,38%	41,75%	36,87%	0,00%
Thessaloniki	0,00%	2,48%	97,52%	0,00%
Volos	14,86%	35,02%	50,12%	0,00%

Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Burgas	58,96%	0,00%	41,04%	0,00%
Constantza	59,97%	4,97%	35,06%	0,00%
Odessa	16,56%	53,30%	30,13%	0,00%
Trabzon	0,00%	100,00%	0,00%	0,00%
Varna	0,00%	0,00%	100,00%	0,00%

APPENDIX VI

MedCruise Ports per Size Category

Category A (>120.000 pax.)		
No	Port	Cruise Pax. 2017
1	Azores	135.783
2	Balearic Islands	2.110.663
3	Barcelona	2.712.247
4	Bari	397.588
5	Cagliari	424.305
6	Cartagena	236.412
7	Civitavecchia	2.204.336
8	Corfu	679.681
9	Cyprus Ports	123.397
10	Dubrovnik	748.918
11	French Riviera Ports	693.351
12	Genoa	925.188
13	Gibraltar	404.995
14	Heraklion	181.693
15	Kotor	541.017
16	La Spezia	454.954
17	Lisbon	521.042
18	Livorno	698.780
19	Madeira Ports	540.593
20	Málaga	510.607
21	Marseille	1.487.313
22	Messina	390.196
23	Monaco	168.017
24	Naples	927.458
25	North Sardinian Ports	133.035
26	Palermo	459.229
27	Piraeus	1.055.559
28	Savona	854.443
29	Souda/Chania	128.067
30	Split	232.244
31	Tenerife Ports	964.337
32	Toulon-Var Provence	239.023
33	Valencia	411.317
34	Valletta	778.596
35	Venice	1.427.812
36	Zadar	137.667

Category B (≤120.000 pax.)		
No	Port	Cruise Pax. 2017
1	Alanya	12.189
2	Ancona	52.086
3	Antalya	39.995
4	Ashdod	26.757
5	Bastia/North Corsica	31.661
6	Bodrum	30.876
7	Brindisi	108.925
8	Burgas	1.925
9	Canarian ports	4.346
10	Castellón	411
11	Ceuta	17.003
12	Constantza	1.891
13	Costa Brava Cruise Ports	45.176
14	Gioia Tauro	4.141
15	Huelva	6.571
16	Igoumenitsa	9.088
17	Istanbul	0
18	Kavala	3.226
19	Koper	72.175
20	Kusadasi	118.448
21	Motril-Granada	4.111
22	Odessa	1.636
23	Patras	952
24	Portimao	29.859
25	Portoferraio	29.463
26	Portofino	35.203
27	Rijeka	12.656
28	Sète	47.377
29	Sibenik	27.718
30	Tangier	23.550
31	Taranto	8.546
32	Tarragona	51.393
33	Thessaloniki	2.424
34	Trabzon	206
35	Tunisian Ports	5.317
36	Varna	791
37	Volos	7.618

The MedCruise Team

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

The members of the MedCruise Secretariat that prepared the report:

Jordi Caballé

Kleopatra Arapi

Aimilia Papachristou

#portstogether

All you want to know
about cruise ports in the Med
and its adjoining seas

WE ARE SOCIAL!

www.medcruise.com

for our chinese friends
www.medcruise.cn

MedCruise Association
10 Akti Miaouli Str.
Tel: +30 210 40 90 675
secreteriat@medcruise.com

www.medcruise.com
www.medcruise.cn

We are social

facebook/MedCruise.Association
twitter/MedCruisePorts
linkedin/MedCruise

#portstogether