

2018 Statistics Cruise Activities in MedCruise Ports

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in MedCruise Ports

A MedCruise Report



Cruise Activities in MedCruise Ports

STATISTICS REPORT 2018

A MedCruise Report produced by

Risposte Turismo

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Version based on previous editions by Secretariat team.

PREFACE

I am proud to introduce to the cruise industry world the 2019 edition of the MedCruise statistical report *Cruise Activities in MedCruise ports: Statistics Report 2018*.

Published in April 2019, this report is first presented to the cruise world during the annual Seatrade Cruise Global meeting – hold in Miami, US- and provides a well-known 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 Report 2018* 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 analyses information on MedCruise memberships as well as details 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 and 2019 forecast.

MedCruise memberships welcomed 28 million cruise passenger movements -which means a 8,2% increase compared to the previous year- and 12.734 cruise calls in 2018. The statistics reveal the positive features in several parts of the Med and the adjoining seas. MedCruise has recently launched Working Groups focused on promoting the cruise industry in the regions where some ports have experienced a decline due to the economic, social and/or political instability.

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 2018 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 Pastor
MedCruise President

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> INTRODUCTION

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 71 members from 21 countries and 3 continents representing more than 130 ports around the Mediterranean region, including the Black Sea, the Red Sea, and the Near Atlantic; plus 30 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 2017 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 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 report 2018"* has been commissioned to Risposte Turismo with the support of the Secretariat, and analyses the statistical data recorded and reported by the members of the Association.

This edition is part of a long series produced by the Association since many years. This edition includes for the first time the forecast for 2019 as well as new elaborations on ferry traffic.

1.3 MedCruise Membership

Table 1.1 *Countries represented in MedCruise*

>> **21 COUNTRIES, 3 DIFFERENT CONTINENTS: AFRICA, ASIA, AND EUROPE**

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

Table 1.2 *MedCruise Port Members*

>> **71 MEMBERS, +130 CRUISE PORTS**

WEST MED

Azores	Civitavecchia / Fiumicino / Gaeta	Madeira Ports	Portofino
Balearic Islands	Costa Brava Cruise Ports	Malaga	Sardinian Ports
Barcelona	French Riviera Ports	Marseille	Sète
Bastia / N.Corsica	Genoa / Savona	Messina/Milazzo	Tangier
Cape Verde Ports	Gibraltar	Monaco	Tarragona
Canarian Ports	Gioia Tauro	Motril-Granada	Tenerife Ports
Cartagena	Huelva	Naples / Salerno / Castellamare di Stabia	Toulon-Var Provence
Castellon	La Spezia / Marina di Carrara	Palermo	Tunisian Ports
Catania / Augusta	Lisbon	Portimao	Valencia
Ceuta	Livorno	Livorno / Piombino / Portoferraio	Valetta

ADRIATIC

Ancona/Pesaro/Ortona	Dubrovnik/Korcula	Rijeka	Taranto
Bari / Brindisi	Koper	Sibenik	Venice
Corfu	Kotor	Split	Zadar

EAST MED

Alanya	Heraklion	Kusadasi / Bodrum / Antalya	Thessaloniki
Ashdod	Igoumenitsa	Patras	Volos
Cyprus Ports	Istanbul	Piraeus	
Egyptian Ports	Kavala	Souda / Chania	

BLACK SEA

Burgas	Constanza	Odessa	Trabzon	Varna
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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 130.

Moreover, **30 associate members**, representing tourist boards, ship agents, port agents as well as other cruise-industry-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 2019 is detailed in Table 1.3.

Table 1.3 MedCruise Associate Members

>> 30 ASSOCIATE MEMBERS

Alfaship	Intercruises Shoreside & Port Services	Perez y Cia
Algeria Cruise Services	Kyriakakis Travel	Salamis Shipping
Cemar	Kvarner	Samer & Co Shipping
Council of Sant Carles de la Rapita	La Goulette Cruise Terminal	SNEAL
Cruise Services	Seaway Shipping	Tenerife Tourism Board
Ceuta Tourism	Medov S.r.l	TRAINOSE
DP World	Mercantile Marine Shipping	Transcoma Cruise & Travel
Dubrovnik County Port Authority	MH Bland - Gibraltar	Tura Turizm
Lanzarote Tourism	Terminal Napoli	Turisme de Barcelona
Ports of State (Puertos del Estado)	Patronat Turisme Costa Brava	Var Provence Cruise Club

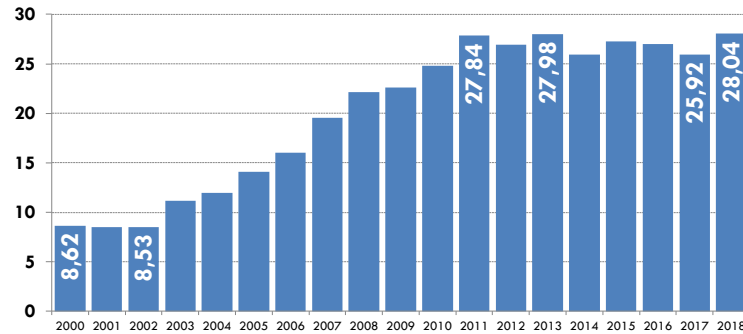
1.4 Evolution of Cruise Activity in MedCruise Ports

The total number of cruise passenger movements at MedCruise Ports during 2018 reached 28,04 million, representing the record in the history of the association, at a level slightly higher than the one registered in 2013. It's a record signed thanks to a +8,2% variation on the cruise passenger movements that took place in 2017 at the same ports. From 2011, the total number of cruise passenger visits at MedCruise Ports never went down of 25 million.

The total of cruise ship calls in MedCruise Ports in 2018 reached 12.700 (Figure 1.2). This figure means a +4,9% increase compared to the 12.100 cruise calls recorded in 2017. It's the first time since 2013 that the ship calls register a positive variation on the previous year, consequence of the added capacity deployed by the cruise companies in the Med.

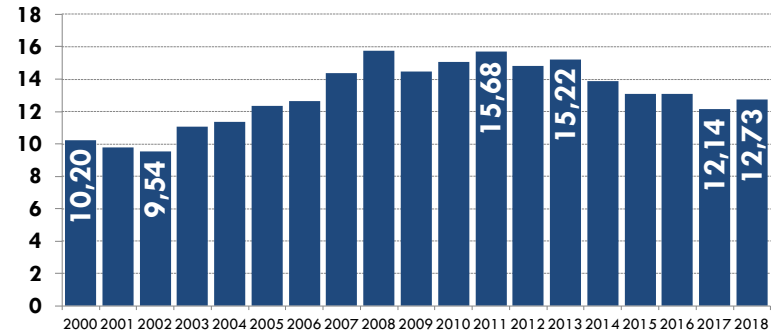
Figures 1.1 and 1.2 Cruise Passenger Movements (millions) and cruise calls (miles) in MedCruise Ports (2000-2018)

>> SINCE 2000 PAX. MOVEMENTS AND CALLS GREW OF 225,4% AND 24,8%



>> +8,2% 1 year (2018/2017) <<

>> +23,9% 10 year (2018/2009) <<



>> +4,9% 1 year (2018/2017) <<

>> -10,1% 10 year (2018/2009) <<

The ratio of Transit passengers to passengers home-porting from MedCruise member ports stands at 70/30. This ratio remains stable over time, as it is almost the same throughout the last 10 years. Interesting to notice how in the first year of the Association the ratio was 50/50 with homeport traffic to double in 20 years while Transit port is now more than 4 times bigger than that.

Figure 1.3 Cruise passengers kind ratio (2000-2018)

>> 70/30 KIND RATIO IN 2018

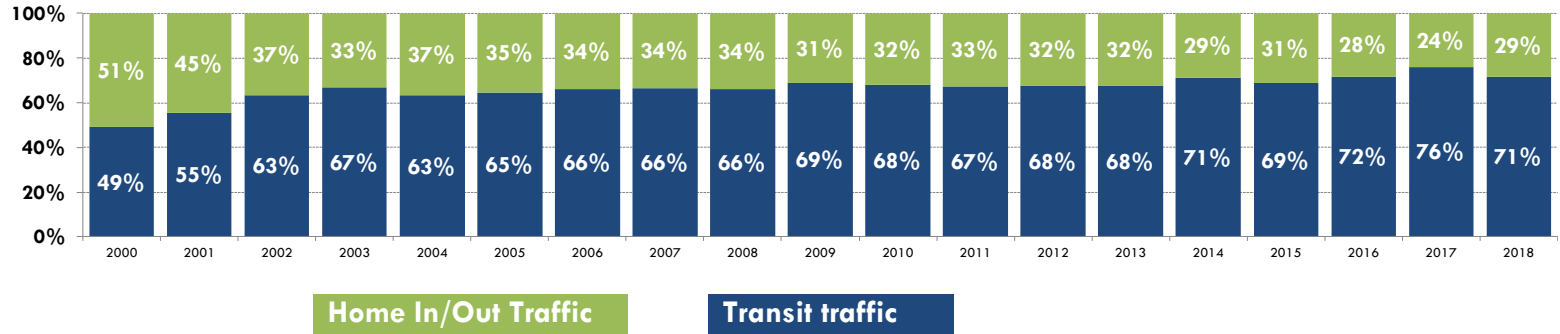
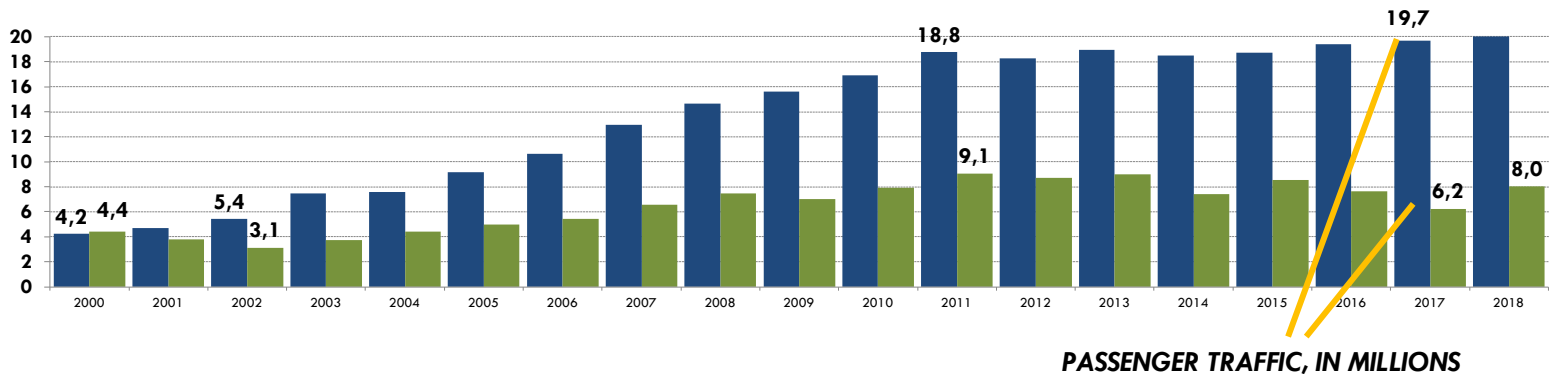


Figure 1.4 Cruise passengers kind, absolute values (2000-2018)

>> 2017 AND 2018 AS THE GREATEST YEARS IN THE MED FOR TRANSIT TRAFFIC BUT IT IS THE HOMEPORT TRAFFIC THAT PULLED THE GROWTH FROM 2017 TO 2018.

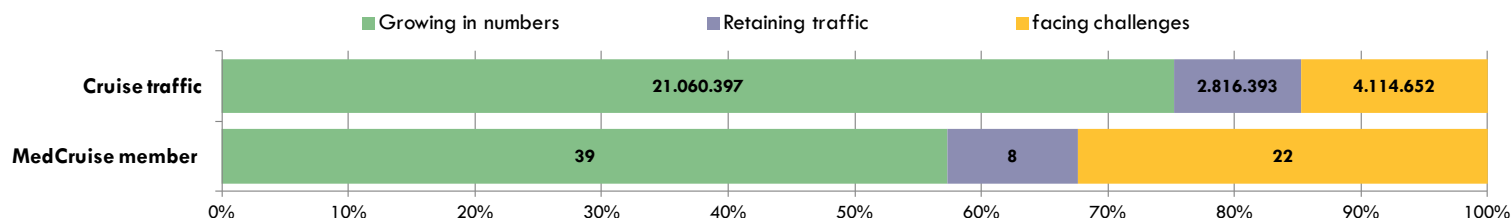


1.5 Cruise passenger movements in MedCruise Ports in 2018

Figure 1.5 presents an overview of cruise traffic recorded at each MedCruise member port in 2018 and the annual variation comparing to 2017. In 39 MedCruise port members, the recorded cruise passenger visits increased over the past year. 7 other port members retained the levels of cruise passengers that they had recorded the year before (a port belongs to this group when its traffic's variation on the previous year is between -3% and +3%), whereas 22 members faced challenges in retaining in 2018 the numbers of cruise passenger movements hosted in 2017. In line with the MedCruise constitution, a MedCruise port member 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.

Figure 1.5 MedCruise Ports cruise traffic overview in 2018

>>> **55,7% HAD INCREASED THEIR TRAFFIC**



Note: a variation +/- 3% has been considered for being considered a "retaining traffic" member.

Alanya 3.027 (-75,2%)	Ancona/Pesaro/Ort. 67.031 (+28,7%)	Ashdod 20.633 (-22,9%)	Azores 164.074 (+20,8%)	Balearic Islands 2.431.153 (+15,2%)	Barcelona 3.041.963 (+12,2%)
Bari/Brindisi 678.621 (+34,0%)	Bastia/North Corsica 34.063 (+7,6%)	Burgas 0 (-100,0%)	Cape Verde Ports 47.094 (N.A.)	Canarian Ports 1.392 (-68,0%)	Cartagena 228.387 (-3,4%)
Castellon 556 (+37,7%)	Catania / Augusta 133.341 (N.A.)	Ceuta 15.790 (-7,1%)	Civitavecchia / Fiumicino/ Gaeta 2.441.737 (+10,8%)	Constantza 0 (-100,0%)	Corfu 735.832 (+8,3%)

Costa Brava Cruise Ports 51.042 (+13,0%)	Cyprus Ports 31.089 (-74,8%)	Dubrovnik/Korcula 732.431 (-2,2%)	Egyptian Ports 106.391 (+981,8%)	French Riviera Ports 610.919 (-11,9%)	Genoa/Savona 1.859.885 (+4,5%)
Gibraltar 406.998 (+0,5%)	Gioia Tauro 8.463 (+104,4%)	Heraklion 297.929 (+64,0%)	Huelva 11.691 (+77,9%)	Igoumenitsa 12.650 (+39,2%)	Istanbul 0 (0.)
Kavala 2.031 (-37,0%)	Koper 101.415 (+40,5%)	Kotor 492.475 (-9,0%)	Kusadasi/Bodrum/ Antalya 29.158 (-84,6%)	La Spezia/M. di Carrara 471.652 (+3,7%)	Lisbon 577.603 (+10,9%)
Livorno/Piombino/ Portoferraio 825.310 (+13,3%)	Madeira Ports 541.467 (+0,2%)	Malaga 507.360 (-0,6%)	Marseille 1.716.184 (+15,4%)	Messina/Milazzo 372.365 (-4,6%)	Monaco 170.571 (+1,5%)
Motril-Granada 5.313 (+29,2%)	Naples/Salerno/ Cast. di Stabia 1.170.764 (+26,2%)	Odessa 2.565 (+56,8%)	Palermo 603.881 (+31,5%)	Patras 1.647 (+73,0%)	Piraeus 961.632 (-8,9%)
Portimao 36.786 (+23,2%)	Portofino 36.048 (+2,4%)	Rijeka 10.913 (-13,8%)	Sardinian Ports 513.874 (-7,8%)	Sète 114.429 (+141,5%)	Sibenik 35.729 (+28,9%)
Souda/Chanina 139.944 (+9,3%)	Split 307.139 (+32,2%)	Tangier 31.250 (+32,7%)	Taranto 658 (-92,3%)	Tarragona 98.126 (+90,9%)	Tenerife Ports 1.015.150 (+5,3%)
Thessaloniki 1.348 (-44,4%)	Toulon-Var Provence 107.943 (-54,8%)	Trabzon 0 (-100,0%)	Tunisian Ports 0 (-100,0%)	Valencia 421.518 (+2,5%)	Valletta 771.018 (-8,7%)
Varna 0 (-100,0%)	Volos 31.337 (+311,4%)	Venice 1.560.579 (+9,3%)	Zadar 166.528 (+21,0%)	MEDCRUISE PORTS IN TOTAL 28,04 million cruise pax (+8,2%)	

Table 1.4 details the data recorded at each MedCruise member port as regards cruise traffic hosted in 2018. These data refer to passenger movements, classification of passengers in either Home In/Out or Transit, as well as cruise calls.

Table 1.4 MedCruise Ports Cruise Traffic data 2018

No	Port	MedCruise Region	Total Pax.	Total Calls	Home In Pax.	Home Out Pax.	Transit Pax.
1	Alanya	East Med	3.027	15	0	0	3.027
2	Ancona / Pesaro / Ortona	Adriatic	67.031	40	6.629	6.225	54.177
3	Ashdod	East Med	20.633	0	0	0	20.633
4	Azores	West Med	164.074	138	678	696	162.700
5	Balearic Islands	West Med	2.431.153	859	858.435		134.227
6	Barcelona	West Med	3.041.963	830	834.988	831.779	1.375.196
7	Bari/Brindisi	Adriatic	678.621	289	113.702	117.009	447.910
8	Bastia/North Corsica	West Med	34.063	115	0	0	34.063
9	Burgas	Black Sea	0	0	0	0	0
10	Cape Verde Ports	West Med	47.094	199	0	0	47.094
11	Canarian Ports	West Med	1.392	5	0	0	1.392
12	Cartagena	West Med	228.387	148	0	0	228.387
13	Castellon	West Med	566	1	0	0	566
14	Catania / Augusta	West Med	133.341	72	7.174	7.297	118.870
15	Ceuta	West Med	15.790	10	0	0	15.790
16	Civitavecchia/Fiumicino/Gaeta	West Med	2.441.737	760	478.439	478.319	1.484.979
17	Constantza	Black Sea	0	0	0	0	0
18	Corfu	Adriatic	735.832	413	40.745	41.514	653.573
19	Costa Brava Cruise Ports	West Med	51.042	54	0	0	51.042
20	Cyprus Ports	East Med	31.089	40	852	780	29.457
21	Dubrovnik/ Korcula	Adriatic	732.431	438	31.616	31.522	669.293
22	Egyptian Ports	East Med	106.391	77	0	0	106.391
23	French Riviera Ports	West Med	610.919	348	49.206		680.813
24	Genoa/Savona	West Med	1.859.885	423	538.241	540.160	781.484
25	Gibraltar	West Med	406.998	243	0	0	406.998
26	Gioia Tauro*	West Med	8.463	12	0	0	8.463
27	Heraklion	East Med	297.929	187	14.626	15.215	268.088
28	Huelva	West Med	11.691	16	0	0	11.691
29	Igoumenitsa	East Med	12.650	14	0	0	12.650
30	Istanbul	East Med	0	0	0	0	0

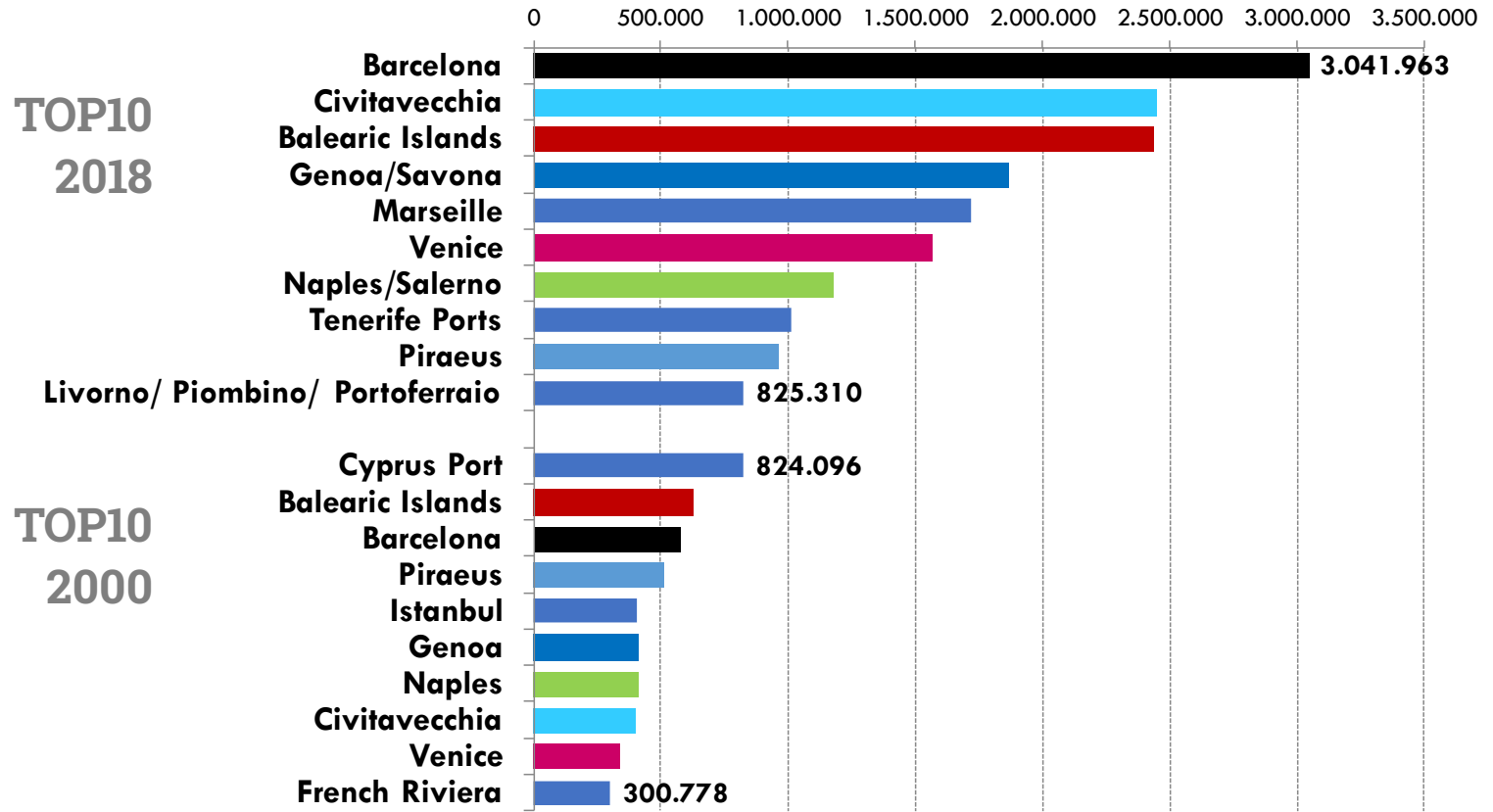
No	Port	MedCruise Region	Total Pax.	Total Calls	Home In Pax.	Home Out Pax.	Transit Pax.
31	Kavala	East Med	2.031	5	0	0	2.031
32	Koper	Adriatic	101.415	75	0	0	101.415
33	Kotor	Adriatic	492.475	411	725	1.148	490.602
34	Kusadasi/Bodrum/Antalya	East Med	29.158	23	15	20	29.123
35	La Spezia/ Marina di Carrara	West Med	471.652	175	2.709	2.758	466.185
36	Lisbon	West Med	577.603	339	31.436	30.653	515.514
37	Livorno/Piombino/Portoferraio	West Med	825.310	469	5.211	5.078	815.021
38	Madeira Ports	West Med	541.467	293	2.252	2.341	536.874
39	Málaga	West Med	507.360	298	53.943	53.944	399.473
40	Marseille	West Med	1.716.184	505	217.199	221.244	1.277.741
41	Messina/Milazzo	West Med	372.365	172	8.790	8.965	354.610
42	Monaco	West Med	170.571	177	13.962	14.669	141.940
43	Motril-Granada	West Med	5.313	28	0	0	5.313
44	Naples/Salerno/C. di Stabia	West Med	1.141.398	442	49.678	49.744	1.041.976
45	Odessa	Black Sea	2.565	17	280	59	2.226
46	Palermo/ Termini Imerese/ Trapani/ Porto Empedocle	West Med	603.881	237	39.162	37.985	526.734
47	Patras	East Med	1.647	2	0	0	1.647
48	Piraeus	East Med	961.632	524	178.057	176.341	607.234
49	Portimao	West Med	36.786	66	550	410	35.826
50	Portofino	West Med	36.048	82	0	0	36.048
51	Rijeka	Adriatic	10.913	11	0	0	10.913
52	Sardinian Ports	West Med	513.874	221	5.681	5.674	502.519
53	Sète	West Med	114.429	72	0	0	114.429
54	Sibenik	Adriatic	35.729	109	0	0	35.729
55	Souda/Chania	East Med	139.944	78	0	0	139.944
56	Split	Adriatic	307.139	260	0	0	307.139
57	Tangier	West Med	31.250	46	0	0	31.250
58	Taranto	Adriatic	658	2	0	0	658
59	Tarragona	West Med	98.126	57	11.214	10.904	76.008
60	Tenerife Ports	West Med	1.015.150	546	80.907	80.896	853.347
61	Thessaloniki	East Med	1.348	4	0	0	1.348
62	Toulon Bay	West Med	107.943	62	81	68	107.794
63	Trabzon	Black Sea	0	0	0	0	0
64	Tunisian Ports	West Med	0	0	0	0	0
65	Valencia	West Med	421.518	196	n.a.	n.a.	n.a.

No	Port	MedCruise Region	Total Pax.	Total Calls	Home In Pax.	Home Out Pax.	Transit Pax.
66	Valletta	West Med	711.018	322	78.855	77.970	554.193
67	Varna	Black Sea	0	0	0	0	0
68	Venice	Adriatic	1.560.579	502	661.058	659.948	239.573
69	Volos	East Med	31.337	27	0	6	31.331
70	Zadar	Adriatic	166.528	133	549	502	165.477
	Total		28.038.536	12.734	3.997.407	4.013.837	20.027.292

** Cruise traffic in Gioia Tauro port member is hosted by the ports of Crotona and Corigliano Calabro ports.*

Figure 1.6 Comparing MedCruise TOP10: 2000 vs 2018

>> NONE OF THE TOP10 MEMBERS IN 2000 WOULD ENTER IN THE CURRENT TOP10



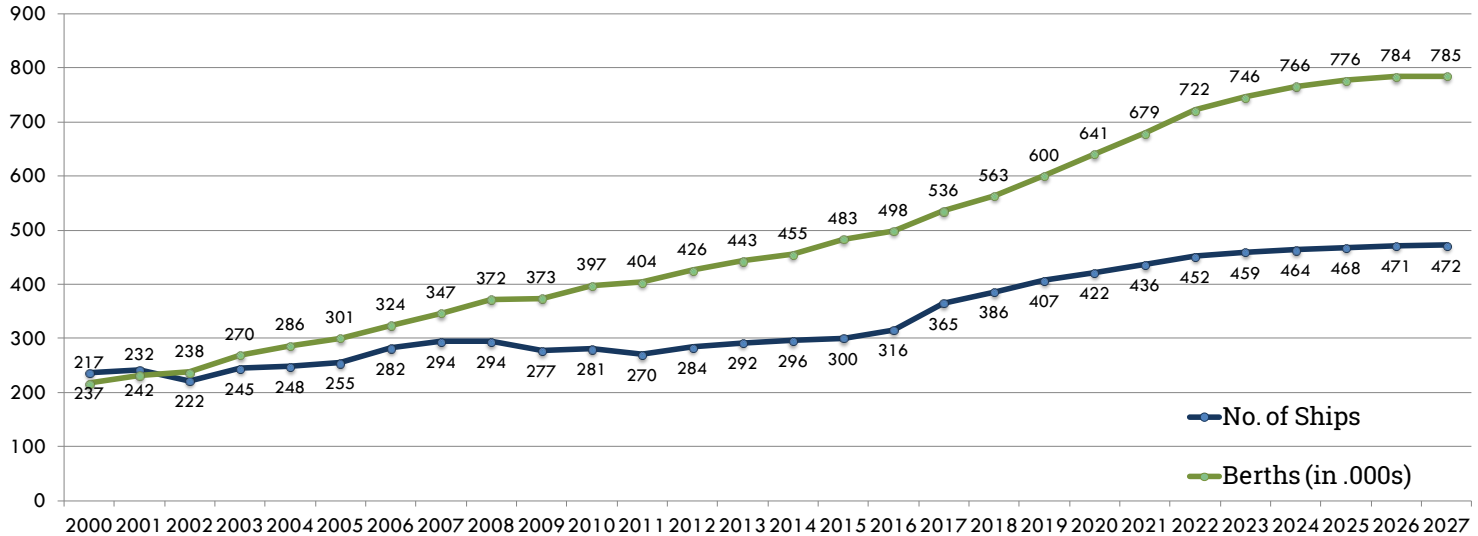
> CRUISE ACTIVITY TRENDS

2.1 Global Cruise Fleet and deployment of Cruise Fleet

The graph below shows the increase in the number of cruise ships and berths from 2000 to 2027, when it will be expected 785.000 berths and more than 470 ships. For both indicators each year should become a new record.

Figure 2.1 Global Cruise Fleet 2000-2027 (Ships & Berths)

>> *IN 2019 MORE THAN 600.000 BERTHS AND 407 CRUISE SHIPS*

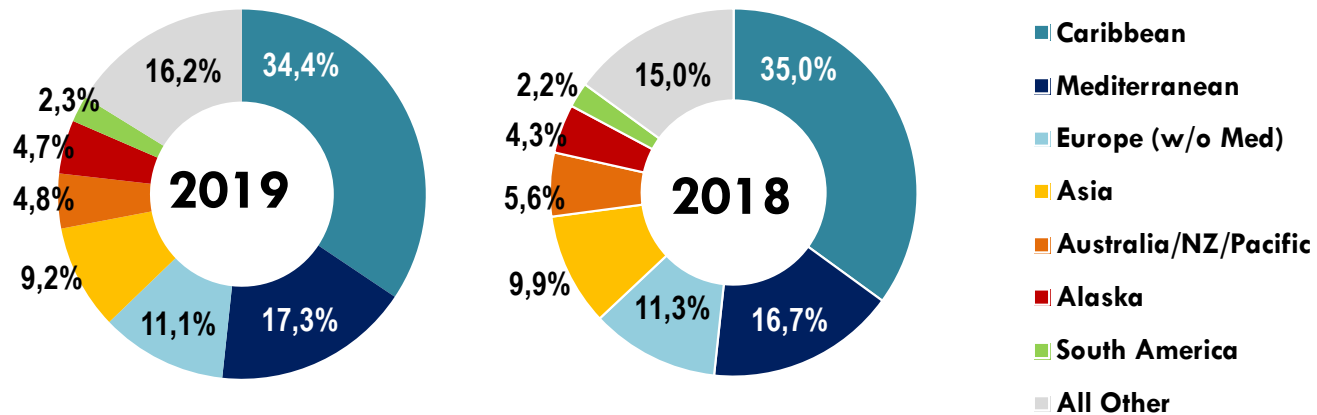


Source: Cruise Industry News 2018-2019 Annual Report

In 2019, similar to the previous year, the Caribbean will count more than one third of the deployment shares. The Mediterranean area will gain a 0,6% compared to the previous year. Asia (included China) will host the 9,2% of the global cruise fleet capacity, with a loss of 0,7% compared to 2018 but with an increase of 6,8% compared to 2010.

Figure 2.2 Global Deployment Shares, 2019 and 2018

>> ONE MORE YEAR MEDITERRANEAN SEA IS THE SECOND AREA IN THE WORLD



Source: Risposte Turismo, Speciale Crociere 2019, based on CLIA data (various years)

2.2 Contribution to the Global Economy

The cruise sector should generate more than 133\$ billion in the world. Europe will account for 38.7% of this value. Regarding employment figures, in Europe had been estimated 403.621 FTE jobs (36,4% on total in the word). All indicators show a positive variation in comparison to 2016 confirming the strengths of this sector and the relevance in all parts of the World.

Table 2.1 Total Cruise Sector Economic Contribution (2017)

>> *CRUISE ECONOMIC CONTRIBUTION IS GROWING.*

Category	Global	Regional Markets		
		North America	Europe (EU+3)	Rest of World
Output (\$ billion)	\$133.96	\$ 61.45	\$ 51.85	\$ 20.66
<i>Share of Global</i>		45,9%	38,7%	15,4%
Income (\$ billion)	\$45.57	\$ 24.49	\$ 13.83	\$ 7.24
<i>Share of Global</i>		53,7%	30,4%	15,9%
Employment	1.108.676	528.229	403.621	176.826
<i>Share of Global</i>		47,6%	36,4%	15,9%
		Percent Change from 2016		
Output	6,3%	6,4%	3,4%	14,4%
Income	10,9%	8,4%	12,3%	17,3%
Employment	8,2%	8,1%	5,8%	16,6%

Source: CLIA 2017 Global Economic Impact Study.

> TRENDS IN THE MEDITERRANEAN AND ITS ADJOINING SEAS

3.1 Evolution of Cruise Traffic (2014-2018)

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 represent 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 2018 as well as for the five previous years (2014-2018) can be found in the Appendix of this report. In total, 28.038.536 cruise passenger movements were registered in MedCruise Ports in 2018 (Table 3.1), which means a 8,19% increase of passenger movements compared to the previous year. The 5-year-variation of cruise passenger movements represents also an increase (+8,85%) similar to the variation between 2018 and 2017, considering that the absolute values registered in 2014 and 2017 were very similar. It helps to reiterate that 2018 passenger movements represent the record to this day.

- 28.038.536 cruise passenger movements were registered in MedCruise port members in 2018.
- Annual variation: 8,19% more cruise passenger movements than in 2017.
- 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 (2014-2018)

>> THE YEAR PAX MOVEMENTS VARIATION TURNS POSITIVE

Year	Total Pax.	% Variation on previous year	Total Calls	% Variation on previous year	Pax/Call	% Variation on previous year
2018	28.038.536	8,19%	12.734	4,90%	2.202	3,28%
2017	25.915.573	-4,12%	12.139	-7,33%	2.132	3,34%
2016	27.028.895	-0,85%	13.099	-0,21%	2.063	-0,67%
2015	27.260.071	5,83%	13.127	-4,19%	2.077	10,48%
2014	25.758.252	-7,05%	13.701	-7,72%	1.883	0,75%
Variation 2018/2014		8,85%		-7,06%		17,12%

3.2 Major MedCruise Ports

In 2018 the 10 major MedCruise Ports - in terms of cruise passengers - hosted a total of 17 million passenger movements, for a strong +10,37% variation on 2017 (Table 3.2).

With the exception of the port of Piraeus which signed a drop of 8,90%, all the others included in the top10 registered positive variations on 2017, ranging from the 23,07% of Naples/Salerno/Castellammare di Stabia member to the 4,51% of Genoa/Savona.

For the first time ever a Med port, namely Barcelona, exceeds the threshold of 3 million cruise passenger movements. For a fourth consecutive year, the third biggest cruise port in the Med was Balearic Islands, which showed numbers close to the ones registered in Civitavecchia/Fiumicino/Gaeta. MedCruise member Livorno/Piombino/Portoferraio enters the top10 this year (it ranked 13 in 2017).

The 5-year-variation, considering the similar traffic data of 2017 and 2014, is also around +16%, with Balearic Islands to lead the ranking with +53,19% followed by Marseille (+30,88%) and Barcelona (+28,66%).

- **2018:** The major Mediterranean cruise port, Barcelona, reaches an all time record, hosting more than 3 million 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.

Table 3.2 Major MedCruise Port Members per Cruise Pax Movements (2018)

>> 9 PORTS OUT OF THE FIRST 10 REGISTERED POSITIVE VARIATIONS

Rank 2018	(Rank 2017)	Port	Total Pax 2018	Total Pax 2017	2018/2017	Total Pax 2014	2018/2014
1	(1)	Barcelona	3.041.963	2.712.247	12,16%	2.364.292	28,66%
2	(2)	Civitavecchia/Fiumicino/Gaeta	2.441.737	2.204.336	10,77%	2.140.039	14,10%
3	(3)	Balearic Islands	2.431.153	2.110.663	15,18%	1.587.064	53,19%
4	(9/10)	Genoa/Savona	1.859.885	1.779.631	4,51%	1.842.903	0,92%
5	(4)	Marseille	1.716.184	1.487.313	15,39%	1.311.284	30,88%
6	(5)	Venice	1.560.579	1.427.812	9,30%	1.733.839	-9,99%
7	(8)	Naples/Salerno/C.di Stabia	1.141.398	927.458	23,07%	1.113.762	2,48%
8	(7)	Tenerife Ports	1.015.150	964.337	5,27%	840.268	20,81%
9	(6)	Piraeus	961.632	1.055.559	-8,90%	1.055.556	-8,90%
10	(13)	Livorno/ Piombino/ Portoferraio	825.310	728.243	13,33%	653.721	26,25%
Total (Major -10)			16.994.991	15.397.599	10,37%	14.642.728	16,06%

As far the cruise calls are concerned, the 10 MedCruise major ports reached a total of 5.875 (Table 3.3), a +3,56% on the previous year, a number which is more or less the same of the 2014 one. At the first 3 positions the same members of 2017: Balearic Islands, Barcelona and Civitavecchia. The highest variation 2018/2017 is the one of Napoli/Salerno/C.di Stabia, while the biggest positive 2018/2014 is the one of Livorno/Portofino/Portoferraio).

Balearic Islands reached the top position of this ranking with 859 calls in 2018. This equals to a rise by 40 calls, or 4,88% comparing to 2017. Barcelona goes right below on the list, following an increase by more than 50 calls (6,68).

CRUISE CALLS

- 2018: The most called Mediterranean cruise member is Balearic Islands with an average of 2.5 call each day of the year.
- 2018 cruise calls got back to the 2014 value

Table 3.3 Major MedCruise Port Members per Cruise Calls (2018)

>> PIRAEUS AND DUBROVNIK-KORCULA WITH NEGATIVE VARIATIONS BOTH ON 2017 AND 2014

Rank 2018	(Rank 2017)	Port	Total Calls 2018	Total Calls 2017	2018/2017	Total Calls 2014	2018/2014
1	(1)	Balearic Islands	859	819	4,88%	678	26,70%
2	(2)	Barcelona	830	778	6,68%	767	8,21%
3	(3)	Civitavecchia/Fiunicino/Gaeta	760	729	4,25%	833	-8,76%
4	(6)	Tenerife Ports	546	533	2,44%	513	6,43%
5	(4)	Piraeus	524	576	-9,03%	606	-13,53%
6	(8)	Marseille	505	444	13,74%	497	1,61%
7	(7)	Venice	502	466	7,73%	488	2,87%
8	(14)	Livorno/ Piombino/ Portoferraio	469	453	3,53%	341	37,54%
9	(18)	Napoli/ Salerno / C. di Stabia	442	336	31,55%	399	10,78%
10	(5)	Dubrovnik/ Korcula	438	539	-18,74%	752	-41,76%
Total (Major -10)			5.875	5.673	3,56%	5.874	0,02%

In total, 45 cruise ports recorded home-porting activities in 2018, embarking and disembarking passengers. The 10 biggest of them hosted, in aggregate, a total of 7,23 million Home In/Out passengers, 600.000 more (+9,41%) than in 2017 (Table 3.4).

Barcelona remains as the most popular cruise home-port in the Med, with more than 220.000 Home In/Out passengers compared to 2017. Venice also remains at the second position with a 7,71% positive variation on the previous year. Genoa/Savona reached, together as member, the third position, overcoming Civitavecchia/Fiumicino/Gaeta and Balearic Islands which both registered considerable positive variations on 2017.

Comparing with 2014, the 2018 top10 MedCruise members per Home In/Out passengers show a total significantly higher (nearly +14,35%), but it should be noticed that nearly half of its increase comes from Barcelona. In a top10 characterized by positive variations, the negative ones have been collected by Venice, Genoa and Savona together with Marseille.

HOME IN/HOME OUT

- In 2018: 9 out of 10 MedCruise Members of the TOP10 recorded growth in home-port traffic with the entire area growing as cruise destination.

Table 3.4 Major MedCruise Port Members per Home In/Out pax (2018)

>> THERE IS A HIGH CONCENTRATION OF TURNAROUND TRAFFIC IN FEW CRUISE PORTS (HALF OF HOME IN/OUT CRUISERS IS IN THE FIRST 3 MEMBER PORTS)

Rank 2018	(Rank 2017)	Port	Home In/Out Pax 2018	Home In/Out Pax 2017	2018/2017	Home In/Out Pax 2014	2018/2014
1	(1)	Barcelona	1.666.767	1.440.383	15,72%	1.222.487	36,34%
2	(2)	Venice	1.321.006	1.226.471	7,71%	1.509.097	-12,46%
3	(5,6)	Genoa/Savona	1.078.401	1.059.442	1,79%	1.239.936	-13,03%
4	(3)	Civitav/Fium./Gaeta	956.758	849.993	12,56%	730.938	30,89%
5	(4)	Balearic Islands	858.435	737.810	16,35%	606.549	41,53%
6	(7)	Marseille	438.443	414.880	5,68%	506.412	-13,42%
7	(8)	Piraeus	354.398	332.611	6,55%	256.196	38,33%
8	(10)	Bari/Brindisi	230.711	187.002	23,37%	152.104	51,68%
9	(12)	Tenerife Ports	161.803	138.076	17,18%	n.a.	n.a.
10	(9)	Valletta	156.825	216.029	-27,41	93.581	67,58%
Total (Major -10)			7.223.547	6.602.697	9,40%	6.317.300	14,35%

In a year with relevant higher traffic on the previous one, also the total registered in the major MedCruise Ports per Transit cruise passengers have grown, showing a positive variation of 11,48% (Table 3.5). Except Dubrovnik/Korcula, all the ports in this top10 contributed to generate the overall positive variation, particularly Balearic Islands, Barcelona, Marseille, Naples/Salerno/Castellammare di Stabia and Livorno/Piombino/Portoferraio.

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 14,56%. The number of visiting cruise passengers in Balearic Islands was 1,57 million. Comparing to five years before (2014), Balearic Islands hosted +60,40% or around 600.000 more Transit passengers in 2018.

The 10 major Med ports in terms of Transit passengers hosted significantly more passenger movements (10,53 million) than those they had hosted five years earlier, back in 2014 (8,92 million). Balearic Islands is the member that top the list in terms of percentage growth within these five years (60,4%), followed by Marseille and Genova/Savona. In absolute values, around 1,5 of the 2 million passengers more come from Balearic Islands, Marseille and Genoa/Savona.

TRANSIT

- 2018: for the third time five members hosted more than 1.000.000 Transit passenger movements (first time in 2013, second in 2015)
- 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 per Transit pax (2018)

>> BALEARIC ISLANDS, MARSEILLE AND GENOVA/SAVONA HAD ALL TOGETHER 1,2 MILLION TRANSIT PASSENGERS MORE THAN IN 2014

Rank 2018	(Rank 2017)	Port	Transit Pax 2018	Transit Pax 2017	2018/2017	Transit Pax 2014	2018/2014
1	(1)	Balearic Islands	1.572.718	1.372.853	14,56%	980.515	60,40%
2	(2)	Civitavecchia/Fiumicino/Gaeta	1.484.979	1.354.343	9,65%	1.409.101	5,38%
3	(3)	Barcelona	1.375.196	1.271.864	8,12%	1.141.805	20,44%
4	(4)	Marseille	1.277.741	1.072.433	19,14%	804.872	58,75%
5	(6)	Naples/Salerno/C. di Stabia	1.041.976	814.133	27,99%	1.014.339	2,72%
6	(5)	Tenerife Ports	853.347	826.261	3,28%	840.268	1,56%
7	(8)	Livorno/Piombino/Portoferraio	815.021	718.532	13,43%	651.633	25,07%
8	(19)	Genoa/Savona	781.484	720.189	8,51%	602.967	29,61%
9	(9)	Dubrovnik/Korcula	669.293	680.813	-1,69%	869.426	-23,02%
10	(11)	Corfù	653.573	609.766	7,18%	600.487	8,84%
Total (Major -10)			10.525.328	9.441.187	11,48%	8.915.413	18,06%

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). It's a way to shed light on ports that can't be included in rankings on absolute values. In order to better understand the trends, these tables provide both a short-term view by comparing data recorded in 2018 to 2017, as well as a medium term perspective by comparing cruise passengers and cruise call statistics of 2018 with those of 2014.

Remarkable variations of the total passenger movements hosted by each port in the Med were observed within just one year. In 2018, three of the smaller ports, namely Volos, Sète and Gioia Tauro more than doubled their cruise passengers (Table 3.6) while Tarragona and - again - Sète recorded the largest growth in 5 years.

Table 3.6 *Total Cruise Passengers - Major Variations 2018/2017 and 2018/2014*

Port	2018	2017	Var. 2018/2017	Port	2018	2014	Var. 2018/2014
Volos	31.337	7.618	311,4%	Tarragona	98.126	1.894	5.080,9%
Sète	114.429	47.377	141,5%	Sète	114.429	9.918	1.053,8%
Gioia Tauro	8.463	4.141	104,4%	Ceuta	15.790	2.432	549,3%
Tarragona	98.126	51.393	90,9%	Castellon	556	130	335,4%
Huelva	11.691	6.571	77,9%	Igoumenitsa	12.650	3.096	308,6%

Table 3.7 *Total Cruise Calls - Major Variations 2018/2017 and 2018/2014*

Port	2018	2017	Var. 2018/2017	Port	2018	2014	Var. 2018/2014
Volos	27	9	200,0%	Tarragona	57	3	1.800,0%
Huelva	16	6	166,7%	Sète	72	24	200,0%
Gioia Tauro	12	6	100,0%	Egyptian Ports	77	29	165,5%
Igoumenitsa	14	8	75,0%	Souda/Chania	78	38	105,3%
Tangier	46	27	70,4%	Gioia Tauro	12	6	100,0%

Remarkable variations of Home In/Out passenger were observed in 2018, in comparison to 2017, in ports with less than 20.000 passengers. The major variation is recorded in Portimao Port, that almost doubled the number of Home In/Out passengers. In a 5-year period, Sardinian Ports added to the 133 Home In/Out passengers of 2014, more than 10.000 passengers.

Table 3.8 *Total Home In/Out - Major Variations 2018/2017 and 2018/2014*

Port	2018	2017	Var. 2018/2017	Port	2018	2014	Var. 2018/2014
Portimao	960	514	86,8%	Sardinian Ports	11.355	133	8.437,6%
Heraklion	29.841	18.874	58,1%	Odessa	339	44	670,5%
Tarragona	22.118	14.238	55,3%	Livorno/P./Portof.	10.289	2.088	392,8%
Madeira Ports	4.593	3.058	50,2%	Dubrovnik/Korc.	63.138	24.790	154,7%
Zara	1.051	736	42,8%	Valletta	156.825	93.581	67,6%

Transit passenger movements show different variations. Compared to the previous year, 2018 transit passengers in Volos Port added almost 25.000 passengers to the 7.600 transit passengers of 2017. The port of Sète counted more than 100.000 transit passengers with an increase of 142% compared with 2017 and of 1511% compared to 2014. In 5 years, Tarragona Port, with more than 75.000 transit passengers, shows an increase of 3900%.

Table 3.9 *Total Transit Passengers - Major Variations 2018/2017 and 2018/2014*

Port	2018	2017	Var. 2018/2017	Port	2018	2014	Var. 2018/2014
Volos	31.331	7.618	311,3%	Tarragona	76.008	1.894	3931,1%
Sète	114.429	47.314	141,9%	Sète	114.429	7.101	1511,4%
Tarragona	76.008	37.155	104,6%	Ceuta	15.790	2.432	549,3%
Gioia Tauro	8.463	4.141	104,4%	Castellon	566	130	335,4%
Huelva	11.691	6.571	77,9%	Souda/Chania	139.944	33.304	320,0%

3.4 Passengers per Call

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 per call. In 2018, the average number of hosted passengers per cruise call was 2.202.

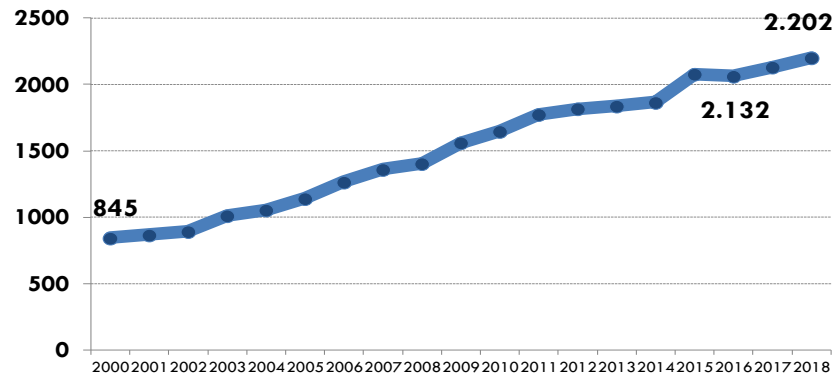
The increase within the last two decades is even more impressive. In 2000 each cruise call in the Med was resulting in 845 passenger movements on average. Within 10 years, the average number of passengers per call moved up of 1.357 for each call, resulting in the new record of 2.202 (Figure 3.1).

MEDCRUISE TRENDS

- 2018: MedCruise Member ports averaged 2.202 passenger per call.
- 2015: for the first time the (average) number of cruise passenger per call surpassed 2.000 pax.
- 2000: the value was only 845 per call.

Figure 3.1 Average Pax/Call in MedCruise Ports (2000-2018)

>> THE PASSENGER MOVEMENTS ON AVERAGE CONTINUE TO GROW



>> +3,14% 1 year (2018/2017) <<

>> +40,94% 10 year (2018/2009) <<

Table 3.10 MedCruise Port overview per cruise Pax/Call 2018

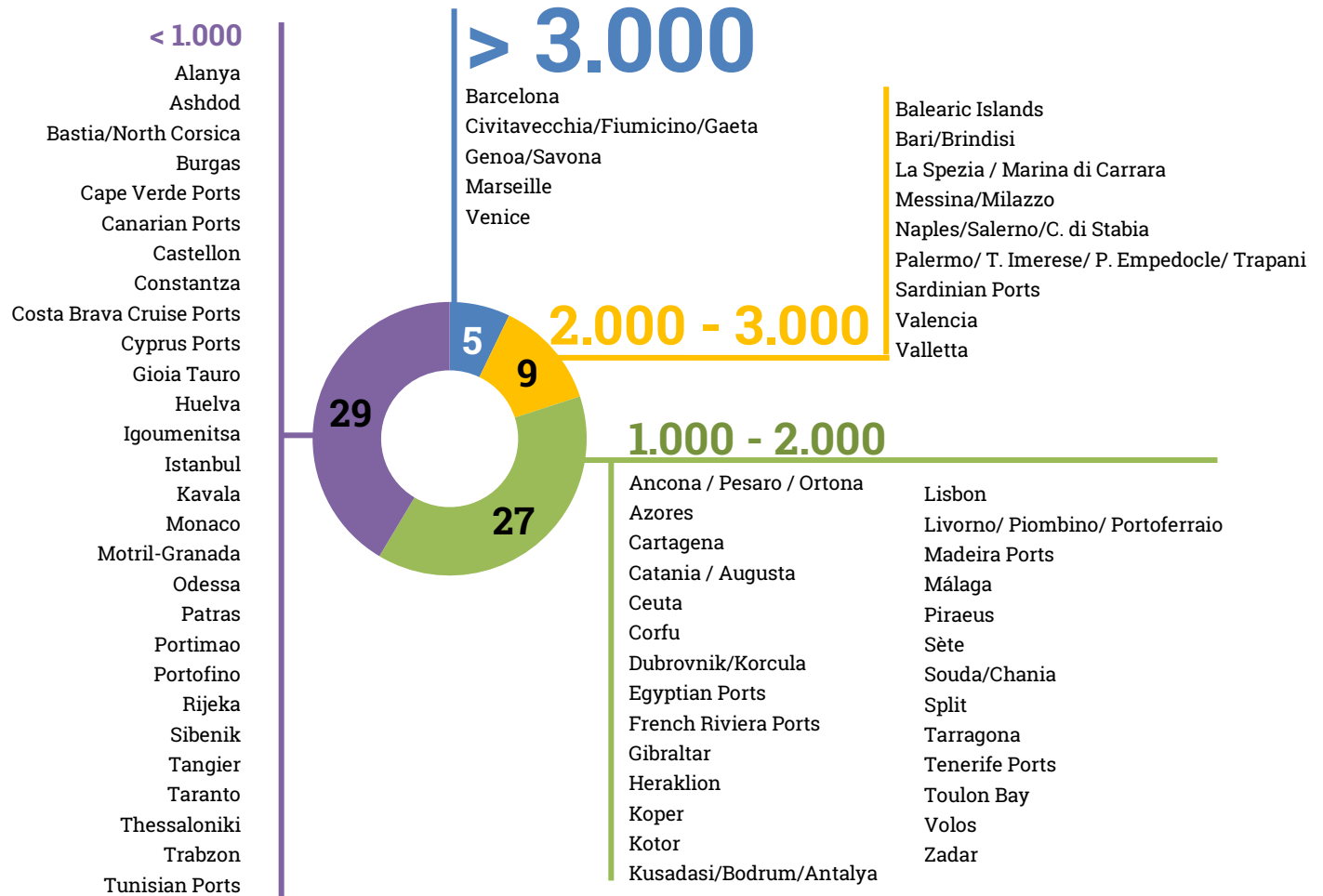


Table 3.11 Major MedCruise Pax/Cruise call

>> 5 PORTS WITH MORE THAN 3.000 PAX/CALL, 9 OVER 2.000 PAX/CALL

No	Port	Pax/Calls 2018	Pax/Calls 2017	Variation 2018/2017	Pax/Calls 2014	Variation 2018/2014
1	Genoa/Savona	4.397	4.460	-1,42%	3.776	16,43%
2	Barcelona	3.665	3.486	5,13%	3.083	18,90%
3	Marseille	3.398	3.350	1,45%	2.638	28,80%
4	Civitavecchia/Fiumicino/Gaeta	3.213	3.024	6,25%	2.569	25,06%
5	Venice	3.109	3.064	1,46%	3.553	-12,50%
6	Balearic Islands	2.830	2.577	9,82%	2.341	20,91%
7	La Spezia/Marina di Carrara	2.695	2.116	27,37%	1.904	41,57%
8	Naples/Salerno/Castellammare di Stabia	2.582	2.760	-6,45%	2.791	-7,49%
9	Palermo /Termini Imerese / Porto Empedocle / Trapani	2.548	2.982	-14,55%	2.406	5,91%
10	Bari/Brindisi	2.348	2.723	-13,77%	3.474	-32,40%
Major-10		30.786	30.543	0,80%	28.535	7,89%
11	Sardinian Ports	2.325	2.152	8,05%	1.637	42,04%
12	Valletta	2.208	2.277	-3,01%	1.714	28,84%
13	Messina/Milazzo	2.165	2.269	-4,57%	1.938	11,72%
14	Valencia	2.151	2.026	6,14%	1.913	12,44%
15	Tenerife Ports	1.859	1.809	2,76%	1.638	13,51%
16	Catania /Augusta	1.852	n.a.	n.a.	n.a.	n.a.
17	Madeira Ports	1.848	1.845	0,16%	1.670	10,66%
18	Piraeus	1.835	1.833	0,14%	1.742	5,36%
19	Souda/Chania	1.794	1.525	17,68%	876	104,71%
20	Corfu	1.782	1.658	7,47%	1.702	4,67%
Major-20		50.605	47.935	5,57%	43.365	16,64%

3.5 Cruise Traffic Concentration

Table 3.12 Major 20 MedCruise Ports - Cruise Pax. Concentration

>> CRUISE PAX CONCENTRATION INCREASES

No	Port	Total Pax. 2018	2018	2017	2016	2015	2014
1	Barcelona	3.041.963	10,84%	10,47%	9,93%	9,34%	9,18%
2	Civitavecchia/Fiumicino/Gaeta	2.441.737	8,70%	8,51%	8,66%	8,35%	8,31%
3	Balearic Islands	2.431.153	8,66%	8,14%	7,24%	7,34%	6,16%
4	Genoa/Savona	1.859.885	6,63%	6,87%	7,13%	6,73%	7,15%
5	Marseille	1.716.184	6,11%	5,74%	5,91%	5,33%	5,09%
Major 5 – SUM		11.490.922	40,94%	39,72%	38,87%	37,09%	35,89%
6	Venice	1.560.579	5,56%	5,51%	5,94%	5,82%	6,73%
7	Naples/Salerno/Castellamare di Stabia	1.141.398	4,07%	3,58%	4,83%	4,67%	4,32%
8	Tenerife Ports	1.015.150	3,62%	3,72%	3,27%	3,43%	3,26%
9	Piraeus	961.632	3,43%	4,07%	4,05%	3,60%	4,10%
10	Livorno/ Piombino/ Portoferraio	825.310	2,94%	2,81%	3,15%	2,70%	2,54%
Major 10 – SUM		16.994.991	60,61%	59,41%	60,11%	57,31%	56,85%
11	Corfu	735.832	2,62%	2,62%	2,77%	2,38%	2,61%
12	Dubrovnik	732.431	2,61%	2,89%	3,08%	3,05%	3,47%
13	Valletta	711.018	2,53%	3,00%	2,53%	2,46%	2,01%
14	Bari/Brindisi	678.621	2,42%	1,95%	1,50%	1,91%	2,28%
15	French Riviera Ports	610.919	2,18%	2,68%	2,08%	2,01%	2,31%
16	Palermo/Termini Imerese/Porto Empedocle/Trapani	603.881	2,15%	1,77%	1,89%	2,01%	2,06%
17	Lisbon	577.603	2,06%	2,01%	1,93%	1,88%	1,94%
18	Madeira Ports	541.467	1,93%	2,09%	1,93%	2,13%	1,85%
19	Sardinian Ports	513.874	1,83%	2,15%	1,73%	1,84%	0,97%
20	Málaga	507.360	1,81%	1,97%	1,64%	1,54%	1,59%
Major 20 – SUM		23.207.997	82,8%	82,6%	81,18%	78,52%	77,94%

Table 3.13 Major 20 MedCruise Ports - Cruise Calls Concentration

>> CRUISE CALLS CONCENTRATION INCREASES

No	Port	Total Pax. 2018	2018	2017	2016	2015	2014
1	Balearic Islands	859	6,74%	6,75%	5,66%	6,01%	4,88%
2	Barcelona	830	6,51%	6,41%	5,79%	5,72%	5,53%
3	Civitavecchia/Fiumicino/Gaeta	760	5,96%	6,01%	6,36%	6,06%	6,00%
4	Tenerife Ports	546	4,28%	4,39%	4,00%	3,86%	3,70%
5	Piraeus	524	4,11%	4,75%	4,77%	4,74%	4,37%
Major 5 – SUM		3.519	27,60%	28,30%	26,58%	26,39%	24,47%
6	Marseille	505	3,96%	3,66%	3,74%	3,37%	3,58%
7	Venice	502	3,94%	3,84%	4,04%	3,98%	3,52%
8	Livorno/Piombino/Portoferraio	469	3,68%	3,73%	3,98%	3,67%	3,18%
9	Naples/Salerno/C. di Stabia	442	3,47%	2,77%	3,76%	3,40%	2,87%
10	Dubrovnik/Korcula	438	3,44%	4,44%	4,88%	3,62%	5,42%
Major 10 – SUM		5.875	46,20%	46,73%	46,98%	44,43%	43,04%
11	Genoa/Savona	423	3,32%	3,29%	3,52%	3,27%	3,52%
12	Corfù	413	3,24%	3,38%	3,67%	3,11%	2,85%
13	Kotor	411	3,22%	3,54%	3,72%	3,14%	2,54%
14	French Riviera Ports	348	2,73%	3,08%	2,48%	2,62%	2,66%
15	Lisbon	339	2,66%	2,72%	2,37%	2,33%	2,30%
16	Valletta	322	2,53%	2,82%	2,42%	2,33%	2,18%
17	Málaga	298	2,34%	2,46%	1,93%	1,78%	1,64%
18	Madeira Ports	293	2,30%	2,41%	2,27%	2,38%	2,05%
19	Bari/Brindisi	289	2,27%	1,53%	1,21%	1,59%	1,22%
20	Split	260	2,04%	1,93%	2,18%	1,99%	1,68%
Major 20 – SUM		9.271	72,81%	73,89%	72,76%	68,97%	65,66%

> ANALYSIS PER MEDCRUISE REGION

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 2018*



A total of 39 MedCruise members are located in the West Med region (Table 4.1). The cruise passenger movements that took place in these ports in 2018 reached 21,5 million, thanks to more than 9.000 calls, definitely the area with the most traffic for the MedCruise geography, with 76,7% of concentration in terms of pax movements and 71% in terms of calls. It's interesting to note that for both Adriatic and East Med the quotes are higher in terms of calls than in pax movements, to indicate how the bigger ships prefer to call the Western side of the Med instead of the Eastern one.

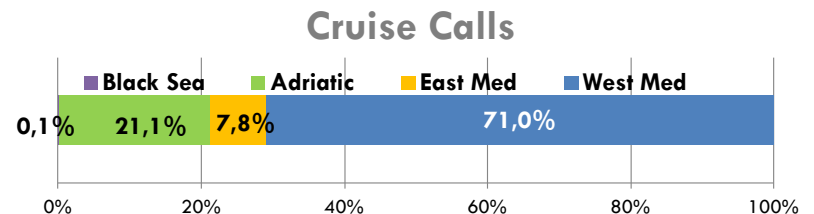
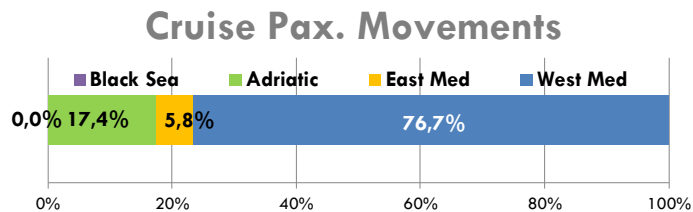
MedCruise has intensified its efforts to support the strategy of these ports to regain cruise activities among others by hosting international gathering of cruise stakeholders in its member ports located in the Black Sea.

Table 4.1 Total Cruise traffic per Region, 2018

Region	No. of Members	Total Cruise Pax.	Total Cruise Calls	Home In/Out Pax.	Transit Pax.
West Med	40	21.507.804	9.038	5.912.101	15.590.703
Adriatic	12	4.889.351	2.683	1.712.892	3.176.459
East Med	14	1.638.816	996	385.912	1.252.904
Black Sea	5	2.565	17	339	2.226

Figure 4.1 Cruise Passenger Traffic Shares per Region, 2018

>> 3 OUT OF 4 CRUISE PASSENGERS HAVE BEEN WELCOMED IN WEST MED PORTS



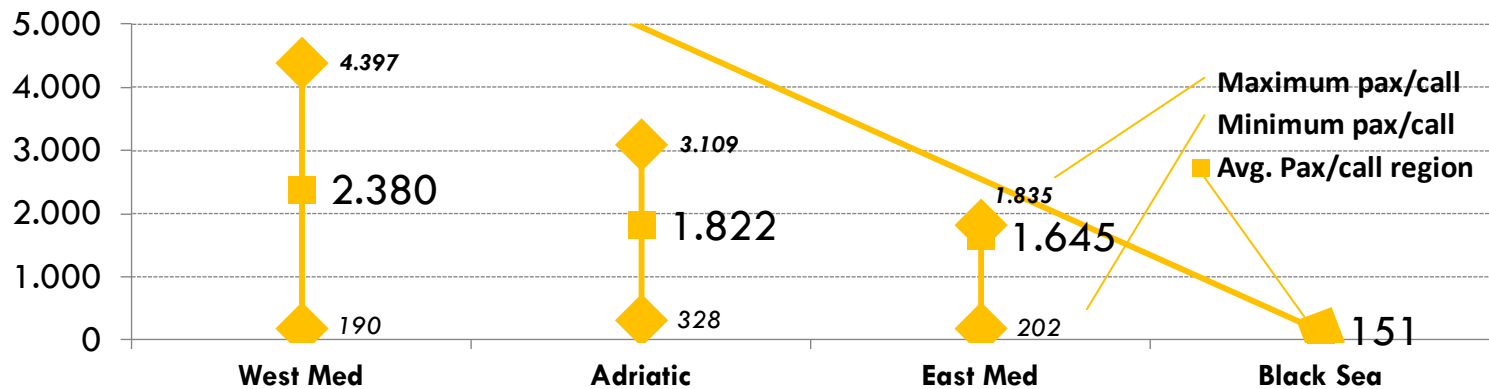
The average pax per cruise call in West Med (Figure 4.2) is the highest in the whole area, with 2.380 (Adriatic follows with 1.822, then East Med with 1.645 and the Black Sea with 151). The number of cruise ports that are located in the Adriatic Sea is 12. This is the third biggest cruise region in terms of members, but the second biggest MedCruise region in terms of cruise activity.

There are 14 MedCruise member ports located in the East Med, able to welcome more than 1,6 million passenger movements in 2018 distributed in 996 calls. Finally, the Black Sea, the smallest distinctive geographical port region regarding the magnitude of cruise activities. This region represented in 2018 less than 0,01% of the annual passenger movements and 0,1% of the annual cruise calls that took place in the area under examination.

Figure 4.2 Average Cruise Passengers/Call per Region, 2018

LARGER IN THE WEST MED (2.380 PAX/CALL) < CRUISE SHIP PAX/CALL > SMALLER IN BLACK SEA (151 PAX/CALL)

MAX IN GENOA/SAVONA (4.397 PAX/CALL) < MEMBER PAX/CALL > MIN IN BLACK SEA AT ODESSA (151 PAX/CALL)



4.2 Cruise traffic evolution per Region

As always, the variations show the direction towards which individual ports and entire areas are going (Table 4.2). In comparison to 2017, the 2018 data are particularly positive for West Med and Adriatic with the increase of almost 10%. These positive variations can also be found when comparing the 2014 to 2018 data, particularly for West Med ports with the increase of 19%. East Med and the Black Sea and vice versa, are penalised – the first one almost halved the passenger traffic in 5 years, while the second one, as confirmed many times, plummeted from 160.000 pax movements to just above 2.500 in 5 years. The evolution of traffic concentration per region chart is particularly interesting (Figure 4.3), with West Med progressively increasing its own share at the expense of East Med considering that the Adriatic remains more or less constant and the Black Sea does not influence the overall distribution.

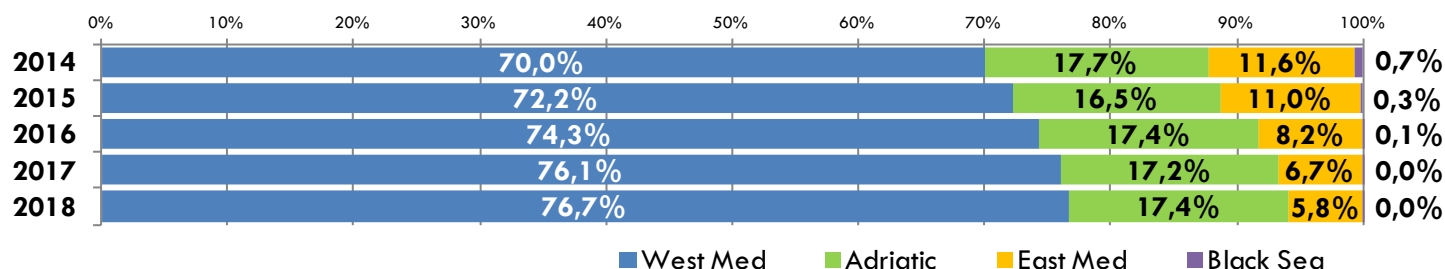
Table 4.2 Total cruise passenger movements variations per Region

>> 2 REGIONS GROW, 2 REGIONS DROP

Region	2018	2017	Variation 2018/2017	2014	Variation 2018/2014
West Med	21.507.804	19.721.802	9,06%	18.029.458	19,28%
Adriatic	4.889.351	4.447.033	9,95%	456.528	7,21%
East Med	1.638.816	1.740.289	-5,83%	2.980.148	-45,01%
Black Sea	2.565	6.449	-60,23%	188.118	-98,64%
Total	28.038.536	25.915.573	8,19%	25.758.252	8,85%

Figure 4.3 Cruise passenger movements Evolution per Region

>> THE WEST MED SHARE IS INCREASING



In terms of cruise call variations, the picture (Table 4.3) shows info not so different from the one about passengers. Comparing 2018 to 2017, West Med and Adriatic grew while East Med and Black Sea dropped. Comparing 2018 to 2014 only West Med ports registered a positive variation altogether and the -7,26% for the Adriatic is the only difference in terms of signs with respect to the passenger movements variations (in that case the Adriatic has shown an increase in the 5 years). If in the past 5 years the whole MedCruise ports' calls declined by just 967, it's because the ones located in the West Med were able to add 617 calls in their schedules in 2017.

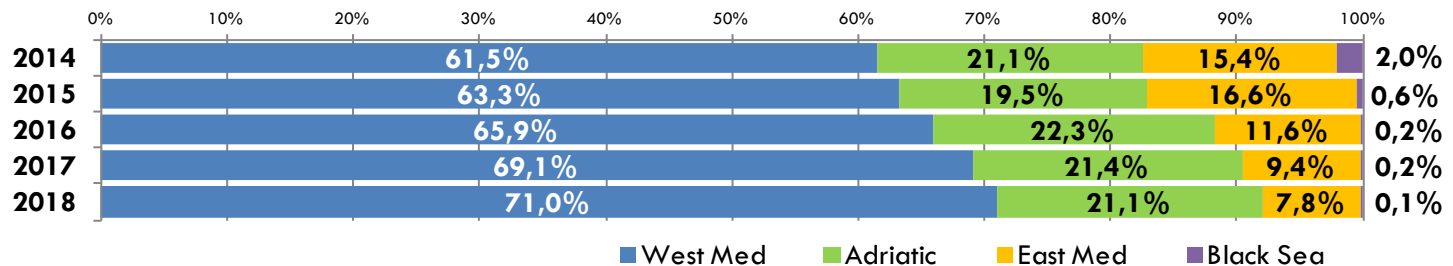
Following these developments, the share of cruise calls in West Med ports has increased by around 10 percentage points in the last five years, from 61,5% of calls in the West Med to 71,0%. The percentage of the Adriatic remained almost stable (21,1%), while East Med quote was cut in half – from 15,4% in 2014 to 7,8% in 2018 - and the Black Sea – from 2,0% to 0,1% - confirming its decline (Figure 4.4).

Table 4.3 Total cruise calls movements variations per Region

>> WEST MED PORTS ARE THE ONLY ONE WHICH GREW IN THE PAST 5 YEARS

Region	2018	2017	Variation 2018/2017	2014	Variation 2018/2014
West Med	9.038	8.383	7,81%	8.421	7,33%
Adriatic	2.683	2.596	3,35%	2.893	-7,26%
East Med	996	1.141	-12,71%	2.111	-52,82%
Black Sea	17	19	-10,53%	276	-93,84%
Total	12.734	12.139	4,90%	13.701	-7,06%

Figure 4.4 Cruise Calls Evolution per Region >> ADRIATIC PORTS KEPT THE SAME SHARE



The embarking/disembarking traffic has grown in the West Med ports whether in the 5-year period or in the last year (Table 4.4). In the last year the Adriatic ports have had embarking and disembarking increase by almost 10%. From 2014 to 2018, the East Med ports' passengers Home In/Out was almost cut in half.

Figure 4.5 illustrates the shares of Home In/Out passengers per MedCruise region since 2014. Within this period the share of the West Med increased to reach 20,1% while the ones for the other 3 regions declined.

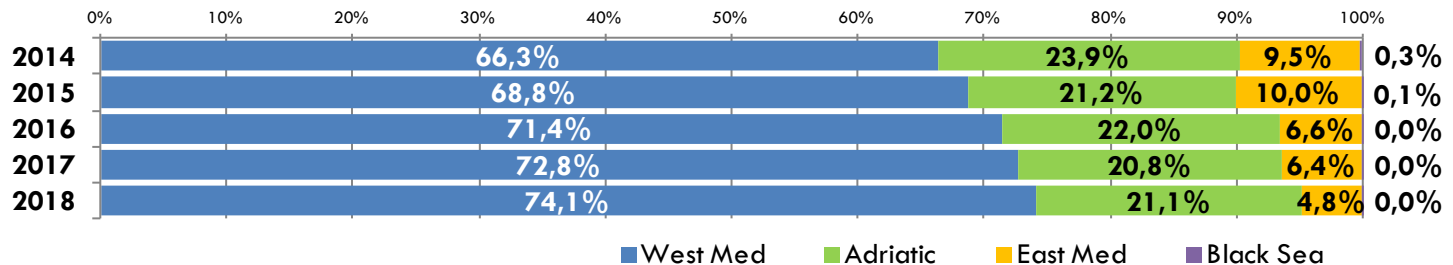
Table 4.4 Total Home In/Out passenger movement variations per Region

>> IN 5 YEARS, ADRIATIC PORTS GREW IN TOTAL TRAFFIC BUT DECLINED IN HOME IN/OUT MOV

Region	2018	2017	Variation 2018/2017	2014	Variation 2018/2014
West Med	5.912.101	5.468.259	8,12%	4.922.458	20,10%
Adriatic	1.712.892	1.564.711	9,47%	1.772.352	-3,35%
East Med	385.912	480.901	-19,75%	706.613	-45,39%
Black Sea	339	460	-26,30%	19.602	-98,27%
Total	8.011.244	7.514.331	6,61%	7.421.025	7,95%

Figure 4.5 Cruise Home In/Out passenger movements Evolution per Region

>> HOME IN/OUT MOV. CONFIRMED THE INCREASING CONCENTRATION OF MED TRAFFIC IN THE WESTERN REGION



West Med ports registered a total of 15,6 million Transit passenger movements in 2018 (Table 4.5), increasing the 2017 data of 9,42% and the 2014 of 18,99%. Double growth has been registered by the Adriatic ports too, which have seen their Transit passengers traffic move from 2,8 million in 2014 to 3,2 million in 2018. While the Black Sea is facing a strong decline in every single traffic dimension, the Transit passengers in the East Med ports remained stable from 2017 to 2018. In total, on an annual basis, Transit passengers in the Med and its adjoining seas increased by 8,84% in 2018 and equal to 20,03 million passengers. Compared to 2014 the increase stands at 9,22%.

It's worth noting that in terms of concentration the Transit passengers' picture (Figure 4.6) shows the West Med region with nearly five times the volumes registered in the Adriatic ports.

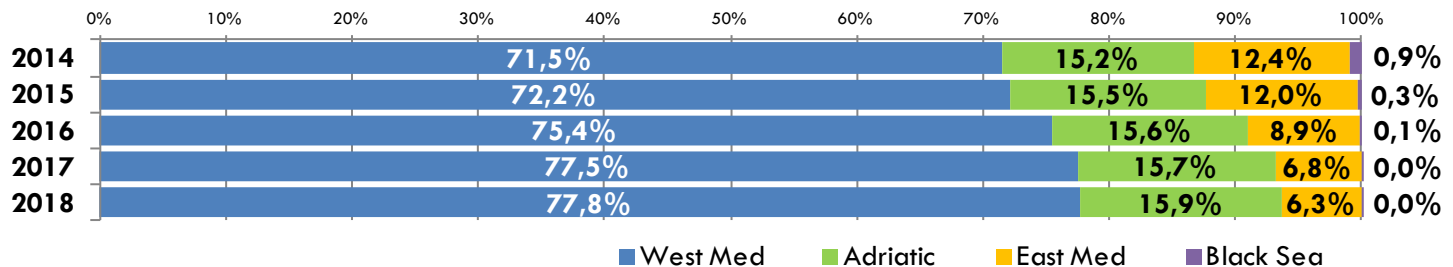
Table 4.5 *Total Transit passengers variations per region*

>> ADRIATIC RECORDED THE HIGHEST GROWTH 2018/2017

Region	2018	2017	Variation 2018/2017	2014	Variation 2018/2014
West Med	15.595.703	14.253.515	9,42%	13.107.000	18,99%
Adriatic	3.176.459	2.882.322	10,20%	2.788.176	13,93%
East Med	1.252.904	1.259.388	-0,51%	2.273.535	-44,89%
Black Sea	2.226	5.989	-62,83%	168.516	-98,68%
Total	20.027.292	18.401.214	8,84%	18.337.227	9,22%

Figure 4.6 *Cruise Transit passengers evolution per region*

>> THE CONCENTRATION IN TRANSIT PAX IS EVEN HIGHER THAN THE ONE IN HOME IN/OUT



4.3 The MedCruise Growth Indexes (MEDGRI)

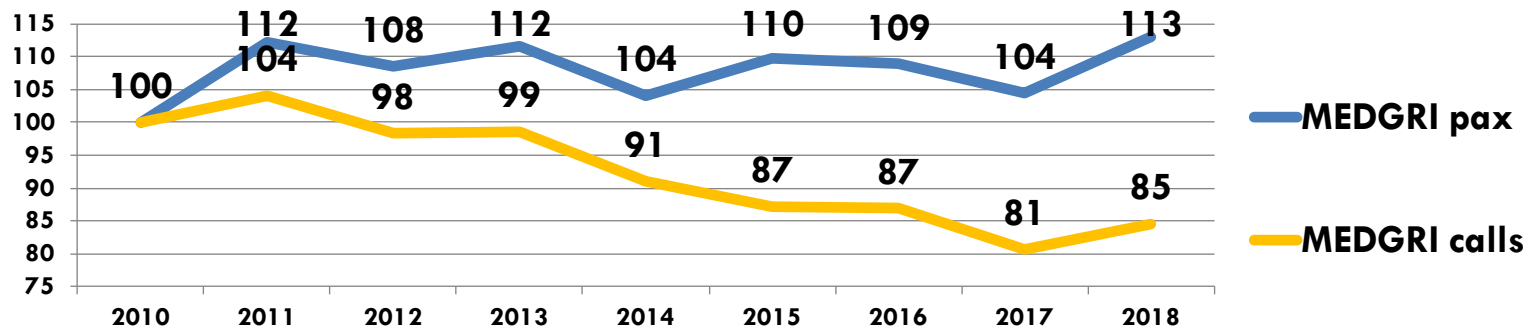
In order to facilitate the monitoring of cruise activity trends in the Mediterranean and its adjoining seas, MedCruise established two indexes aiming to give a clear picture of the evolution of cruise passenger movements and cruise calls respectively, in each of the four MedCruise regions, as well as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

MEDGRI_{pax} (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 (MEDGRI_{pax}=100). The figure presents the evolution since the base year, easily showing a period marked by variations of opposite sign ending in 2018, with the highest index (MEDGRI_{pax} = 113).

Looking at regional trends, West Med and East Med are going in opposite directions – the first one growing more or less steadily and the second one dropping. The most stable is the Adriatic which is in slight growth during the period indicated in the chart, whereas the downfall of the Black Sea is even more evident with this type of processing.

MEDGRI_{calls} monitors the annual trend of cruise calls in the Med and in each of the four regions, having again 2010 as the basis year (MEDGRI_{calls} =100). The evolution of MEDGRI_{calls} is illustrated in the same following figure. 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 except in the West Med, where the 2018 index (MEDGRI_{calls}= 129) is over 100. While a MEDGRI_{calls}= 86 had been recorded in the Adriatic, in East Med the decline of the number of cruise calls (2018 MEDGRI_{calls}=35) is comparatively lower than the one of cruise passenger movements.

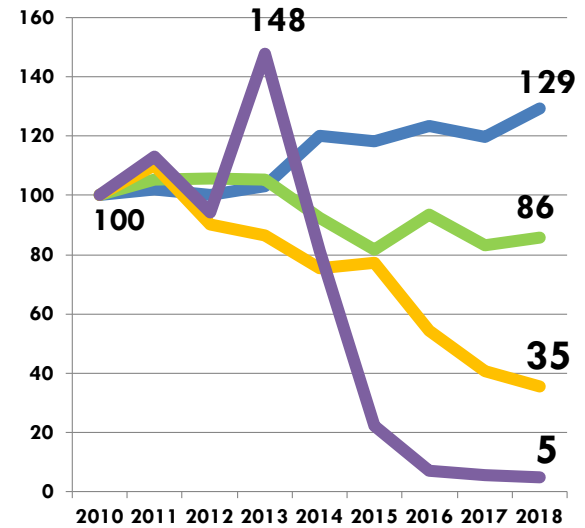
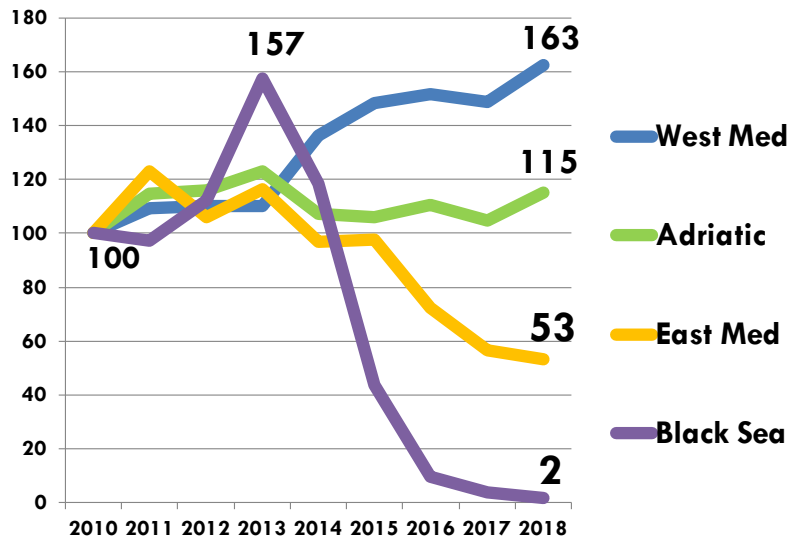
Figure 4.7 MEDGRI Trends: the MedCruise growth indexes (2010=100)



Figures 4.8 and 4.9 MEDGRI Trends: the MedCruise growth indexes (2010=100)

>> WEST MED INCREASES BOTH PASSENGERS AND CRUISE CALLS

>> EAST MED AND BLACK SEA DECREASE BOTH PASSENGERS AND CRUISE CALLS

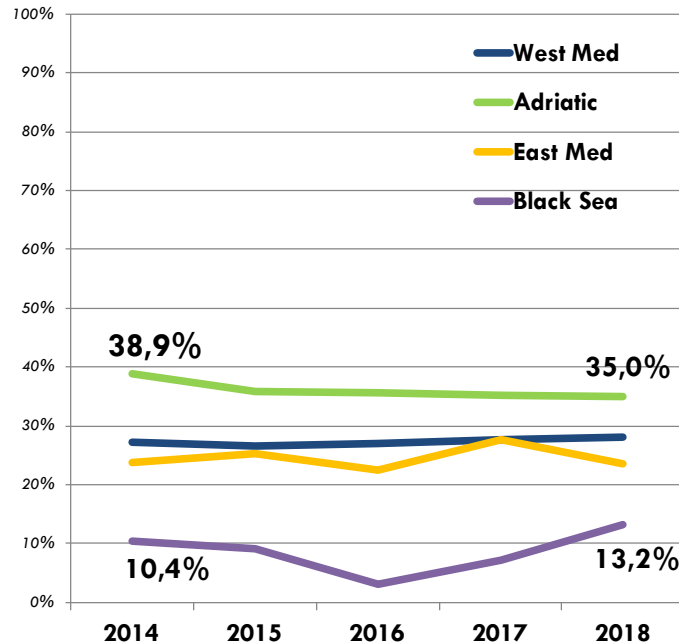


The following figures provide visualised information on the evolution of Home In/Out shares per region, as well as on those of the Transit passenger movements compared to the total of the cruise passengers recorded in each of the four MedCruise regions per year. Evidently, still a relevant part of cruise activities taking place in the Adriatic (35,0% in 2018, less than the 38,9% in 2014) are home-ported activities, particularly thanks to the role of Venice. In 5 years, the Home In/Out versus Transit passengers ratio didn't change in the West and East Med.

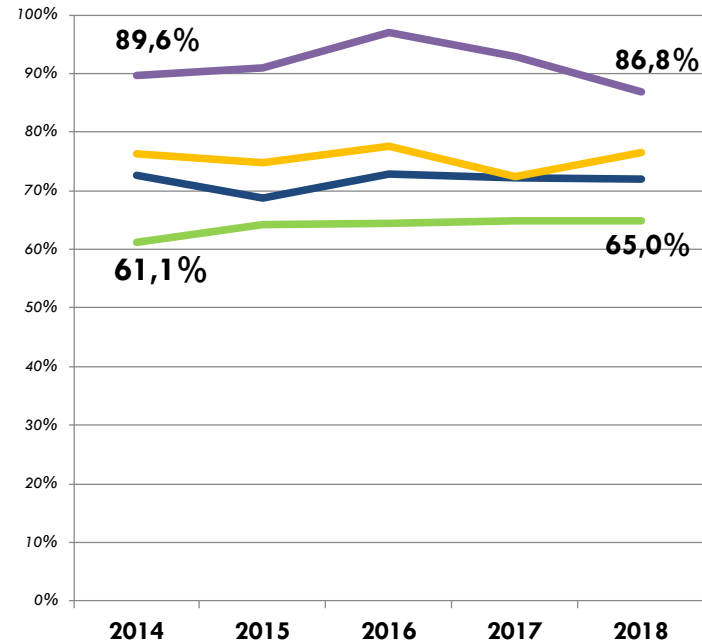
Figures 4.10 and 4.11 *Home In/Out vs Transit Passenger Shares Evolution per Region*

>> ADRIATIC SHOWS THE HIGHER SHARE OF HOME IN/OUT PAX AND THE LOWER OF TRANSIT PAX

HOME IN/OUT



TRANSIT PASSENGER



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 2018 with those of 2017, as well as a similar comparison with the passenger movements and calls that had been recorded in 2014.

Table 4.6 Major Ports per region: Total Cruise Passenger Movements

>> BARCELONA OVERCOMES 3 MILLION THRESHOLD

Region	No	Port	2018	2017	Var. 2018/2017	2014	Var. 2018/2014
West Med	1	Barcelona	3.041.963	2.712.247	12,2%	2.364.292	28,7%
	2	Civitav/Fiumicino/Gaeta	2.441.737	2.204.336	10,8%	2.140.039	14,1%
	3	Balearic Islands	2.431.153	2.110.663	15,2%	1.587.064	53,2%
Adriatic	1	Venice	1.560.579	1.427.812	9,3%	1.733.839	-10,0%
	2	Corfu	735.832	679.681	-1,8%	672.368	-17,7%
	3	Dubrovnik	732.431	748.918	7,8%	894.216	8,9%
East Med	1	Piraeus	961.632	1.055.559	-8,9%	1.055.556	-8,9%
	2	Heraklion	297.929	181.693	64,0%	242.951	22,6%
	3	Souda/Chania	139.944	128.067	9,3%	33.304	320,2%

Table 4.7 Major Ports per Region: Total Cruise Calls

>> BALEARIC ISLANDS WITH A RELEVANT GROWTH IN 5 YEARS, DUBROVNIK WITH A HEAVY DECREASE

Region	No	Port	2018	2017	Var. 2018/2017	2014	Var.2018/2014
West Med	1	Balearic Islands	859	819	4,9%	678	26,7%
	2	Barcelona	830	778	6,7%	767	8,2%
	3	Civitav/Fiumicino/Gaeta	760	729	4,3%	833	-8,8%
Adriatic	1	Venice	502	466	7,7%	488	2,9%
	2	Dubrovnik	438	539	-18,7%	752	-41,8%
	3	Corfu	413	410	0,7%	395	4,6%
East Med	1	Piraeus	524	576	-9,0%	606	-13,5%
	2	Heraklion	187	131	42,7%	160	16,9%
	3	Souda/Chania	78	84	-7,1%	38	105,3%

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.

Table 4.8 Major Ports per Region: Total Home In/Out passengers

>> CYPRUS DECLINED IN HOMEPORT TRAFFIC

Region	No	Port	2018	2017	Variation 2018/2017	2014	Variation 2018/2014
West Med	1	Barcelona	1.666.767	1.440.383	15,7%	1.222.487	36,3%
	2	Genova/Savona	1.078.401	1.059.442	1,8%	1.239.936	-13,0%
	3	Civitavecchia	956.758	849.993	12,6%	730.938	30,9%
Adriatic	1	Venice	1.321.006	1.226.471	7,7%	1.509.097	-12,5%
	2	Bari/Brindisi	230.711	187.002	23,4%	152.104	51,7%
	3	Corfu	82.259	69.915	17,7%	71.881	14,4%
East Med	1	Piraeus	354.398	332.611	6,6%	256.196	38,3%
	2	Heraklion	29.841	18.874	58,1%	23.925	24,7%
	3	Cyprus	1.632	71.342	-97,7%	76.892	-97,9%

Table 4.9 Major Ports per Region: Total Transit passengers

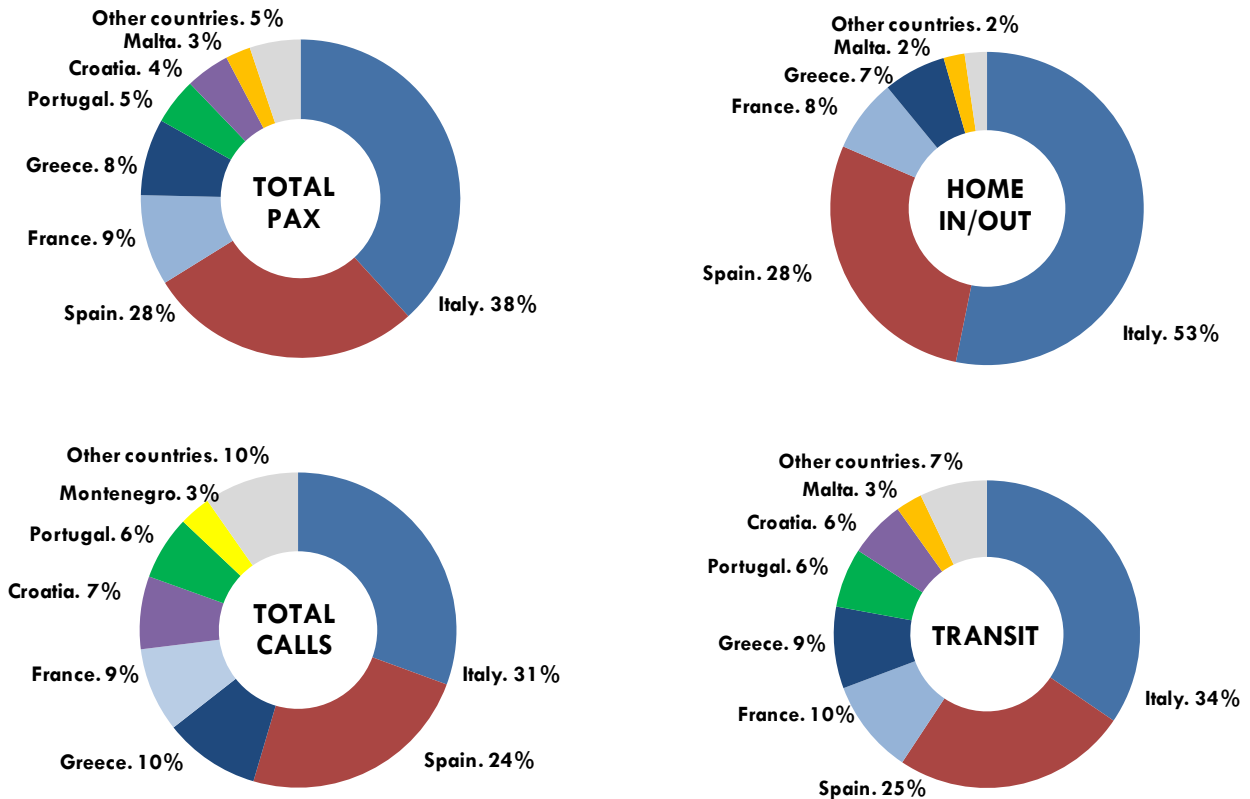
>> DESPITE THE DECREASE, DUBROVNIK IS STILL THE FIRST PORT IN ADRIATIC FOR TRANSIT PASSENGERS

Region	No	Port	2018	2017	Variation 2018/2017	2014	Variation 2018/2014
West Med	1	Balearic Islands	1.572.718	1.372.853	14,6%	980.515	60,4%
	2	Civitav/Fium/Gaeta	1.484.979	1.354.343	9,6%	1.409.101	5,4%
	3	Barcelona	1.375.196	1.271.864	8,1%	1.141.805	20,4%
Adriatic	1	Dubrovnik	669.293	680.813	-1,7%	869.426	-23,0%
	2	Corfu	653.573	609.766	7,2%	600.487	8,8%
	3	Kotor	490.602	539.653	-9,1%	309.322	58,6%
East Med	1	Piraeus	607.234	722.948	-16,0%	799.360	-24,0%
	2	Heraklion	268.088	162.819	64,7%	219.026	22,4%
	3	Souda/Chania	139.944	127.285	9,9%	133.304	5,0%

4.5 Cruise Traffic per country

MedCruise members spread in 21 different countries in the Mediterranean and its adjoining seas. The fact that MedCruise members represent in most cases the vast majority 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. Figures below picture the shares of cruise activities per major country.

Figures 4.12, 4.13, 4.14 and 4.15 *Cruise Traffic per MedCruise Country*



The next table lists the cruise passenger movements that were recorded in 2018 per country and the respective variations observed when comparing these data with those of previous years. Italy confirms its leading role and shows the highest growth on the previous year among the first 10 countries. Spain, second in the ranking, recorded a relevant growth in 5 years, thanks to approximately 800.000 passenger movements added in 2018 compared to 2017. Together with Turkey, Cyprus and Israel, Malta and Montenegro registered a negative variation 2018 on 2017, while in the last 5 years these two countries had grown respectively by 37,4% and 59,2%.

Table 4.10 *Cruise Passenger Movements per MedCruise Country*

>> DOUBLE DIGIT GROWTH FOR THE FIRST 2 COUNTRIES

Country	2018	% Share in 2018	2017	Variation 2018/2017	2014	Variation 2018/2014
Italy	10.714.843	38,2%	9.535.688	12,4%	9.725.259	10,2%
Spain	7.829.451	27,9%	7.074.594	10,7%	5.809.122	34,8%
France	2.583.538	9,2%	2.498.725	3,4%	2.315.942	11,6%
Greece	2.184.350	7,8%	2.068.308	5,6%	2.098.652	4,1%
Portugal	1.319.930	4,7%	1.227.277	7,5%	1.087.226	21,4%
Croatia	1.252.740	4,5%	1.159.203	8,1%	1.153.788	8,6%
Malta	711.018	2,5%	778.596	-8,7%	517.594	37,4%
Montenegro	492.475	1,8%	541.017	-9,0%	309.322	59,2%
Gibraltar	406.998	1,5%	404.995	0,5%	299.923	35,7%
Turkey	321.85	0,1%	201.714	-84,0%	1.403.997	-97,7%
Monaco	170.571	0,6%	168.017	1,5%	200.039	-14,7%
Cyprus	31.089	0,1%	123.397	-74,8%	183.507	-83,1%
Slovenia	101.415	0,4%	72.175	40,5%	58.970	72,0%
Israel	20.633	0,1%	26.757	-22,9%	n.a.	n.a.
Morocco	31.250	0,1%	23.550	32,7%	n.a.	n.a.
Ukraine	2.565	0,0%	1.636	56,8%	8.506	-69,8%
Cape Verde Ports	47.094	0,2%	n.a.	n.a.	n.a.	n.a.
Egypt	106.391	0,4%	9835	981,8%	n.a.	n.a.

Considering the annual variation of cruise calls per country (Table 4.11), 10 out of the 18 showed positive signs 2018 on 2017, Morocco and Ukraine the highest, although with small numbers, followed by Italy.

The medium-term trends of the number of cruise calls per country indicate that Slovenia (66,7%), Gibraltar (34,3%), and Spain (17,4%) are the ones that within the period 2014-2018 experienced major increases in the number of calls. Among the first 3 countries, France experienced a decrease in calls, dropping from 1.241 in 2014 to 1.102 in 2018.

Table 4.11 Cruise Calls per MedCruise Country

>> NEW MEMBER CAPE VERDE ENTERED THE COUNTRY RANKING

Country	2018	% Share in 2018	2017	Variation 2018/2017	2014	Variation 2018/2014
Italy	3.898	30,6%	3.489	11,7%	3.714	5,0%
Spain	3.048	23,9%	2.917	4,5%	2.596	17,4%
France	1.102	8,7%	1.042	5,8%	1.241	-11,2%
Greece	1.254	9,8%	1.230	2,0%	1.324	-5,3%
Croatia	951	7,5%	1.001	-5,0%	1.402	-32,2%
Portugal	836	6,6%	946	-11,6%	728	14,8%
Montenegro	411	3,2%	430	-4,4%	353	16,4%
Malta	322	2,5%	342	-5,8%	302	6,6%
Gibraltar	243	1,9%	235	3,4%	181	34,3%
Cape Verde	199	1,6%	n.d.	n.d.	n.d.	n.a.
Monaco	177	1,4%	166	6,6%	182	-2,7%
Egypt	77	0,6%	7	1000,0%	n.d.	n.a.
Slovenia	75	0,6%	68	10,3%	45	66,7%
Morocco	46	0,4%	27	70,4%	n.d.	n.a.
Cyprus	40	0,3%	113	-64,6%	223	-82,1%
Turkey	38	0,3%	188	-79,8%	1.021	-96,3%
Ukraine	17	0,1%	12	41,7%	32	-46,9%
Israel	0	0,0%	21	-100,0%	n.d.	n.a.

> 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 70 MedCruise port members are divided in two categories based on the total cruise passenger movements per year. Both category A and B contain 35 ports. These are the two categories

107.000

Category B	Category A
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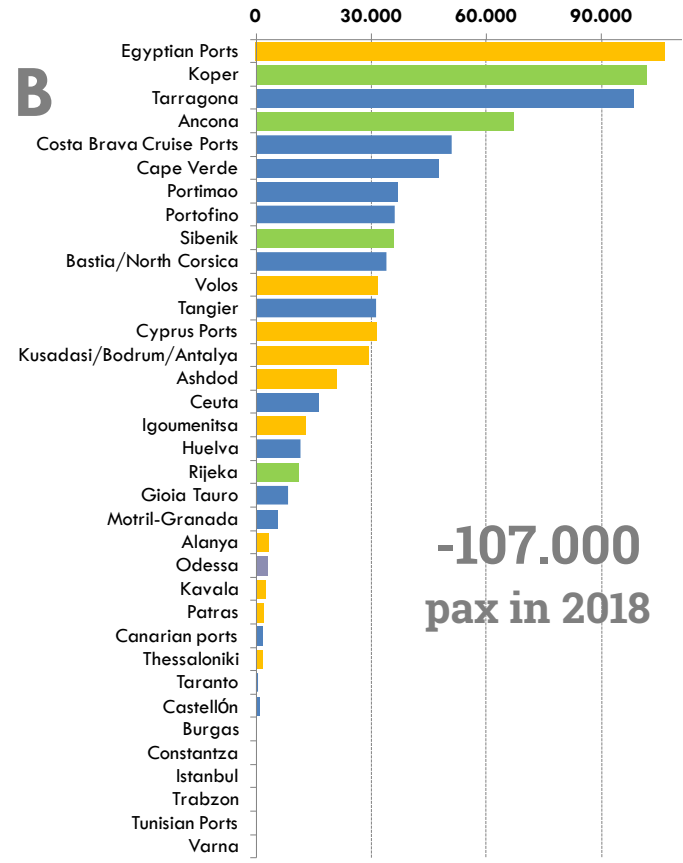
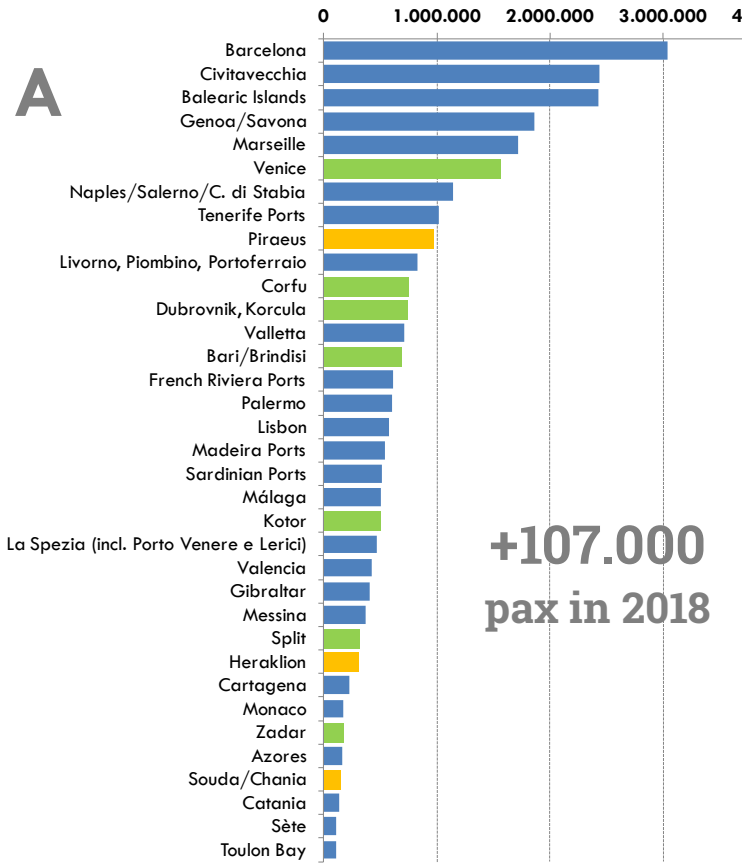
Port members with less than 107.000 cruise passenger traffic in 2018

Port members with more than 107.000 cruise passenger traffic in 2018

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 and 5.2 detail the list of MedCruise port members included in Category A and B (see also the Appendix for the list of ports included in each of these categories). In total, 25 of the 35 ports of Category A are located in the West Med. In terms of passenger movements hosted per year, among the major 10 members only two are not ports of West Med. These are Venice, an Adriatic port that stands as the sixth major member, and Piraeus in Greece. Seven ports located in the Adriatic are part of this group while only three ports located in the East Med can be found in Category A, with Piraeus being the only one that hosted near 1 million passenger movement in 2018. Again this year there is no Black Sea port in this category as all ports in the region recorded less than 107.000 passenger movements in 2018. The geographical distribution of this group of ports in the four regions is more balanced for category B. Black sea member Odessa is listed in this size category.

Figures 5.1 and 5.2 MedCruise Ports per Region - Category A and B



■ West Med ■ Adriatic ■ East Med ■ Black Sea

5.2 Cruise traffic by size

Table 5.1 presents the major variations as regards total passengers, cruise calls, Home In/Out and Transit passengers in the case of each of the two size categories.

Table 5.1 *Cruise Traffic Variations by size category*

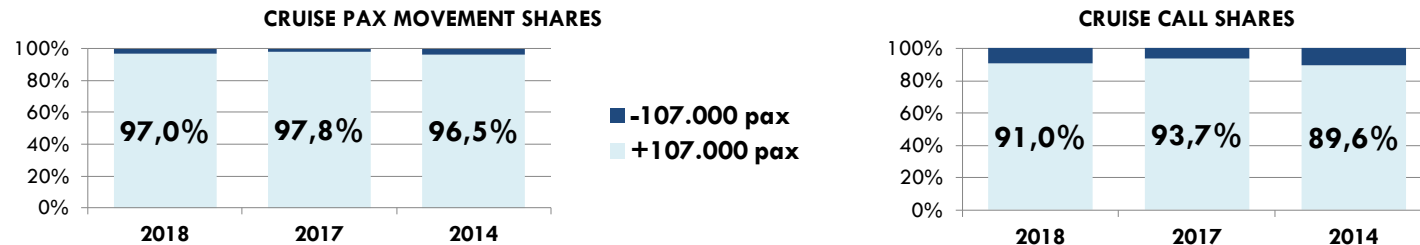
>> "A" PORTS GROW BOTH HOME IN/OUT AND TRANSIT WHILE "B" ONLY IN TRANSITS

Category		2018	2017	Variation 2018/2017	2014	Variation 2018/2014
Total Pax.	A	27.203.290	25.367.570	7,24%	24.943.213	9,06%
	B	835.246	557.838	49,73%	893.669	-6,54%
Cruise Calls	A	11.582	11.381	1,77%	12.325	-6,03%
	B	1.152	765	50,59%	1.425	-19,16%
Home In/Out Pax.	A	7.973.300	7.487.559	6,49%	7.382.188	8,01%
	B	37.944	26.772	41,73%	30.271	25,35%
Transit Pax.	A	19.229.990	17.879.983	7,55%	16.720.757	15,01%
	B	797.302	531.066	50,13%	863.398	-7,66%

The overall positive variations 2018 on 2017 can be found both on the categories A and B. It's evident how the variations attributed to group B are much more higher than the ones marked by the group A, but this should be explained, together with the good performances, through the absolute values which, being enormously lower, are subject to much more pronounced jumps, when downward as well as upward. The figure 5.3 clearly shows how to evaluate the Med: the ports included in the first group (A) influence and characterize the whole area's performances, but it's also true that all the other ports with less traffic, whereas do not relevantly impinge on the overall dimensions, are crucial for the deployment's choices made by the cruise companies.

Figure 5.3 *Cruise Traffic Evolution by size category*

>> 35 PORTS REPRESENT 97,0% OF TOTAL PAX AND 91,0% OF TOTAL CALLS



5.3 Variations by Size Category per Region

Table 5.2 details the distribution of the total passenger movements hosted in 2018 by the ports of each size category per region, together with the variations on the previous year and in a 5-year horizon. In terms of variations 2018 on 2017, the Category A ports located in the Adriatic lead the ranking, but in absolute values the ones located in the West Med contributed to the growth of the group with more than 1,5 million passenger movements (out of around 2,1 million). The 5-year-variations showed the well-known drop of the traffic in the East Med area (-50,60%) while in the same period the Adriatic ports of Category A grew of 6,68% and the West Med ones of 19,18%. Performances in 5 years had been quite different considering the Category B ports which belong to the single areas. The ones located in the West Med did not grow as the ones of Category A and the Adriatic ones registered in 2018 around 45.000 passenger movements less than in 2014. The East Med ports gained around 50.000 movements. A dramatic collapse had characterized the ports located in the Black Sea, bringing the 158.236 pax. movements registered in 2014 to 2.565 in 2018, 60,23% less than the 6.449 marked in 2017. The variations 2018 on 2017 limited to the Category B ports are positive in 3 areas and negative only for the Black Sea Ports.

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

>> ADRIATIC "A" PORTS GREW, THE "B" ONES LOST TRAFFIC

Size Category	Region	% of Total 2018	2018	2017	Variation 2018/2017	2014	Variation 2018/2014
A	West Med	75,36%	21.130.180	19.415.683	8,83%	17.729.075	19,18%
	Adriatic	16,67%	4.673.605	4.273.852	9,35%	4.380.859	6,68%
	East Med	4,99%	1.399.505	1.678.035	-16,60%	2.833.279	-50,60%
B	West Med	1,35%	377.624	306.119	23,36%	375.502	0,57%
	Adriatic	0,77%	215.746	173.181	24,58%	172.282	25,23%
	East Med	0,85%	239.311	72.089	231,97%	187.649	27,53%
	Black Sea	0,01%	2.565	6.449	-60,23%	158.236	-98,38%

Variations 2018 on 2017 of cruise calls for the two categories are directly connected to the previous table: a growth in West Med both for A and B ports. Interesting to notice how Adriatic grows only in ports A group. For Home In/Out (table 5.4) variations of B ports are more accentuated due to lower basis in the previous year. Last table (5.5) shows how Transit in larger East Med ports is half of the one recorded five years ago while the "B" category ports increased of 27%. In comparison to 2017 West Med Category A ports registered over one million passengers more, to which additional 150.000 visited Category B. In Adriatic growth of transits had been led by big ports.

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

>> EAST MED PORTS THE ONLY "B" PORTS TO GROW IN 5 YEARS ARE THE WEST MED ONES

Size Category	Region	% of Total 2018	2018	2017	Var. 2018/2017	2014	Variation 2018/2014
A	West Med	65,55%	8.347	7.943	5,09%	8.010	4,21%
	Adriatic	19,21%	2.446	2.369	3,25%	2.390	2,34%
	East Med	6,20%	789	1.069	-26,19%	1.925	-59,01%
B	West Med	5,43%	691	440	57,05%	474	45,78%
	Adriatic	1,86%	237	227	4,41%	233	1,72%
	East Med	1,63%	207	79	162,03%	249	-16,87%
	Black Sea	0,13%	17	19	-10,53%	217	-92,17%

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

>> ADRIATIC HOME-PORT TRAFFIC IS LESS THAN IT WAS IN 2014

Size Category	Region	% of Total 2018	2018	2017	Var. 2018/2017	2014	Variation 2018/2014
A	West Med	73,51%	5.889.023	5.453.444	7,99%	4.917.534	7,99%
	Adriatic	21,22%	1.700.038	1.553.593	9,43%	1.758.202	9,43%
	East Med	4,80%	384.239	480.522	-20,04%	706.452	-20,04%
B	West Med	0,29%	23.078	14.815	55,77%	4.780	55,77%
	Adriatic	0,16%	12.854	11.118	15,61%	19.946	15,61%
	East Med	0,02%	1.673	379	341,42%	446	341,42%
	Black Sea	0,00%	339	460	-26,30%	5.099	-26,30%

Table 5.5 Variations by size category per Region: Total Transit Pax

>> EAST MED "A" PORTS LOST IN 5 YEARS HALF OF THE TRANSIT TRAFFIC

Size Category	Region	% of Total 2018	2018	2017	Var. 2018/2017	2014	Variation 2018/2014
A	West Med	76,10%	15.241.157	13.962.211	9,16%	11.971.273	27,31%
	Adriatic	14,85%	2.973.567	2.720.259	9,31%	2.622.657	13,38%
	East Med	5,07%	1.015.266	1.197.513	-15,22%	2.126.827	-52,26%
B	West Med	1,77%	354.546	291.304	21,71%	370.722	-4,36%
	Adriatic	1,01%	202.892	162.063	25,19%	152.336	33,19%
	East Med	1,19%	237.638	71.710	231,39%	187.203	26,94%
	Black Sea	0,01%	2.226	5.989	-62,83%	153.137	-98,55%

> 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 2018. The highest share of both cruise passenger movements and calls in 2018 was recorded in October (14,27% and 13,88%). Notably, the same happened in the years 2014-2017 as well as October hosted around 14% of the cruise traffic in these years. From April to May the shares per month have never been lower than 10%, both per passenger movements and calls. The stronger distance between the passenger movements and call shares is registered in July and August.

Figure 6.1 Cruise Traffic Shares per month (2018)

>> OCTOBER CONFIRMS ITS LEADERSHIP

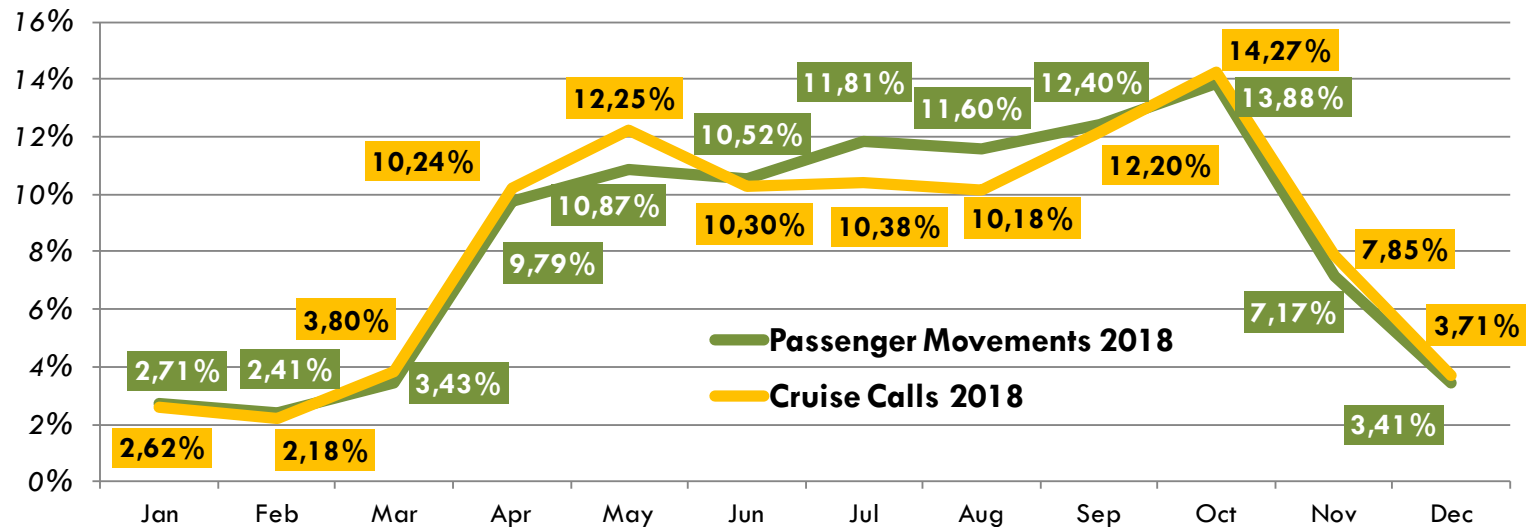


Table 6.1 Total Cruise Traffic per month (2018)

>> AROUND 71% AND 80% OF PAX MOVEMENTS AND CALL HAPPEN FROM MAY TO OCTOBER

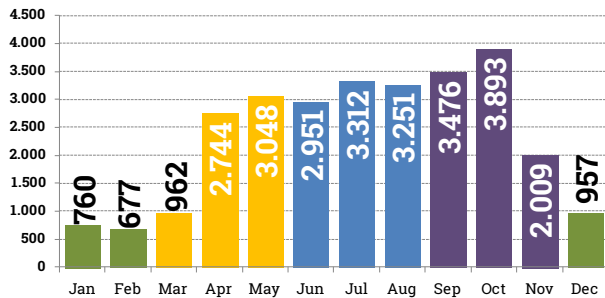
Month	Total Cruise Pax	% of Total Pax	Total Cruise Calls	% of Total Cruise Calls	Pax/Call
January	760.001	2,71%	333	2,62%	2.281
February	676.502	2,41%	278	2,18%	2.432
March	962.240	3,43%	484	3,80%	1.986
April	2.743.717	9,79%	1.304	10,24%	2.104
May	3.047.518	10,87%	1.560	12,25%	1.954
June	2.950.601	10,52%	1.312	10,31%	2.249
July	3.312.071	11,81%	1.322	10,38%	2.505
August	3.251.336	11,60%	1.296	10,18%	2.509
September	3.475.831	12,40%	1.553	12,20%	2.238
October	3.893.059	13,88%	1.817	14,27%	2.142
November	2.009.079	7,17%	1.000	7,85%	2.009
December	956.581	3,41%	472	3,71%	2.027

As usual, cruise traffic in Med is mostly centered around warmer months. In 2018, from May to October, there was 71,08% of the total passenger movements and 79,75% of calls in Association ports. The month of February had less traffic, but overall, the winter months (January, February and December) contributed by generating over 8,5% of the total passenger movements, the same as calls.

Figures 6.2 and 563 Total traffic per month (2018)

>> IN 5 MONTHS +3M PASSENGER MOVEMENTS > IN 3 MONTHS + 1.500 CRUISE CALLS

Cruise Passenger movements (in thousands)



Cruise Calls

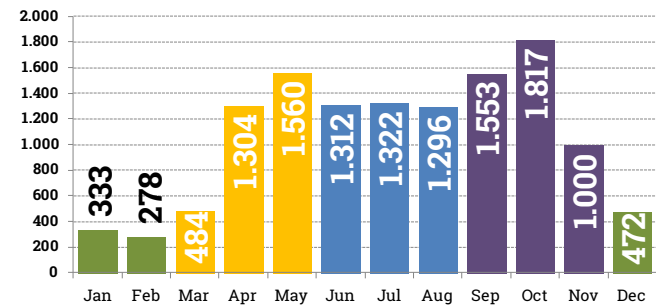
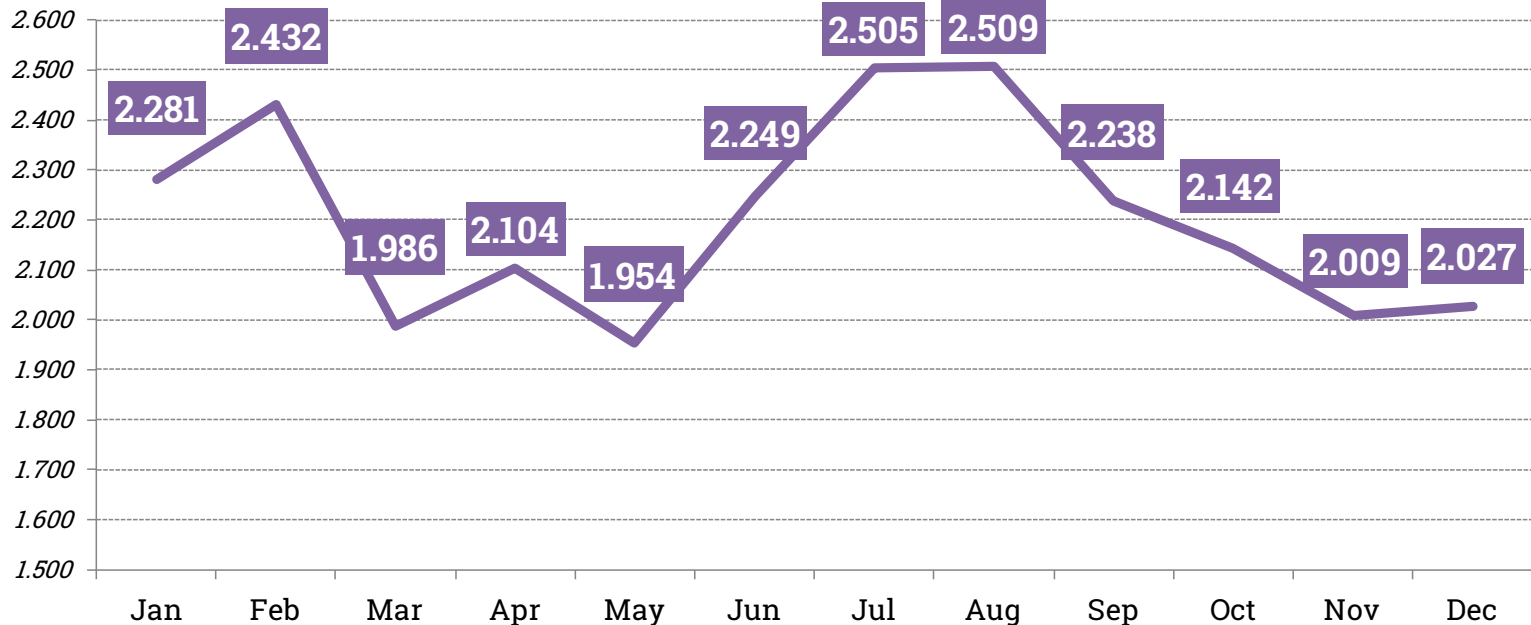


Figure 6.4 presents the average number of passengers per cruise call during each month of the year. The variations per month, as expected, are significant and follow the ones of the total traffic except for the months of January and February, which is quite atypical. In July, the number of passengers per call appears to be 31,0% higher compared to the respective ratio of May. August is the month of 2018 with the highest rate of passengers per call (2.509), immediately followed by July (2.505) and February (2.432). The lowest rates are registered in May (1.954) and March (1.986). Compared with the 2017 data (1.871 registered in May), this year the lower average increased of 4,4%.

Figure 6.4 Average Pax/Call per month (2018)

>> JULY AND AUGUST SHARE THE LEADING POSITION



6.2 Seasonality by region in 2018

The four distinctive regions in which MedCruise membership spreads (West Med, Adriatic, East Med, Black Sea) register different seasonality trends 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 10,5% share of the total cruise passenger movements in the region, while 30,9% takes place during the summer.

In the Adriatic and in the East Med, cruise traffic is concentrated mostly during the second and third trimester of the year, in particular the period commencing in June and ending in November. The passenger movements in the Adriatic and in the East Med during the winter months (Dec-Feb) correspond to a minimal 1,85% and 2,71% of the total traffic taking place in the region on an annual basis.

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

>> THE FOUR VARIABLES SHOW SIMILAR TRIMESTER TRENDS, EVEN IF HOME-PORT TRAFFIC IN MEDCRUISE MEMBER PORTS IS HIGHER IN SUMMER AND LOWER IN WINTER

Region	Total Passenger Movements				Total Calls			
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	25,03%	30,85%	33,62%	10,50%	28,55%	26,40%	34,80%	10,25%
Adriatic	20,25%	45,90%	31,99%	1,85%	20,05%	42,97%	32,17%	4,81%
East Med	23,12%	38,62%	35,55%	2,71%	22,89%	38,35%	35,94%	2,81%
Black Sea	10,10%	59,57%	30,33%	0,00%	11,76%	58,82%	29,41%	0,00%
Total	24,09%	33,93%	33,45%	8,53%	26,30%	30,87%	34,32%	8,51%
Region	Home In/Out Passengers				Transit Passengers			
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	24,38%	33,27%	33,36%	8,99%	25,16%	30,53%	33,59%	10,73%
Adriatic	19,19%	47,41%	31,34%	2,06%	20,82%	45,09%	32,34%	1,75%
East Med	20,21%	41,84%	37,36%	0,59%	24,02%	37,62%	34,99%	3,36%
Black Sea	0,00%	97,35%	2,65%	0,00%	11,64%	53,82%	34,55%	0,00%
Total	23,15%	36,48%	33,14%	7,23%	24,40%	33,28%	33,48%	8,84%

6.3 Seasonality by size in 2018

Table 6.3 details the shares of the total cruise traffic that correspond to each trimester of 2018 within the two different port size categories of MedCruise.

Category A ports (i.e., ports hosting more than 107.000 passenger movements in 2018) recorded a higher share of annual passenger movements hosted during the winter season (8,7%) compared to the respective share observed in Category B ports (3,5%), but not in terms of calls (8,3% vs 9,7%).

The seasonality in terms of pax movements is quite similar for the two groups, while the distribution of the calls differs, particularly in the March-May and June-August trimesters. Comparing the differences between the seasonality in the two port categories, they are quite relevant for the Home In/Out traffic, while less significant for the Transit passengers.

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

>> NO BIG DIFFERENCES BETWEEN THE CATEGORIES A AND B SEASONALITY

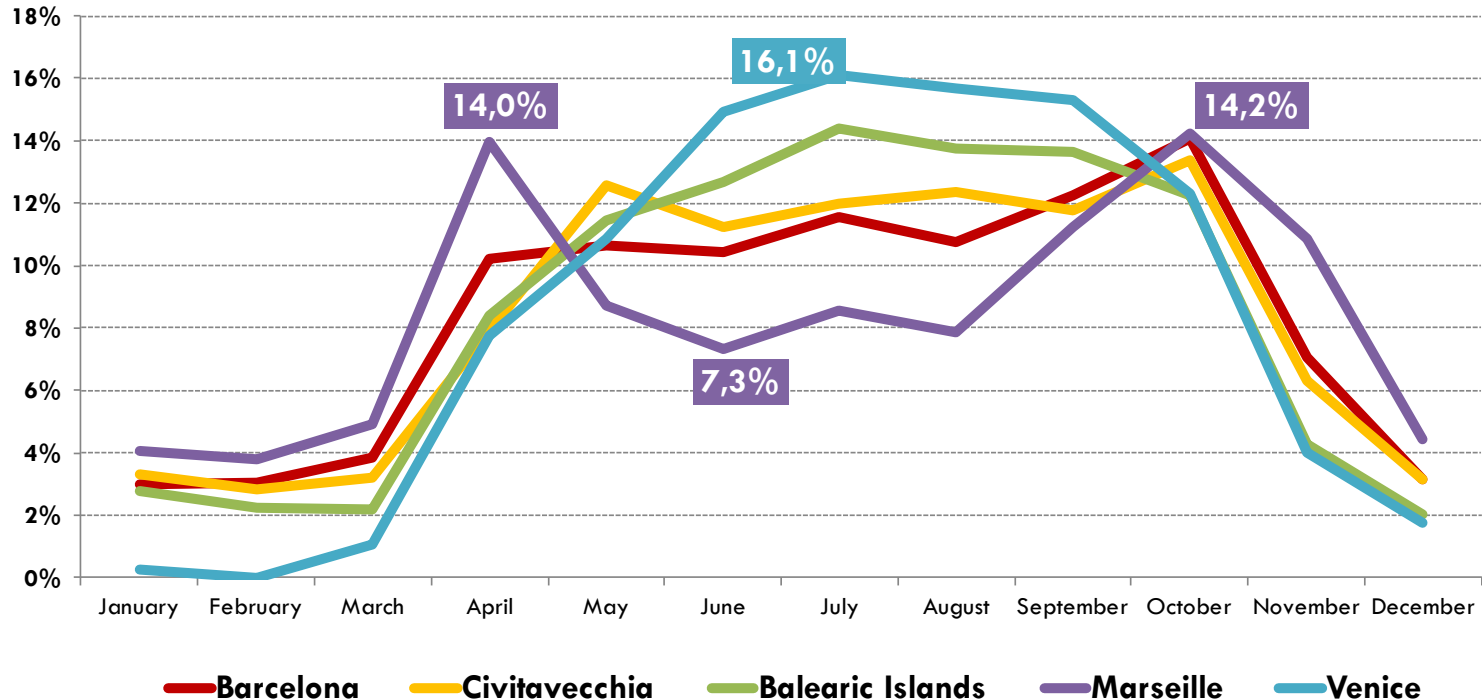
	Size Category	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Cruise Pax Movements	A	24,0%	33,9%	33,4%	8,7%
	B	25,7%	34,9%	35,9%	3,5%
Cruise Calls	A	25,7%	31,3%	34,7%	8,3%
	B	31,5%	27,5%	31,3%	9,7%
Home In/Out Pax	A	23,5%	35,4%	33,4%	7,7%
	B	19,9%	39,0%	39,4%	1,6%
Transit Pax	A	24,2%	33,3%	33,4%	9,1%
	B	26,6%	34,2%	35,4%	3,8%

6.4 Seasonality of cruise activity in MedCruise Ports

Seasonality trends in the major five ports in the Med do not differ remarkably from those of the total sample. The only exception to the rule is Marseille where the summer months stand under 10% of share, showing a sharp decline of the curve between April and October when it's peaking. The other 4 ports register movements that do not exceed 4% of their total annual traffic in January, February and December, and over 10% between May and October.

Figure 6.5 Major 5 MedCruise Ports Cruise Pax Seasonality (2018)

>> *MARSEILLE PRESENTS A PECULIAR TREND*



The following tables present MedCruise Ports registering the major concentration of their cruise activities during each of the four trimester from Spring to Winter.

Table 6.4 Highest Concentration of Passenger Movements (March/April/May, 2018)

No	Port	Region	Size	% share of the port's total traffic	% share of all MedCruise Ports trimester traffic	Total Pax Mar-May	Total Calls Mar-May
1	Azores	West Med	A	55,41%	1,35%	90.914	75
2	Egyptian Ports	East Med	B	46,29%	0,73%	49.247	40
3	Motril-Granada	West Med	B	44,98%	0,04%	2.390	14
4	Ashdod	East Med	B	44,33%	0,14%	9.147	0
5	Cape Verde Ports	West Med	B	39,16%	0,27%	18.442	75
6	Catania / Augusta	West Med	A	38,06%	0,75%	50.752	21
7	Portimao	West Med	B	34,96%	0,19%	12.860	30
8	Gioia Tauro	West Med	B	32,91%	0,04%	2.785	4
9	Rijeka	Adriatic	B	32,69%	0,05%	3.567	4
10	Bastia and North Corsica	West Med	B	32,53%	0,16%	11.079	51
TOTAL				-	3,72%	251.183	314

Table 6.5 Highest Concentration of Passenger Movements (June/July/August, 2018)

No	Port	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	Castellon	West Med	B	100,00%	0,01%	566	1
2	Alanya	East Med	B	64,55%	0,02%	1.954	10
3	Ancona/Pesaro/Ortona	Adriatic	B	64,89%	0,46%	43.497	19
4	Odessa	Black Sea	B	59,57%	0,02%	1.528	10
5	Costa Brava Ports	West Med	B	50,40%	0,27%	25.726	21
6	Tarragna	West Med	B	49,92%	0,51%	48.982	22
7	Sardinian Ports	West Med	A	49,18%	2,66%	252.701	97
8	French Riviera Ports	West Med	A	48,29%	3,10%	295.040	138
9	Zadar	Adriatic	A	48,16%	0,84%	80.194	54
10	Cyprus	East Med	B	46,99%	0,15%	14.609	16
TOTAL				-	8,04%	764.797	388

Table 6.6 Highest Concentration of Passenger Movements (September/October/November, 2018)

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	Taranto	Adriatic	B	94,1%	0,01%	619	1
2	Kavala	East Med	B	77,2%	0,02%	1.568	2
3	Patras	East Med	B	64,7%	0,01%	1.065	1
4	Ceuta	West Med	B	63,8%	0,11%	10.073	6
5	Ashdod	East Med	B	55,1%	0,12%	11.379	0
6	Motril-Granada	West Med	B	53,4%	0,03%	2.835	11
7	Thessaloniki	East Med	B	49,0%	0,01%	661	2
8	Huelva	West Med	B	47,8%	0,06%	5.591	5
9	Catania / Augusta	West Med	A	47,2%	0,67%	62.914	37
10	Egyptian Ports	East Med	B	46,4%	0,53%	49.331	30
TOTAL				-	1,56%	146.036	95

Table 6.7 Highest Concentration of Passenger Movements (December/January/February, 2018)

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	Canarian Ports	West Med	B	70,26%	0,04%	978	1
2	Tenerife Ports	West Med	A	41,39%	17,56%	420.125	221
3	Madeira Ports	West Med	A	37,98%	8,82%	210.955	56
4	Cape Verde Ports	West Med	B	37,41%	0,74%	17.618	75
5	Tangier	West Med	B	26,30%	0,34%	8.220	5
6	Palermo	West Med	A	20,97%	5,29%	126.634	31
7	Azores	West Med	A	17,94%	1,23%	29.437	21
8	Lisboa	West Med	A	11,23%	2,71%	64.867	38
9	Genoa / Savona	West Med	A	10,93%	8,50%	203.326	39
10	Valletta	West Med	A	9,81%	2,92%	69.785	20
TOTAL				-	48,14%	1.151.945	507

> FOCUS: CRUISE AND FERRY TRAFFIC IN MEDCRUISE PORTS

7.1 MedCruise Ports hosting cruise and ferry traffic

This section provides a new analysis of passenger movements in the MedCruise port members. For the first time ports have been requested to provide numbers about the hosted ferry traffic in order to extend the framework. It is interesting to notice how just the sum of the two kinds of traffic (cruise + ferry) generates new rankings highlighting different ports and areas. Being the present analysis, the very first collection of data, one or multi-year variations are not included.

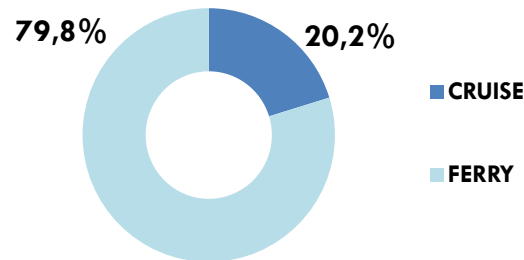
- MedCruise port members ports hosted more than 80 Million ferry passengers in 2018
- At least 360.000 ferry calls had been recorded
- Each day of the year around 1.000 ferries call a MedCruise member port

The full list of ports included in this analysis, along with the raw material for ferry passenger movements and ferry calls for 2018, are available at the end of the section. It had been collected ferry traffic data from 54 members with 15 of them to declare no ferry traffic in 2018. The MedCruise members which provided both data on cruise and ferry (included the ones which declared to have had no ferry traffic) hosted more than 80 million ferry passengers in 2018 (81.532.072, with 365.013 ferry calls).

Figures 7.1 and 7.2 *Passenger traffic in MedCruise Ports, cruise vs. ferry (2018)*

>> 80% OF THE PASSENGERS USED A FERRY AND 42 SHIPS OUT OF 43 WHERE FERRIES

PASSENGER MOVEMENTS



SHIP CALLS

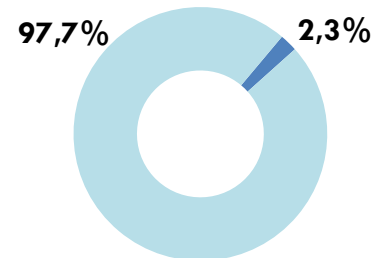


Table 7.1 shows the ranking of Top10 MedCruise port members for total passengers. Two members - Piraeus and Messina/Milazzo -hosted in 2018 more than 10M ferry passengers and more than 12M adding the cruise passengers. Balearic Islands and Naples/Salerno/Castellammare di Stabia exceeded the 8M threshold. Barcelona, that leads the ranking for cruise traffic, is only at the sixth place of this ranking, with Messina/Milazzo, Split and Igoumenitsa which enter thanks of their ferry traffic.

Table 7.1 Major MedCruise Port Members for total passenger movements (cruise+ferry)

>> PIRAEUS LEADS THE RANKING, IN WHICH BARCELONA IS ONLY AT THE 6TH PLACE

Rank 2018	MedCruise Member	State	MedCruise Region	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Piraeus	Greece	East Med	961.632	524	15.657.368	n.a.	16.619.000	n.a.
2	Messina/Milazzo	Italy	West Med	372.365	172	11.890.571	96.938	12.262.936	97.110
3	Balearic Islands	Spain	West Med	2.431.153	859	6.512.276	48.706	8.943.429	49.565
4	Naples/Salerno/C. di Stabia	Italy	West Med	1.141.398	442	7.486.170	n.a.	8.627.568	n.a.
5	Split	Croatia	Adriatic	307.139	260	5.115.441	17.978	5.422.580	18.238
6	Barcelona	Spain	West Med	3.041.963	830	1.451.682	3.464	4.493.645	4.294
7	Genoa/Savona	Italy	West Med	1.859.885	423	2.432.666	2.259	4.292.551	2.682
8	Livorno/Piombino/Portoferraio	Italy	West Med	825.310	469	2.652.829	92.188	3.478.139	92.657
9	Igoumenitsa	Greece	East Med	12.650	14	2.842.629	11.903	2.855.279	11.917
10	Corfu	Greece	Adriatic	735.832	413	1.904.778	19.319	2.640.610	19.732

The next three tables show the leading ports for each of the MedCruise member areas with the exception of Black Sea. Data refer only to MedCruise members which provided their info. These rankings shed light on different ports such as Igoumenitsa and Kavala in the East Med or Split and Zadar in the Adriatic.

Table 7.2 Major MedCruise Port Members for total passenger traffic in the East Med

Rank 2018	MedCruise Member	State	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Piraeus	Greece	961.632	524	15.657.368	n.a.	16.619.000	n.a.
2	Igoumenitsa	Greece	12.650	14	2.842.629	11.903	2.855.279	11.917
3	Kavala	Greece	2.031	5	2.221.275	9.144	2.223.306	9.149

Table 7.3 Major MedCruise Port Members for total passenger traffic in the West Med

Rank 2018	MedCruise Member	State	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Messina/Milazzo	Italy	372.365	172	11.890.571	96.938	12.262.936	97.110
2	Balearic Islands	Spain	2.431.153	859	6.512.276	48.706	8.943.429	49.565
3	Naples/Salerno/C. di Stabia	Italy	1.141.398	442	7.486.170	n.a.	8.627.568	n.a.

Table 7.4 Major MedCruise Port Members for total passenger traffic in the Adriatic

Rank 2018	MedCruise Member	State	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Split	Croatia	307.139	260	5.115.441	17.978	5.422.580	18.238
2	Corfu	Greece	735.832	413	1.904.778	19.319	2.640.610	19.732
3	Zadar	Croatia	166.528	133	2.389.727	17.000	2.556.255	17.133

Table 7.5 shows the few ports that recorded a high average of ferry pax per call. The leading port (Souda/Chania) did not reach the 1.700 mark. It should be noted how the average ferry pax per call is 224, a value that is 10 times less than the value for cruise ships.

Table 7.5 Major MedCruise Port Members for average of ferry pax/call

>> NO AVERAGES FERRY PAX PER CALL WENT OVER 1.700

Rank 2018	MedCruise Member	State	MedCruise Region	FerryPax	FerryCalls	AVG Ferry Pax/Call
1	Souda/Chania	Greece	East Med	883.031	520	1698,1
2	Toulon Bay	France	West Med	1.531.649	1.173	1305,8
3	Tunisian Ports	Tunisia	West Med	706.660	564	1252,9
4	Madeira Ports	Portugal	West Med	347.933	317	1097,6
5	Genoa/Savona	Italy	West Med	2.432.666	2.259	1076,9
6	Sète	France	West Med	131.962	132	999,7
7	Ancona/Pesaro/Ortona	Italy	Adriatic	1.084.235	1.234	878,6
8	Bastia/North Corsica	France	West Med	2.602.287	3.077	845,7
9	Gioia Tauro	Italy	West Med	8.263	12	688,6
10	Málaga	Spain	West Med	364.445	612	595,5

Elaborations have been done to explore the profile of a port limited to the passenger traffic in order to understand if and how one of the two components (cruise and ferry) can be predominant. Only ports which hosted in 2018 both kind of traffic had been considered. Easy to envisage, there are many ports which ferry traffic represents the large majority of their passenger traffic, exceeding the 95% (Table 7.6).

Table 7.6 MedCruise Port Members with the highest ferry pax traffic share on overall traffic

>> MANY MEDCRUISE MEMBERS WITH REDUCED CRUISE TRAFFIC ARE STRONG IN FERRY

Rank 2018	MedCruise Member	State	MedCruise Region	Cruise pax	Ferry pax	Ferry share
1	Kavala	Greece	East Med	2.031	2.221.275	99,9%
2	Patras	Greece	East Med	1.647	486.163	99,7%
3	Igoumenitsa	Greece	East Med	12.650	2.842.629	99,6%
4	Ceuta	Spain	West Med	15.790	1.996.592	99,2%
5	Bastia/North Corsica	France	West Med	34.063	2.602.287	98,7%
6	Tangier	Morocco	West Med	31.250	1.610.051	98,1%
7	Motril-Granada	Spain	West Med	5.313	258.694	98,0%
8	Messina/Milazzo	Italy	West Med	372.365	11.890.571	97,0%
9	Cape Verde Ports	Cape Verde	West Med	47.094	934.654	95,2%
10	Split	Croatia	Adriatic	307.139	5.115.441	94,3%

Note: table 7.6 and table 7.7 exclude port members with no ferry traffic or no cruise traffic

At the same time there are other ports, although not so many, in which the cruise traffic represents the biggest share (Table 7.7).

Table 7.7 MedCruise Port Members with the highest cruise pax traffic share on overall traffic

>> MARSEILLE AND GIBRALTAR STAND OUT HAVING VERY LIMITED NUMBERS IN FERRY TRAFFIC

Rank 2018	MedCruise Member	State	MedCruise Region	Cruise pax	Ferry pax	Cruise share
1	Marseille	France	West Med	1.716.184	1.674	99,9%
2	Gibraltar	Gibraltar	West Med	406.998	1.273	99,7%
3	Barcelona	Spain	West Med	3.041.963	1.451.682	67,7%
4	Madeira Ports	Portugal	West Med	541.467	347.933	60,9%
5	Málaga	Spain	West Med	507.360	364.445	58,2%
6	Catania / Augusta	Italy	West Med	133.341	99.016	57,4%
7	Dubrovnik, Korcula	Croatia	Adriatic	732.431	588.274	55,5%
8	Gioia Tauro	Italy	West Med	8.463	8.263	50,6%
9	French Riviera Ports	France	West Med	610.919	675.934	47,5%
10	Sète	France	West Med	114.429	131.962	46,4%

With the same purpose, elaborations on calls' number had been realized and the results are shown in Tables 7.8 and 7.9. As for the passengers and even with higher concentrations, there are many ports hosting both kind of traffic to deal with ferries much more than with cruises (the last port in this ranking presents a ratio of 98.3%). The 10 ports with the higher percentage of cruise calls on total calls show a different situation, considering that it's more frequent in this case to find ports with a more balanced ratio.

Table 7.8 MedCruise Port Members with the highest ferry call share on overall traffic

>> FOR MANY MEDCRUISE PORTS CRUISE SHIPS REPRESENT LESS THAN 2% OF OVERALL CALLS

Rank 2018	MedCruise Member	State	MedCruise Region	Cruise calls	Ferry Calls	Ferry/Cruise Calls
1	Kavala	Greece	East Med	5	9.144	99,9%
2	Igoumenitsa	Greece	East Med	14	11.903	99,9%
3	Patras	Greece	East Med	2	1.441	99,9%
4	Ceuta	Spain	West Med	10	6.806	99,9%
5	Messina/Milazzo	Italy	West Med	172	96.938	99,8%
6	Livorno/Piombino/Portoferraio	Italy	West Med	469	92.188	99,5%
7	Zadar	Croatia	Adriatic	133	17.000	99,2%
8	Tangier	Morocco	West Med	46	4.217	98,9%
9	Split	Croatia	Adriatic	260	17.978	98,6%
10	Balearic Islands	Spain	West Med	859	48.706	98,3%

Note: this table excludes port members with no ferry traffic or no cruise traffic

Table 7.9 MedCruise Member Ports with the highest cruise call share on overall traffic

>> FEW PORTS PRESENT A BALANCED CALLS DISTRIBUTION

Rank 2018	MedCruise Member	State	MedCruise Region	Cruise calls	Ferry Calls	Cruise/Ferry Call
1	Gibraltar	Gibraltar	West Med	243	53	82,1%
2	Portofino	Italy	West Med	82	84	49,4%
3	Madeira Ports	Portugal	West Med	293	317	48,0%
4	Sète	France	West Med	72	132	35,3%
5	Málaga	Spain	West Med	298	612	32,7%
6	Alanya	Turkey	East Med	15	36	29,4%
7	French Riviera Ports	France	West Med	348	1.338	20,6%
8	Huelva	Spain	West Med	16	64	20,0%
9	Barcelona	Spain	West Med	830	3.464	19,3%
10	Genoa/Savona	Italy	West Med	423	2.259	15,8%

Note: this table excludes port members with no ferry traffic or no cruise traffic

To complete the analysis, table 7.10 details the data recorded at each MedCruise member port which provided numbers, as regards cruise and ferry traffic hosted in 2018 (cruise traffic data refer to overall passenger movements: Home In/Out and Transit).

Table 7.10 MedCruise Ports Cruise and Ferry traffic data (2018)

No	Port	MedCruise Region	Cruise Total Pax.	Cruise Calls	Ferry Total Pax.	Ferry Calls	Total Pax	Total Calls
1	Alanya	East Med	3.027	15	9.191	36	12.218	51
2	Ancona/Pesaro/Ortona	Adriatic	67.031	40	1.084.235	1.234	1.151.266	1.274
3	Ashdod	East Med	20.633	n.a.	n.a.	n.a.	n.a.	n.a.
4	Azores	West Med	164.074	138	0	0	164.074	138
5	Balearic Islands	West Med	2.431.153	859	6.512.276	48.706	8.943.429	49.565
6	Barcelona	West Med	3.041.963	830	1.451.682	3.464	4.493.645	4.294
7	Bari/Brindisi	Adriatic	678.621	289	1.641.487	3.037	2.320.108	3.326
8	Bastia/North Corsica	West Med	34.063	115	2.602.287	3.077	2.636.350	3.192
9	Burgas	Black Sea	0	0	0	0	0	0
10	Cape Verde Ports	West Med	47.094	199	934.654	6.273	981.748	6.472
11	Canarian Ports	West Med	1.392	5	n.a.	n.a.	n.a.	n.a.
12	Cartagena	West Med	228.387	148	n.a.	n.a.	n.a.	n.a.
13	Castellon	West Med	566	1	n.a.	n.a.	n.a.	n.a.
14	Catania / Augusta	West Med	133.341	72	99.016	1.506	232.357	1.578
15	Ceuta	West Med	15.790	10	1.996.592	6.806	2.012.382	6.816
16	Civitavecchia/Fiumicino/Gaeta	West Med	2.441.737	760	n.a.	n.a.	n.a.	n.a.
17	Constantza	Black Sea	0	0	0	0	0	0
18	Corfu	Adriatic	735.832	413	1.904.778	19.319	2.640.610	19.732
19	Costa Brava Cruise Ports	West Med	51.042	54	0	0	51.042	54
20	Cyprus Ports	East Med	31.089	40	n.a.	n.a.	n.a.	n.a.
21	Dubrovnik/ Korcula	Adriatic	732.431	438	588.274	2.959	1.320.705	3.397
22	Egyptian Ports	East Med	106.391	77	n.a.	n.a.	n.a.	n.a.
23	French Riviera Ports	West Med	610.919	348	675.934	1.338	1.286.853	1.686
24	Genoa/Savona	West Med	1.859.885	423	2.432.666	2.259	4.292.551	2.682
25	Gibraltar	West Med	406.998	243	1.273	53	408.271	296
26	Gioia Tauro*	West Med	8.463	12	8.263	12	16.726	24
27	Heraklion	East Med	297.929	187	1.582.484	2.806	1.880.413	2.993
28	Huelva	West Med	11.691	16	37.509	64	49.200	80
29	Igoumenitsa	East Med	12.650	14	2.842.629	11.903	2.855.279	11.917

No	Port	MedCruise Region	Cruise Total Pax.	Cruise Calls	Ferry Total Pax.	Ferry Calls	Total Pax	Total Calls
30	Istanbul	East Med	0	0	0	0	0	0
31	Kavala	East Med	2.031	5	2.221.275	9.144	2.223.306	9.149
32	Koper	Adriatic	101.415	75	0	0	101.415	75
33	Kotor	Adriatic	492.475	411	0	0	492.475	411
34	Kusadasi/Bodrum/Antalya	East Med	29.158	23	176.481	1.289	205.639	1.312
35	La Spezia/Marina di Carrara	West Med	471.652	175	n.a.	n.a.	n.a.	n.a.
36	Lisbon	West Med	577.603	339	0	0	577.603	339
37	Livorno/Piombino/Portoferraio	West Med	825.310	469	2.652.829	92.188	3.478.139	92.657
38	Madeira Ports	West Med	541.467	293	347.933	317	889.400	610
39	Málaga	West Med	507.360	298	364.445	612	871.805	910
40	Marseille	West Med	1.716.184	505	1.674	0	1.717.858	505
41	Messina/Milazzo	West Med	372.365	172	11.890.571	96.938	12.262.936	97.110
42	Monaco	West Med	170.571	177	0	0	170.571	177
43	Motril-Granada	West Med	5.313	28	258.694	694	264.007	722
44	Naples/Salerno/C. di Stabia	West Med	1.141.398	442	7.486.170	n.a.	8.627.568	n.a.
45	Odessa	Black Sea	2.565	17	n.a.	n.a.	n.a.	n.a.
46	Palermo/ Termini Imerese/ Trapani/ Porto Empedocle	West Med	603.881	237	n.a.	n.a.	n.a.	n.a.
47	Patras	East Med	1.647	2	486.163	1.441	487.810	1.443
48	Piraeus	East Med	961.632	524	15.657.368	0	16.619.000	524
49	Portimao	West Med	36.786	66	0	0	36.786	66
50	Portofino	West Med	36.048	82	n.a.	n.a.	n.a.	n.a.
51	Rijeka	Adriatic	10.913	11	0	0	10.913	11
52	Sardinian Ports	West Med	513.874	221	n.a.	n.a.	n.a.	n.a.
53	Sète	West Med	114.429	72	131.962	132	246.391	204
54	Sibenik	Adriatic	35.729	109	290.266	3.028	325.995	3.137
55	Souda/Chania	East Med	139.944	78	883.031	520	1.022.975	598
56	Split	Adriatic	307.139	260	5.115.441	17.978	5.422.580	18.238
57	Tangier	West Med	31.250	46	1.610.051	4.217	1.641.301	4.263
58	Taranto	Adriatic	658	2	n.a.	n.a.	n.a.	n.a.
59	Tarragona	West Med	98.126	57	0	0	98.126	57
60	Tenerife Ports	West Med	1.015.150	546	n.a.	n.a.	n.a.	n.a.
61	Thessaloniki	East Med	1.348	4	n.a.	n.a.	n.a.	n.a.
62	Toulon Bay	West Med	107.943	62	1.531.649	1.173	1.639.592	1.235
63	Trabzon	Black Sea	0	0	0	0	0	0

No	Port	MedCruise Region	Cruise Total Pax.	Cruise Calls	Ferry Total Pax.	Ferry Calls	Total Pax	Total Calls
64	Tunisian Ports	West Med	0	0	706.660	564	706.660	564
65	Valencia	West Med	421.518	196	620.445	1.993	1.041.963	2.189
66	Valletta	West Med	711.018	322	n.a.	n.a.	n.a.	n.a.
67	Varna	Black Sea	0	0	0	0	0	0
68	Venice	Adriatic	1.560.579	502	0	0	1.560.579	502
69	Volos	East Med	31.337	27	304.007	933	335.344	960
70	Zadar	Adriatic	166.528	133	2.389.727	17.000	2.556.255	17.133

* Cruise and Ferry traffic in Gioia Tauro port member is hosted by the ports of Crotona and Corigliano Calabro ports.

> CRUISE TRAFFIC FORECAST: 2019 IN THE MEDCRUISE PORTS

8.1 MedCruise Ports cruise traffic forecast for 2019

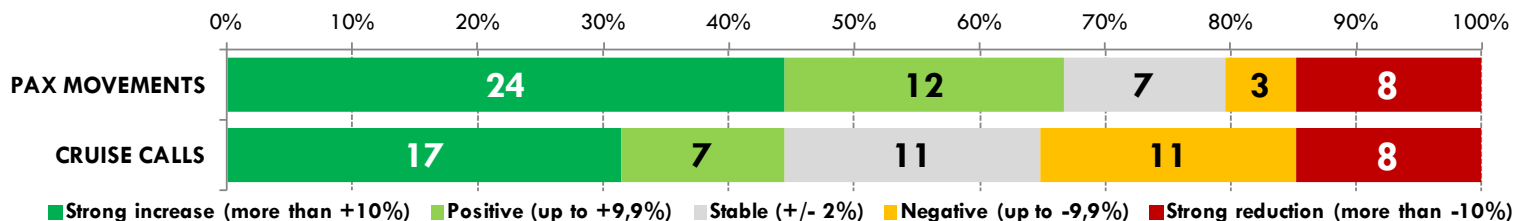
The last section of MedCruise Statistics Report 2018 provides further new data: for the first time the Association requested all the MedCruise port members their forecasts for 2019 traffic in order to give its stakeholder new perspectives on the region. Not all the members provided the forecasts. The full list of ports included in this analysis, along with all data for cruise passenger movements and cruise calls for 2019, is available at the end of the section. It had been collected data from 57 members that represent 92,4% of overall MedCruise port members traffic (25,9 M of pax movements out of a total 28,0 M).

- **MedCruise port members forecasts for 2019 let emerge a positive outlook.**
- **The positive variation of passenger movements should be around 8,8%.**
- **MedCruise port members should expect roughly 13.000 calls, this would mean a stop in the drop of calls (+2,2% on 2018).**

Grouping the port members in 5 classes according to the sign and dimension of the expected variations in calls and passengers, it emerges a positive scenario, with 36 members to expect a positive variation in passenger movements (24 of them higher than 10%) and other 7 to retain their volumes. Just for 8 MedCruise port members, 2019 could result in a decrease in terms of passengers and calls of at least -10%. Once again it's possible to affirm that the forecast for calls, less positive than the ones for passengers, reflect the contemporary worldwide cruise fleet.

Figure 8.1 *Overlook of cruise traffic variation in MedCruise Members (2019 on 2018)*

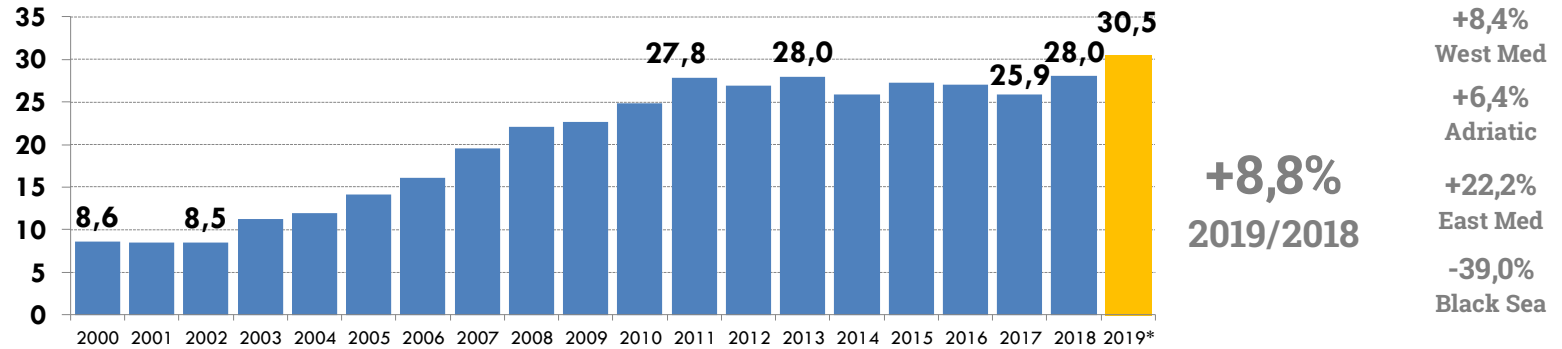
>> ONLY 8 MEMBERS WILL PROBABLY SUFFER A REDUCTION OF CRUISE TRAFFIC HIGHER THAN 10%, WHILE A THREEFOLD TO EXPECT A STRONG INCREASE IN PAX



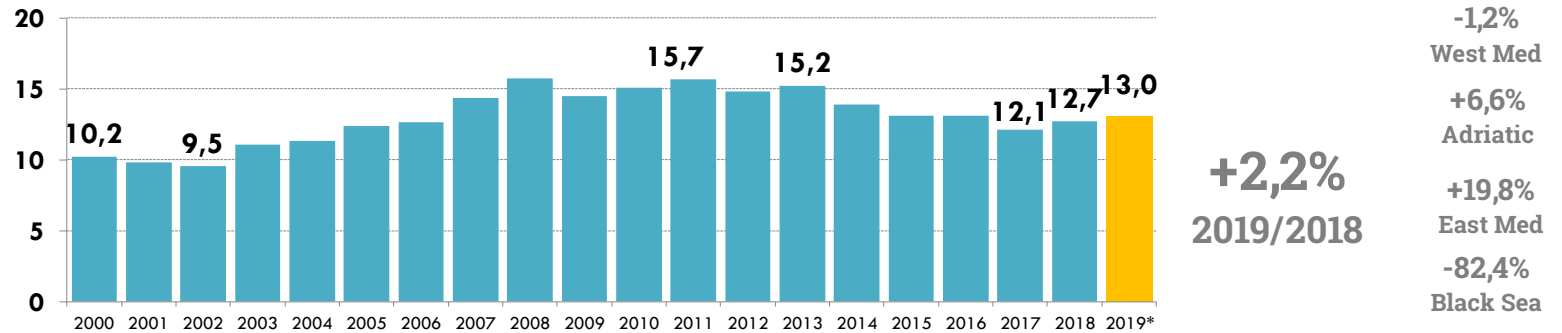
Figures 8.2 and 8.3 provide, for passenger movements and calls an updated trend of the traffic adding the 2019 forecast to the final data of the previous years. The important thing to note is that for the second year in a row both dimensions should increase, something which didn't happen from 2011. It's relevant the expected variation of passengers (+8,8%) as well as to observe the new possible increase of cruise calls in a phase in which they seemed destined to drop. On the right side, the 2019/2018 variation for each MedCruise member area are shown.

Figures 8.2 and 8.3 MedCruise Members cruise traffic 2000-2018 and 2019 forecast

>> THE PAX MOV WILL OVERCOME THE 30M THRESHOLD



>> CRUISE CALLS TO GROW FOR THE SECOND CONSECUTIVE YEAR



Notes: (*) forecast on passenger movements and calls are based on data for 57 ports (representing 92,4% for passengers movements and 90,1% of cruise calls registered in 2018)



APPENDICES

Appendix I: MedCruise Ports: Total Cruise Passenger Movements 2014-2018

Appendix II: MedCruise Ports: Total Cruise Calls 2014-2018

Appendix III: MedCruise Ports: Total Home In/Out Passengers 2014-2018

Appendix IV: MedCruise Ports: Total Transit Passengers 2014-2018

Appendix V: Seasonality of Cruise Activities in MedCruise Ports

Appendix VI: MedCruise Ports per Size Category

Appendix I MedCruise Ports: Total Cruise Passenger Movements 2014-2018

No	Port	2018	2017	Var. 2018/2017	2016	2015	2014	Var. 2018/2014
1	Alanya	3.027	12.189	-75,17%	9.272	22.321	19.092	-84,15%
2	Ancona / Pesaro / Ortona	67.031	52.086	28,69%	54.901	39.277	37.220	80,09%
3	Ashdod	20.633	26.757	-22,89%	27.632	33.419	40.780	-49,40%
4	Azores	164.074	135.783	20,84%	125.904	141.846	95.765	71,33%
5	Balearic Islands	2.431.153	2.110.663	15,18%	1.957.429	1.996.533	1.587.064	53,19%
6	Barcelona	3.041.963	2.712.247	12,16%	2.683.594	2.540.302	2.364.292	28,66%
7	Bari/Brindisi	678.621	506.513	33,98%	406.145	520.203	587.052	15,60%
8	Bastia/North Corsica	34.063	31.661	7,59%	18.533	53.024	57.927	-41,20%
9	Burgas	0	1.925	-100,00%	5.833	7.575	41.763	-100,00%
10	Cape Verde Ports	47.094	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
11	Canarian Ports	1.392	4.346	-67,97%	5.853	1.421	4.396	-68,33%
12	Cartagena	228.387	236.412	-3,39%	187.843	151.195	137.985	65,52%
13	Castellon	566	411	37,71%	1.095	366	130	335,38%
14	Catania / Augusta	133.341	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
15	Ceuta	15.790	17.003	-7,13%	19.251	1.613	2.432	549,26%
16	Civitavecchia/Fiumicino/Gaeta	2.441.737	2.204.336	10,77%	2.339.676	2.271.652	2.140.039	14,10%
17	Constantza	0	1.891	-100,00%	6.912	31.856	69.910	-100,00%
18	Corfu	735.832	679.681	8,26%	748.914	647.346	672.368	9,44%
19	Costa Brava Cruise Ports	51.042	45.176	12,98%	25.505	40.800	38.612	32,19%
20	Cyprus Ports	31.089	123.397	-74,81%	141.358	173.309	183.507	-83,06%
21	Dubrovnik/ Korcula	732.431	748.918	-2,20%	831.730	830.684	894.216	-18,09%
22	Egyptian Ports	106.391	9.835	981,76%	n.a.	n.a.	n.a.	n.a.
23	French Riviera Ports	610.919	693.351	-11,89%	562.929	546.199	595.685	2,56%
24	Genoa/Savona	1.859.885	1.779.631	4,51%	1.927.612	1.830.453	1.842.903	0,92%
25	Gibraltar	406.998	404.995	0,49%	404.005	344.140	299.923	35,70%
26	Gioia Tauro	8.463	4.141	104,37%	13.758	13.868	3.320	154,91%
27	Heraklion	297.929	181.693	63,97%	238.780	219.805	242.951	22,63%
28	Huelva	11.691	6.571	77,92%	20.071	4.788	0	n.a.
29	Igoumenitsa	12.650	9.088	39,19%	7.623	3.090	3.096	308,59%
30	Istanbul	0	0	0,00%	36.708	589.314	589.353	-100,00%
31	Kavala	2.031	3.226	-37,04%	6.042	12.783	13.087	-84,48%
32	Koper	101.415	72.175	40,51%	78.923	57.893	58.970	71,98%
33	Kotor	492.475	541.017	-8,97%	536.644	442.029	309.322	59,21%
34	Kusadasi/Bodrum/Antalya	29.158	189.319	-84,60%	453.898	808.446	761.912	-96,17%
35	La Spezia/ Marina di Carrara	471.652	454.954	3,67%	507.531	667.446	483.564	-2,46%

No	Port	2018	2017	Var. 2018/2017	2016	2015	2014	Var. 2018/2014
36	Lisbon	577.603	521.042	10,86%	522.497	512.128	500.872	15,32%
37	Livorno/Piombino/Portoferraio	825.310	728.243	13,33%	850.687	735.441	653.721	26,25%
38	Madeira Ports	541.467	540.593	0,16%	522.483	580.348	475.955	13,76%
39	Málaga	507.360	510.607	-0,64%	442.931	419.121	409.298	23,96%
40	Marseille	1.716.184	1.487.313	15,39%	1.597.213	1.451.059	1.311.284	30,88%
41	Messina/Milazzo	372.365	390.196	-4,57%	373.199	327.702	319.750	16,46%
42	Monaco	170.571	168.017	1,52%	185.392	259.325	200.039	-14,73%
43	Motril-Granada	5.313	4.111	29,24%	4.570	6.481	19.589	-72,88%
44	Naples/Salerno/C. di Stabia	1.141.398	927.458	23,07%	1.306.151	1.269.571	1.113.762	2,48%
45	Odessa	2.565	1.636	56,78%	1.242	6.563	8.506	-69,84%
46	Palermo/ Termini Imerese/ Trapani/ Porto Empedocle	603.881	459.229	31,50%	510.078	546.884	531.712	13,57%
47	Patras	1.647	952	73,00%	743	1.090	745	121,07%
48	Piraeus	961.632	1.055.559	-8,90%	1.094.135	980.149	1.055.556	-8,90%
49	Portimao	36.786	29.859	23,20%	19.520	14.786	14.634	151,37%
50	Portofino	36.048	35.203	2,40%	19.894	30.696	21.579	67,05%
51	Rijeka	10.913	12.656	-13,77%	13.874	9.082	9.026	20,91%
52	Sardinian Ports	513.874	557.340	-7,80%	210.386	501.503	248.829	106,52%
53	Sète	114.429	47.377	141,53%	23.791	20.555	9.918	1053,75%
54	Sibenik	35.729	27.718	28,90%	12.276	17.562	12.693	181,49%
55	Souda/Chania	139.944	128.067	9,27%	147.915	96.612	33.304	320,20%
56	Split	307.139	232.244	32,25%	275.651	271.445	184.062	66,87%
57	Tangier	31.250	23.550	32,70%	97.311	121.608	105.306	-70,32%
58	Taranto	658	8.546	-92,30%	0	314	582	13,06%
59	Tarragona	98.126	51.393	90,93%	14.013	11.600	1.894	5080,89%
60	Tenerife Ports	1.015.150	964.337	5,27%	884.173	933.154	840.268	20,81%
61	Thessaloniki	1.348	2.424	-44,39%	18.876	26.356	19.720	-93,16%
62	Toulon Bay	107.943	239.023	-54,84%	362.479	240.833	341.128	-68,36%
63	Trabzon	0	206	-100,00%	452	2.280	17.118	-100,00%
64	Tunisian Ports	0	5.317	-100,00%	757	53.780	440.433	-100,00%
65	Valencia	421.518	411.317	2,48%	404.783	371.374	372.975	13,02%
66	Valletta	711.018	778.596	-8,68%	682.970	668.277	517.594	37,37%
67	Varna	0	791	-100,00%	1.109	3.159	20.939	-100,00%
68	Venice	1.560.579	1.427.812	9,30%	1.605.660	1.582.481	1.733.839	-9,99%
69	Volos	31.337	7.618	311,35%	37.445	67.096	57.825	-45,81%
70	Zadar	166.528	137.667	20,96%	136.462	74.660	53.791	209,58%

Appendix II MedCruise Ports: Total Cruise Calls 2014-2018

No	Port	2018	2017	Var. 2018/2017	2016	2015	2014	Var. 2018/2014
1	Alanya	15	22	-31,82%	13	34	23	-34,78%
2	Ancona / Pesaro / Ortona	40	28	42,86%	34	24	20	100,00%
3	Ashdod	0	21	-100,00%	22	32	34	-100,00%
4	Azores	138	152	-9,21%	121	138	90	53,33%
5	Balearic Islands	859	819	4,88%	742	788	678	26,70%
6	Barcelona	830	778	6,68%	758	749	767	8,21%
7	Bari/Brindisi	289	186	55,38%	159	208	169	71,01%
8	Bastia/North Corsica	115	73	57,53%	27	90	94	22,34%
9	Burgas	0	2	-100,00%	8	5	27	-100,00%
10	Cape Verde Ports	199	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
11	Canarian Ports	5	3	66,67%	4	1	5	0,00%
12	Cartagena	148	151	-1,99%	120	108	109	35,78%
13	Castellon	1	1	0,00%	2	2	1	0,00%
14	Catania / Augusta	72	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
15	Ceuta	10	10	0,00%	13	4	8	25,00%
16	Civitavecchia/Fiumicino/Gaeta	760	729	4,25%	833	794	833	-8,76%
17	Constantza	0	3	-100,00%	8	25	92	-100,00%
18	Corfu	413	410	0,73%	481	407	395	4,56%
19	Costa Brava Cruise Ports	54	46	17,39%	37	37	36	50,00%
20	Cyprus Ports	40	113	-64,60%	135	167	223	-82,06%
21	Dubrovnik/ Korcula	438	539	-18,74%	639	475	752	-41,76%
22	Egyptian Ports	77	7	1000,00%	n.a.	n.a.	29	165,52%
23	French Riviera Ports	348	374	-6,95%	325	343	369	-5,69%
24	Genoa/Savona	423	399	6,02%	461	429	488	-13,32%
25	Gibraltar	243	235	3,40%	224	204	181	34,25%
26	Gioia Tauro	12	6	100,00%	13	12	6	100,00%
27	Heraklion	187	131	42,75%	165	170	160	16,88%
28	Huelva	16	6	166,67%	17	6	0	n.a.
29	Igoumenitsa	14	8	75,00%	7	6	13	7,69%
30	Istanbul	0	0	0,00%	42	331	331	-100,00%
31	Kavala	5	6	-16,67%	18	22	26	-80,77%
32	Koper	75	68	10,29%	69	49	45	66,67%
33	Kotor	411	430	-4,42%	487	411	353	16,43%
34	Kusadasi/Bodrum/Antalya	23	165	-86,06%	338	660	605	-96,20%
35	La Spezia/ Marina di Carrara	175	215	-18,60%	211	175	254	-31,10%

No	Port	2018	2017	Var. 2018/2017	2016	2015	2014	Var. 2018/2014
36	Lisbon	339	330	2,73%	311	306	319	6,27%
37	Livorno/Piombino/Portoferraio	469	453	3,53%	521	481	442	6,11%
38	Madeira Ports	293	293	0,00%	297	312	285	2,81%
39	Málaga	298	299	-0,33%	253	233	227	31,28%
40	Marseille	505	444	13,74%	490	442	497	1,61%
41	Messina/Milazzo	172	172	0,00%	223	160	165	4,24%
42	Monaco	177	166	6,63%	181	209	182	-2,75%
43	Motril-Granada	28	31	-9,68%	21	27	30	-6,67%
44	Naples/Salerno/C. di Stabia	442	336	31,55%	493	445	399	10,78%
45	Odessa	17	12	41,67%	5	13	32	-46,88%
46	Palermo/ Termini Imerese/ Trapani/ Porto Empedocle	237	154	53,90%	174	200	221	7,24%
47	Patras	2	2	0,00%	2	3	2	0,00%
48	Piraeus	524	576	-9,03%	625	621	606	-13,53%
49	Portimao	66	71	-7,04%	43	47	34	94,12%
50	Portofino	82	79	3,80%	57	80	56	46,43%
51	Rijeka	11	15	-26,67%	15	7	247	-95,55%
52	Sardinian Ports	221	259	-14,67%	240	246	152	45,39%
53	Sète	72	44	63,64%	36	31	24	200,00%
54	Sibenik	109	109	0,00%	106	83	93	17,20%
55	Souda/Chania	78	84	-7,14%	86	59	38	105,26%
56	Split	260	234	11,11%	286	261	233	11,59%
57	Tangier	46	27	70,37%	66	88	87	-47,13%
58	Taranto	2	7	-71,43%	0	2	3	-33,33%
59	Tarragona	57	37	54,05%	22	11	3	1800,00%
60	Tenerife Ports	546	533	2,44%	524	506	513	6,43%
61	Thessaloniki	4	4	0,00%	23	35	31	-87,10%
62	Toulon Bay	62	107	-42,06%	278	124	257	-75,88%
63	Trabzon	0	1	-100,00%	3	10	31	-100,00%
64	Tunisian Ports	0	6	-100,00%	2	15	175	-100,00%
65	Valencia	196	203	-3,45%	181	174	195	0,51%
66	Valletta	322	342	-5,85%	317	306	302	6,62%
67	Varna	0	1	-100,00%	4	10	35	-100,00%
68	Venice	502	466	7,73%	529	521	488	2,87%
69	Volos	27	9	200,00%	46	57	53	-49,06%
70	Zadar	133	104	27,88%	114	96	77	72,73%

Appendix III MedCruise Ports: Total Home In/Out Passengers 2014-2018

No	Port	2018	2017	Var. 2018/2017	2016	2015	2014	Var. 2018/2014
1	Alanya	0	0	0,00%	0	0	0	0,00%
2	Ancona / Pesaro / Ortona	12.854	11.118	15,61%	10.896	6.676	9.110	41,10%
3	Ashdod	0	376	-100,00%	n.a.	0	285	-100,00%
4	Azores	1.374	1.556	-11,70%	1.182	1.787	833	64,95%
5	Balearic Islands	858.435	737.810	16,35%	600.181	553.928	606.549	41,53%
6	Barcelona	1.666.767	1.440.383	15,72%	1.555.819	1.363.754	1.222.487	36,34%
7	Bari/Brindisi	230.711	187.002	23,37%	109.144	106.213	152.104	51,68%
8	Bastia/North Corsica	0	0	0,00%	0	0	0	0,00%
9	Burgas	0	0	0,00%	0	2	0	0,00%
10	Cape Verde Ports	0	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
11	Canarian Ports	0	0	0,00%	n.a.	0	0	0,00%
12	Cartagena	0	133	-100,00%	186	0	0	0,00%
13	Castellon	0	0	0,00%	0	0	0	0,00%
14	Catania / Augusta	14.471	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
15	Ceuta	0	0	0,00%	0	0	0	0,00%
16	Civitavecchia/Fiumicino/Gaeta	956.758	849.993	12,56%	847.009	868.143	730.938	30,89%
17	Constantza	0	0	0,00%	0	667	5.049	-100,00%
18	Corfu	82.259	69.915	17,66%	70.864	69.926	71.881	14,44%
19	Costa Brava Cruise Ports	0	0	0,00%	0	0	0	0,00%
20	Cyprus Ports	1.632	71.342	-97,71%	58.163	66.120	76.892	-97,88%
21	Dubrovnik/ Korcula	63.138	68.105	-7,29%	68.169	61.797	24.790	154,69%
22	Egyptian Ports	0	0	0,00%	n.a.	n.a.	n.a.	n.a.
23	French Riviera Ports	49.206	47.920	2,68%	41.967	55.302	34.791	41,43%
24	Genoa/Savona	1.078.401	1.059.442	1,79%	1.183.423	1.213.051	1.239.936	-13,03%
25	Gibraltar	0	0	0,00%	90	583	0	0,00%
26	Gioia Tauro	0	0	0,00%	21	147	0	0,00%
27	Heraklion	29.841	18.874	58,11%	7.302	3.344	23.925	24,73%
28	Huelva	0	0	0,00%	0	0	0	0,00%
29	Igoumenitsa	0	0	0,00%	0	0	0	0,00%
30	Istanbul	0	0	0,00%	16.252	203.135	148.297	-100,00%
31	Kavala	0	0	0,00%	0	0	0	0,00%
32	Koper	0	0	0,00%	51	82	47	-100,00%
33	Kotor	1.873	1.364	37,32%	1.412	2.921	n.a.	n.a.
34	Kusadasi/Bodrum/Antalya	35	56.913	-99,94%	62.594	200.200	201.142	-99,98%
35	La Spezia/ Marina di Carrara	5.467	8.824	-38,04%	0	96.881	40.280	-86,43%

No	Port	2018	2017	Var. 2018/2017	2016	2015	2014	Var. 2018/2014
36	Lisbon	62.089	58.915	5,39%	47.632	42.536	41.465	49,74%
37	Livorno/Piombino/Portoferraio	10.289	9.711	5,95%	9.274	4.181	2.088	392,77%
38	Madeira Ports	4.593	3.058	50,20%	2.775	3.721	3.421	34,26%
39	Málaga	107.887	138.053	-21,85%	92.246	32.492	74.170	45,46%
40	Marseille	438.443	414.880	5,68%	486.964	503.325	506.412	-13,42%
41	Messina/Milazzo	17.755	20.532	-13,53%	18.027	17.068	19.951	-11,01%
42	Monaco	28.631	23.758	20,51%	26.225	29.563	33.093	-13,48%
43	Motril-Granada	0	0	0,00%	0	0	0	0,00%
44	Naples/Salerno/C. di Stabia	99.422	113.255	-12,21%	142.137	126.672	99.423	0,00%
45	Odessa	339	253	33,99%	9	15	44	670,45%
46	Palermo/ Termini Imerese/ Trapani/ Porto Empedocle	77.147	75.176	2,62%	72.034	65.582	65.935	17,00%
47	Patras	0	0	0,00%	0	0	0	0,00%
48	Piraeus	354.398	332.611	6,55%	352.663	284.241	256.196	38,33%
49	Portimao	960	514	86,77%	44	238	1.130	-15,04%
50	Portofino	0	0	0,00%	0	0	0	0,00%
51	Rijeka	0	0	0,00%	0	0	9.026	-100,00%
52	Sardinian Ports	11.355	20.338	-44,17%	8.456	16.536	133	8437,59%
53	Sète	0	63	-100,00%	28	149	2.817	-100,00%
54	Sibenik	0	0	0,00%	0	0	0	0,00%
55	Souda/Chania	0	782	-100,00%	0	0	0	0,00%
56	Split	0	0	0,00%	879	0	330	-100,00%
57	Tangier	0	0	0,00%	n.a.	0	0	0,00%
58	Taranto	0	0	0,00%	0	0	0	0,00%
59	Tarragona	22.118	14.238	55,34%	1.842	11	0	n.a.
60	Tenerife Ports	161.803	138.076	17,18%	74.124	n.a.	n.a.	n.a.
61	Thessaloniki	0	3	-100,00%	774	51	161	-100,00%
62	Toulon Bay	149	3.407	-95,63%	12.186	21.257	28.974	-99,49%
63	Trabzon	0	206	-100,00%	452	0	0	0,00%
64	Tunisian Ports	0	0	0,00%	0	0	0	0,00%
65	Valencia	81.756	72.195	13,24%	60.963	63.142	73.907	10,62%
66	Valletta	156.825	216.029	-27,41%	114.731	140.512	93.581	67,58%
67	Varna	0	1	-100,00%	2	5	6	-100,00%
68	Venice	1.321.006	1.226.471	7,71%	1.408.066	1.364.044	1.509.097	-12,46%
69	Volos	6	0	n.a.	0	0	0	n.a.
70	Zadar	1.051	736	42,80%	877	1.064	1.763	-40,39%

Appendix IV MedCruise Ports: Total Transit Passengers 2014-2018

No	Port	2018	2017	Var. 2018/2017	2016	2015	2014	Var. 2018/2014
1	Alanya	3.027	12.189	-75,17%	9.272	22.321	19.092	-84,15%
2	Ancona / Pesaro / Ortona	54.177	40.968	32,24%	44.005	32.601	28.110	92,73%
3	Ashdod	20.633	26.381	-21,79%	27.262	33.129	40.495	-49,05%
4	Azores	162.700	134.227	21,21%	124.722	140.059	94.932	71,39%
5	Balearic Islands	1.572.718	1.372.853	14,56%	1.357.248	1.442.605	980.515	60,40%
6	Barcelona	1.375.196	1.271.864	8,12%	1.127.775	1.176.548	1.141.805	20,44%
7	Bari/Brindisi	447.910	319.511	40,19%	297.001	413.990	434.948	2,98%
8	Bastia/North Corsica	34.063	31.661	7,59%	18.533	53.024	57.927	-41,20%
9	Burgas	0	1.925	-100,00%	5.833	7.573	41.763	-100,00%
10	Cape Verde Ports	47.094	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
11	Canarian Ports	1.392	4.346	-67,97%	5.853	1.421	4.396	-68,33%
12	Cartagena	228.387	236.279	-3,34%	187.657	151.195	137.985	65,52%
13	Castellon	566	411	37,71%	1.095	366	130	335,38%
14	Catania / Augusta	118.870	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
15	Ceuta	15.790	17.003	-7,13%	19.251	1.613	2.432	549,26%
16	Civitavecchia/Fiumicino/Gaeta	1.484.979	1.354.343	9,65%	1.492.667	1.403.509	1.409.101	5,38%
17	Constantza	0	1.891	-100,00%	6.912	31.189	64.861	-100,00%
18	Corfu	653.573	609.766	7,18%	678.050	577.420	600.487	8,84%
19	Costa Brava Cruise Ports	51.042	45.176	12,98%	25.505	40.800	38.612	32,19%
20	Cyprus Ports	29.457	52.055	-43,41%	83.195	107.189	106.615	-72,37%
21	Dubrovnik/ Korcula	669.293	680.813	-1,69%	763.561	768.887	869.426	-23,02%
22	Egyptian Ports	106.391	9.835	981,76%	n.a.	n.a.	n.a.	n.a.
23	French Riviera Ports	561.713	645.430	-12,97%	520.962	490.897	560.894	0,15%
24	Genoa/Savona	781.484	720.189	8,51%	708.810	617.402	602.967	29,61%
25	Gibraltar	406.998	404.995	0,49%	403.915	343.557	299.923	35,70%
26	Gioia Tauro	8.463	4.141	104,37%	13.737	13.721	3.320	154,91%
27	Heraklion	268.088	162.819	64,65%	231.478	216.461	219.026	22,40%
28	Huelva	11.691	6.571	77,92%	20.071	4.788	0	n.a.
29	Igoumenitsa	12.650	9.088	39,19%	7.623	3.090	3.096	308,59%
30	Istanbul	0	0	0,00%	20.456	386.179	441.056	-100,00%
31	Kavala	2.031	3.226	-37,04%	6.042	12.783	13.087	-84,48%
32	Koper	101.415	72.175	40,51%	78.872	57.811	58.923	72,11%
33	Kotor	490.602	539.653	-9,09%	535.232	439.108	309.322	58,61%
34	Kusadasi/Bodrum/Antalya	29.123	132.406	-78,00%	391.304	608.246	560.770	-94,81%
35	La Spezia/ Marina di Carrara	466.185	446.130	4,50%	500.129	570.565	443.284	5,17%
36	Lisbon	515.514	462.127	11,55%	474.865	469.592	459.407	12,21%

No	Port	2018	2017	Var. 2018/2017	2016	2015	2014	Var. 2018/2014
37	Livorno/Piombino/Portoferraio	815.021	718.532	13,43%	841.413	731.260	651.633	25,07%
38	Madeira Ports	536.874	537.535	-0,12%	519.708	576.627	472.534	13,62%
39	Málaga	399.473	372.554	7,23%	350.685	386.629	335.128	19,20%
40	Marseille	1.277.741	1.072.433	19,14%	1.110.249	947.734	804.872	58,75%
41	Messina/Milazzo	354.610	369.664	-4,07%	337.512	310.634	299.799	18,28%
42	Monaco	141.940	144.259	-1,61%	159.167	229.761	166.946	-14,98%
43	Motril-Granada	5.313	4.111	29,24%	4.570	6.481	19.589	-72,88%
44	Naples/Salerno/C. di Stabia	1.041.976	814.133	27,99%	1.164.041	1.142.899	1.014.339	2,72%
45	Odessa	2.226	1.383	60,95%	1.233	6.548	8.462	-73,69%
46	Palermo/ Termini Imerese/ Trapani/ Porto Empedocle	526.734	384.053	37,15%	438.044	481.302	465.777	13,09%
47	Patras	1.647	952	73,00%	743	1.090	745	121,07%
48	Piraeus	607.234	722.948	-16,01%	741.472	695.908	799.360	-24,03%
49	Portimao	35.826	29.345	22,09%	19.476	14.548	13.504	165,30%
50	Portofino	36.048	35.203	2,40%	19.894	30.696	21.579	67,05%
51	Rijeka	10.913	12.656	-13,77%	13.874	9.082	0	n.a.
52	Sardinian Ports	502.519	537.002	-6,42%	457.803	484.967	248.696	102,06%
53	Sète	114.429	47.314	141,85%	23.763	20.406	7.101	1511,45%
54	Sibenik	35.729	27.718	28,90%	12.276	17.562	12.693	181,49%
55	Souda/Chania	139.944	127.285	9,95%	147.915	96.612	33.304	320,20%
56	Split	307.139	232.244	32,25%	274.772	271.445	183.732	67,17%
57	Tangier	31.250	23.550	32,70%	97.311	121.608	105.306	-70,32%
58	Taranto	658	8.546	-92,30%	0	314	582	13,06%
59	Tarragona	76.008	37.155	104,57%	12.171	11.589	1.894	3913,09%
60	Tenerife Ports	853.347	826.261	3,28%	810.049	n.a.	n.a.	n.a.
61	Thessaloniki	1.348	2.421	-44,32%	18.102	26.305	19.559	-93,11%
62	Toulon Bay	107.794	235.616	-54,25%	350.293	219.576	312.154	-65,47%
63	Trabzon	0	0	0,00%	0	2.280	17.118	-100,00%
64	Tunisian Ports	0	5.317	-100,00%	757	53.780	440.433	-100,00%
65	Valencia	339.762	339.122	0,19%	343.820	308.232	299.068	13,61%
66	Valletta	554.193	562.610	-1,50%	568.239	527.765	424.013	30,70%
67	Varna	0	790	-100,00%	1.107	3.154	20.933	-100,00%
68	Venice	239.573	201.341	18,99%	197.594	218.437	224.742	6,60%
69	Volos	31.331	7.618	311,28%	37.445	67.096	57.825	-45,82%
70	Zadar	165.477	136.931	20,85%	135.584	73.596	52.028	218,05%

Appendix V *Seasonality of Cruise Activities in MedCruise Ports*

Cruise Pax Shares of MedCruise Ports per region – Shares per trimester in 2018*

West Med Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Azores	55,41%	0,73%	25,92%	17,94%
Balearic Islands	22,03%	40,80%	30,14%	7,02%
Barcelona	24,70%	32,74%	33,39%	9,18%
Bastia and North Corsica	32,53%	41,50%	25,98%	0,00%
Cape Verde	39,16%	0,00%	23,43%	37,41%
Canarian Ports	0,00%	0,00%	29,74%	70,26%
Cartagena	26,08%	29,97%	38,00%	5,96%
Castellòn	0,00%	100,00%	0,00%	0,00%
Catania	38,06%	14,65%	47,18%	0,10%
Ceuta	0,00%	36,21%	63,79%	0,00%
Civitavecchia	23,71%	35,57%	31,39%	9,33%
Costa Brava cruise Ports	18,45%	50,40%	31,15%	0,00%
French Riviera Ports	21,19%	48,29%	30,16%	0,35%
Genoa/Savona	24,56%	26,76%	37,75%	10,93%
Gibraltar	26,54%	32,73%	34,84%	5,89%
Gioia Tauro	32,91%	29,52%	37,58%	0,00%
Huelva	30,47%	21,71%	47,82%	0,00%
La Spezia	25,01%	38,90%	36,09%	0,00%
Lisbon	29,05%	17,93%	41,79%	11,23%
Livorno/Piombino/Portoferraio	21,82%	41,90%	29,61%	6,66%
Madeira Ports	28,02%	3,37%	30,62%	37,98%
Malaga	31,63%	17,03%	42,93%	8,41%
Motril-Granada	44,98%	1,66%	53,36%	0,00%
Naples/Salerno/Castellammare di Stabia	22,90%	41,00%	34,04%	2,06%
Palermo/ Termini Imerese/ Trapani/ Porto				
Empedocle	27,06%	25,98%	25,99%	20,97%
Portimao	34,96%	34,61%	29,36%	1,07%
Portofino	21,10%	44,35%	34,55%	0,00%
Sardinian Ports	18,71%	49,18%	30,17%	1,94%
Sète	21,88%	39,10%	36,59%	2,43%
Tangier	25,44%	3,86%	44,40%	26,30%
Tarragona	21,71%	49,92%	28,37%	0,00%

West Med Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Tenerife Ports	26,61%	3,16%	28,84%	41,39%
Toulon Bay	21,40%	31,71%	46,03%	0,86%
Valencia	29,13%	23,70%	40,64%	6,54%
Valletta	25,86%	29,85%	34,48%	9,81%

Adriatic Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Ancona	13,28%	64,89%	21,83%	0,00%
Bari/Brindisi/Manfredonia/Barletta/Monopoli	21,61%	46,19%	29,64%	2,56%
Corfu	19,99%	46,26%	32,70%	1,05%
Dubrovnik/Korcula	21,60%	46,77%	31,25%	0,38%
Koper	25,30%	40,14%	34,36%	0,19%
Kotor	18,85%	40,99%	37,01%	3,14%
Rijeka	32,69%	30,31%	37,00%	0,00%
Sibenik	19,60%	44,94%	31,89%	3,57%
Split	18,99%	43,54%	33,12%	4,35%
Taranto	0,00%	5,93%	94,07%	0,00%
Venezia	19,63%	46,68%	31,64%	2,04%
Zadar	21,31%	48,16%	30,14%	0,40%
Ancona	13,28%	64,89%	21,83%	0,00%
Bari/Brindisi/Manfredonia/Barletta/Monopoli	21,61%	46,19%	29,64%	2,56%
Corfu	19,99%	46,26%	32,70%	1,05%
Dubrovnik/Korcula	21,60%	46,77%	31,25%	0,38%
Koper	25,30%	40,14%	34,36%	0,19%
Kotor	18,85%	40,99%	37,01%	3,14%
Rijeka	32,69%	30,31%	37,00%	0,00%
Sibenik	19,60%	44,94%	31,89%	3,57%
Split	18,99%	43,54%	33,12%	4,35%
Taranto	0,00%	5,93%	94,07%	0,00%
Venezia	19,63%	46,68%	31,64%	2,04%
Zadar	21,31%	48,16%	30,14%	0,40%

East Med Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Alanya	0,0%	64,6%	35,4%	0,0%
Ashdod	44,3%	0,4%	55,1%	0,2%
Cyprus Port	20,0%	47,0%	28,1%	4,9%
Egyptian Ports	46,3%	4,4%	46,4%	2,9%
Heraklion	20,8%	34,8%	41,1%	3,3%
Igoumenitsa	21,0%	40,4%	38,6%	0,0%
Kavala	4,0%	18,8%	77,2%	0,0%
Kusadasi/Bodrum/Antalya	13,6%	44,3%	42,1%	0,0%
Patras	0,0%	35,3%	64,7%	0,0%
Piraeus	21,1%	42,7%	33,4%	2,8%
Souda/Chania	23,7%	45,9%	28,0%	2,4%
Thessaloniki	6,0%	45,0%	49,0%	0,0%
Volos	29,5%	43,0%	27,5%	0,0%

Black Sea Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Odessa	10,1%	59,6%	30,3%	0,0%

Note: (*) All tables include only ports that provided seasonality data for 2018

Appendix VI MedCruise Ports per Size Category

CATEGORY A (> 107.000 PAX.)			CATEGORY B (< 107.000 PAX)		
No	Port	2018	No	Port	2018
1	Azores	164.074	1	Alanya	3.027
2	Balearic Islands	2.431.153	2	Ancona	67.031
3	Barcelona	3.041.963	3	Ashdod	20.633
4	Bari/Brindisi	678.621	4	Bastia/North Corsica	34.063
5	Cartagena	228.387	5	Burgas	0
6	Catania	133.341	6	Cape Verde	47.094
7	Civitavecchia	2.441.737	7	Canarian ports	1.392
8	Corfu	735.832	8	Castellón	566
9	Dubrovnik/Korcula	732.431	9	Ceuta	15.790
10	French Riviera Ports	610.919	10	Constantza	0
11	Genoa/Savona	1.859.885	11	Costa Brava Cruise Ports	51.042
12	Gibraltar	406.998	12	Cyprus Ports	31.089
13	Heraklion	297.929	13	Egyptian Ports	106.391
14	Kotor	492.475	14	Gioia Tauro	8.463
15	La Spezia	471.652	15	Huelva	11.691
16	Lisbon	577.603	16	Igoumenitsa	12.650
17	Livorno/Piombino/Portoferraio	825.310	17	Istanbul	0
18	Madeira Ports	541.467	18	Kavala	2.031
19	Málaga	507.360	19	Koper	101.415
20	Marseille	1.716.184	20	Kusadasi/Bodrum/Antalya	29.158
21	Messina	372.365	21	Motril-Granada	5.313
22	Monaco	170.571	22	Odessa	2.565
23	Naples/Salerno/Castellammare di Stabia	1.141.398	23	Patras	1.647
24	Palermo	603.881	24	Portimao	36.786
25	Piraeus	961.632	25	Portofino	36.048
26	Sardinian Ports	513.874	26	Rijeka	10.913
27	Sète	114.429	27	Sibenik	35.729
28	Souda/Chania	139.944	28	Tangier	31.250

CATEGORY A (> 107.000 PAX.)			CATEGORY B (< 107.000 PAX)		
No	Port	2018	No	Port	2018
29	Split	307.139	29	Taranto	658
30	Tenerife Ports	1.015.150	30	Tarragona	98.126
31	Toulon Bay	107.943	31	Thessaloniki	1.348
32	Valencia	421.518	32	Trabzon	0
33	Valletta	711.018	33	Tunisian Ports	0
34	Venice	1.560.579	34	Varna	0
35	Zadar	166.528	35	Volos	31.337

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