



a MedCruise report

Cruise Activities in MedCruise Ports

# 2017 STATISTICS



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A MedCruise Report

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Version based on previous editions by Secretariat team.



## PREFACE

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

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

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

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

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

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

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

**#PortsTogether**

**Airam Díaz**

MedCruise President



# MedCruise

## Bringing the Med together

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



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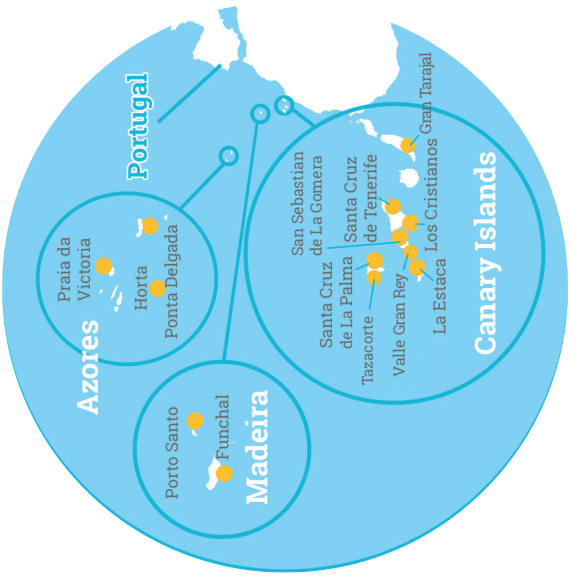
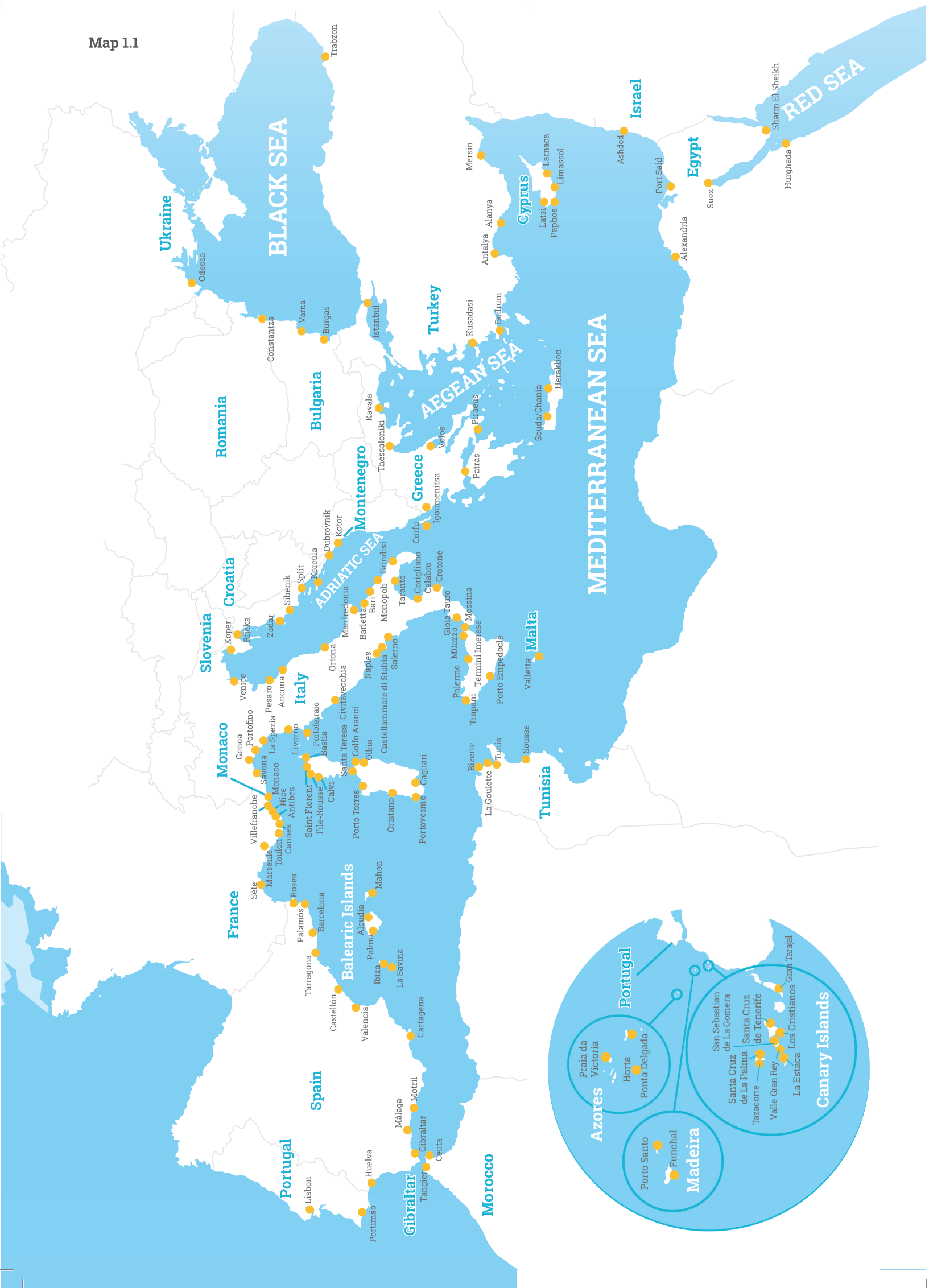
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Map 1.1





## #PortsTogether

# MedCruise Statistics

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

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

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

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

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

**Map 1.1** provides an illustration of the geography of the members of the Association and browses the extent that MedCruise membership spreads in the Mediterranean and its adjoining seas.

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

## 1.2 The Report

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

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

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

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

## 1.3 MedCruise Membership

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

**Table 1.1: Countries represented in MedCruise**

|                                      |           |            |          |
|--------------------------------------|-----------|------------|----------|
| <i>3 continents<br/>20 countries</i> | Bulgaria  | Israel     | Romania  |
|                                      | Croatia   | Italy      | Slovenia |
|                                      | Cyprus    | Malta      | Spain    |
|                                      | Egypt     | Monaco     | Tunisia  |
|                                      | France    | Montenegro | Turkey   |
|                                      | Gibraltar | Morocco    | Ukraine  |
|                                      | Greece    | Portugal   |          |

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

**Table 1.2: MedCruise Port Members**

| <i>4 regions<br/>100+ ports</i> | WEST MED                 |                             | ADRIATIC SEA        |                 |
|---------------------------------|--------------------------|-----------------------------|---------------------|-----------------|
|                                 | Azores                   | Gioia Tauro                 | Palermo             | Ancona          |
|                                 | Balearic Islands         | Huelva                      | Portimao            | Bari / Brindisi |
|                                 | Barcelona                | La Spezia                   | Portoferraio        | Corfu           |
|                                 | Bastia / N.Corsica       | Lisbon                      | Portofino           | Dubrovnik       |
|                                 | Canarian Ports           | Livorno                     | Sardinian Ports     | Koper           |
|                                 | Cartagena                | Madeira Ports               | Sete                | Kotor           |
|                                 | Castellon                | Malaga                      | Tangier             | Rijeka          |
|                                 | Ceuta                    | Marseille                   | Tarragona           | Sibenik         |
|                                 | Civitavecchia            | Messina                     | Tenerife Ports      | Split           |
|                                 | Costa Brava Cruise Ports | Monaco                      | Toulon-Var Provence | Taranto         |
|                                 | French Riviera Ports     | Motril-Granada              | Tunisian Ports      | Venice          |
|                                 | Genoa / Savona           | Naples / Salerno /          | Valencia            | Zadar           |
|                                 | Gibraltar                | Castellamare di Stabia      | Valletta            |                 |
|                                 | EAST MED                 |                             | BLACK SEA           |                 |
|                                 | Alanya                   | Kusadasi / Bodrum / Antalya | Burgas              |                 |
|                                 | Ashdod                   | Mersin                      | Constantza          |                 |
|                                 | Cyprus Ports             | Patras                      | Odessa              |                 |
| Egyptian Ports                  | Piraeus                  | Trabzon                     |                     |                 |
| Heraklion                       | Souda / Chania           | Varna                       |                     |                 |
| Igoumenitsa                     | Thessaloniki             |                             |                     |                 |
| Istanbul                        | Volos                    |                             |                     |                 |
| Kavala                          |                          |                             |                     |                 |

*32 associate members*

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

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

**Table 1.3: MedCruise Associate Members**

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

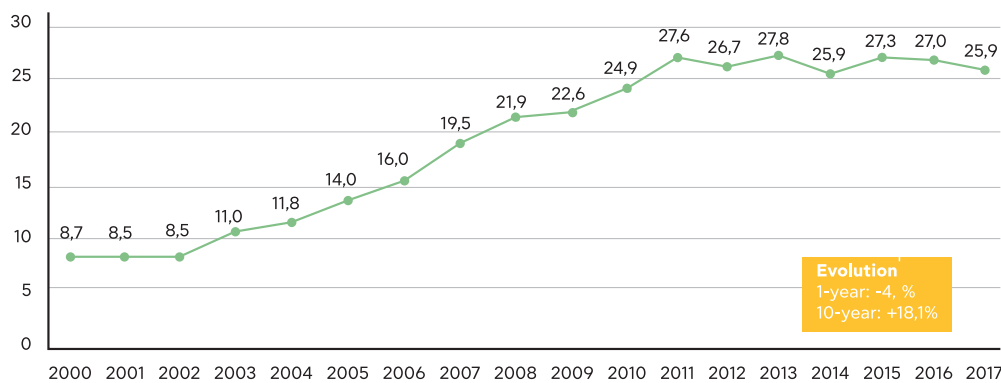
*An active program for cruise ports partners*

## 1.4 Evolution of Cruise Activity in MedCruise ports

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

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

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

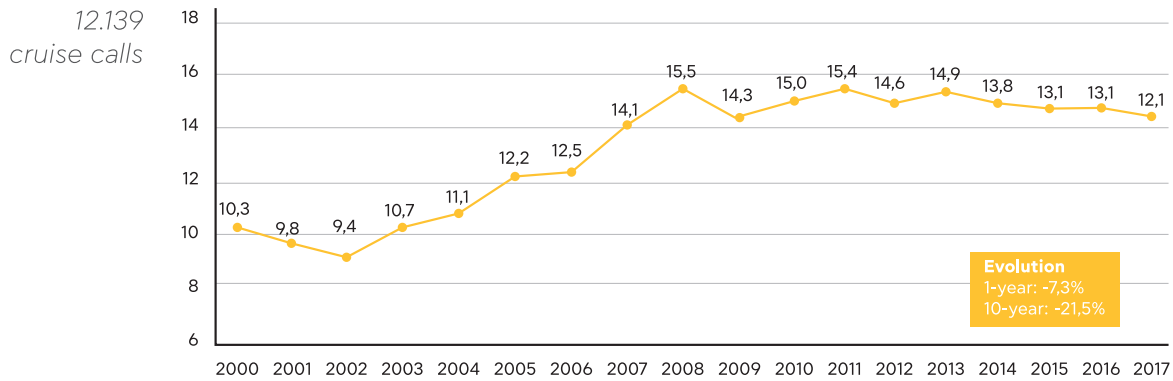


25,9 million pax

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

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

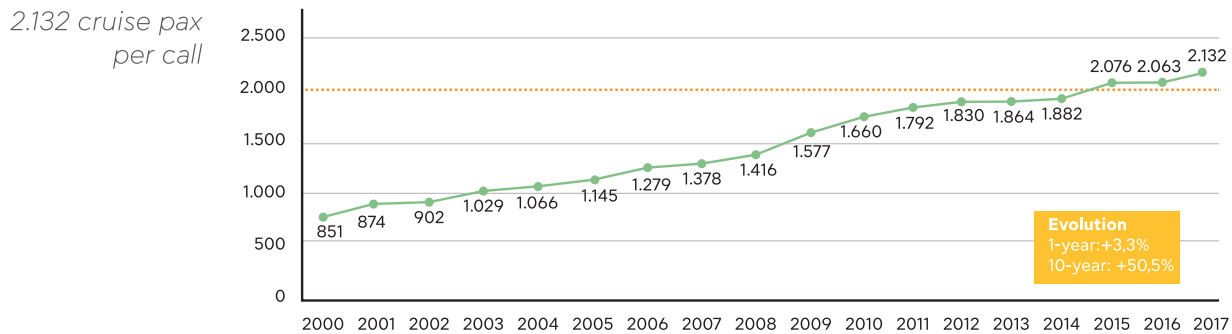
**Figure 1.2: Cruise Calls in MedCruise ports (2000-2017)**



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

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

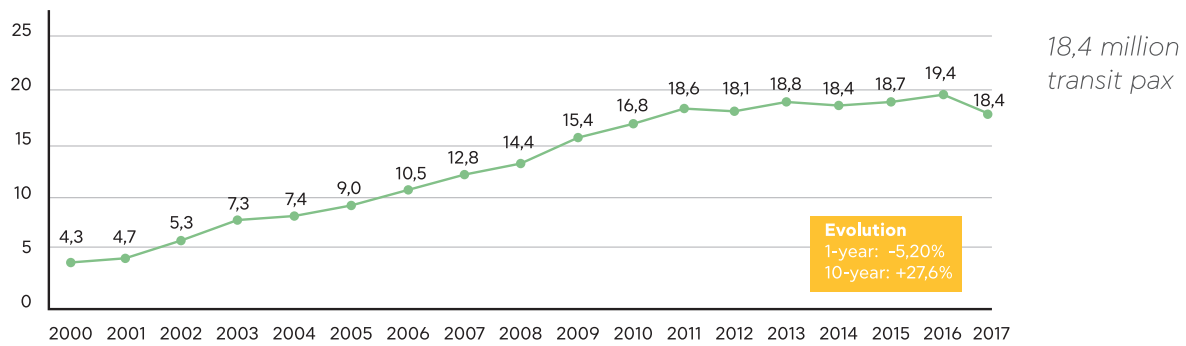
**Figure 1.3: Average Pax/Call in MedCruise ports (2000-2017)**



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

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

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



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

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

## 1.5 Cruise passenger movements in MedCruise Ports in 2017

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

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

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

In line with the MedCruise constitution, a MedCruise member port might administer or operate multiple ports of the same geographical region. This might occasionally affect to a certain extent specific results of the statistical analysis, for instance rankings or averages.

Table 1.4

# MedCruise ports cruise traffic overview in 2017

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

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

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

Table 1.5

# MedCruise Ports Cruise Traffic data **2017**

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

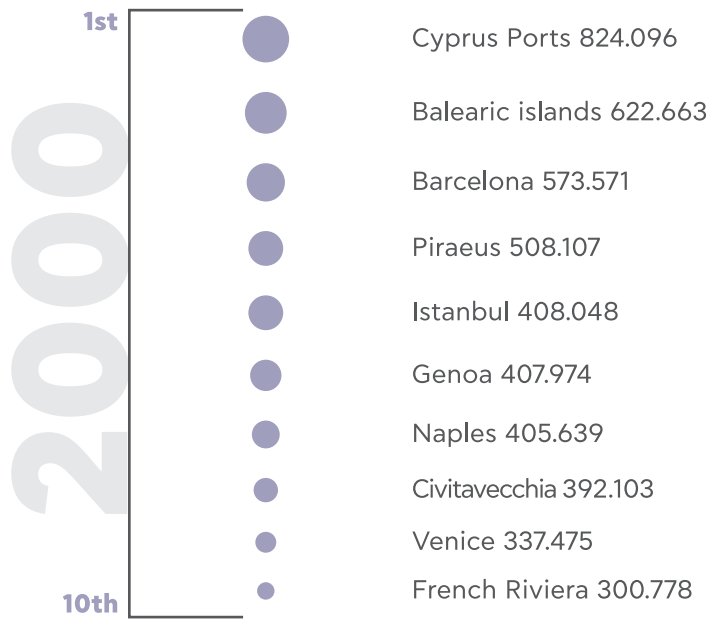
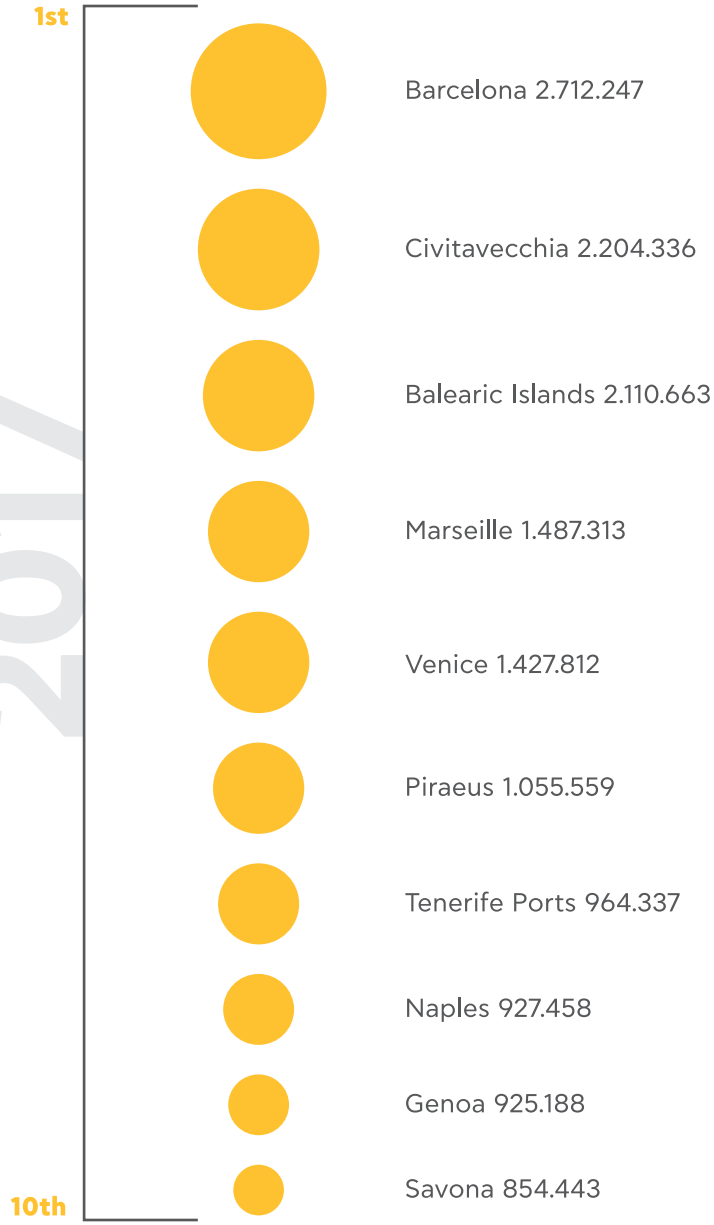


| No | Port                  | MedCruise Region | Total Pax. | Total Calls | Home in Pax. | Home out Pax. | Transit Pax. |
|----|-----------------------|------------------|------------|-------------|--------------|---------------|--------------|
| 35 | Kotor                 | Adriatic         | 541.017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

\* Cruise traffic in Egyptian Ports refers only to Alexandria Port.

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

# 2017



- Major Ports 2017
- Major Ports 2000

## CRUISE ACTIVITY TRENDS

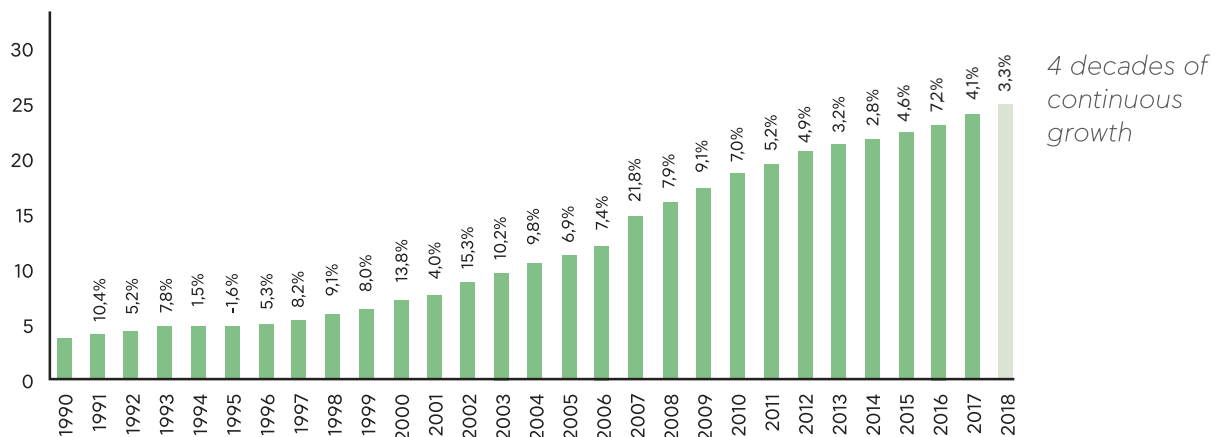
### 2.1 Trends in the Global Cruise Market

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

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

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

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



Source: Cruise Market Watch

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

Mediterranean destinations led the mentioned worldwide growth, recording extraordinary results with 8% more international arrivals than in 2016. Africa and Asia, the other two continents

where MedCruise members are located, also recorded increases, 8% and 6% growth, respectively.

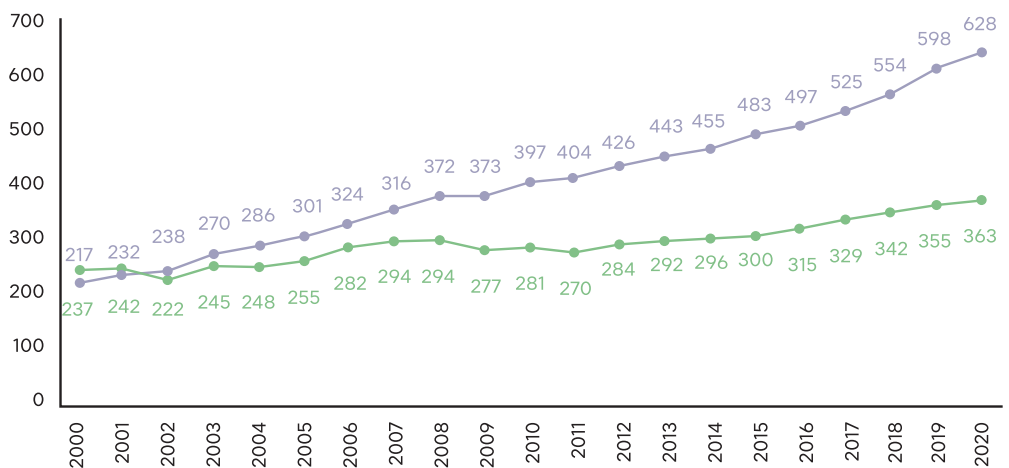
Cruise Lines International Association (CLIA), in its 2018 State of the Cruise Industry Outlook, revealed in December 2017, is projecting stronger growth for the cruise industry in 2018. CLIA expects 27,2 million passengers to cruise within 2018, while Cruise Market Watch (**Figure 2.1**), expects 26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

## 2.2 Global Cruise fleet

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

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

**Figure 2.2: Global Cruise Fleet 2000-2020 (Ships & Berths)** — No. of Ships — Berths (in .000s)



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

## 2.3 Deployment of Cruise Fleet

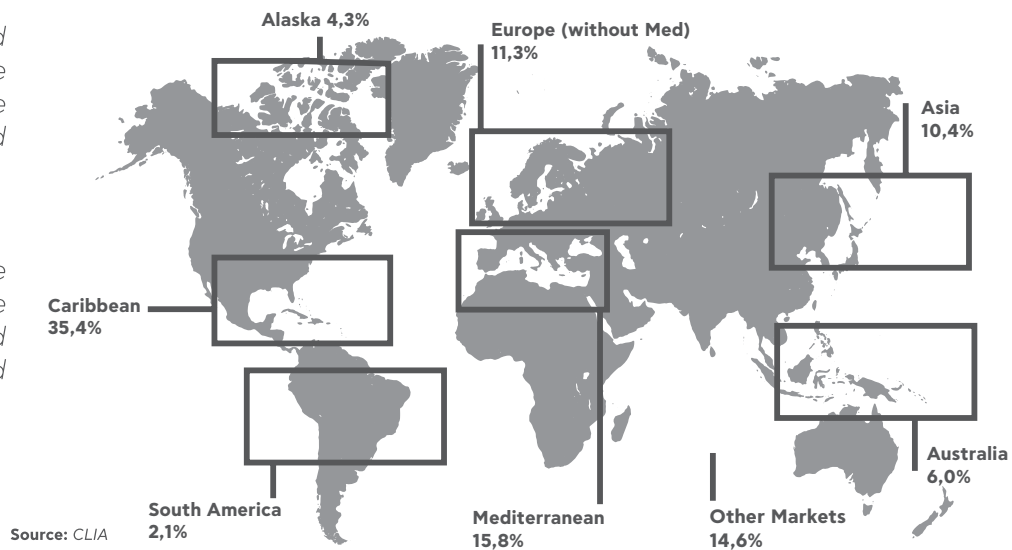
The Mediterranean and its adjoining seas has been one of the most dynamic cruise regions of the world in recent times. The patterns of cruise fleet deployment around the globe the past 15 years indicate that the share of the Med increased from 11,5% of the total cruise fleet deployed in 2003, to 12,9%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

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

**Figure 2.3: Global Deployment Shares 2017**

The Med: Second biggest cruise region in the world

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



Source: CLIA

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

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

**Table 2.1: 2016 Cruise Passenger Capacity in the Mediterranean**

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

Source: Cruise Industry News 2016- 2017 Annual Report

## 2.4 Contribution to the Global Economy

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

while cruise lines purchased goods and services related to cruise and port operations.

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

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

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

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

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

*\$57,9 billion direct global spending by cruise industry*

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

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

**Table 2.3: Total Cruise Sector Economic Contribution (2016)**

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

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

## 2.5 Cruise Passenger Sourcing

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

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

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

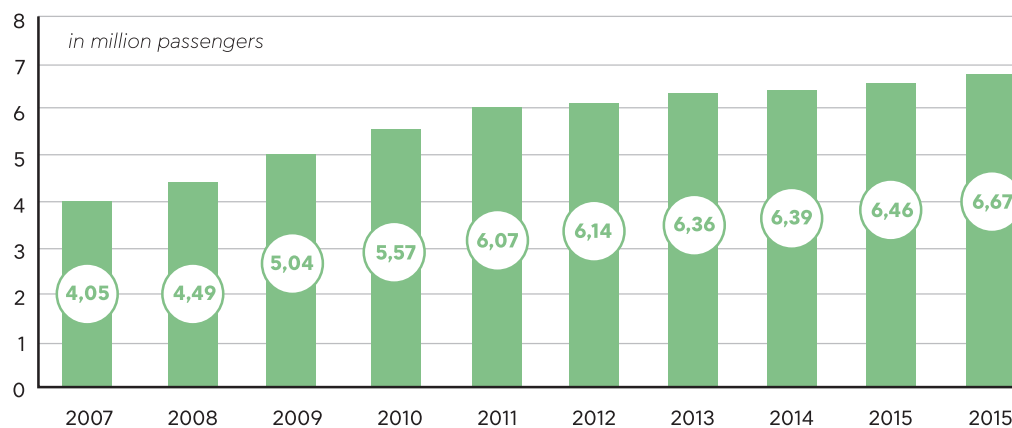
MedCruise has already embarked on making its member ports known, campaigning to generate interest of Asian people for cruising in the respective regions (for more information: [www.medcruise.cn](http://www.medcruise.cn)). At the same time MedCruise has embarked in a strategic partnership with the European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

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

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

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

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



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



# MedCruise

## Bringing the Med together

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





## TRENDS IN THE MEDITERRANEAN AND ITS ADJOINING SEAS

### 3.1 Evolution of Cruise Traffic (2013-2017)

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

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

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

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

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

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

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

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

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

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

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

## 3.2 Major MedCruise Ports

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

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

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

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

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

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

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

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

hosting ‘just’ 1,9 million passengers.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

6,7 million hosted in 2016 (Table 3.4).

Barcelona remains as the most popular cruise home-port in the Med, despite its 7,4% decrease, and hosting 1,4 million

passengers. Venice also remains at the second position after hosting 1,2 million passengers and being the fifth major port in the region in 2017.

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

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

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

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

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

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

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

Balearic Islands returned to the top of the list of the major cruise ports in terms of transit passengers after one year, as

recorded a growth of 1,2%. The number of visiting cruise passengers in Balearic Islands was 1,4 million transit passengers per year. Comparing to five years before (2013), Balearic Islands hosted 30,7% or 315.000 more transit passengers in 2017.

Following a 9,3% decrease comparing to 2016, Civitavecchia hosted, in 2017, 1,4

million transit passengers and stands as the second most popular cruise port.

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

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

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

the top 10, has recorded a growth of 23,9% or 125.000 more passengers.

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

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

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

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

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

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

### 3.3 Major Variations in MedCruise Ports

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

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

The ports that have not reached any of these thresholds and have been

excluded from the analysis of variations are Burgas, Canarian ports, Castellón, Constantza, Gioia Tauro, Huelva, Igoumenitsa, Istanbul, Kavala, Odessa, Patras, Taranto, Thessaloniki, Trabzon, Tunisian Ports, Varna and Volos.

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

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

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

| Total Cruise Passengers<br>Major variations 2017/2016 |         |        |                    | Total Cruise Passengers<br>Major variations 2017/2013 |         |        |                    |
|---|---------|--------|--------------------|---|---------|--------|--------------------|
| Port  | 2017    | 2016   | Var. 2017/<br>2016 | Port  | 2017    | 2013   | Var. 2017/<br>2013 |
| Brindisi  | 108.925 | 5.270  | 1966,89%           | Tarragona   | 51.393  | 1.421  | 3516,68%           |
| Tarragona   | 51.393  | 14.013 | 266,75%            | Brindisi  | 108.925 | 4.628  | 2253,61%           |
| Sibenik   | 27.718  | 12.276 | 125,79%            | Sète  | 47.377  | 11.084 | 327,44%            |
| Sète  | 47.377  | 23.791 | 99,14%             | Zadar   | 137.667 | 34.575 | 298,17%            |
| Costa Brava<br>Cruise Ports                           | 45.176  | 25.505 | 77,13%             | Ceuta   | 17.003  | 4.605  | 269,23%            |

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

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

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

| Total Cruise Calls<br>Major variations 2017/2016 |      |      |                    | Total Cruise Calls<br>Major variations 2017/2013 |      |      |                    |
|--|------|------|--------------------|--|------|------|--------------------|
| Port   | 2017 | 2016 | Var. 2017/<br>2016 | Port   | 2017 | 2016 | Var. 2017/<br>2013 |
| Bastia/<br>North Corsica                         | 73   | 23   | 217,39%            | Tarragona  | 37   | 3    | 1133,33%           |
| Brindisi   | 43   | 14   | 207,14%            | Brindisi   | 43   | 15   | 186,67%            |
| Alanya   | 22   | 13   | 69,23%             | Souda/Chania                                     | 84   | 47   | 78,72%             |
| Tarragona  | 37   | 22   | 68,18%             | Cagliari   | 161  | 94   | 71,28%             |
| Portimao   | 71   | 43   | 65,12%             | Portimao   | 71   | 42   | 69,05%             |

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

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

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

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

| Total Home In/Out Passengers<br>Major variations 2017/2016 |         |         |                    | Total Home In/Out Passengers<br>Major variations 2017/2013 |         |         |                    |
|--|---------|---------|--------------------|--|---------|---------|--------------------|
| Port   | 2017    | 2016    | Var. 2017/<br>2016 | Port   | 2017    | 2013    | Var. 2017/<br>2013 |
| Brindisi   | 22.842  | 7       | n/d                | Brindisi   | 22.842  | 119     | n/d                |
| Tarragona  | 14.238  | 1.842   | 672,96%            | Tarragona  | 14.238  | 0       | n/d                |
| Heraklion  | 18.874  | 7.302   | 158,48%            | Cagliari   | 20.338  | 5.731   | 254,88%            |
| Cagliari   | 20.338  | 8.456   | 140,52%            | Dubrovnik  | 68.105  | 24.840  | 174,17%            |
| Valletta   | 216.029 | 114.731 | 88,29%             | Valletta   | 216.029 | 102.034 | 111,72%            |

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

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

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

| Total Transit Passengers<br>Major variations 2017/2016 |        |        |                    | Total Transit Passengers<br>Major variations 2017/2013 |         |        |                    |
|--|--------|--------|--------------------|--|---------|--------|--------------------|
| Port   | 2017   | 2016   | Var. 2017/<br>2016 | Port   | 2017    | 2013   | Var. 2017/<br>2013 |
| Brindisi   | 86.083 | 5.263  | 1535,63%           | Tarragona  | 37.155  | 1.421  | 2514,71%           |
| Tarragona  | 37.155 | 12.171 | 205,27%            | Brindisi   | 86.083  | 4.509  | 1809,14%           |
| Antalya  | 2.762  | 929    | 197,31%            | Rijeka   | 12.656  | 685    | 1747,59%           |
| Sibenik  | 27.718 | 12.276 | 125,79%            | Sète   | 47.314  | 11.076 | 327,18%            |
| Sète   | 47.314 | 23.763 | 99,11%             | Zadar  | 136.931 | 32.939 | 315,71%            |

### 3.4 Passengers per Call

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

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

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

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

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

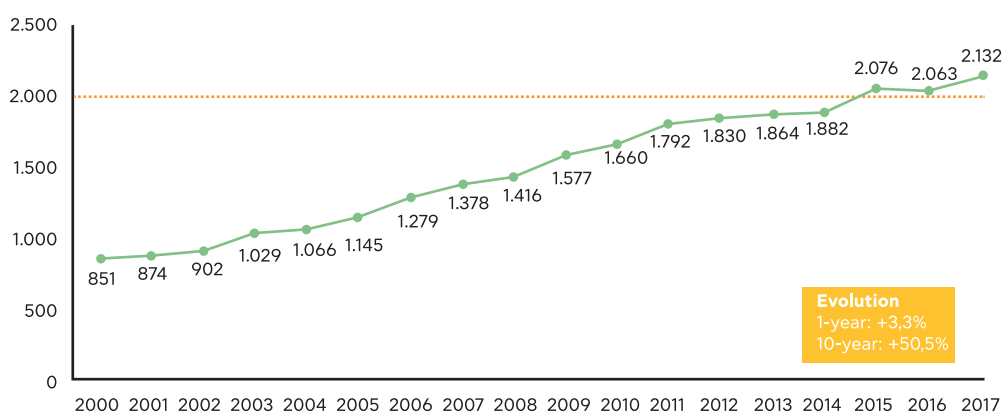
The deployment of bigger vessels in the Mediterranean and the adjoining seas is evident by the continuous increase of the average number of cruise passengers that reach a destination via one call alone.

In 2017, the average number of hosted cruise passengers per cruise call was 2.132. A year before, in 2016, this average had surpassed for the second time in history 2.000 passengers, standing at 2.063 passengers. Even

though the standard deviation from this average is significant, thus a note of caution essential, this is a milestone in all respects. In 2014, this average was standing at 1.882 passengers per call.

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

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





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

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



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

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

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

**Table 3.10: Cruise Pax/Cruise Call - Major 20**

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

### 3.5 Cruise Traffic Concentration

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

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

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

| No                       | Port                 | Total Pax<br>2017 | Cruise Pax Shares |               |               |               |               |
|--------------------------|----------------------|-------------------|-------------------|---------------|---------------|---------------|---------------|
|                          |                      |                   | 2017              | 2016          | 2015          | 2014          | 2013          |
| 1                        | Barcelona            | 2.712.247         | 8,16%             | 7,24%         | 7,32%         | 6,14%         | 5,56%         |
| 2                        | Civitavecchia        | 2.204.336         | 10,48%            | 9,93%         | 9,32%         | 9,15%         | 9,38%         |
| 3                        | Balearic Islands     | 2.110.663         | 8,52%             | 8,66%         | 8,33%         | 8,28%         | 9,16%         |
| 4                        | Marseille            | 1.487.313         | 4,08%             | 4,05%         | 3,60%         | 4,09%         | 4,70%         |
| 5                        | Venice               | 1.427.812         | 2,89%             | 3,08%         | 3,05%         | 3,46%         | 4,10%         |
| <b>Major 5 -SUM</b>      |                      | <b>9.942.371</b>  | <b>34,13%</b>     | <b>32,95%</b> | <b>31,62%</b> | <b>31,12%</b> | <b>32,90%</b> |
| 6                        | Piraeus              | 1.055.559         | 5,52%             | 5,94%         | 5,81%         | 6,71%         | 6,55%         |
| 7                        | Tenerife Ports       | 964.337           | 5,75%             | 5,91%         | 5,32%         | 5,08%         | 4,29%         |
| 8                        | Naples               | 927.458           | 2,09%             | 1,99%         | 1,62%         | 1,20%         | 1,15%         |
| 9                        | Genoa                | 925.188           | 2,63%             | 2,77%         | 2,37%         | 2,60%         | 2,69%         |
| 10                       | Savona               | 854.443           | 2,68%             | 2,08%         | 2,00%         | 2,31%         | 2,21%         |
| <b>Major 10 -SUM</b>     |                      | <b>14.669.356</b> | <b>52,79%</b>     | <b>51,64%</b> | <b>48,75%</b> | <b>49,01%</b> | <b>49,79%</b> |
| 11                       | Valletta             | 778.596           | 2,70%             | 2,99%         | 2,56%         | 2,42%         | 2,66%         |
| 12                       | Dubrovnik            | 748.918           | 3,58%             | 4,83%         | 4,66%         | 4,31%         | 4,24%         |
| 13                       | Livorno              | 698.780           | 2,01%             | 1,93%         | 1,88%         | 1,94%         | 2,01%         |
| 14                       | French Riviera Ports | 693.351           | 1,97%             | 1,64%         | 1,54%         | 1,58%         | 1,43%         |
| 15                       | Corfu                | 679.681           | 2,09%             | 1,93%         | 2,13%         | 1,84%         | 1,74%         |
| 16                       | Kotor                | 541.017           | 1,56%             | 1,49%         | 1,26%         | 1,16%         | 1,00%         |
| 17                       | Madeira Ports        | 540.593           | 0,90%             | 1,02%         | 1,00%         | 0,71%         | 0,68%         |
| 18                       | Lisbon               | 521.042           | 1,76%             | 1,88%         | 2,45%         | 1,87%         | 0,77%         |
| 19                       | Málaga               | 510.607           | 3,57%             | 3,76%         | 3,11%         | 3,19%         | 3,79%         |
| 20                       | Palermo              | 459.229           | 1,59%             | 1,50%         | 1,36%         | 1,44%         | 1,71%         |
| <b>Total (Major -20)</b> |                      | <b>20.841.170</b> | <b>74,53%</b>     | <b>74,62%</b> | <b>70,69%</b> | <b>69,49%</b> | <b>69,83%</b> |

In aggregate, the major-5 ports in terms of passenger movements had in 2017 a share standing at 34,1% of the total passenger movements in the Med and its adjoining seas. This is almost 2% higher than the share of the major-5 cruise ports a year before. When focusing on the major-20 ports, the share remains near 74,5% in 2017. The growth of cruising observed in the Med within the 21st century has spread proportionally in all ports of different size. When one concentrates in developments over the last five years though, it is evident that major cruise ports have grown their share of the total traffic, i.e. the major 20 ports had hosted 69,8% of the traffic in 2013, while in 2017 they hosted 74,5%.

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

**Table 3.12: Major 20 MedCruise Ports - Cruise Calls Concentration**

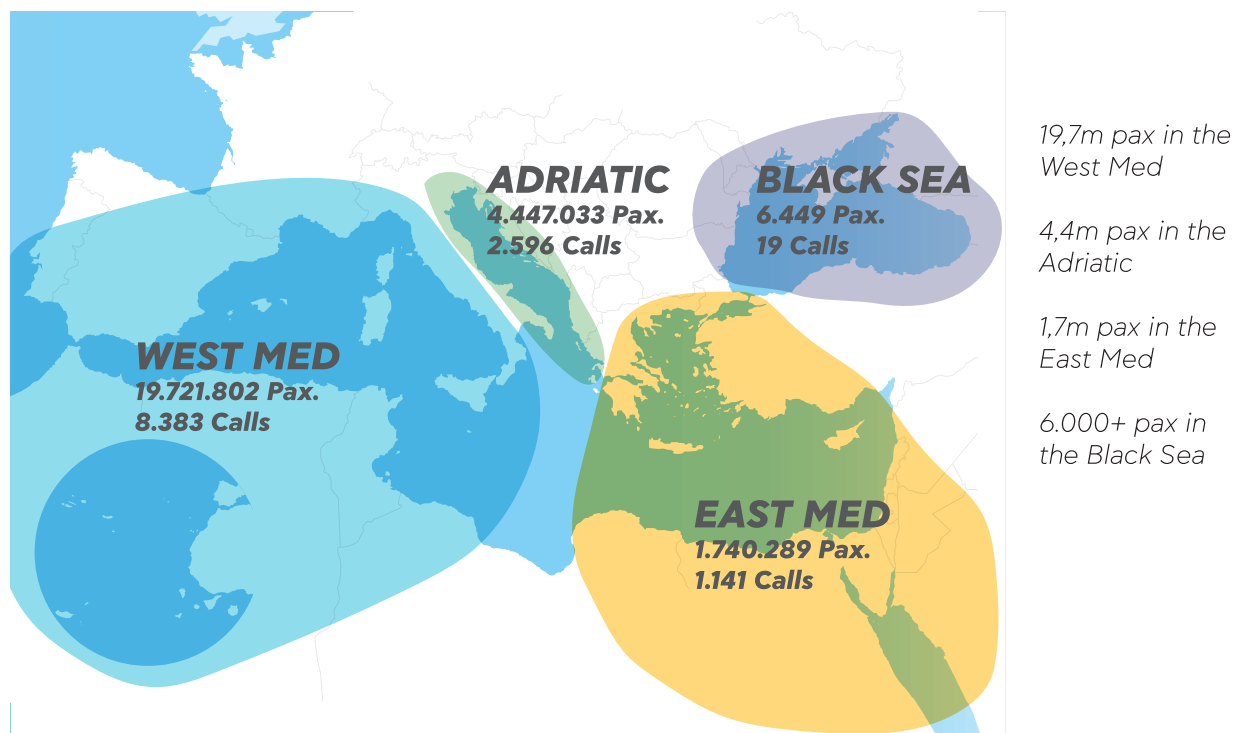
| No                       | Port                 | Total Calls  | Cruise Calls Shares |               |               |               |               |
|--------------------------|----------------------|--------------|---------------------|---------------|---------------|---------------|---------------|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

## SEASONALITY ANALYSIS

### 4.1 The MedCruise Regions

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

**Map 4.1: Cruise Traffic by MedCruise Region in 2017**



A total of 40 MedCruise members are located in the West Med region (**Table 4.1**). The cruise passenger movements that took place in these ports in 2017 reached 19,7 millions. And the number of cruise calls in this region was 8,617. This is the biggest region of the four MedCruise regions in terms of the share of cruise activities hosted, as West Med ports accommodated 76,1% of the total passenger movements that took place in the Med and a 69,1% share of the respective number of cruise calls.

**Table 4.1: Total Cruise Traffic 2017**

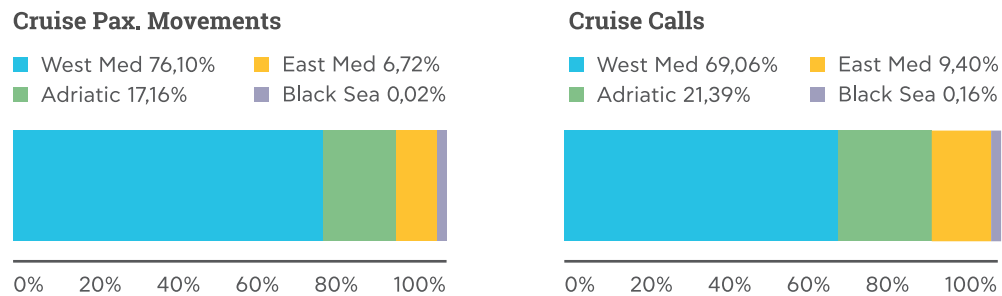
| Region    | No. of members | Total Cruise Pax. | Total Cruise Calls | Home In/Out Pax. | Transit Pax. |
|-----------|----------------|-------------------|--------------------|------------------|--------------|
| West Med  | 40             | 19.721.802        | 8.383              | 5.468.259       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

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

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

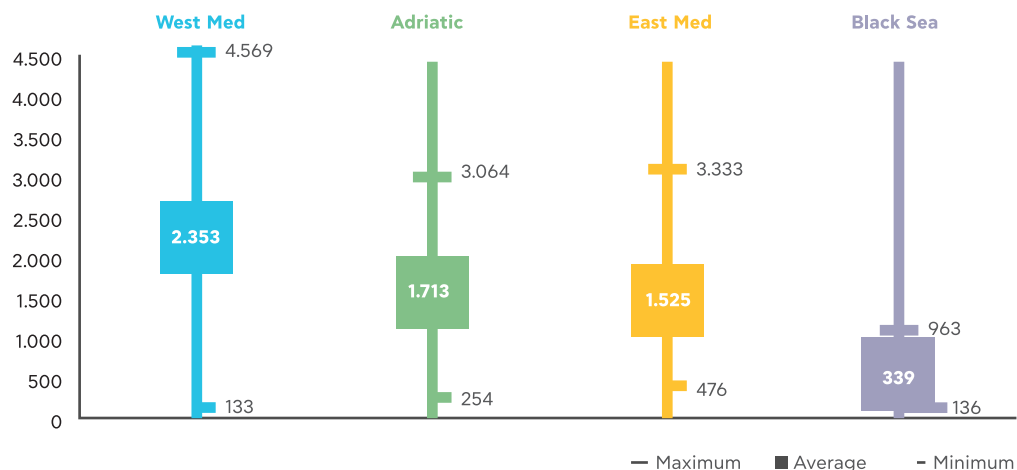
The Black Sea is the smallest distinctive geographical port region as regards the magnitude of cruise activities. This region represented in 2017 only 0,02% of the annual passenger movements and 0,2% of the annual cruise calls that took place in the area under examination. Cruise activities in the Black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

**Figure 4.1: Cruise Passenger Traffic Shares 2017 per region**



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

**Figure 4.2: Average Cruise Passengers/Call 2017 per region**



## 4.2 Cruise traffic evolution per region

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

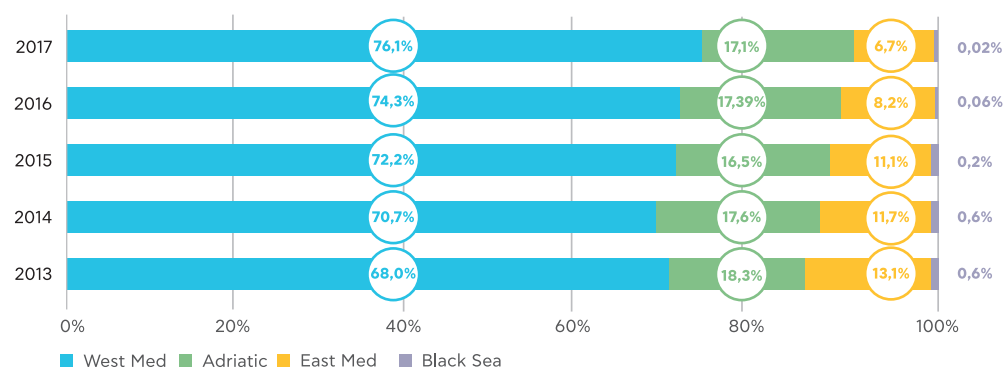
The East Med ports accommodated within 2017 a total of cruise passenger

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

**Table 4.2: Total Cruise Passenger Movements per region**

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

**Figure 4.3: Cruise Pax. Movements Evolution per region**



As regards the total number of cruise calls per region (**Table 4.3**), the evolution of the four sub-regions was negative. In the West Med the total of calls in 2017 was 2,9% less than in 2016. An even more notable decline was recorded in the Adriatic, where the number of cruise vessel calls in 2017 was 11,1% less

compared to the year before. The number of calls also declined substantially in the East Med (-25,03%), and almost eliminated in the Black Sea, where only 19 cruise calls happened in 2017. As a result, a total of 12.139 calls took place in 2017 among MedCruise ports, a number that is 7,3% less than in 2016.

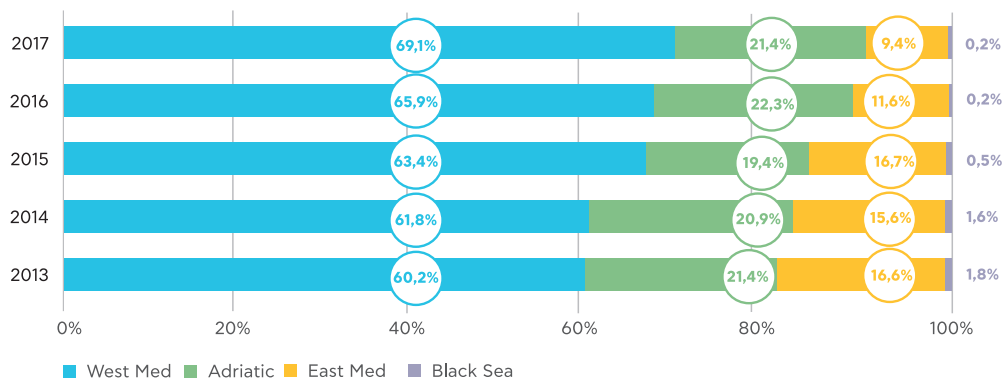
Looking at the 5-year trend, the number of calls declined in all four regions as well. The decline in the case of the West Med ports was 6,3% and 18,4% in the case of the Adriatic ports. A very significant decrease has been recorded in the case of the East Med (-53,7%) and, even more significant, in the Black Sea (-92,8%). Following these developments, the share of cruise calls in West Med

ports increased in the last five years from 60,2% of calls in the Med to 69,1%, the percentage of the Adriatic remained almost stable (21,4%), while East Med –from 16,6% in 2013 to 9,4% in 2017– and the Black Sea –from 1,8% in 2013 to 0,2% in 2017– have seen their respective shares of the total cruise calls in the Med declining (**Figure 4.4**).

**Table 4.3: Total Cruise Calls per region**

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

**Figure 4.4: Cruise Calls Evolution per region**



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

with Venice alone hosting 1,2 million of such passengers.

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



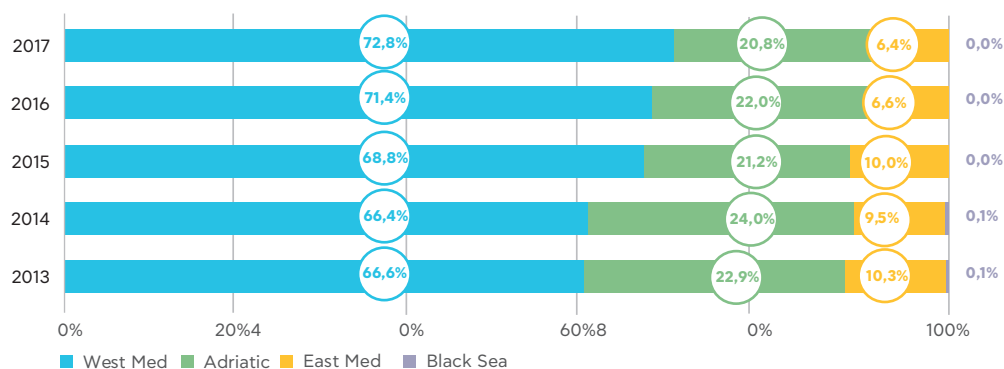
**Table 4.4: Total Home In/Out Passengers per region**

| Region       | 2017             | 2016             | Variation 2017/2016 | 2013             | Variation 2017/2013 |
|--------------|------------------|------------------|---------------------|------------------|---------------------|
| West Med     | 5,468,259        | 5,406,968        | 1,13%               | 5,312,051        | 2,94%               |
| Adriatic     | 1,564,711        | 1,670,358        | -6,32%              | 1,825,566        | -14,29%             |
| East Med     | 480,901          | 497,748          | -3,38%              | 824,242          | -41,66%             |
| Black Sea    | 460              | 463              | -0,65%              | 10,982           | -95,81%             |
| <b>Total</b> | <b>7,514,331</b> | <b>7,575,537</b> | <b>-0,81%</b>       | <b>7,972,841</b> | <b>-5,75%</b>       |

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

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

**Figure 4.5: Home In/Out Passengers Evolution per region**



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

Cruise ports located in Adriatic also recorded a decrease of transit cruise passengers in 2017. The decline was 4,9% as the Adriatic ports hosted 2,9 million transit passengers comparing to 3 million the year before. Comparing to 2013, transit passengers increased by 10,9% and the share of the Adriatic lowered to 15,7% of the

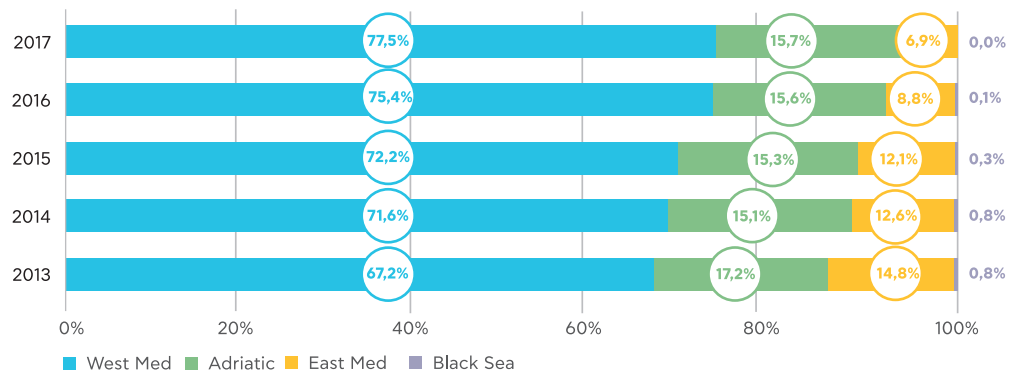
total transit passengers in the Med and its adjoining seas comparing to 17,2% five years before. The number of transit passengers in East Med ports in 2017 was 26,9% less than in 2016, and 54,9% less than in 2013. The Black Sea ports have seen extensively lower numbers of passengers cruising the region in 2017, with the 5.989 transit passengers traffic standing 96,1% lower than in 2013.

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

**Table 4.5: Total Transit Passengers per region**

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

**Figure 4.6: Transit Passengers Evolution per region**



### 4.3 The MedCruise Growth Indexes (MEDGRI)

19,7m pax in the West Med

4,4m pax in the Adriatic

1,7m pax in the East Med

6.000+ pax in the Black Sea

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

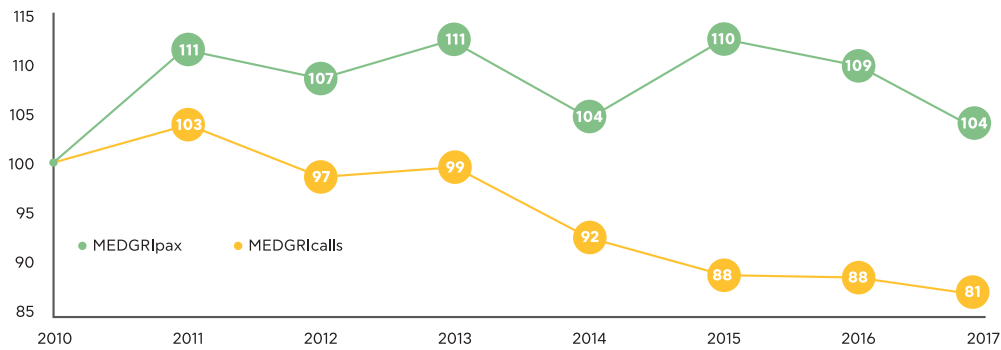
**MEDGRIpax (Figure 4.7)** is the index that monitors the annual trend of cruise passenger movements in the Med and in each of the four regions in terms of passenger movements. The index has 2010 as the basis year (MEDGRIpax=100). **Figure 4.7** presents the evolution since the base year, illustrating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

Looking at regional trends Black Sea ports that had experienced the most remarkable growth of all regions in 2013 and 2014, returned in 2015 to half the levels of 2010 and to just 6 in 2017. The index is also lower (52) in the case of East Med region compared to the previous year (66). The

two other regions continue to host more cruisers than those they were hosting in 2010, with the respective 2017 values of MEDGRIpax standing at 105 in the Adriatic and at 114 in the West Med case.

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

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

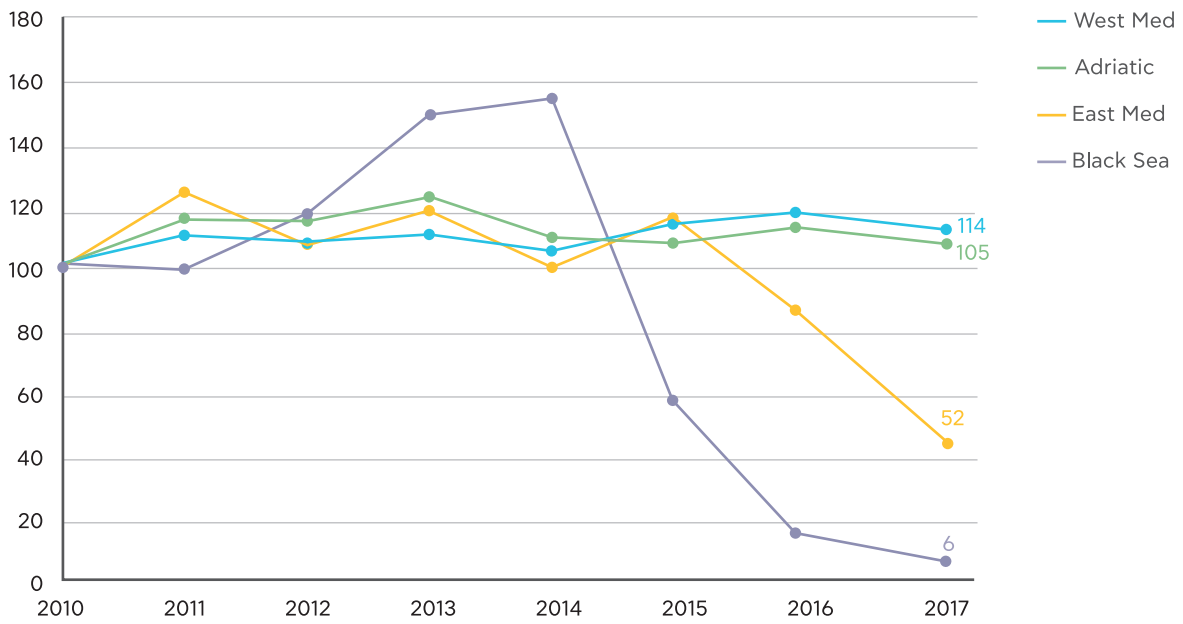


MEDGRI2010 = 100

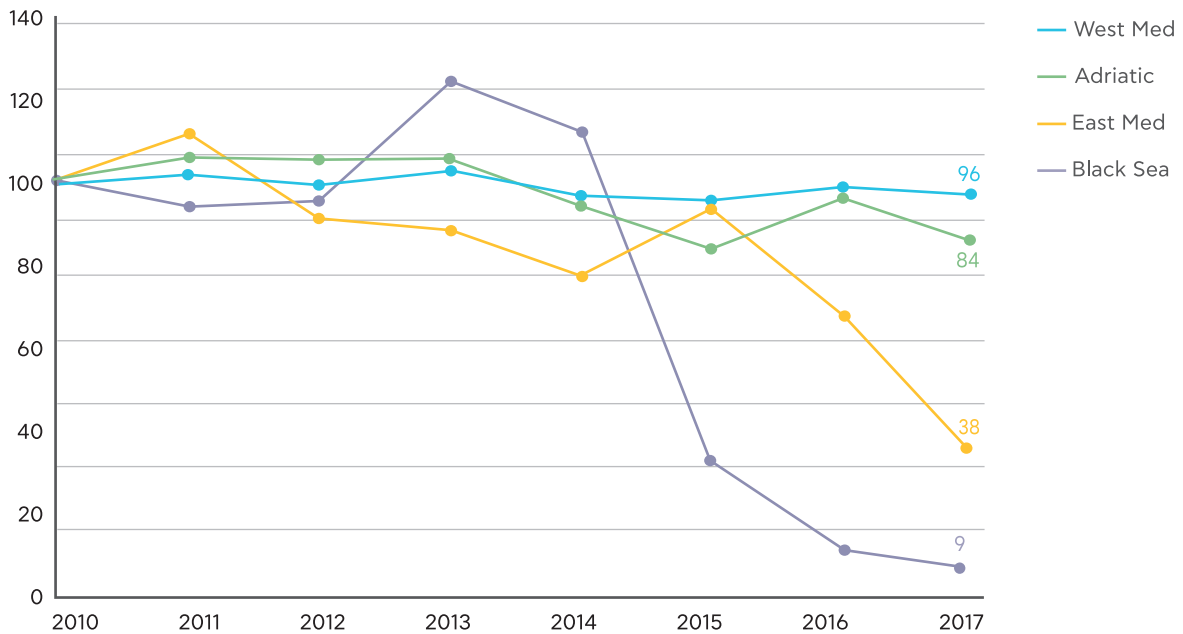
MEDGRIpax = 104

MEDGRIcalls = 81

**Cruise Pax Movements**



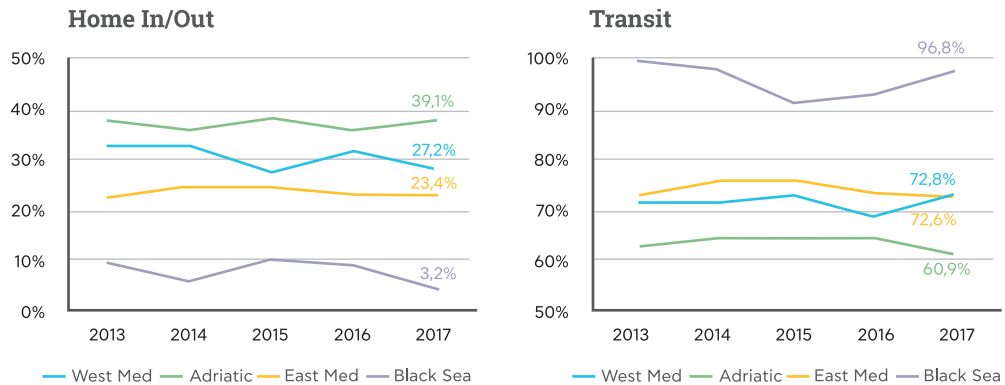
**Cruise Calls**



**Figure 4.8** provides visualised information on the evolution of home in/out shares per region, as well as those of the transit passenger movements comparing to the total of the cruise passengers recorded in each of the four MedCruise regions

per year. Evidently, a major part of cruise activities taking place in the Adriatic (39,1% in 2017), the East Med (23,4%) and the West Med (27,2%), are home-porting activities. The respective percentage of the Black Sea was 3,2% in 2017.

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



## 4.4 Major ports per MedCruise region

In this section the reader might find a presentation of the major ports per region, an overall picture of the variation of passenger movements and cruise calls when comparing the activities of 2017 with those of 2016, as well as a similar comparison with the passenger movements and calls that had been recorded in 2013.

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

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

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

**Table 4.7: Major Ports per region: Total Cruise Calls**

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

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

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

In the Adriatic, Venice, the second major port of all in the Med and its adjoining

seas as regards the hosting of passengers embarking and disembarking a cruise, hosted 1,2 million home in/out passengers within a year.

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

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

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

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

Dubrovnik sustains as the major port of the Adriatic region in terms of transit

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

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

**Table 4.9: Major Ports per region: Total Transit Passengers**

| Region   | No | Port             | 2017      | 2016      | Variation<br>2017/2016 | 2013      | Variation<br>2017/2013 |
|----------|----|------------------|-----------|-----------|------------------------|-----------|------------------------|
| West Med | 1  | Balearic Islands | 1,372,853 | 1,357,248 | 1,15%                  | 1,050,745 | 30,66%                 |
|          | 2  | Civitavecchia    | 1,354,343 | 1,492,667 | -9,27%                 | 1,548,261 | -12,52%                |
|          | 3  | Barcelona        | 1,271,864 | 1,127,775 | 12,78%                 | 1,092,966 | 16,37%                 |
| Adriatic | 1  | Dubrovnik        | 680,813   | 763,561   | -10,84%                | 1,111,663 | -38,76%                |
|          | 2  | Corfu            | 609,766   | 678,050   | -10,07%                | 673,916   | -9,52%                 |
|          | 3  | Kotor            | 539,653   | 535,232   | 0,83%                  | 317,746   | 69,84%                 |
| East Med | 1  | Piraeus          | 722,948   | 741,472   | -2,50%                 | 993,876   | -27,26%                |
|          | 2  | Heraklion        | 162,819   | 231,478   | -29,66%                | 214,577   | -24,12%                |
|          | 3  | Souda/Chania     | 127,285   | 147,915   | -13,95%                | 124,205   | 2,48%                  |

## 4.5 Cruise Traffic per country

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

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

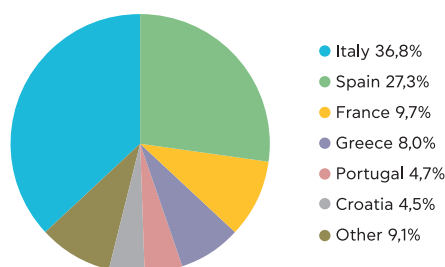
As regards the number of cruise calls, the share of Italy is 28,7% of the total calls, Spain 24,0%, and Greece 10,1%. The other major (in terms of cruise calls per year) countries are France (8,6%), Croatia (8,2%), and Portugal (7,0%).

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

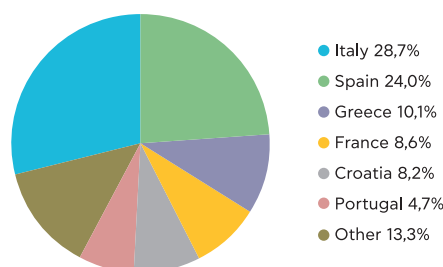
Transit passenger movements per country are a bit more balanced. Italy (32,4%), Spain (24,6%), and France (11,0%) host double-digit shares, while Greece (8,9%), Portugal (6,3%), and Croatia (5,9%) retain significant shares as well.

**Figure 4.9: Cruise Traffic per MedCruise Country (2017)**

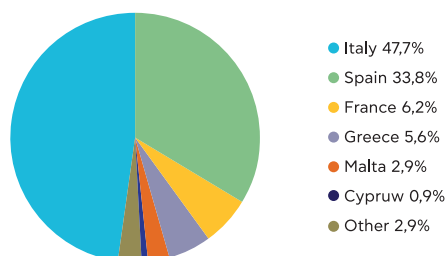
**Pax. Movements**



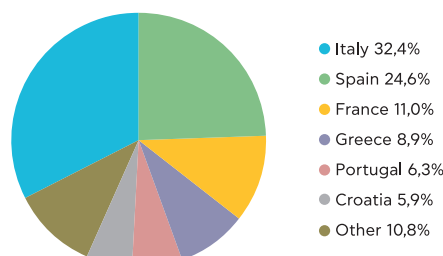
**Cruise Calls**



**Home In/Out Pax**



**Transit Pax.**



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

The evolution of cruise traffic is quite different when comparing the variation

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

**Table 4.10: Cruise Passenger Movements per MedCruise Country**

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

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

The medium-term trends of the number of cruise calls per country indicate that Gibraltar (31,3%), Slovenia (25,9%),

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

Table 4.11: Cruise Calls per MedCruise Country

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



## #PortsTogether

# ANALYSIS PER MEDCRUISE PORT SIZE

## 5.1 Categories of MedCruise ports per size

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

These two categories are:

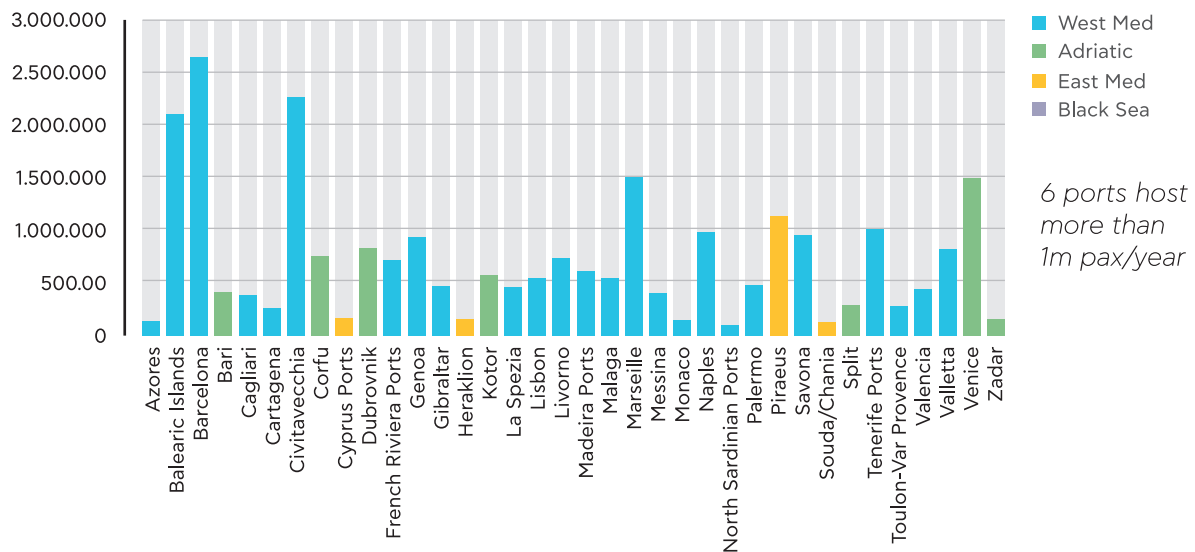
|                    |  |
|--------------------|--|
| <b>Category A:</b> | Port members with more than 120.000 cruise passenger traffic in 2017 |
| <b>Category B:</b> | Port members with less than 120.000 cruise passenger traffic in 2017 |

*Half of MedCruise ports host more than 120.000 pax/year*

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

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

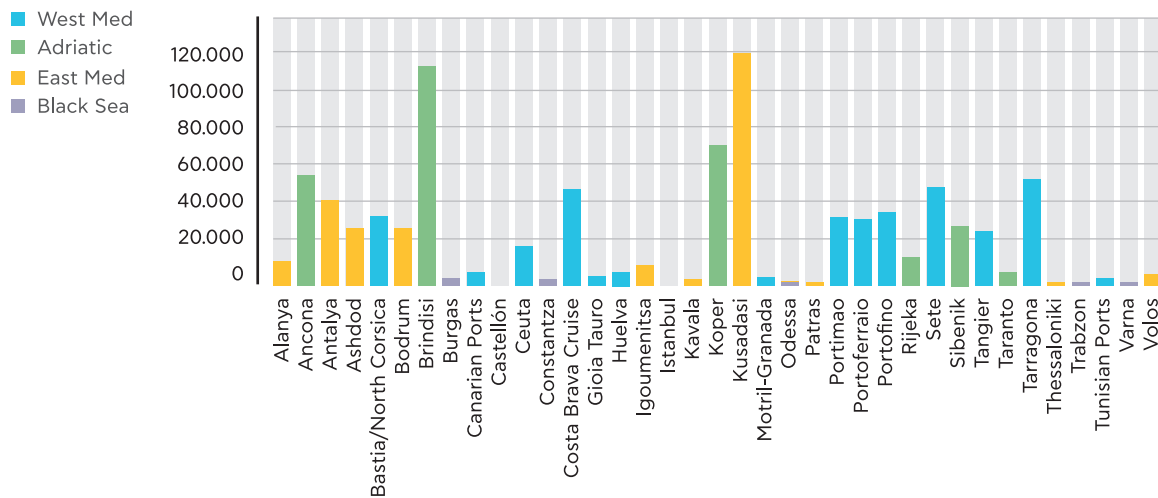
**Figure 5.1: Category A - MedCruise Ports per region**



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

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

**Figure 5.2: Category B - MedCruise Ports per region**



## 5.2 Categories of MedCruise ports per size

**Table 5.1** presents the major variations as regards total passengers, cruise calls, home in/out, and transit passengers in the case of each of the two size categories. In 2017, Category A ports registered a decline of total passenger movements by 3,4%, of home in/out passengers by 1,0%, and of transit passengers by 4,1%. In terms of cruise calls Category A ports experienced a decrease by 6,7%.

**Table 5.1: Cruise Traffic Variations by size category**

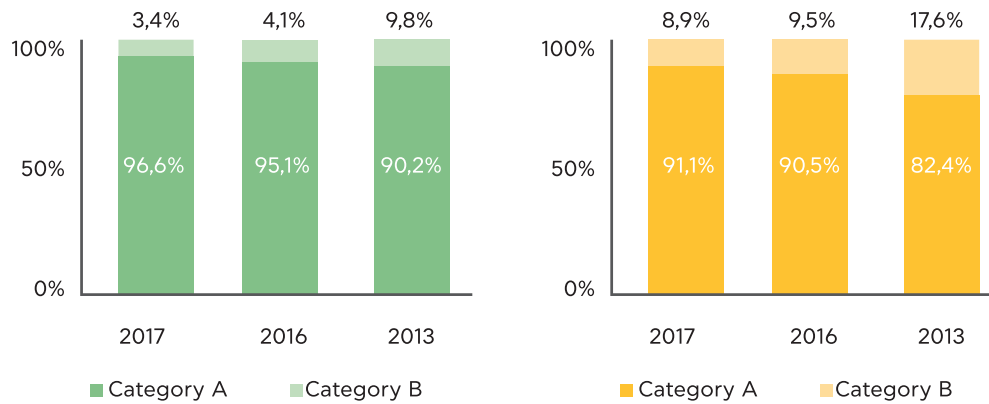
| Category                |          | 2017       | 2016       | Variation 2017/2016 | 2013       | Variation 2017/2013 |
|-------------------------|----------|------------|------------|---------------------|------------|---------------------|
| <b>Total Pax.</b>       | <b>A</b> | 25.039.863 | 25.923.190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

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

As **Figure 5.3** shows, the share of Category B ports remains a minor share of the total cruise passengers that visit the Mediterranean and its adjoining seas. Taking for example the cruise passenger movements that happened in 2017, the share of Category B ports barely touches

the 3,4% of the total; one year earlier this percentage was 4,1%, but developments that took place mostly in East Med and the Black Sea have resulted in a significant decrease of cruise activities over the last year. Five years earlier this percentage was standing at a notably higher level of 9,8%. As regards the total cruise calls hosted per year, the share of Category B ports proves to be higher, as it exceeds 8,8% of the total calls of 2017. This share had been almost a double digit one year earlier (9,5% in 2016) and even higher (17,6%) five years before.

**Figure 5.3: Cruise Traffic Evolution by size category**



### 5.3 Variations by Size Category per Region

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

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

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

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

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

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

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

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

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

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

**Table 5.4** details the trends per size category as regards the evolution of home in/out passengers. In this case, as one would expect, the big ports of Category A are dominant. These ports recorded almost 99% of passengers of this type. Thus, they are the ones demanding closer consideration. 5,5 million home in/out passengers within 2017 visited Category A West Med ports, a number that equals 72,6% of the total home in/out passengers in the Med. Another 20,4% (1,5 million passengers) is hosted in the Adriatic Category A ports and the rest 5,6% (423.609 passengers) in the biggest East Med ports. The records of 2017 are positive in the case of East Med (1,3%) and in the West Med (1,0%), but negative in the Adriatic (-7,8%). Looking at the mid-term trends though the levels of 2017 home in/out traffic in the West Med were higher than in 2013 by 2,7%; and lower in the Adriatic and in the East Med by 13,8% and 8,9% decline, respectively.

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

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

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

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

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

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

# Meet MedCruise

Alanya | Ancona | Ashdod | Azores  
Balearic Islands | Barcelona | Bari/Brindisi  
Bastia/North Corsica | Burgas



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

## #PortsTogether

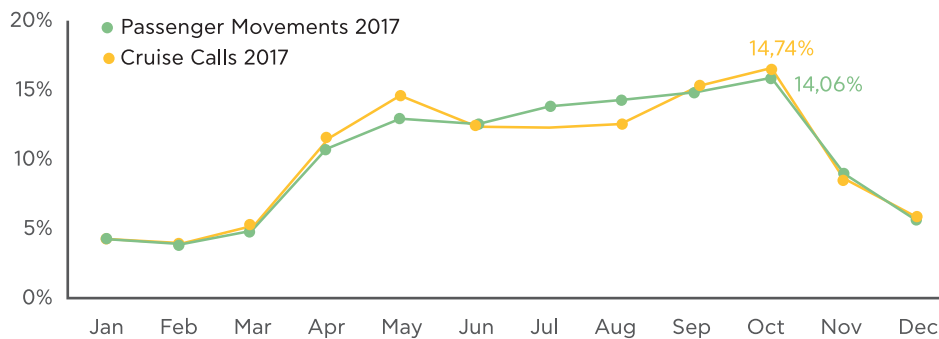
# SEASONALITY ANALYSIS

## 6.1 Seasonality in MedCruise Ports

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

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

**Figure 6.1: Cruise Passenger Shares per month (2017)**



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

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

**Table 6.1: Total Cruise Traffic per month in 2017**

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

May to October:  
73,3% of  
total visits

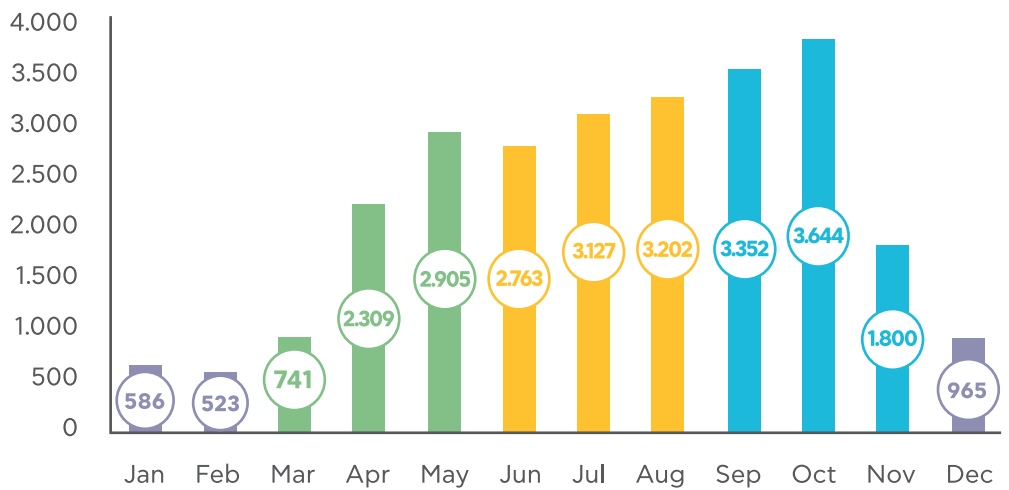
Each month of the May-October period hosts, in a most balanced way, passenger movement shares of 10-14%. In total, 73,3% of the 2017 cruise passenger movements happened during the specific six-months period. The share of the total passenger movements registered during the three winter months (January,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

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

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

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

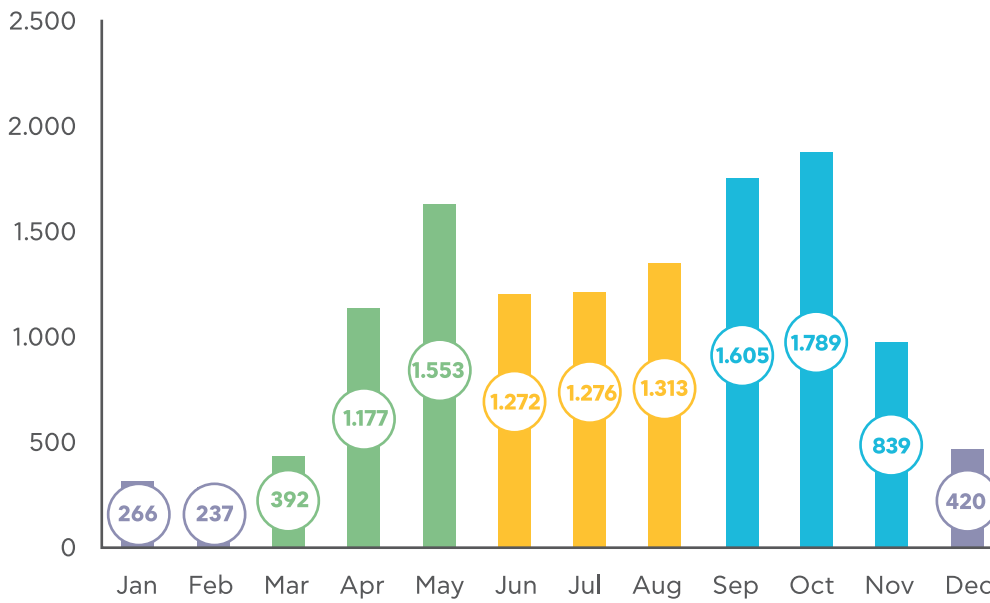
**Figure 6.2: Total Cruise Pax. per month (in thousands; 2017)**



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



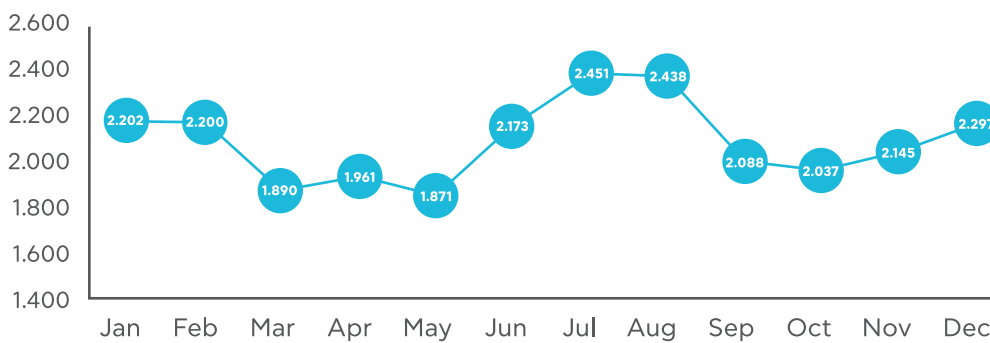
**Figure 6.3: Total Cruise Calls per month (2017)**



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

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

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



*July 2017: Highest pax per call rate (2.451)*

## 6.2 Seasonality by region in 2017

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

In West Med the cruise traffic is distributed in a more balanced way throughout the year. Cruise activities during the winter months correspond to a 10,0% share of the total cruise passenger movements in the region, while 34,0% takes place during the summer. In the Adriatic and the East Med cruise traffic is concentrated mostly during the

second half of the year, in particular the period commencing in June and ending in November. In absolute numbers the passenger movements in the Adriatic during the winter months (Dec-Feb) did not exceed 70.000, corresponding to a minimal 1,5% of the total traffic taking place in the region on an annual basis.

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

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

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

| 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     | 23,56%                 | 33,41%        | 34,26%        | 8,77%        | 23,48%             | 32,29%        | 33,83%        | 10,40%       |
| Adriatic     | 19,38%                 | 45,61%        | 33,27%        | 1,74%        | 19,71%             | 45,16%        | 33,70%        | 1,44%        |
| East Med     | 24,93%                 | 41,86%        | 32,50%        | 0,71%        | 25,88%             | 35,36%        | 35,65%        | 3,12%        |
| Black Sea    | 7,17%                  | 66,52%        | 26,30%        | 0,00%        | 41,86%             | 14,46%        | 43,68%        | 0,00%        |
| <b>Total</b> | <b>22,77%</b>          | <b>36,49%</b> | <b>33,94%</b> | <b>6,79%</b> | <b>23,06%</b>      | <b>34,51%</b> | <b>33,94%</b> | <b>8,50%</b> |

## 6.3 Seasonality by size in 2017

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

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

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

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

when 36,5% of the total cruise calls take place.

Focusing on the different types of passenger movements, the picture is quite balanced during the summer and autumn trimesters for ports of both categories. During each of these trimesters around one third of the total cruise passenger movements takes

place. The only exception is the case of transit passengers in smaller ports, where a high concentration is observed during the autumn months (40,6%). Given the low levels of cruise passenger movements registered this year in Category B ports during winter months, it is no surprising that almost no home-porting activity (0,06%) took place in the particular ports during this period of time.

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

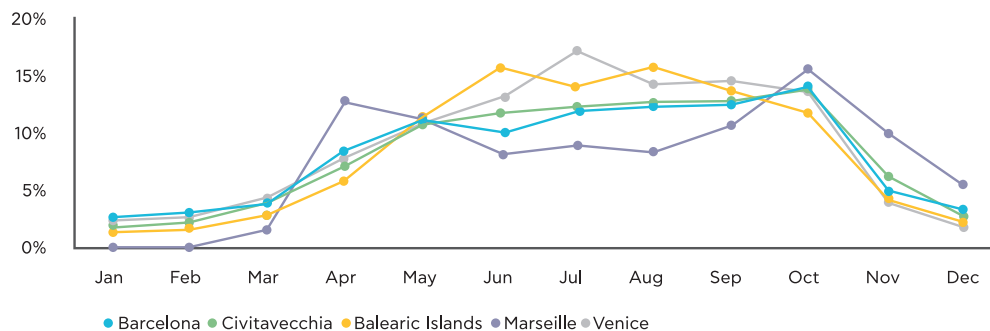
|                             | Size Category | Mar-May | Jun-Aug | Sept-Nov | Dec-Feb |
|-----------------------------|---------------|---------|---------|----------|---------|
| <b>Cruise Pax Movements</b> | A             | 22,95%  | 34,91%  | 33,92%   | 8,22%   |
|                             | B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

## 6.4 Seasonality of cruise activity in MedCruise Ports

Seasonality trends in the major five ports in the Med (**Figure 6.5**) do not differ remarkably from that of the total sample. Civitavecchia, Balearic Islands and Venice register in January, February and December movements that do not exceed 4% of their total annual traffic. Whereas Barcelona is also close to these numbers, Marseille records a slightly higher share of passenger movements

during winter months, while at the same time having a significantly lower share during the months from May to September. The concentration of traffic in the period May-September is far more evident in Venice and Balearic Islands (71,5% and 71,0% respectively of the total traffic) rather than in any other major port.

**Figure 6.5: Major 5 MedCruise Ports Cruise Pax Seasonality 2017**



*Seasonality patterns of 5 major ports*

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

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

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

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

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

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

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

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

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

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

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

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

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

The **Appendix** presents the seasonality of cruise activities in MedCruise ports based on the shares that each port recorded per trimester, providing a clear picture of the distribution of traffic in each port per three months period during the year 2017.

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# APPENDIX I

## MedCruise Ports: Total Cruise Passenger Movements 2013-2017

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



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

## APPENDIX II

### MedCruise Ports: Total Cruise Calls 2013-2017

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

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

## APPENDIX III

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

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

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

## APPENDIX IV

### MedCruise Ports: Total Transit Passengers 2013-2017

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

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

## APPENDIX V

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

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



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

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

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

## APPENDIX VI

### MedCruise Ports per Size Category

| Category A (>120.000 pax.) |                       |                  | Category B (≤120.000 pax.) |                          |                  |
|----------------------------|-----------------------|------------------|----------------------------|--------------------------|------------------|
| No                         | Port                  | Cruise Pax. 2017 | No                         | Port                     | Cruise Pax. 2017 |
| 1                          | Azores                | 135.783          | 1                          | Alanya                   | 12.189           |
| 2                          | Balearic Islands      | 2.110.663        | 2                          | Ancona                   | 52.086           |
| 3                          | Barcelona             | 2.712.247        | 3                          | Antalya                  | 39.995           |
| 4                          | Bari                  | 397.588          | 4                          | Ashdod                   | 26.757           |
| 5                          | Cagliari              | 424.305          | 5                          | Bastia/North Corsica     | 31.661           |
| 6                          | Cartagena             | 236.412          | 6                          | Bodrum                   | 30.876           |
| 7                          | Civitavecchia         | 2.204.336        | 7                          | Brindisi                 | 108.925          |
| 8                          | Corfu                 | 679.681          | 8                          | Burgas                   | 1.925            |
| 9                          | Cyprus Ports          | 123.397          | 9                          | Canarian ports           | 4.346            |
| 10                         | Dubrovnik             | 748.918          | 10                         | Castellón                | 411              |
| 11                         | French Riviera Ports  | 693.351          | 11                         | Ceuta                    | 17.003           |
| 12                         | Genoa                 | 925.188          | 12                         | Constantza               | 1.891            |
| 13                         | Gibraltar             | 404.995          | 13                         | Costa Brava Cruise Ports | 45.176           |
| 14                         | Heraklion             | 181.693          | 14                         | Gioia Tauro              | 4.141            |
| 15                         | Kotor                 | 541.017          | 15                         | Huelva                   | 6.571            |
| 16                         | La Spezia             | 454.954          | 16                         | Igoumenitsa              | 9.088            |
| 17                         | Lisbon                | 521.042          | 17                         | Istanbul                 | 0                |
| 18                         | Livorno               | 698.780          | 18                         | Kavala                   | 3.226            |
| 19                         | Madeira Ports         | 540.593          | 19                         | Koper                    | 72.175           |
| 20                         | Málaga                | 510.607          | 20                         | Kusadasi                 | 118.448          |
| 21                         | Marseille             | 1.487.313        | 21                         | Motril-Granada           | 4.111            |
| 22                         | Messina               | 390.196          | 22                         | Odessa                   | 1.636            |
| 23                         | Monaco                | 168.017          | 23                         | Patras                   | 952              |
| 24                         | Naples                | 927.458          | 24                         | Portimao                 | 29.859           |
| 25                         | North Sardinian Ports | 133.035          | 25                         | Portoferraio             | 29.463           |
| 26                         | Palermo               | 459.229          | 26                         | Portofino                | 35.203           |
| 27                         | Piraeus               | 1.055.559        | 27                         | Rijeka                   | 12.656           |
| 28                         | Savona                | 854.443          | 28                         | Sète                     | 47.377           |
| 29                         | Souda/Chania          | 128.067          | 29                         | Sibenik                  | 27.718           |
| 30                         | Split                 | 232.244          | 30                         | Tangier                  | 23.550           |
| 31                         | Tenerife Ports        | 964.337          | 31                         | Taranto                  | 8.546            |
| 32                         | Toulon-Var Provence   | 239.023          | 32                         | Tarragona                | 51.393           |
| 33                         | Valencia              | 411.317          | 33                         | Thessaloniki             | 2.424            |
| 34                         | Valletta              | 778.596          | 34                         | Trabzon                  | 206              |
| 35                         | Venice                | 1.427.812        | 35                         | Tunisian Ports           | 5.317            |
| 36                         | Zadar                 | 137.667          | 36                         | Varna                    | 791              |
|                            |                       |                  | 37                         | Volos                    | 7.618            |

## ***The MedCruise Team***

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

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