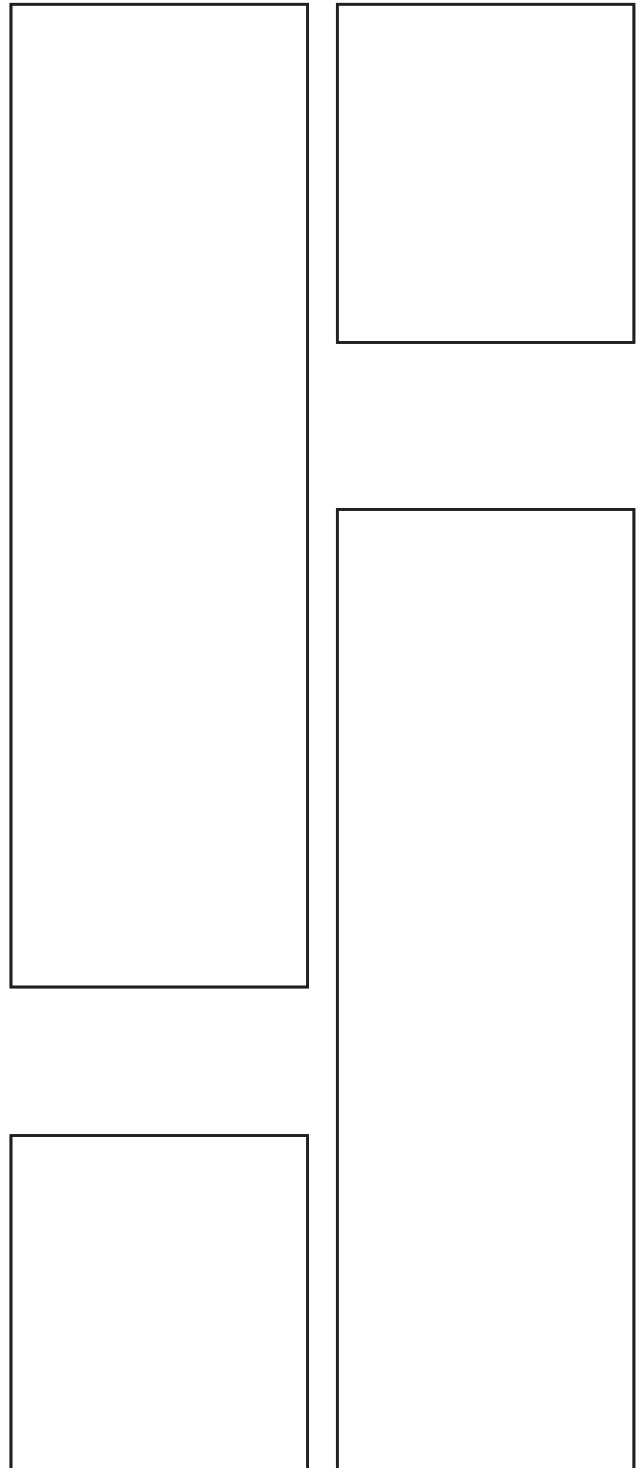


2021 Statistics

A MedCruise Report

Cruise activities in MedCruise ports



Cruise activities in MedCruise ports Statistics report 2021

A MedCruise report produced by

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Data, figures, maps and tables of the report might be freely reproduced acknowledging MedCruise Association and the present report as the source of information.

All current and past data of the present report refer to the cruise passenger movements and cruise calls that have taken place at MedCruise member ports as of January 2022.

Preface

It a pleasure to introduce to the cruise industry the **MedCruise Statistics 2021** Report.

The present edition of “Cruise activities in MedCruise ports: Statistics report 2021” is part of a long series of publication produced by MedCruise Association. We can consider this document as a highly expected annual report and one of the flagship publications of our Association.

The report shows with clear numbers the situation of cruise activities in the Mediterranean and its adjoining seas over the past year and reveals the market trends. Moreover, it enables our port members, associate members and cruise industry to better understand the current challenges but also allow us to adjust to dynamic market structures and solutions.

Although the 2021 year has been experienced with too many similarities with 2020, one more time, we have all seen that the cruise industry and every port have shown remarkable agilities to handle the global health crisis. As responsible executives of this amazing industry, we have always been looking at the horizon in a positive manner and we can allow ourselves to pause, slow down and welcome an optimistic and prosperous 2022.

The number of the ships that are sailing back today in the region shows that MedCruise with the cruise industry succeeded in bringing differences together and doing what we know best: connecting travellers from all around the globe in a safe manner and inscribing unforgettable memories.

The statistics of 2021 reveals the fast ‘restart’ and dexterity of all the stakeholders in just one year. The comparison of 2021 with 2019’s data, shows us a full return of cruise activities allowing a sustainable growth.

Honoured to be the President of such a vibrant and proactive association representing so many ports, I would like to take the opportunity to truly thank MedCruise Secretariat for their fantastic work in developing this report, analysing and bringing the data together in a useful manner and of course our valuable port members for sharing their statistics with us.

I am confident that, like MedCruise, this report works towards the further development of cruise activities in the Med and its adjoining seas.

Enjoy the reading!

Our Diversity, Our Strength

#PortsTogether
Figen Ayan

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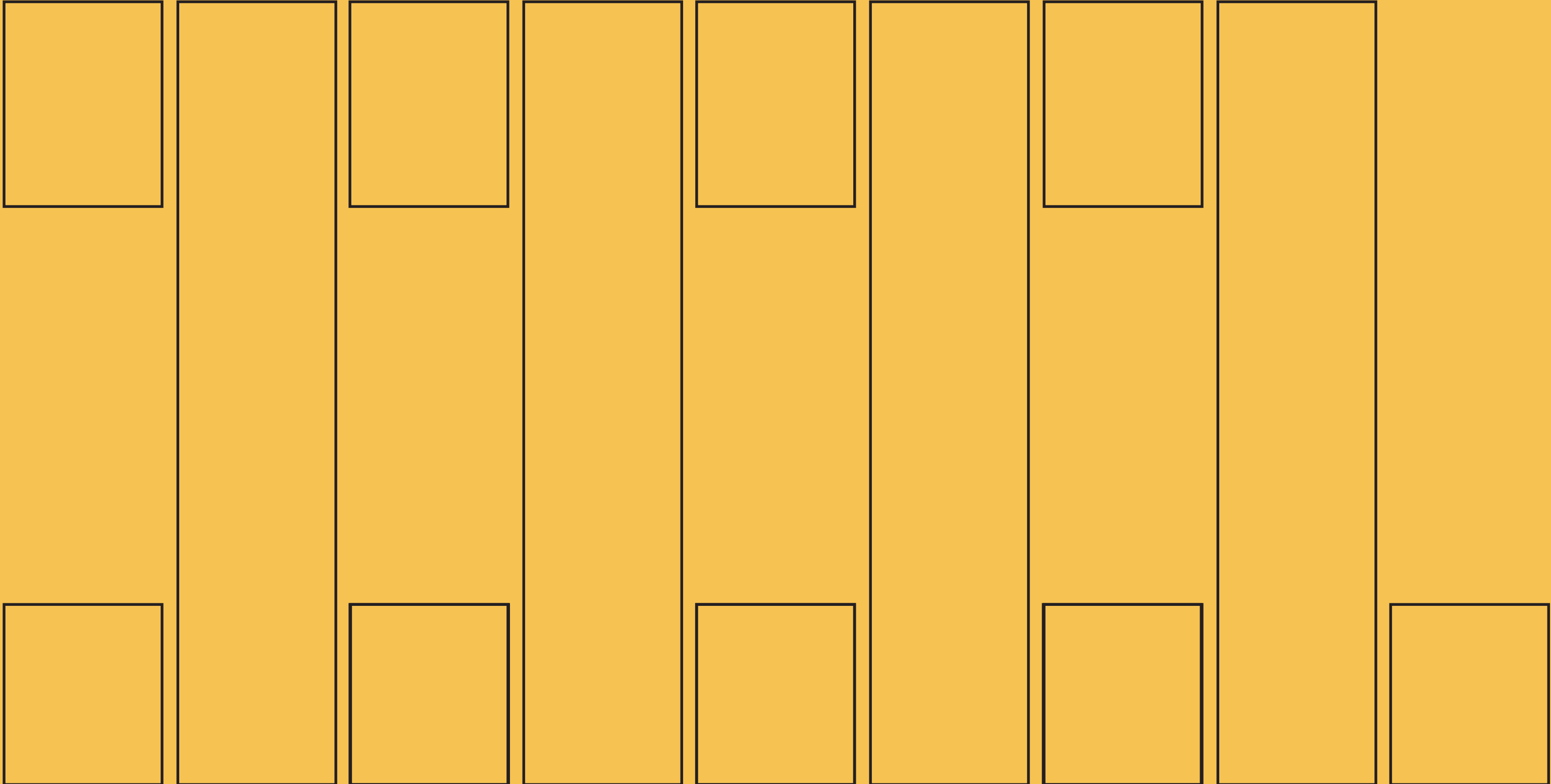
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MedCruise statistics



1.1 MedCruise: the association of the cruise ports in the Med and its adjoining seas (est. 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 facilitates its member ports but also their partners who have enrolled in MedCruise as associate members to achieve a sustainable growth of their cruise activities.

Today, the Association has grown up to 75 members from 22 countries and 3 continents representing more than 145 ports around the Mediterranean regions, including the West Med, Adriatic, East Med and Black Sea; plus 36 associate members, representing associations, tourist boards, ship/port agents and other cruise industry companies.

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

Since 2014, MedCruise is a member of the Network of Cruise and Ferry Ports, set up within the European Sea Ports Organisation (ESPO), and member of the EU Ports Forum since 2017 among other EU initiatives.

Map 1.1 provides an illustration of the geography of the members of the Association and browses the extent that MedCruise members spread 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.

Map 1.1 The MedCruise membership



1.2 The report

The annual MedCruise statistical report is among the flagship publications of the Association representing cruise ports in the Med and its adjoining seas. It details the actual picture of cruise activities in the region over the past year. It reveals the trends and enables the understanding of the present challenges for ports, cruise lines, destinations and all stakeholders. It also facilitates the adjustment of MedCruise ports and associate members to contemporary market structures and dynamics.

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 that recorded in the second biggest region of the world, the Med and its adjoining seas during 2021. For a second year however, the cruise world did not remain unaffected by the pandemic that changed social and economic lives around the globe over the last two years. In almost all parts of the world, the twelve months of 2021 represent the first steps towards the return of cruising, rather than a year to be considered as part of to pre-Covid existing trends.

In the light of these events, we have adjusted the content of our report in many respects, aiming to provide a meaningful analysis to its reader.

The report (i) details what happened in 2021, (ii) compares these records with the respective data of 2020, revealing the considerable ‘restart’ and advancements achieved within one year, and (iii) compares 2021 data with what had happened in 2019, allowing an understanding of the progress towards the full return of cruising to sustainable growth. In this vein, we invite an avoidance of comparisons of 2021 data with the data and trends that had been recorded in the earlier years.

The 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 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 members to better understand the findings, identify the responses, and enjoy the most benefits possible.

The present edition of **“Cruise activities in Med-Cruise ports: Statistics report 2021”** is part of a long series produced by the Association for many years.

The report has been developed by the MedCruise Secretariat and analyses the statistical data recorded and reported by the members of the Association.

1.3 MedCruise membership

MedCruise membership expands in 22 countries in the Med and its adjoining seas (Table 1.1).

Approximately 55% of the Association’s 75 members (Figure 1.1) are entities that manage and represent more than one port, and up to five, in the same region. This reflects the organisational heterogeneity of cruise port governance and organisation. The total amount of ports that make up the MedCruise family is well above 145.

Moreover, 36 associate members, representing tourist boards, ship agents, port agents as well as other cruise industry related organisations, also share the benefits of being part of the MedCruise family. MedCruise is regularly upgrading its associate members program, aiming to increase the prospects of the respective destinations. The list of the MedCruise associate members as of 1 January 2022 is detailed in Table 1.3.

Table 1.1 Countries represented in MedCruise

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

Figure 1.1 MedCruise port members (as of 1 January 2022)

WEST MED

Azores, Balearic Islands, Barcelona
Cabo Verde, Cadiz, Canarian ports
Cartagena, Castellon, Catania | Augusta
Ceuta, Civitavecchia | Fiumicino | Gaeta
Corsica Ports, Costa Brava Cruise Ports
French Riviera Ports, Genoa | Savona
Gibraltar, Gioia Tauro, Huelva
La Spezia | Marina Di Carrara, Leixoes
Lisbon, Livorno | Piombino | Portoferraio
Madeira Ports, Málaga, Marseille
Messina | Milazzo | Reggio Calabria
Monaco, Motril-Granada
Naples | Salerno | Castellammare di Stabia
Palermo, Port-Vendres, Portimao
Sardinian Ports, Sète, Tangier, Tarragona
Tenerife Ports, Toulon-Var Provence
Tunisian Ports, Valencia, Valletta

ADRIATIC

Ancona | Ortona | Pesaro
Bari | Brindisi | Manfredonia | Monopoli
Corfu, Dubrovnik | Korcula, Koper
Kotor, Rijeka, Sibenik, Split, Taranto
Venice, Zadar

BLACK SEA

Burgas, Constantza, Odessa,
Trabzon, Varna

EAST MED

Alanya, Antalya, Ashdod
Cyprus Ports, Egyptian Ports
Haifa, Heraklion, Igoumenitsa
Istanbul, Jeddah, Yanbu, Al Wajh
Kavala, Kusadasi, Bodrum, Patras
Piraeus, Souda/Chania, Thessaloniki
Volos



Table 1.3 MedCruise associate members

Algeria Cruise Services	BC Tours	Cemar- Genoa
Council of Sant Carles de la Rapita	Cruise Services- Monaco	Ceuta Tourism
Cyprus Deputy Ministry of Tourism	DP World- Limassol	Dubrovnik County Port Authority
Intercruises Shoreside & Ports Services	Five Senses Consulting	Kyriakakis Travel
Kvarner County Tourism Office	La Goulette Cruise Port	Lanzarote Tourism
Livorno 2000	Medov S.r.l- Venice	Mercantile Marine Shipping
MH Bland - Gibraltar	Pan Marine Group	Patronat Turisme Costa Brava
Peninsula Tours	Perez y Cia	Puertos del Estado
Seaway Shipping	Scandinavian Near East Agency	SunCruise Andalucia
Tecnología Medio Ambiente	Terminal Napoli	Tenerife Tourism Corporation
Thessaloniki Tourism Organisation	Trainose	Turisme de Barcelona
Turkish Chamber of Shipping	Turkey Tourism Promotion & Development Agency	Var Provence Cruise Club

1.4 Evolution of the cruise activity in MedCruise ports

The recorded cruise activities in the Med and its adjoining seas during the twelve months of 2021 represent the first steps towards the return of cruising to operations – with all signs of the first months of 2022 suggesting that this trend continues and intensifies.

The same data however reveal that for a second year, the cruise world did not remain unaffected by the pandemic that changed social and economic lives around the globe over the last two years – justifying the comprehensive efforts developed by cruise ports in the region to generate conditions that secure their resilience to all types of crises.

The total number of **cruise passenger movements** at MedCruise ports during 2021 reached 5.89 million (Figure 1.1). These total of passenger movements is 3.86 million or 190% more than those that had taken place in 2020, and a clear mark of the eventual restart of cruising in the region.

On the other hand, the aggregate reflects the impact of the pandemic, and the remaining of restrictions in social and economic lives in many destinations and source markets, as the total number of cruise passenger movements in MedCruise ports in 2019 had exceeded the 31 million threshold.

The total number of cruise ship calls at MedCruise Ports in 2021 reached 5,182 (Figure 1.2). This total is 3,928 calls, or three times, more than the 1,254 calls that had occurred in 2020. Comparing to the pre-pandemic period, the 2021 calls represent 38.1% of the calls that had taken place in 2019.

Figure 1.2 Cruise pax movements in MedCruise ports, 2000-2021 (millions)

Variation 2021/2020
189.73%

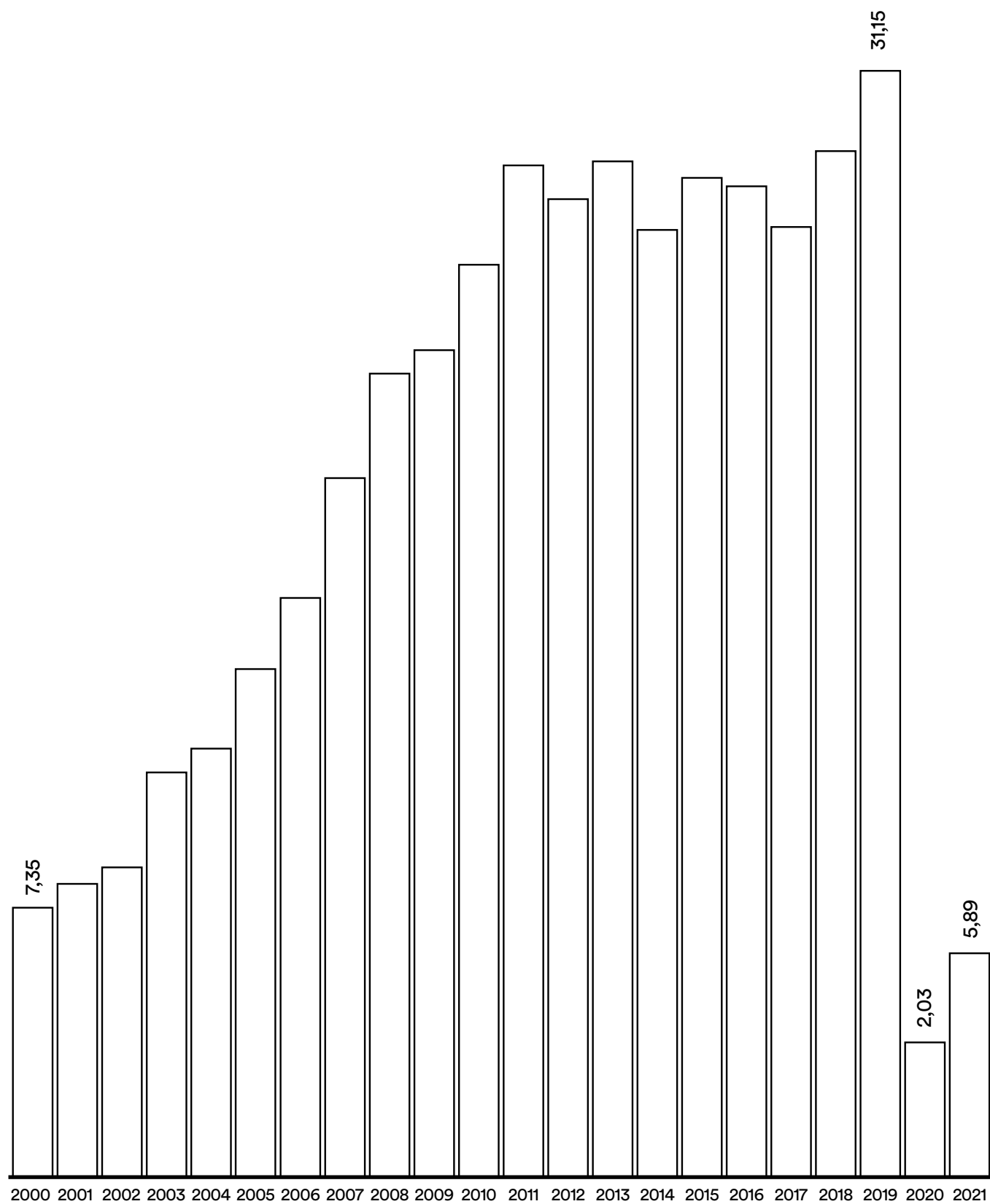
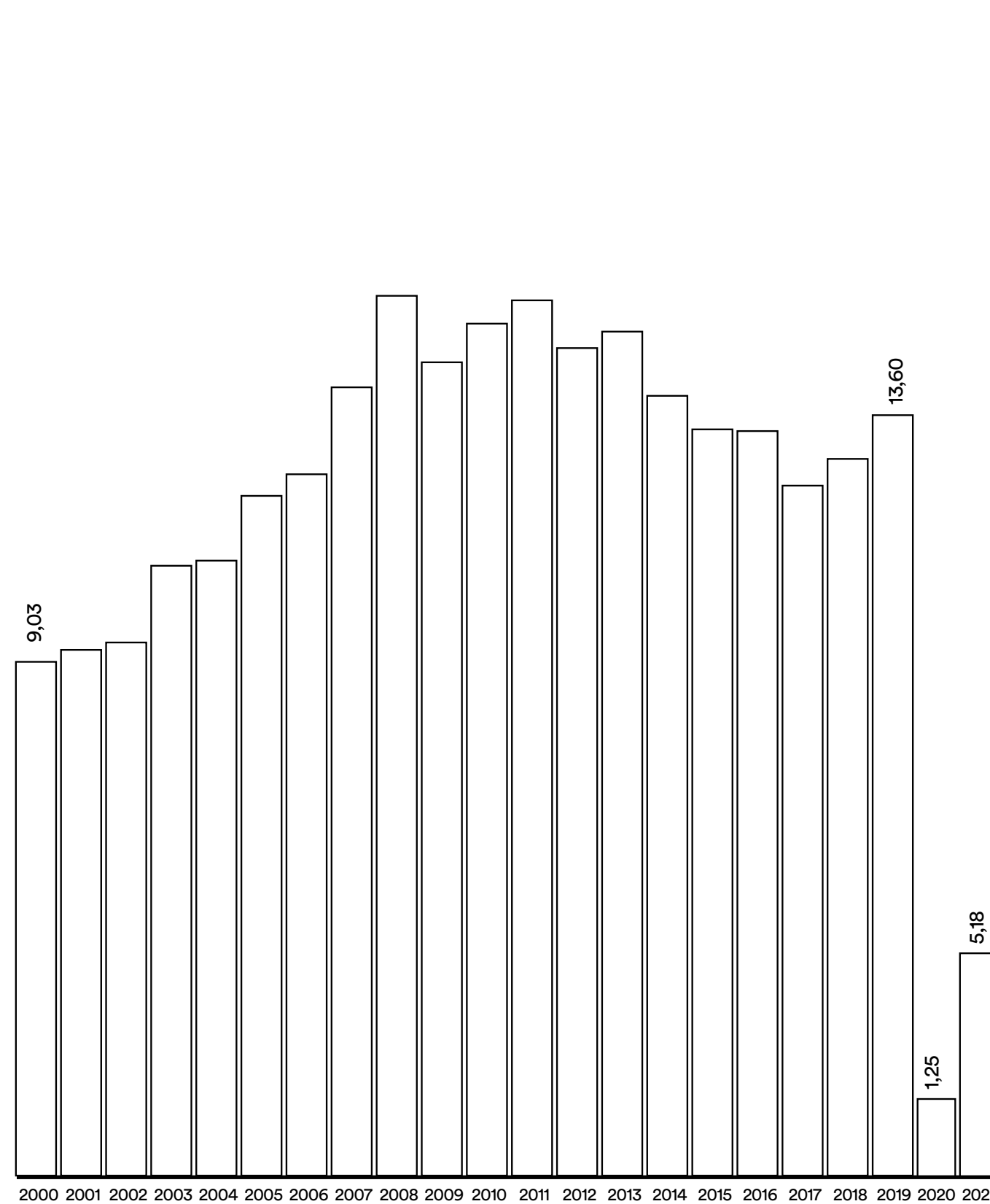


Figure 1.3 Cruise calls in MedCruise ports, 2000-2021 (thousands)

Variation 2021/2020
313.24%



The ratio of transit passenger movements to passengers home-porting at MedCruise port members remained at 71/29 (Figure 1.3). This ratio remains stable for at least the last 15 years. In 2021, the total of transit passenger movements in the Med and its adjoining seas was 4,171,789 million. The total of the home-porting passenger movements (home-in and home-out) was 1,720,811.

Figure 1.4 Transit & Home in/Home out cruise pax movements, absolute values, 2000-2021 (millions)

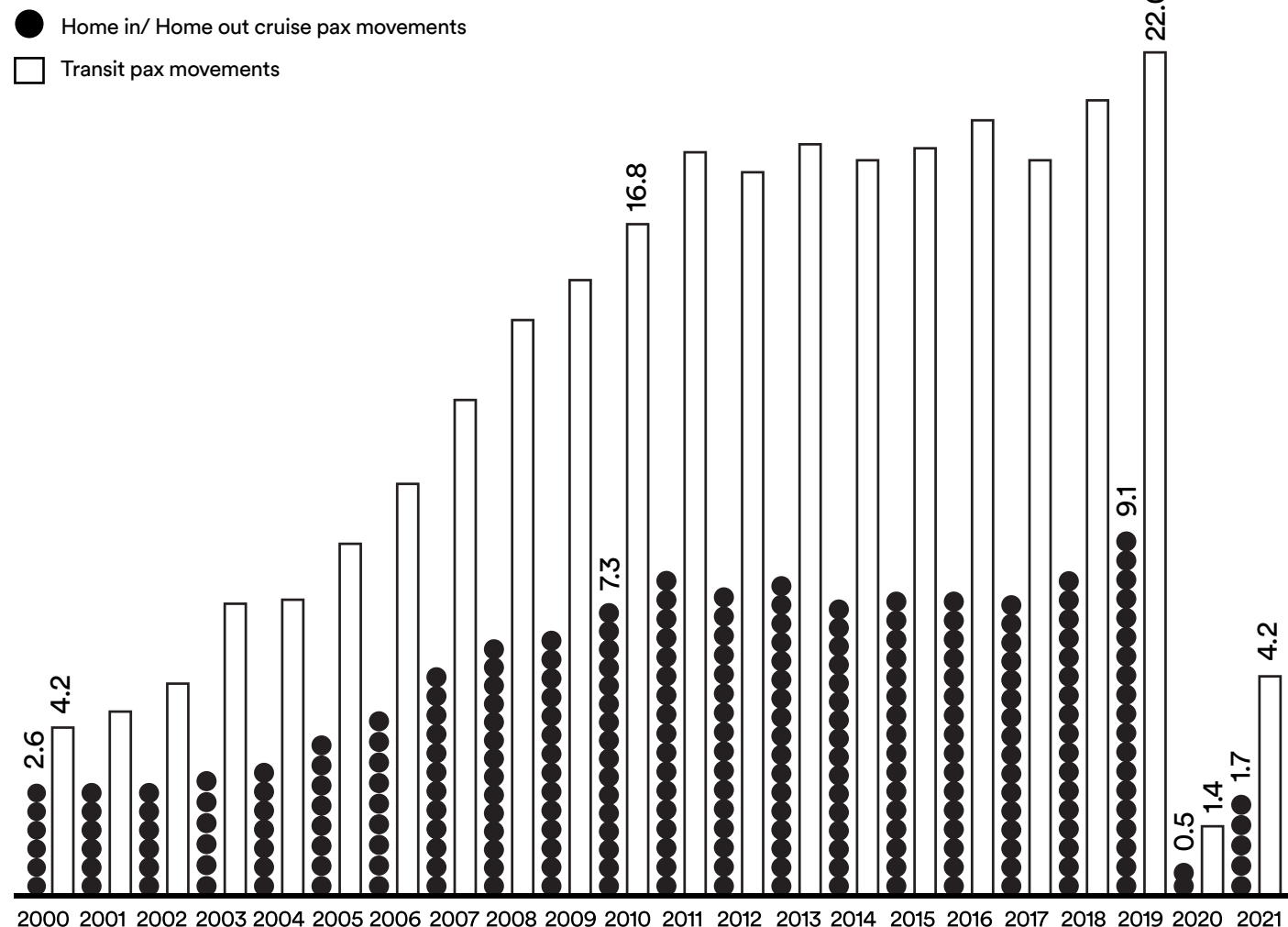


Figure 1.5 presents an overview of cruise traffic recorded at each MedCruise port member in 2021 and the annual variation compared to 2020.

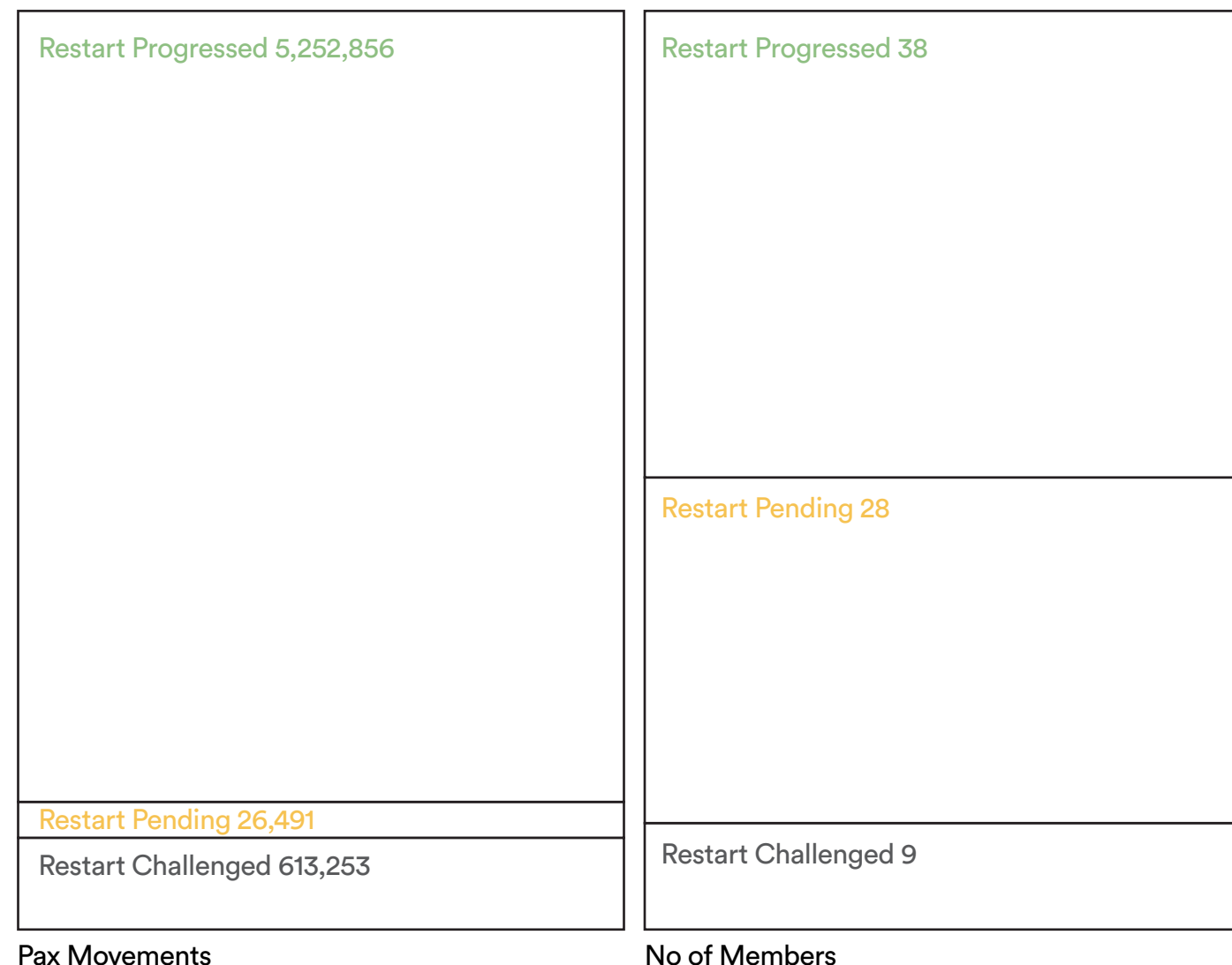
Given the incomparable circumstances generated by the pandemic, the recorded trends cruise traffic, are classified based on three different categories than is commonly done:

- Category A -“Restart Progressed”, includes all ports that in 2021 hosted more than 5,000 passenger movements and achieved an annual growth that exceeded 50%.
- Category B -“Restart (continued to be) challenged”, includes all ports that in 2021 hosted more than 5,000 cruise passenger movements but did not recorded a year-on-year growth increase higher than 50%;
- Category C -“Restart Pending”, includes all ports that in 2021 continued to host less than 5,000 cruise passenger movements per year.

In 2021, the restart of cruise activities progressed significantly in 38 MedCruise port members, as they recorded cruise passenger visits increased over the past year by more than 50%. In the case of 9 other port members, the restart of cruise activities this restart is taking place but, based on the levels of growth that occurred in 2021, this restart continues to be challenged. The levels of cruise passengers that were recorded in 28 other ports were less than 5,000 – in six cases there were no cruise vessels calls at all. In all these cases, the restart of cruises still pending.

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

Figure 1.5 MedCruise ports cruise traffic overview, 2021



Alanya 116 27.47%	Ancona, Ortona, Pesaro 37,396 2641.64%	Antalya 1,413 100.00%	Ashod 0 0.00%	Azores 21,266 1.21%	Balearic Islands 345,065 120.13%	Barcelona 520,854 161.94%	Bari, Brindisi, Manfredonia, Monopoli 219,705 2484.46%	Burgas 128 100.00%	Cabo Verde 11,193 -40.69%
Cadiz 133,427 228.00%	Canarian Ports 1,159 100.00%	Cartagena 70,087 271.58%	Castellon 1,079 100.00%	Catania 14,187 237.30%	Ceuta 150 100.00%	Civitavecchia 490,344 136.92%	Constantza 57 100.00%	Corfu 234,699 2921.36%	Corsica Ports 45,884 702.31%
Costa Brava Cruise Ports 3,947 100.00%	Cyprus Ports 50,927 321.37%	Dubrovnik, Korcula 116,975 2220.47%	Egyptian Ports 27,788 38.52%	French Riviera Ports 60,280 1001.00%	Genoa,Savona 591,391 186.13%	Gibraltar 22,225 122.21%	Gioia Tauro 600 -61.59%	Haifa 0 -100.00%	Heraklion 119,930 499.71%
Huelva 584 -37.47%	Igoumenitsa 558 447.06%	Istanbul 4,248 100.00%	Jeddah, Yanbu, Al Wajh 61,666 n/a	Kavala 938 3250.00%	Koper 4,450 100.00%	Kotor 9,139 203.72%	Kusadasi, Bodrum 8,775 406.35%	La Spezia/Marina Di Carrara 107,820 99.68%	Leixoes 8,941 43.98%
Lisbon 115,984 131.67%	Livorno/Piombino/ Portoferraio 56,338 189.95%	Madeira Ports 117,289 -23.06%	Málaga 118,330 194.56%	Marseille 351,887 184.69%	Messina, Milazzo, Reggio Calabria 156,449 1052.05%	Monaco 0 -100.00%	Motril-Granada 1,567 100.00%	Naples/Salerno /Castellammare di Stabia 263,435 834.96%	Odessa 59 100.00%
Palermo 107,084 42.33%	Patras 674 100.00%	Piraeus 303,665 1724.91%	Port-Vendres 471 n/a	Portimao 1,983 100.00%	Rijeka 903 100.00%	Sardinian Ports 63,176 627.16%	Sete 5,445 0.00%	Sibenik 8,164 1064.62%	Souda/Chania 45,619 43346.67%
Split 89,148 17623.26%	Tangier 0 -100.00%	Taranto 80,309 100.00%	Tarragona 1,348 -7.80%	Tenerife Ports 304,408 -11.79%	Thessaloniki 11,777 41960.71%	Toulon-Var Provence 9,839 -19.72%	Trabzon 0 n/a	Tunisian Ports 0 0.00%	Valencia 130,869 397.87%
Valletta 147,132 148.62%	Varna 59 100.00%	Venice 31,685 505.02%	Volos 7,949 11255.71%	Zadar 10,164 1323.53%					

Table 1.4 MedCruise ports cruise traffic data 2021

NO.	PORT	MEDCRUISE REGION	TOTAL PAX.	TOTAL CALLS	HOME IN PAX.	HOME OUT PAX.	TRANSIT PAX.
1	Alanya	East Med	116	1	0	0	116
2	Ancona, Ortona, Pesaro	Adriatic	37,396	28	6,118	5,707	25,571
3	Antalya	East Med	1,413	4	659	720	34
4	Ashdod	East Med	0	0	0	0	0
5	Azores	West Med	21,266	97	282	335	20,649
6	Balearic Islands	West Med	345,065	226	72,674	75,491	196,900
7	Barcelona	West Med	520,854	271	100,322	93,636	326,896
8	Bari, Brindisi, Manfredonia, Monopoli	Adriatic	219,705	125	55,844	56,755	107,106
9	Burgas	Black Sea	128	2	0	0	128
10	Cabo Verde	West Med	11,193	30	88	39	11,066
11	Cadiz	West Med	133,427	130	130	173	133,124
12	Canarian ports	West Med	1,159	6	1,159	0	0
13	Cartagena	West Med	70,087	79	0	0	70,087
14	Castellon	West Med	1,079	2	0	0	1,079
15	Catania	West Med	14,187	21	545	507	13,135
16	Ceuta	West Med	150	3	0	0	150
17	Civitavecchia, Fiumicino, Gaeta	West Med	490,344	258	87,529	82,809	320,006
18	Constantza	Black Sea	57	1	0	0	57
19	Corfu	Adriatic	234,699	200	29,262	27,408	178,029
20	Corsica Ports	West Med	45,884	201	0	0	45,884
21	Costa Brava Cruise Ports	West Med	3,947	9	0	0	3,947

NO.	PORT	MEDCRUISE REGION	TOTAL PAX.	TOTAL CALLS	HOME IN PAX.	HOME OUT PAX.	TRANSIT PAX.
22	Cyprus Ports	East Med	50,927	78	14,956	14,881	21,090
23	Dubrovnik, Korcula	Adriatic	116,975	191	2,914	2,556	111,505
24	Egyptian Ports	East Med	27,788	38	1,400	1,400	24,988
25	French Riviera Ports	West Med	60,280	135	7,991	9,897	42,392
26	Genoa, Savona	West Med	591,391	209	161,086	164,820	265,485
27	Gibraltar	West Med	22,225	44	0	0	22,225
28	Gioia Tauro	West Med	600	1	0	0	600
29	Haifa	East Med	0	0	0	0	0
30	Heraklion	East Med	119,930	118	25,531	25,035	69,364
31	Huelva	West Med	584	5	0	0	584
32	Igoumenitsa	East Med	558	2	0	0	558
33	Istanbul	East Med	4,248	9	1,519	1,036	1,693
34	Jeddah, Yanbu, Al Wajh	East Med	61,666	71	25,061	24,235	12,370
35	Kavala	East Med	938	3	0	0	938
36	Koper	Adriatic	4,450	11	0	0	4,450
37	Kotor	Adriatic	9,139	64	92	132	8,915
38	Kusadasi, Bodrum	East Med	8,775	25	1	7	8,767
39	La Spezia, Marina Di Carrara	West Med	107,820	59	3,348	5,083	99,389
40	Leixoes	West Med	8,941	23	265	422	8,254
41	Lisbon	West Med	115,984	97	11,615	9,658	94,711
42	Livorno, Piombino, Portoferraio	West Med	56,338	58	12	16	56,310
43	Madeira Ports	West Med	117,289	125	1,623	1,842	113,824

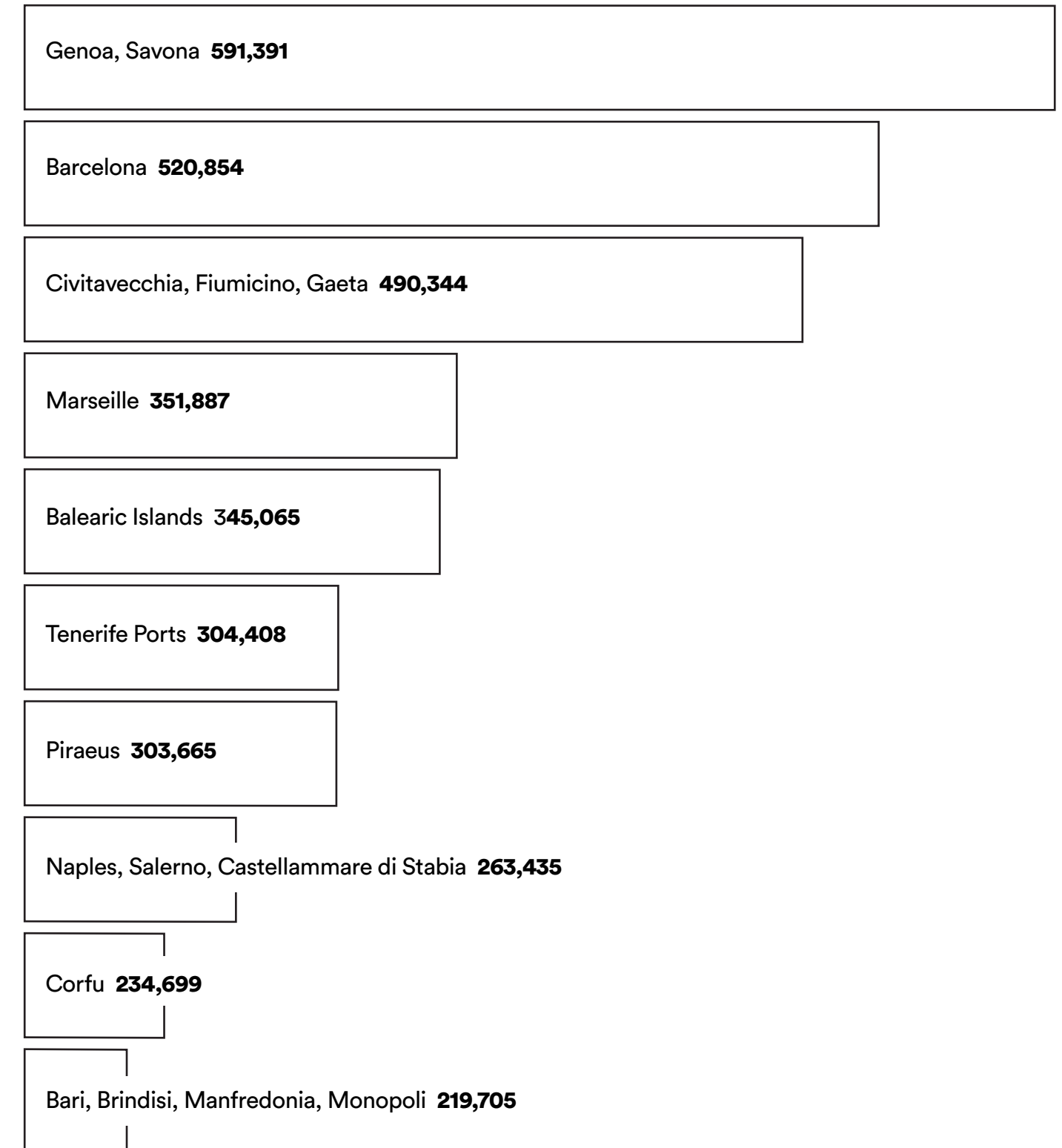
MedCruise Statistics 2021

NO.	PORT	MEDCRUISE REGION	TOTAL PAX.	TOTAL CALLS	HOME IN PAX.	HOME OUT PAX.	TRANSIT PAX.
44	Málaga	West Med	118,330	113	8,653	9,060	100,617
45	Marseille	West Med	351,887	161	61,197	64,706	225,984
46	Messina Milazzo, Reggio Calabria	West Med	156,449	73	15,047	14,759	126,643
47	Monaco	West Med	0	0	0	0	0
48	Motril-Granada	West Med	1,567	8	0	0	1,567
49	Naples, Salerno, Castellammare di Stabia	West Med	263,435	172	31,078	31,678	200,679
50	Odessa	Black Sea	59	1	0	0	59
51	Palermo	West Med	107,084	104	7,144	7,423	92,517
52	Patras	East Med	674	8	337	12	325
53	Piraeus	East Med	303,665	379	65,396	70,543	167,726
54	Port-Vendres	East Med	471	5	0	0	471
55	Portimao	West Med	1,983	13	60	56	1,867
56	Rijeka	Adriatic	903	1	0	0	903
57	Sardinian Ports	West Med	63,176	60	0	0	63,176
58	Sète	West Med	5,445	19	0	0	5,445
59	Sibenik	Adriatic	8,164	43	0	0	8,164
60	Souda/Chania	East Med	45,619	76	0	0	45,619
61	Split	Adriatic	89,148	105	0	0	89,148
62	Tangier	West Med	0	0	0	0	0
63	Taranto	Adriatic	80,309	28	8,197	7,980	64,132
64	Tarragona	West Med	1,348	8	4	4	1,340
65	Tenerife Ports	West Med	304,408	411	15,464	16,346	272,598

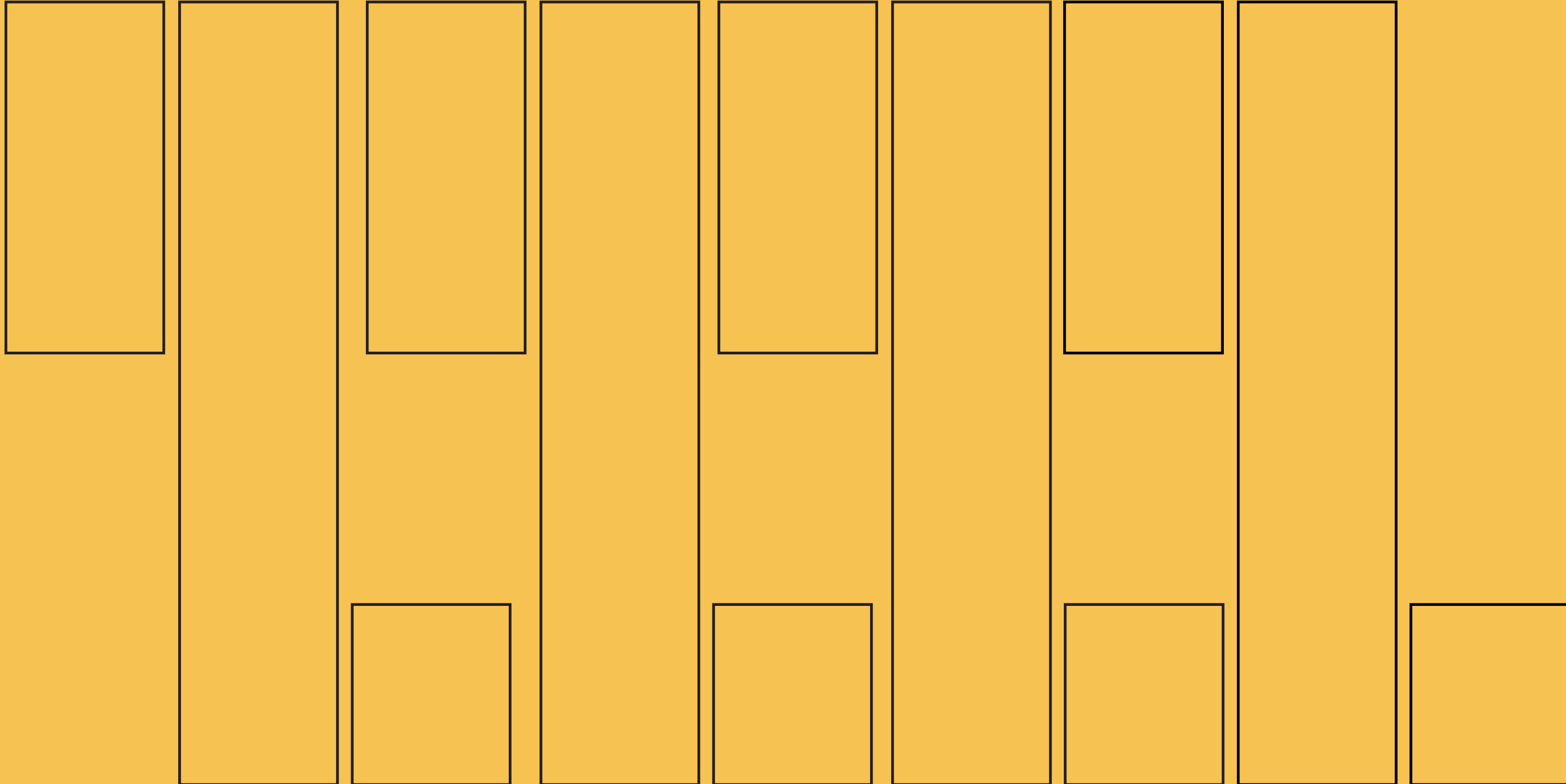
NO.	PORT	MEDCRUISE REGION	TOTAL PAX.	TOTAL CALLS	HOME IN PAX.	HOME OUT PAX.	TRANSIT PAX.
66	Thessaloniki	East Med	11,777	17	2,163	2,543	7,071
67	Toulon-Var Provence	West Med	9,839	11	471	265	9,103
68	Trabzon	Black Sea	0	0	0	0	0
69	Tunisian Ports	West Med	0	0	0	0	0
70	Valencia	West Med	130,869	95	9,046	8,952	112,871
71	Valletta	West Med	147,132	107	8,817	9,725	128,590
72	Varna	Black Sea	59	1	0	0	59
73	Venice	Adriatic	31,685	52	12,237	14,822	4,626
74	Volos	East Med	7,949	21	0	0	7,949
75	Zadar	Adriatic	10,164	30	0	0	10,164
Total			5,892,600	5,182	857,337	863,474	4,171,789

Two cruise ports in the Med and its adjoining seas hosted more than half a million passengers movements in 2021 and top the list of the ports with the most significant traffic (Figure 1.6). These are Genoa/Savona (591,391), and Barcelona (520,854). A third one, Civitavecchia/Fiumicino/Gaeta hosted almost half a million passenger movements (490,344). Passenger movements in four more ports - Marseille, Balearic Islands, Tenerife Ports and Piraeus - ranged between 352,000 to 300,000. Each of the other three ports that are included in the list (Naples/Salerno/Catellamare di Stabia; Corfu; Bari/Brindisi/Manfredonia/Monopoli) hosted in 2021 more than 210,000 passenger movements.

Figure 1.6 Top10 MedCruise ports, 2021



Cruise activity trends



2.1 Global cruise fleet & deployment of cruise fleet

The graph below shows the increase in the number of cruise ships and berths from 2000 to 2027 when it will be expected 829,000 berths and almost 500 ships. For both indicators, each forthcoming year should become a new record.

Figure 2.1 Global cruise fleet 2000-2027 (ships & berths)

Source: Cruise Industry News, 2022 Annual Report

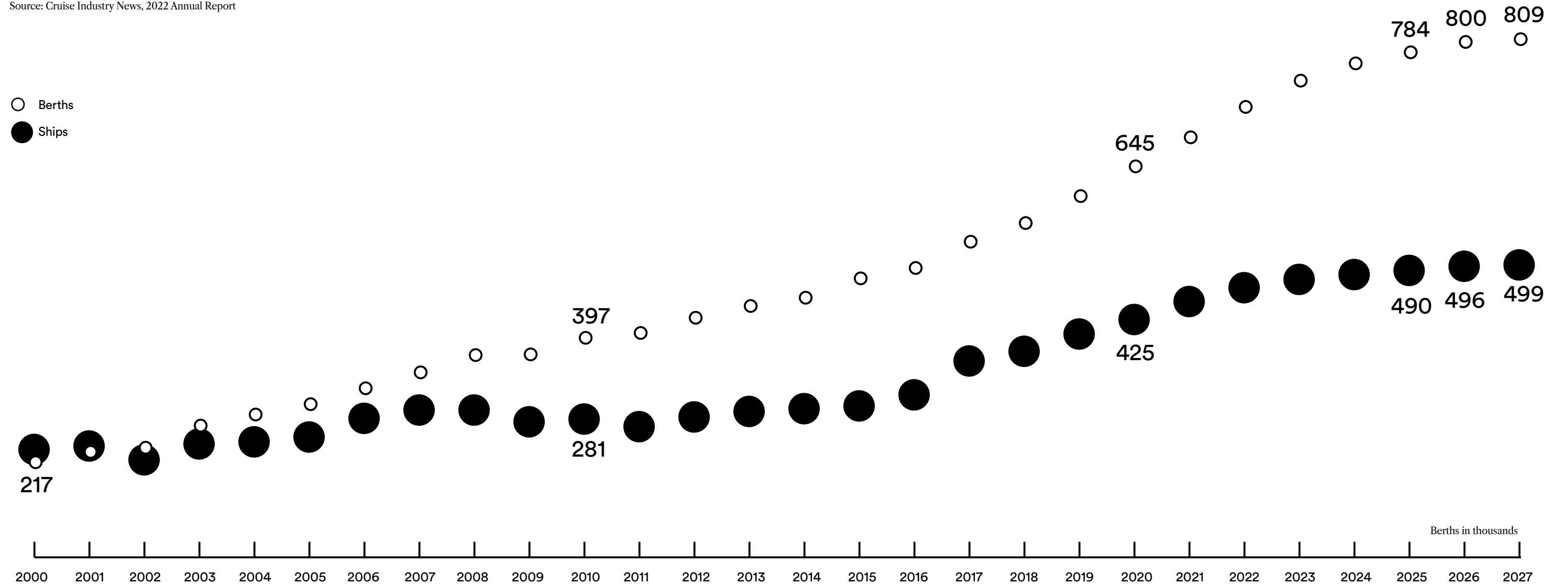
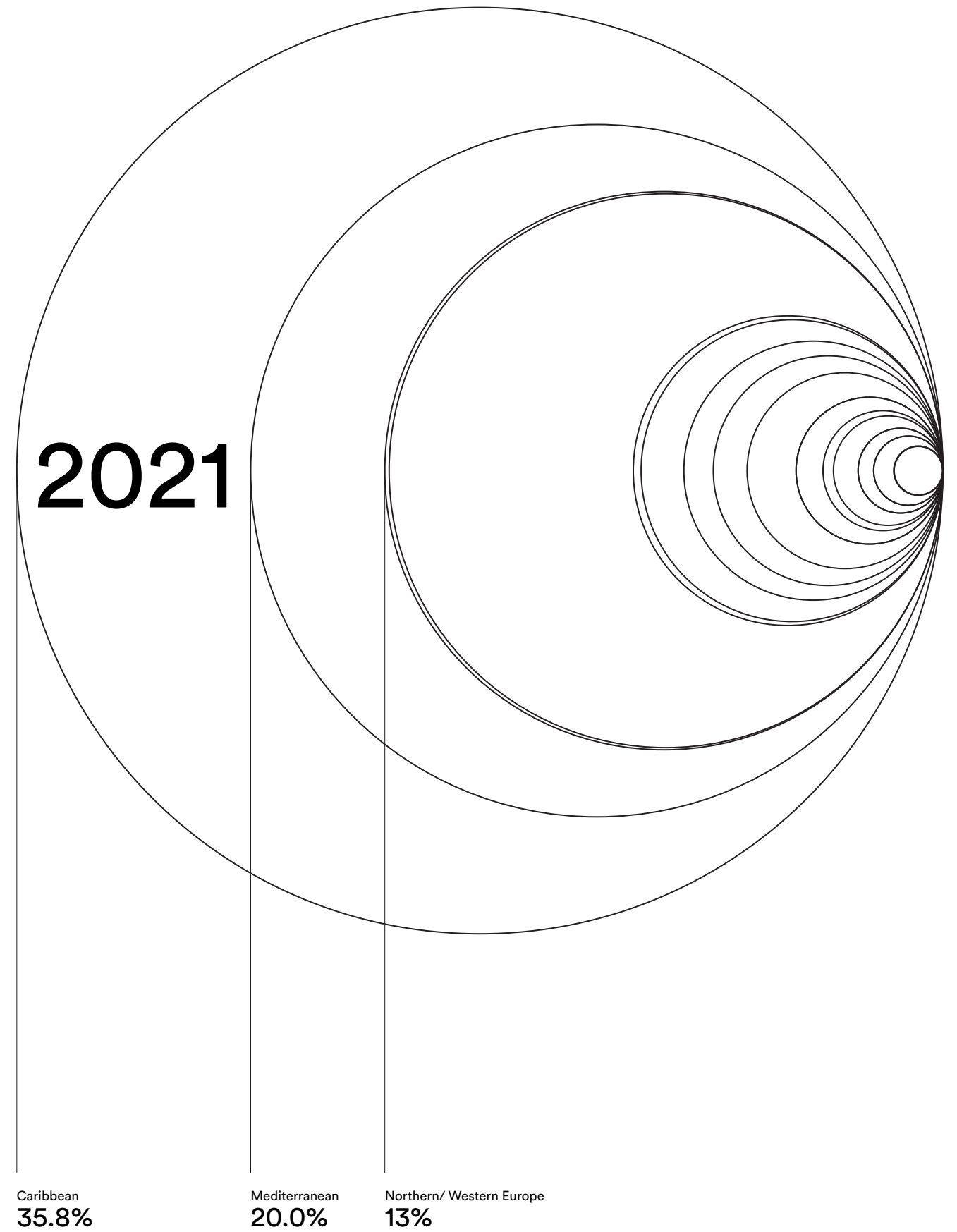
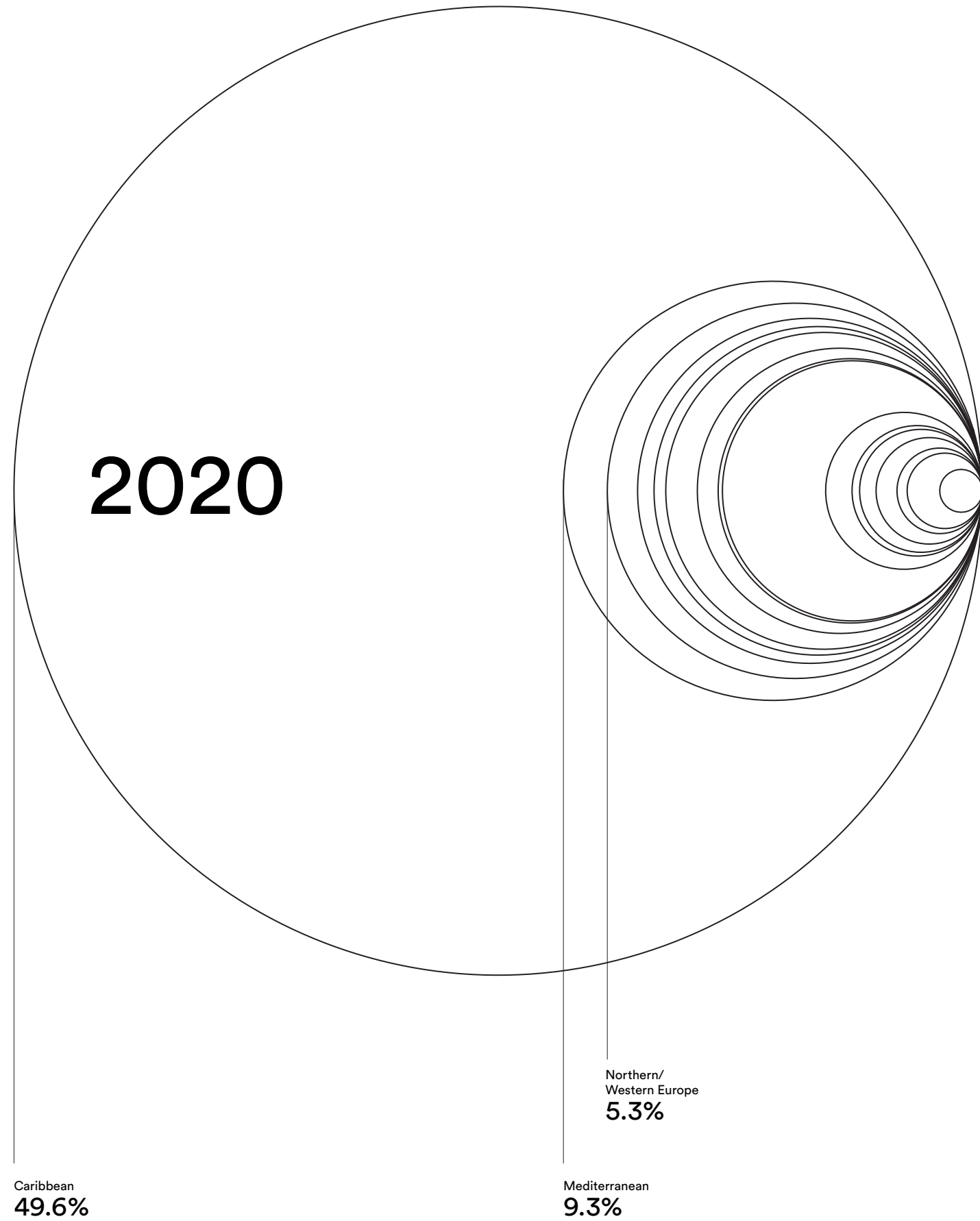


Figure 2.2 Global deployment shares

Source: Cruise Industry News, 2022 Annual Report



The Mediterranean continued in 2021 as the second-largest cruise destination in the world. The 20% of the cruise vessels capacity deployed worldwide operated in the region in 2021. The share of the region in the worldwide deployment in the pre-pandemic period (2019) was 14.8%. The outbreak of the pandemic lowered this share in 2020 to just 9.3%.

The increase of the region’s share in 2021 is indicative of the capacities demonstrated by the cruise ports of the region, to work with cruise lines, destinations, public authorities in adjusting to the new conditions that emerged during the 2020 crisis and thereafter.

2.2 Contribution to the global economy

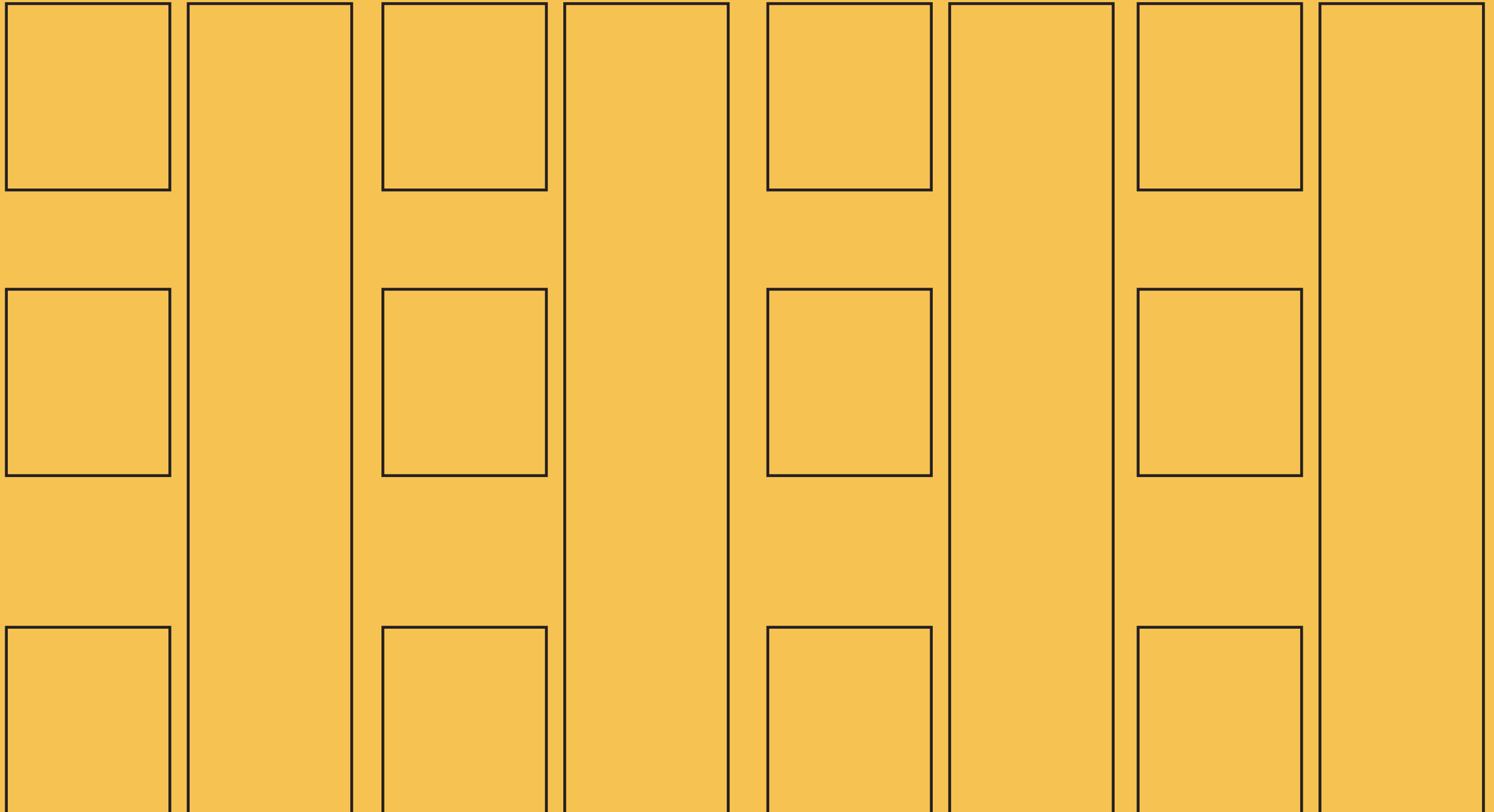
According to the latest data available, the cruise sector generated in 2019 more than \$133 billion. Europe accounted for 38.7% of this value and 403,621 FTE jobs (36.4% on total in the world). In the pre-pandemic period, all indicators suggested a positive trend confirming the strengths of this sector and the relevance in all parts of the world. The resumption of cruising that occurred in 2021 creates the essential conditions for achieving once more these levels of contribution to the local economies.

Table 2.1 Total cruise sector economic contribution, 2019

Source: CLIA, The Global Economic Contribution of Cruise Tourism 2019

CATEGORY	GLOBAL	NORTH AMERICA	EUROPE (EU+3)	REST OF WORLD
Output (\$ Billion)	\$72.02	\$31.60	\$28.79	\$11.63
Share of Global		43.9%	40.0%	16.2%
Income (\$ Billion)	\$21.65	\$9.93	\$7.50	\$4.22
Share of Global		45.9%	34.6%	19.5%
Employment	554,216	251,147	193,300	
Share of Global		45.3%	34.9%	19.8%

Cruise activity trends in the Mediterranean and its adjoining seas



3.1 Evolution of cruise traffic in MedCruise ports, 2019-2021

5,892,600 cruise passenger movements were registered in MedCruise port members

118.7% more cruise passenger movements than in 2020 – but still only 19% of the 2019 traffic.

1,137 pax/call in 2021 – half the 2.2291 pax/call of 2019

2019: the first time that more than 31 million passenger movements were recorded in the Mediterranean and its adjoining seas within a single year

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

In total, 5,892,600 cruise passenger movements were registered in MedCruise Ports in 2021 (Table 3.1). This equals 189.7% or 3,858,796 passenger movements increase compared to the previous year. Compared with the cruise passenger movements that were hosted by the same ports in 2019, the 2021 total represents only 19% of the passenger movements that had taken place the last year before the pandemic.

As regards the number of pax/call, the size of passengers visiting a port per call decreased for a second successive year. In 2021 the pax/call were 1,137, almost 30% lower than in 2020 (1,622 pax/call), in turn, a further 29.2% less than the pax/call in 2019. The nature of the pandemic and in particular the generated need for social distancing, combined with stricter protocols in the first post-pandemic cruise services, means that the crisis had a further impact which is the (temporal) rebalancing of the frequency of calls by the contemporary bigger cruise vessels' operations and by the smaller ones in favour of the latter.

The full list of ports included in this analysis, along with the raw material for passenger movements and cruise calls for 2021 as well as for the two previous years (2018-2020) can be found in the Appendix of this report.

Table 3.1 Evolution of cruise traffic in MedCruise ports (2019-2021)

YEAR	TOTAL PAX	% VARIATION ON PREVIOUS YEAR	TOTAL CALLS	VARIATION ON PREVIOUS YEAR	PAX/CALL	VARIATION ON PREVIOUS YEAR
2019	31,146,600	11.08%	13596	6.77%	2290.86	0.00%
2020	2,033,804	-93.47%	1254	-90.78%	1621.85	-29.20%
2021	5,892,600	189.73%	5182	313.24%	1137.13	-29.89%
Variation 2021/2019		-81.08%		-61.89%		-50.36%

3.2 Major MedCruise ports

In 2021 the 10 major MedCruise ports - in terms of cruise passenger movements- hosted a total of 3.6 million passenger movements, for a strong positive variation over 2020 (Table 3.2). All ports included in this list registered positive variations over 2018, ranging from the remarkable growth of the Greek ports of the list (Piraeus and Corfu) to the 120.1% of Balearic Islands. The only exception has been Tenerife Ports where cruise passenger movements in 2021 were 11.8% lower than in 2020.

Two cruise ports in the Med and its adjoining seas hosted more than half a million passenger movements in 2021 and top the list of the ports with the most significant traffic (Figure 1.6). These are the port system of Genova/Savona (591,391), and Barcelona (520,854). The former tops this list for the first time ever. A third one, the port system that includes Civitavecchia/Fiumicino/Gaeta, hosted almost half a million passenger movements

(490,344). Passenger movements in four more ports - Marseille, Balearic Islands, Tenerife Ports, and Piraeus - ranged between 352,000 to 300,000. Each of the other three ports that are included in the list (the port system of Naples/Salerno/Castellammare di Stabia; Corfu; and the port system of Bari/Brindisi/Manfredonia/Monopoli) hosted in 2021 more than 210,000 passenger movements.

Compared to 2019, in 2021 the ports with the most traffic in the Med hosted 79.3% fewer passenger movements. The standard deviation from this average is notably small. There is neither a port where the decline was lower than 70% nor a port where the decline exceeded 88%. The restart of cruising begins from the biggest ports, as these ports hosted in 2019 the 56% and in 2021 the 63.8% of the respective total.

Cruise passenger movements

2021: Cruise re-starts with two Med ports – Genova/Savona and Barcelona hosting more than half a million passenger movements.

2020: Following a year of limited activities – only Genova/Savona hosts more than 200.000 passenger movements.

2018: The first time that a single Med port, Barcelona, hosts more than 3 million passenger movements.

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

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

Table 3.2 Major MedCruise port members (cruise pax movements, 2021)

RANK 2021	RANK 2019	PORT	TOTAL PAX 2021	TOTAL PAX 2020	2021/2020	TOTAL PAX 2019	2021/2019
1	(4)	Genoa, Savona	591,391	206,689	186.13%	2,018,847	-70.71%
2	(1)	Barcelona	520,854	198,842	161.94%	3,137,918	-83.40%
3	(3)	Civitavecchia, Fiumicino, Gaeta	490,344	206,967	136.92%	2,652,403	-81.51%
4	(5)	Marseille	351,887	123,604	184.69%	1,865,918	-81.14%
5	(2)	Balearic Islands	345,065	156,757	120.13%	2,658,156	-87.02%
6	(9)	Tenerife Ports	304,408	345,093	-11.79%	1,067,440	-71.48%
7	(8)	Piraeus	303,665	16,640	1724.91%	1,098,091	-72.35%
8	(7)	Naples, Salerno, Castellammare di Stabia	263,435	28,176	834.96%	1,454,023	-81.88%
9	(12)	Corfu	234,699	7,768	2921.36%	807,197	-70.92%
10	(14)	Bari, Brindisi, Manfredonia, Monopoli	219,705	8,501	2484.46%	763,195	-71.21%
Total (Major -10)			3,625,453	1,299,037	179.09%	17,523,188	-79.31%

Cruise Calls

2021

8 MedCruise members host more than 200 cruise calls; two of them, Tenerife Ports and Piraeus, host more than 350 calls

2020

Due to the pandemic, only one MedCruise member – Tenerife Ports – hosts more than 100 calls

2019

The most called Mediterranean cruise member is the Balearic Islands with an average of 2.2 calls each day of the year

As far as the cruise calls are concerned, the calls at the top-10 MedCruise ports (in terms of hosted calls hosted) reached a total of 2,158 (Table 3.3). This is three times the number of calls that had taken place in 2021. Tenerife Ports, with 411 calls, and Piraeus, with 379 calls, top the list. Six more ports hosted 200 or more cruise calls in 2021. These are Barcelona, the port system of Civitavecchia/Fiumicino/Gaeta, Balearic Islands, the port system of Genoa/Savona, Corsica Ports, Corfu, and Dubrovnik/Korcula. The highest variation in 2021/2020 was recorded in the two Greek ports of the list, that is Corfu and Piraeus.

Table 3.3 Major MedCruise port members (cruise calls, 2021)

RANK 2021	RANK 2019	PORT	TOTAL CALLS 2021	TOTAL CALLS 2020	2021/2020	TOTAL CALLS 2019	2021/2019
1	(7)	Tenerife Ports	411	182	125.82%	511	-19.57%
2	(4)	Piraeus	379	32	1084.38%	622	-39.07%
3	(2)	Barcelona	271	53	411.32%	800	-66.13%
4	(3)	Civitavecchia, Fiumicino, Gaeta	258	99	160.61%	800	-67.75%
5	(1)	Balearic Islands	226	39	479.49%	819	-72.41%
6	(12)	Genoa, Savona	209	73	186.30%	435	-51.95%
7	(42)	Corsica Ports	201	59	240.68%	77	161.04%
8	(13)	Corfu	200	10	1900.00%	420	-52.38%
9	(5)	Dubrovnik, Korcula	191	64	198.44%	622	-69.29%
10	(6)	Naples, Salerno, Castellammare di Stabia	172	27	537.04%	526	-67.30%
			2,518	638	294.67%	5,632	-55.29%

Home in/ Home out

2021: 43 cruise ports recorded home-porting activities in 2021, with 7 of them hosting more than 100.000 of such moves.

2020: 20 cruise ports recorded home-porting activities in 2020, with only one hosting more than 100.000 of Home In/Out passengers

In total, 43 cruise ports recorded home-porting activities in 2021, embarking and disembarking passengers. In 16 of them this number was higher than 10,000 passenger movements. In 2020 home-porting activities had been recorded in only 20 MedCruise member ports.

Ten ports with the biggest home-porting activity hosted, in aggregate, a total of 1,382,800, Home In/Out passengers, which is 1,000,607 more (+261.8%) than in 2020 (Table 3.4). While the total of 2021 remains substantially lower than the 6.46 million records of 2019, the resumption of homeporting activities in the Med and its adjoining seas is more than evident.

Genoa/Savona was the most popular cruise home-port in the Med, with more than 325,000 Home In/Out passengers. Barcelona and Civitavecchia/Fiumicino/Gaeta hosted over 193,000 and over 170,000 Home In/Out passengers respectively. Four more ports (Balearic Islands, Piraeus, Marseille, and the Italian port systems of Bari/

Brindisi/Manfredonia/Monopoli hosted over 100,000 Home In/Out passengers. The other three ports on the list, the port systems of Naples/Salerno/Castellammare di Stabia and the Greek ports of Corfu and Heraklion are the other ports in the Med where the homeporting traffic in 2021 exceeded the 50,0000 Home In/Out passengers.

Table 3.4 Major MedCruise port members (home in/home out pax movements, 2021)

RANK 2021	RANK 2019	PORT	HOME IN/OUT PAX 2021	HOME IN/OUT PAX 2020	2021/2020	HOME IN/OUT PAX 2019	2021/2019
1	(4)	Genoa, Savona	325,906	117,058	178.41%	1,096,742	-70.28%
2	(1)	Barcelona	193,958	68,765	182.06%	1,753,222	-88.94%
3	(3)	Civitavecchia, Fiumicino, Gaeta	170,338	69,890	143.72%	1,111,542	-84.68%
4	(5)	Balearic Islands	148,165	100,048	48.09%	982,697	-84.92%
5	(7)	Piraeus	135,939	3,622	0.00%	410,512	-66.89%
6	(6)	Marseille	125,903	n/a	n/a	452,774	-72.19%
7	(9)	Bari, Brindisi, Manfredonia, Monopoli	112,599	1,373	8100.95%	269,875	-58.28%
8	(10)	Naples, Salerno, Castellammare di Stabia	62,756	9,474	562.40%	230,611	-72.79%
9	(13)	Corfu	56,670	0	0.00%	107,879	-47.47%
10	(19)	Heraklion	50,566	11,963	322.69%	46,720	8.23%
			1,382,800	382,193	261.81%	6,462,574	-78.60%

The total of transit cruise passenger movements in the major MedCruise Ports has also increased in 2021, standing at more than three times the respective total of 2020 (Table 3.5). All the ports in this top-10 contributed to generating the overall positive variation. Barcelona and Civitavecchia/ Fiumicino/Gaeta top the list as they recorded 326,896 and 320,006 transit passengers respectively.

Given the limited number of activities, that had taken place in 2020, it worth avoiding the percentage comparison between 2021 and the immediate past years. What is worth noting however is the progressive resumption of cruise activities in all major ports that is reflected on the number of cruise passengers that visited the top-10 MedCruise member ports.

Table 3.5 Major MedCruise port members (transit pax movements, 2021)

RANK 2021	RANK 2019	PORT	TRANSIT PAX 2021	TRANSIT PAX 2020	2021/2020	TRANSIT 2019	2021/2019
1	(4)	Barcelona	326,896	130,077	151.31%	1,384,696	-76.39%
2	(2)	Civitavecchia, Fiumicino, Gaeta	320,006	137,077	133.45%	1,540,861	-79.23%
3	(8)	Tenerife Ports	272,598	241,577	12.84%	857,190	-68.20%
4	(6)	Genoa, Savona	265,485	89,631	196.20%	922,105	-71.21%
5	(3)	Marseille	225,984	n/a	n/a	1,413,144	-84.01%
6	(5)	Naples, Salerno, Castellammare di Stabia	200,679	18,702	973.03%	1,223,412	-83.60%
7	(1)	Balearic Islands	196,900	56,709	247.21%	1,675,459	-88.25%
8	(10)	Corfu	178,029	7,768	2191.83%	699,318	-74.54%
9	(11)	Piraeus	167,726	13,018	1188.42%	687,579	-75.61%
10	n/a	Cadiz	133,124	40,679	227.25%	n/a	n/a
			2,287,427	735,238	211.11%	10,403,764	-78.01%

3.4 Passengers per call

Perhaps one of the most striking trends that were noticed since the COVID-19 pandemic has been the reversing of the number of passengers onboard each of the cruise vessels that calls the Med and its adjoining seas (Figure 3.1).

The deployment of bigger vessels in the Mediterranean and the adjoining seas has been a key future of the cruise market throughout the 21st century, and up and including 2019. The trend was reflected in the continuous increase of the average number of cruise passengers that reach a destination per call. In 2019, the average number of hosted passengers per cruise call was 2,279.

Since then, the trend has been reversed in an even more impressive way. In 2000 each cruise call in the Med was resulting in 1,622 passenger movements

on average. In 2021 the average number of passengers per call moved notably lower to 1,137 for each call.

Twenty MedCruise member ports hosted calls that on average resulted more than 1,000 pax/call (Figure 4.2). In the case of four of them, Taranto (2,868) Genoa/ Savona (2,830), Marseille (2,186) and Messina (2,143) this average exceeded 2,000 pax/call.

Based on, the characteristics of the world cruise fleet and, foremost, on the fact that in the early days of the pandemic lockdowns and strict social distancing measures and protocols prevailed in too many countries, it is most probable that the trend is temporal and as cruises restart the average pax/call will return to the pre-Covid era – in any case, and given its implications for ports, cruise lines, and destinations, this variable is worth to be monitored further.

MedCruise trends

2021: MedCruise member ports host on average 1,137 pax/call – as many as they did in 2006

2020: MedCruise Member ports host on average 1,622 pax/call

2019: MedCruise Member ports host on average 2,279 pax/call

2015: For the first time the (average) number of cruise passengers per call surpassed 2,000 pax

2000: The value was only 813 per call

Figure 3.1 Average pax/call in MedCruise ports, 2000-2021

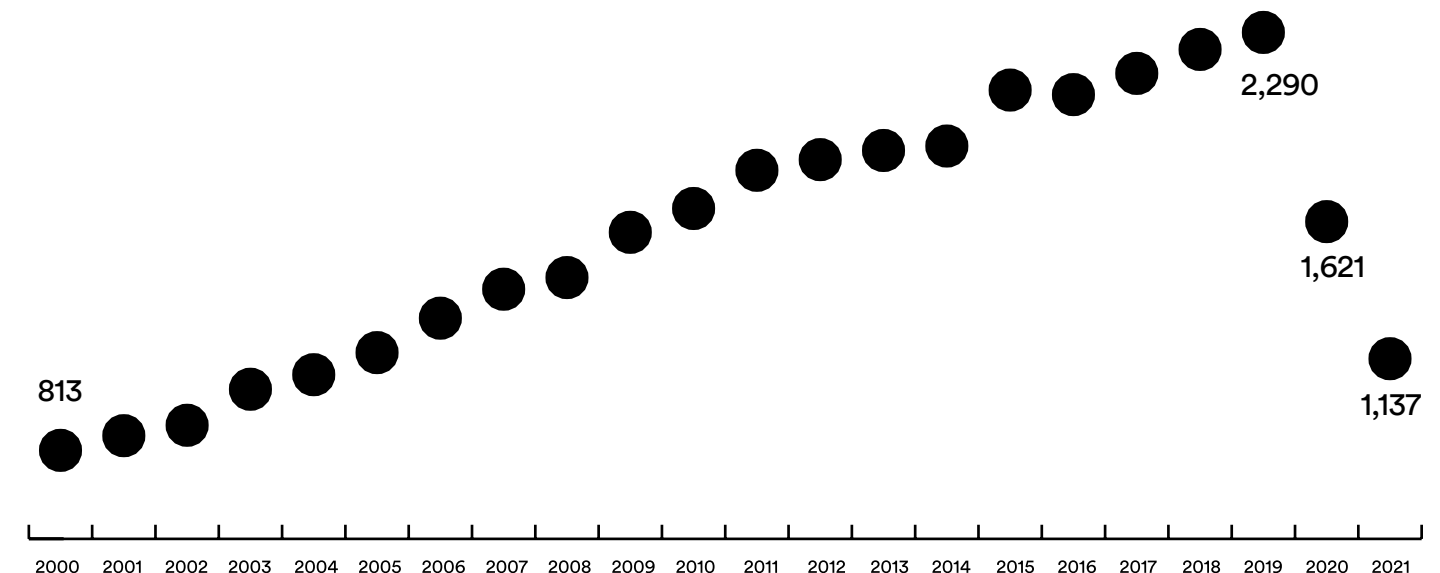


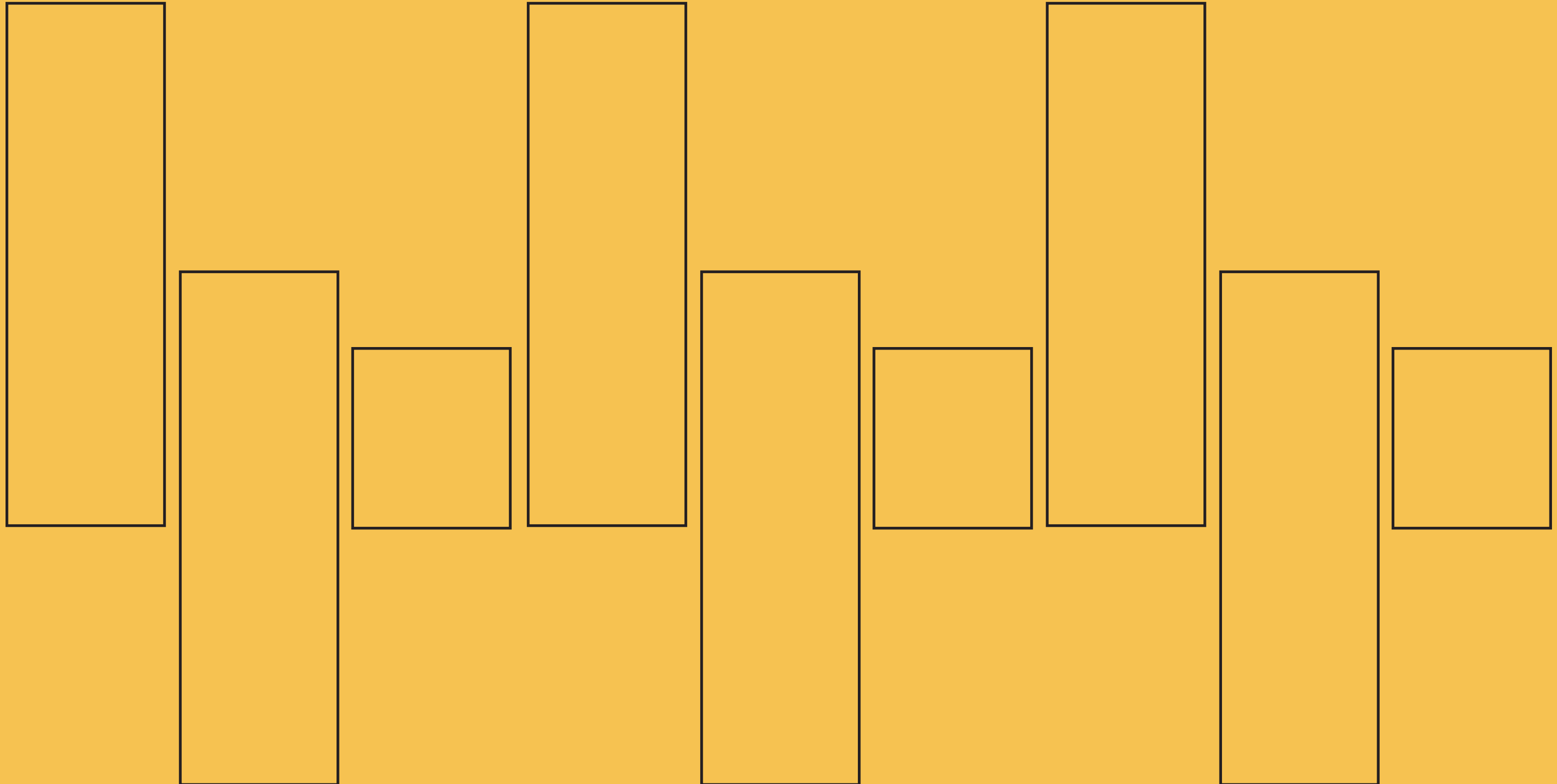
Figure 3.2 Cruise pax per call: MedCruise port classification overview 2021

>500	Antalya, Ashdod, Azores, Burgas, Cabo Verde, Canarian ports, Ceuta, Constantza Corsica Ports, Costa Brava Cruise Ports, French Riviera Ports, Haifa, Huelva, Igoumenitsa Istanbul, Kavala, Koper, Kotor, Kusadasi Bodrum, Leixoes, Monaco, Motril-Granada Odessa, Patras, Port-Vendres, Portimao, Sete, Sibenik, Tangier, Tarragona, Trabzon Tunisian Ports, Varna, Volos, Zadar
501-1000	Cartagena, Castellon, Catania, Cyprus Ports, Dubrovnik Korcula, Egyptian Ports Gibraltar, Gioia Tauro, Jeddah Yanbu Al Wajh, Livorno Piombino Portoferraio Madeira Ports, Piraeus, Rijeka, Souda/Chania, Split, Tenerife Ports, Thessaloniki Toulon-Var Provence, Venice
1001-2015	Ancona, Ortona, Pesaro, Balearic Islands, Barcelona, Bari Brindisi Manfredonia Monopoli, Cadiz, Civitavecchia Fiumicino Gaeta Corfu, Heraklion, La Spezia Marina Di Carrara, Lisbon, Malaga Naples Salerno Castellammare di Stabia, Palermo, Sardinian Ports, Valencia Valletta
2001-3000	Genoa Savona, Marseille, Messina, Taranto

Table 3.6 Cruise pax/Cruise call - Major 20

NO.	PORT	TP/TC 2021	TP/TC 2020	VARIATION 2021/2020	TC/TP 2019	VARIATION 2021/2019
1	Taranto	2,868.18	0.00	0.00%	1,315.00	118.11%
2	Genoa, Savona	2,829.62	2,831.36	-0.06%	4,641.03	-39.03%
3	Marseille	2,185.63	3,433.44	-36.34%	3,754.36	-41.78%
4	Messina	2,143.14	714.74	199.85%	2,486.66	-13.81%
5	Barcelona	1,921.97	3,751.74	-48.77%	3,922.40	-51.00%
6	Civitavecchia, Fiumicino, Gaeta	1,900.56	2,090.58	-9.09%	3,315.50	-42.68%
7	La Spezia, Marina Di Carrara	1,827.46	2,347.65	-22.16%	3,492.41	-47.67%
8	Bari, Brindisi, Manfredonia, Monopoli	1,757.64	531.31	230.81%	2,535.53	-30.68%
9	Naples, Salerno, Castellammare di Stabia	1,531.60	1,043.56	46.77%	2,764.30	-44.59%
10	Balearic Islands	1,526.84	4,019.41	-62.01%	3,245.61	-52.96%
Major - 10		20,492.63	20,763.78	-1.31%	31,472.80	-34.89%
11	Valencia	1,377.57	2,190.50	-37.11%	2,145.89	-35.80%
12	Valletta	1,375.07	1,849.38	-25.65%	2,425.87	-43.32%
13	Ancona, Ortona, Pesaro	1,335.57	682.00	95.83%	1,096.57	21.80%
14	Lisbon	1,195.71	1,517.09	-21.18%	1,842.77	-35.11%
15	Corfu	1,173.50	776.80	51.07%	1,921.90	-38.94%
16	Sardinian Ports	1,052.93	620.57	69.67%	2,241.51	-53.03%
17	Málaga	1,047.17	2,114.32	-50.47%	1,651.89	-36.61%
18	Palermo	1,029.65	2,212.79	-53.47%	2,337.60	-55.95%
19	Cadiz	1,026.36	1,694.96	-39.45%	n/a	n/a
20	Heraklion	1,016.36	833.25	21.97%	1,505.11	-32.47%
Major - 20		11,629.88	14,491.66	-19.75%	17,169.12	-32.26%

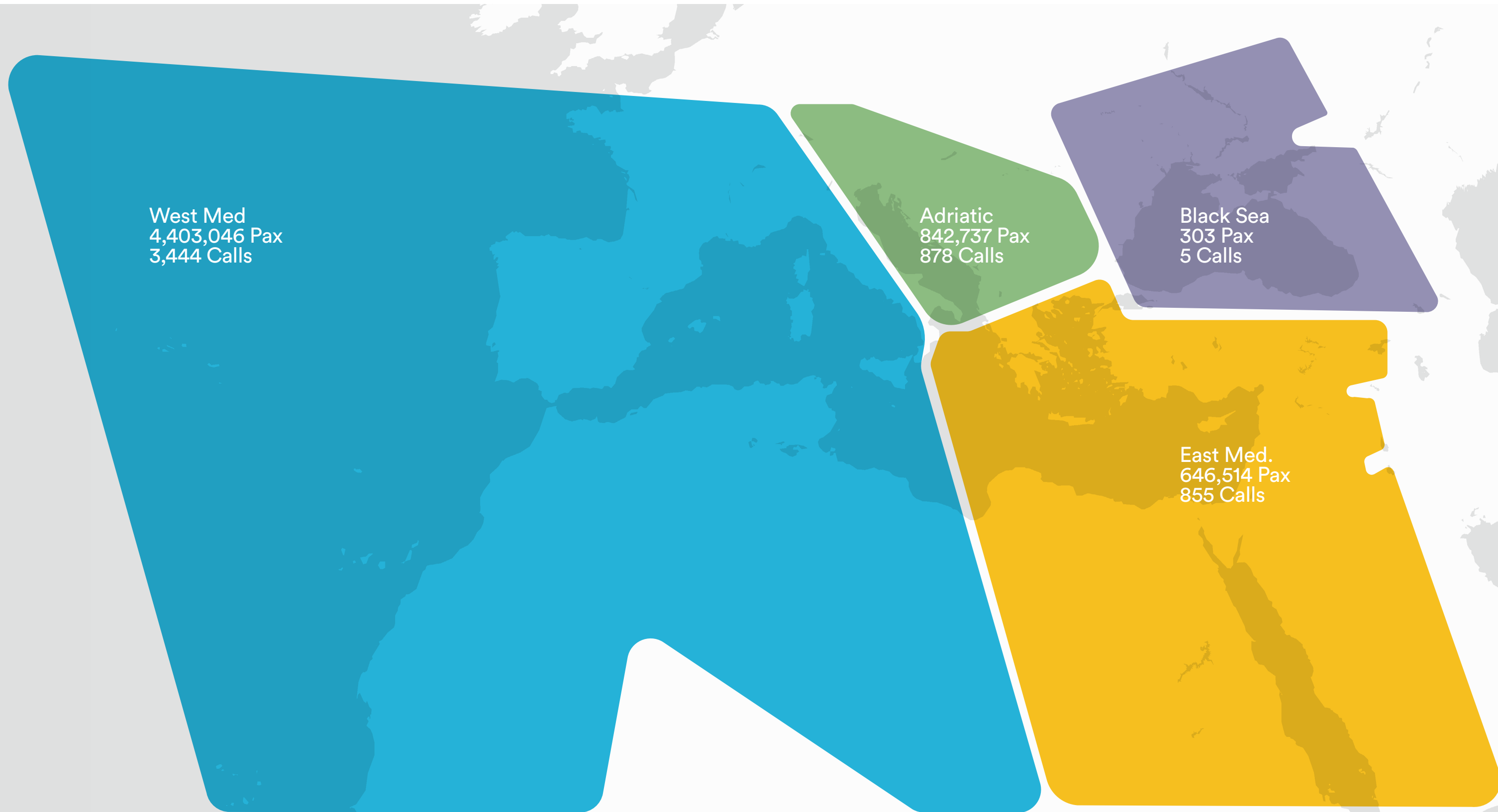
Analysis per MedCruise region



4.1 The MedCruise regions

MedCruise membership spreads in four distinct geographical regions, each of them having its own dynamics. These regions are West Med, Adriatic, East Med and the 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 2021



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 2021 reached 4.4 million. The total of cruise calls in the region over the same period was 3,444. The Adriatic was the second most popular region in 2021, hosting 842,737 passenger movements that reached the region via 878 calls.

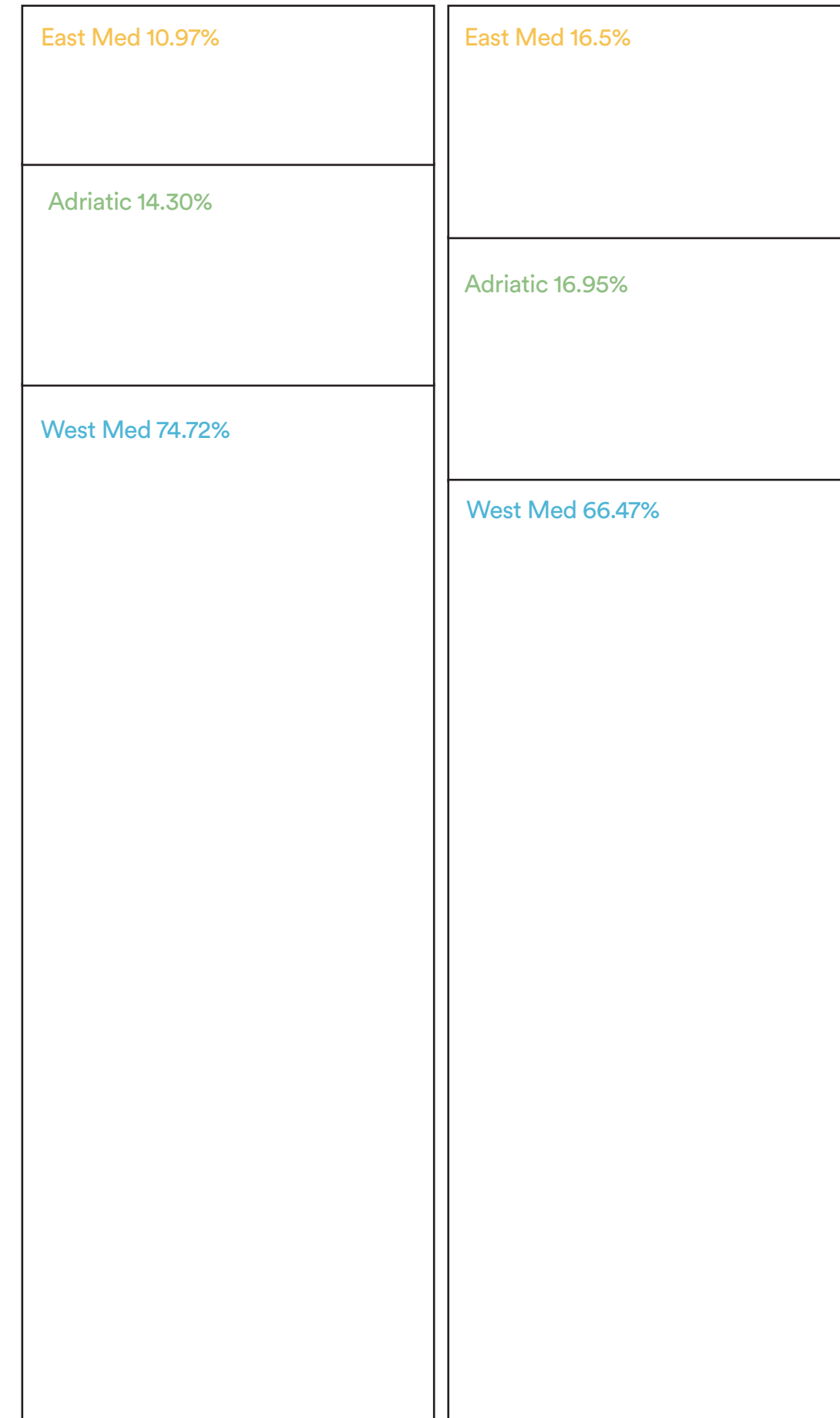
West Med remains the biggest region of the four in terms of the share of cruise activities. In 2021 it hosted 74.7% of the total passenger movements and 66.4% of the cruise calls. Both percentages do not differ from the respective shares that were recorded in 2019, i.e., the pre-pandemic period. On the other hand, the restart of cruising in the Black Sea has been slow, with the region hosting a minimal number of cruise calls and passenger movements.

MedCruise has intensified its efforts to support the strategy of all ports in all four cruise regions to regain cruise activities and achieve sustainable growth in the emerging new normal.

Table 4.1 Total cruise traffic per region, 2021

REGION	NO OF MEMBERS	TOTAL PAX MOVEMENTS	TOTAL CRUISE CALLS	TRANSIT PAX MOVEMENTS	HOME IN/OUT MOVEMENTS
West Med	40	4,403,046	3,444	3,189,694	1,213,352
Adriatic	12	842,737	878	612,713	230,024
East Med	18	646,514	855	369,079	277,435
Black Sea	5	303	5	303	0
Total	75	5,892,600	5,182	4,171,789	1,720,811

Figure 4.1 Cruise pax movements traffic share per region, 2021



3 Out of 4 Cruise passengers have been welcomed in West Med ports

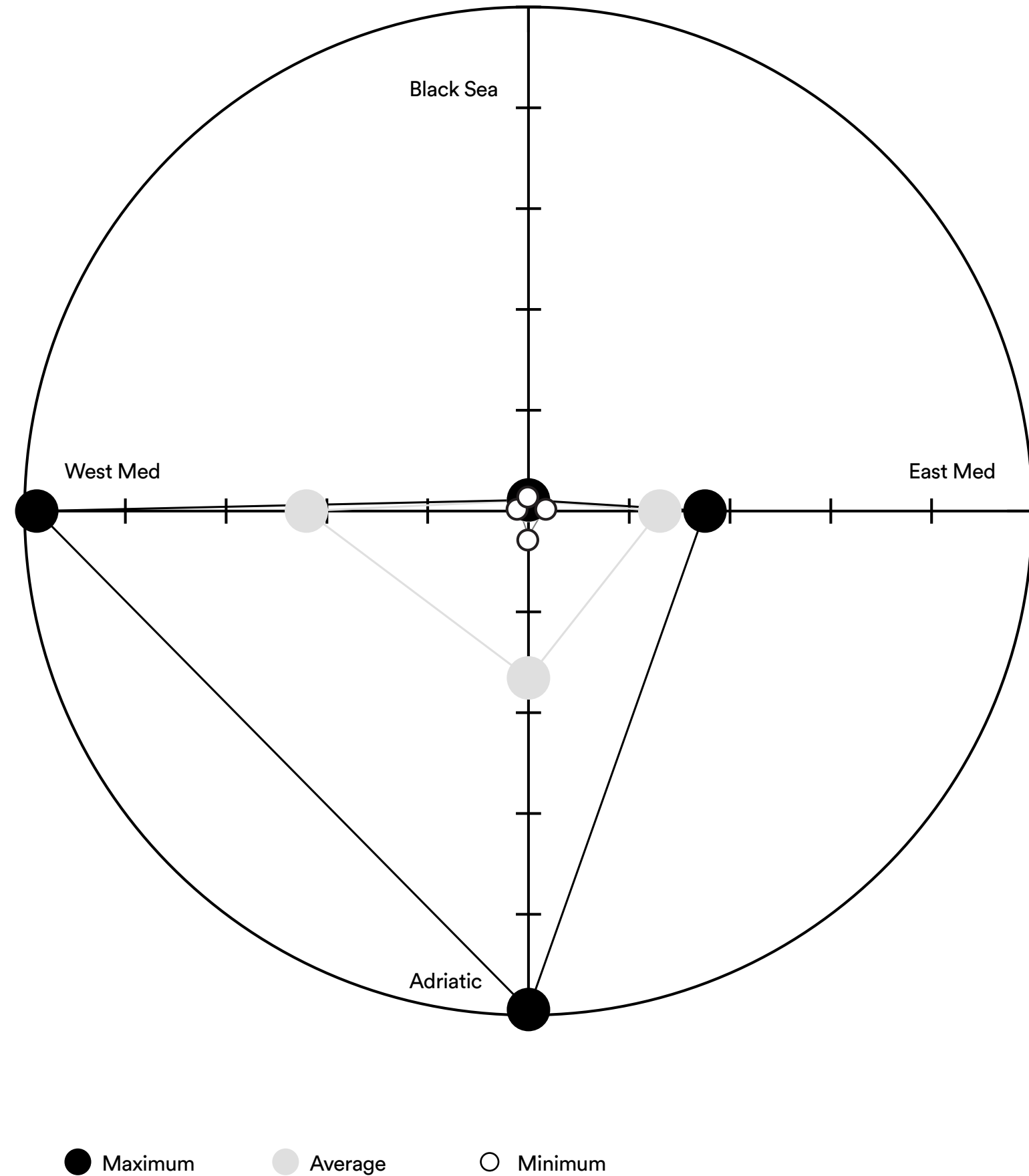
Cruise pax movements traffic shares per region

Cruise call traffic shares 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 2,567. The Adriatic is the region where the second highest average of passengers/call is recorded (1,799), with the maximum observed at an Adriatic port being 3,223 passengers. Adriatic is the third in terms of MedCruise members (12) but the second biggest MedCruise region in terms of cruise activity. Cruise ships deployed in the East Med are even smaller, i.e. 1,523 passengers/call. The region where the smaller cruise ships of all are deployed is the Black Sea (average 600 passengers per call); Black Sea ports recorded just two (2) calls during 2019.

Figure 4.2 Average cruise pax movements /call per region, 2021

REGION	MAXIMUM	AVERAGE	MINIMUM
West Med	2,830	1,278	50
Adriatic	2,868	960	143
East Med	1,016	756	84
Black Sea	64	61	57



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.

Ports in the Adriatic experienced a considerable return of cruise activities in 2021, hosting 842,737 passenger movements, compared to just 32,838 in 2021. A resumption of cruise activities was also noted in East Med, where 842,737 passenger movements were recorded in 2021, compared to just 80,563 in 2019. West Med, the region that had managed to retain almost two million cruise passenger movements in the adverse conditions of 2020, also doubled in 2021 the number of cruise

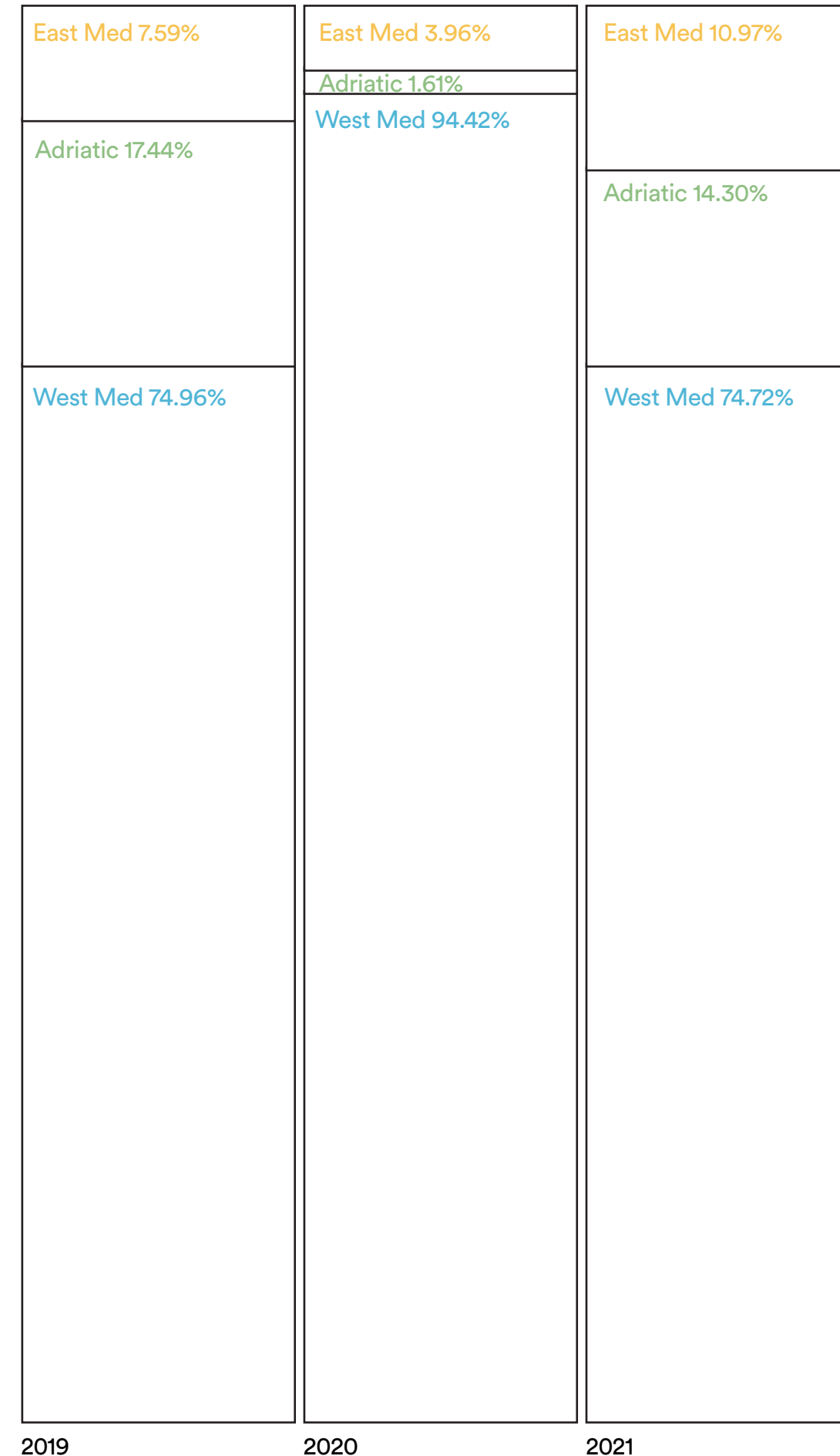
passengers hosted, with the aggregate standing at 4,403,046 passenger movements. On the other hand, the number of cruise activities in the Black Sea remained particularly small, with the recent military events harming further the prospects for an immediate return of cruise activities in the region.

Each of the four regions hosted in 2021 approximately 20-30% of the passenger movement that had hosted in 2019, with any variation reflected in the evolution of traffic concentration per region chart (Figure 4.3). West Med remains the region with the dominant share of the cruise activities in the Med and its adjoining seas.

Table 4.2 Total cruise pax movement variations per region

REGION	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
West Med	4,403,046	1,920,403	129.28%	23,348,849	-81.14%
Adriatic	842,737	32,838	2466.35%	5,431,388	-84.48%
East Med	646,514	80,563	702.49%	2,365,163	-72.67%
Black Sea	303	0	100.00%	1,200	-74.75%
Total	5,892,600	2,033,804	189.7%	31,146,600	-81.1%

Figure 4.3 Cruise pax movements share evolution per region, 2021



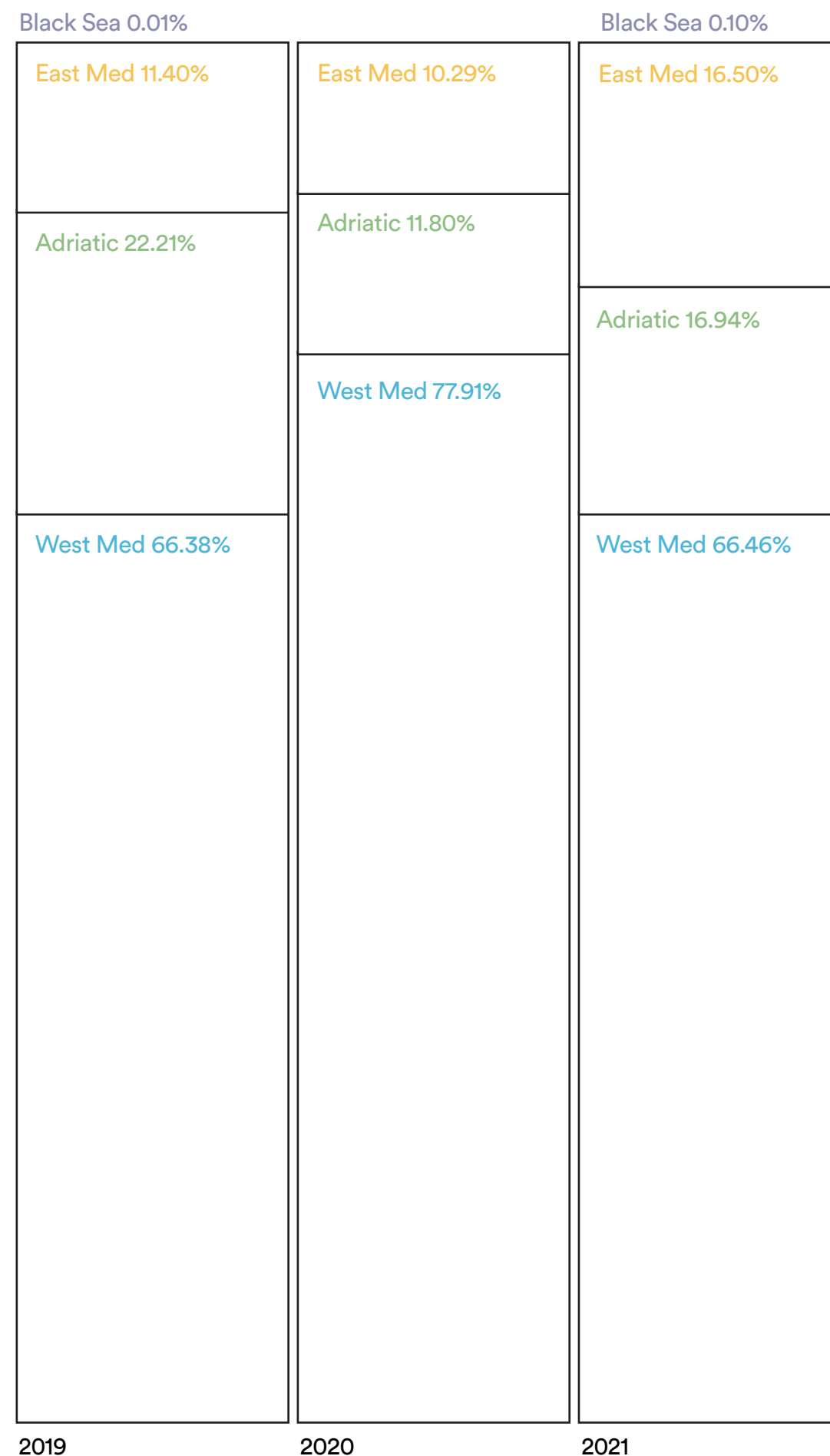
As regards the total number of cruise calls per region (Table 4.3), all the regions registered higher numbers of calls when comparing 2020.

The ports in the East Med experienced the highest return of cruise activities in 2021, hosting 562.8% more cruise calls (855), compared to 2020 (just 129) and more than the 50% of the cruise calls that were hosted in 2019. A resumption of cruise activities was also noted in Adriatic, where 878 cruise calls were recorded in 2021, compared to just 148 in 2019. West Med increased the cruise calls to 3,444 from 977. West Med and Adriatic hosted in 2021 approximately 20-30% of the cruise calls that had hosted in 2019, with any variation reflected in the evolution of cruise calls concentration per region chart (Figure 4.6).

Table 4.3 Total cruise calls movements variations per region

REGION	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
West Med	3,444	977	252.51%	9,025	-61.84%
Adriatic	878	148	493.24%	3,019	-70.92%
East Med	855	129	562.79%	1,550	-44.84%
Black Sea	5	0	100.00%	2	150.00%
Total	5,182	1,254	313.24%	13,596	-61.89%

Figure 4.4 Cruise calls share evolution per region, 2021



The West Med, which has been the region where most home-porting activities are traditionally happening, has hosted most home-porting taking place in 2021 as well (Table 4.4). The total of home in/out passengers in the region reached 1,213,352, which is more than double the respective number of 2020. In both East Med and the Adriatic home-porting activities registered a notable annual increase reaching 277,435 home in/out passengers and 230,024 home in/out passengers respectively. There were no homeporting activities at all in the Black Sea.

Figure 4.5 illustrates the shares of Home In/Out passengers per MedCruise region over the last year.

Figure 4.5 Cruise home in/out pax movements share evolution per region, 2021

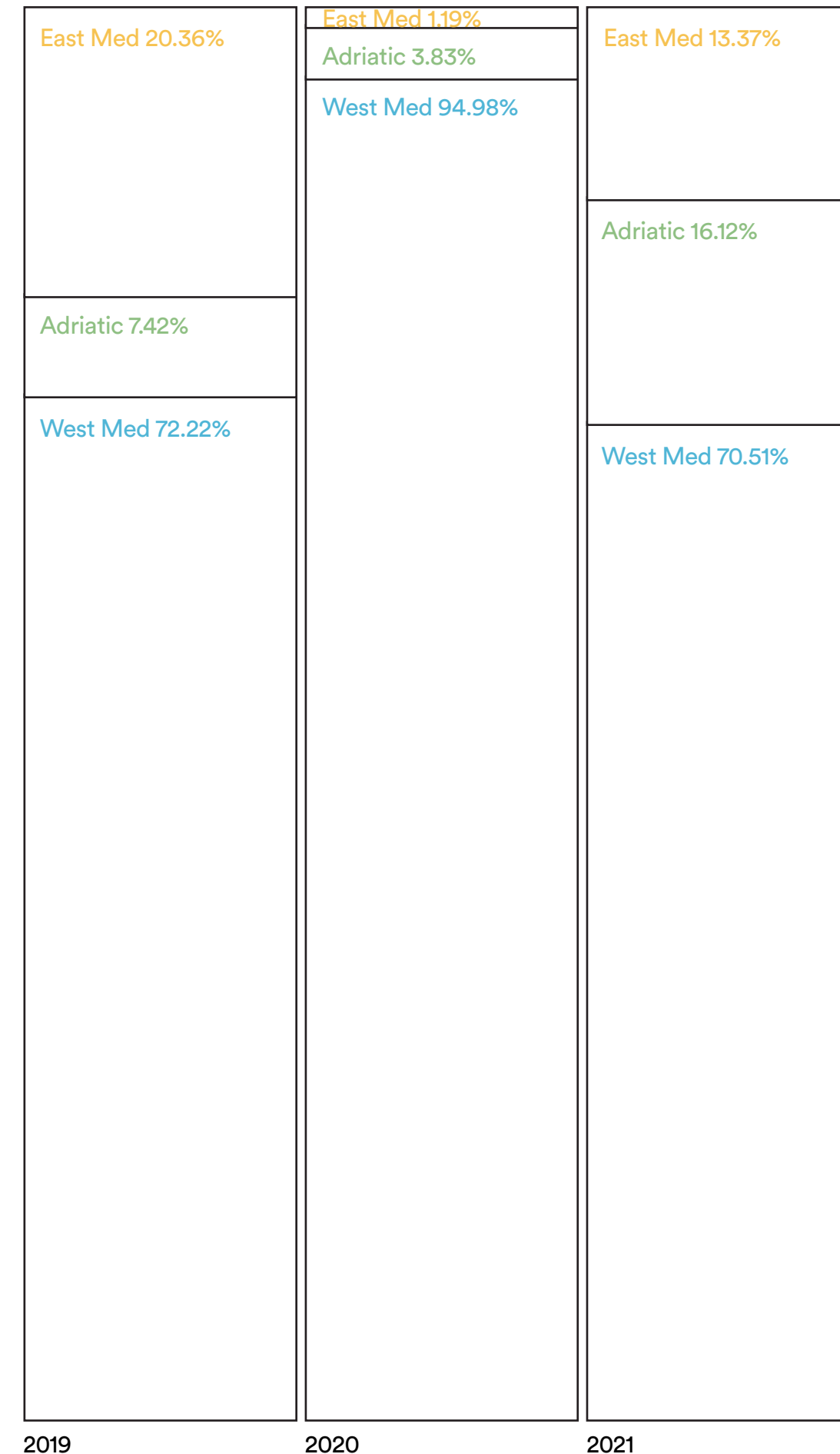


Table 4.4 Total home in/out pax movements variations per region

REGION	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
West Med	1,213,352	506,708	139.46%	6,595,195	-81.60%
Adriatic	230,024	6,336	3530.43%	1,859,058	-87.63%
East Med	277,435	20,430	1257.98%	677,898	-59.07%
Black Sea	0	0	100.00%	0	0.00%
Total	1,720,811	533,474	222.57%	9,132,151	-81.16%

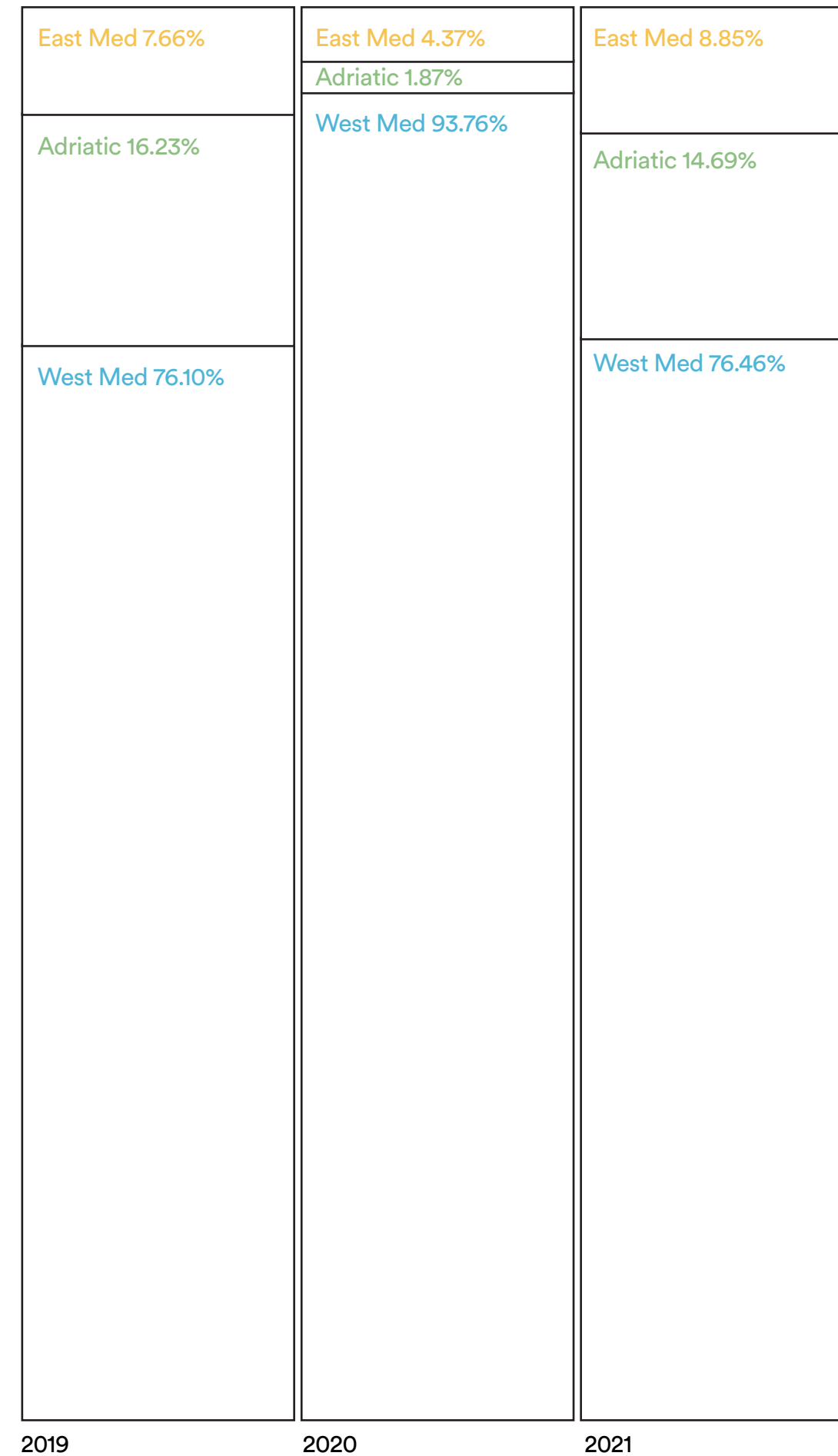
Compared to 2020, on an annual basis transit passengers in the Med and its adjoining seas tripled in 2019 and equal to 4,171,789 passenger movements. This growth is the outcome of the increase of transit passengers to 3,189,694 passenger movements in West Med, to 612,713 in the Adriatic (+12.5%), and to 369,079 in the East Med. A tiny number of cruise passenger movements took place in the Black Sea. Affected by the pandemic however the total of transit passengers in 2021 remained at just 20% the size of the respective total of 2019.

In terms of market share (Figure 4.6), West Med region ports served more than five times more traffic than the second most popular regional market, which is the Adriatic.

Table 4.5 Total transit pax movements variations per region

REGION	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
West Med	3,189,694	1,290,091	147.25%	16,753,654	-80.96%
Adriatic	612,713	25,788	2275.96%	3,572,330	-82.85%
East Med	369,079	60,133	513.77%	1,687,265	-78.13%
Black Sea	303	0	100.00%	1,200	0.00%
Total	4,171,789	1,376,012	203.18%	22,014,449	-81.05%

Figure 4.6 Cruise transit pax movements share evolution per region, 2021



4.3 The MedCruise growth indexes (MEDGRI)

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

MEDGRIPax (Figure 4.8) 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). The figure presents the evolution since the base year. The index had recorded its highest in 2019 (MEDGRIPax = 125). Following its lower price ever in 2020 (MEDGRIPax = 8), a partial recovery took place in 2021 (MEDGRIPax = 24).

Looking at regional trends (Figure 4.9), the index recovered from its lower single-digit levels in 2021 to 19 in the East-Med to 20 in the West Med and to the even higher level of 26 in the case of the Adriatic ports. The challenges that cruise activities faced in the Black Sea region are reflected in this index as well.

MEDGRICalls monitors the annual trend of cruise calls in the Med and in each of the four regions, having again 2010 as the basis year (MEDGRICalls =100). The evolution of MEDGRICalls is illustrated in Figure 4.8. It is worth reminding that throughout the 2010s, the Med and its adjoining seas hosted a continuously increasing number of passenger movements without the number of vessel calls increasing as well. Following a dramatic decrease in 2020 (MEDGRICalls= 8), the index increased in 2021 to MEDGRICalls= 35

Cruise calls in all regions recovered in 2021 from their lowest levels that had been recorded in 2019. The major recovery occurred in the West Med region (MEDGRICalls= 40). In the Adriatic (MEDGRICalls= 20) and the the East Med, the index was equal (MEDGRICalls=29), and even lower in the case of the Black Sea (MEDGRICalls= 2).

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

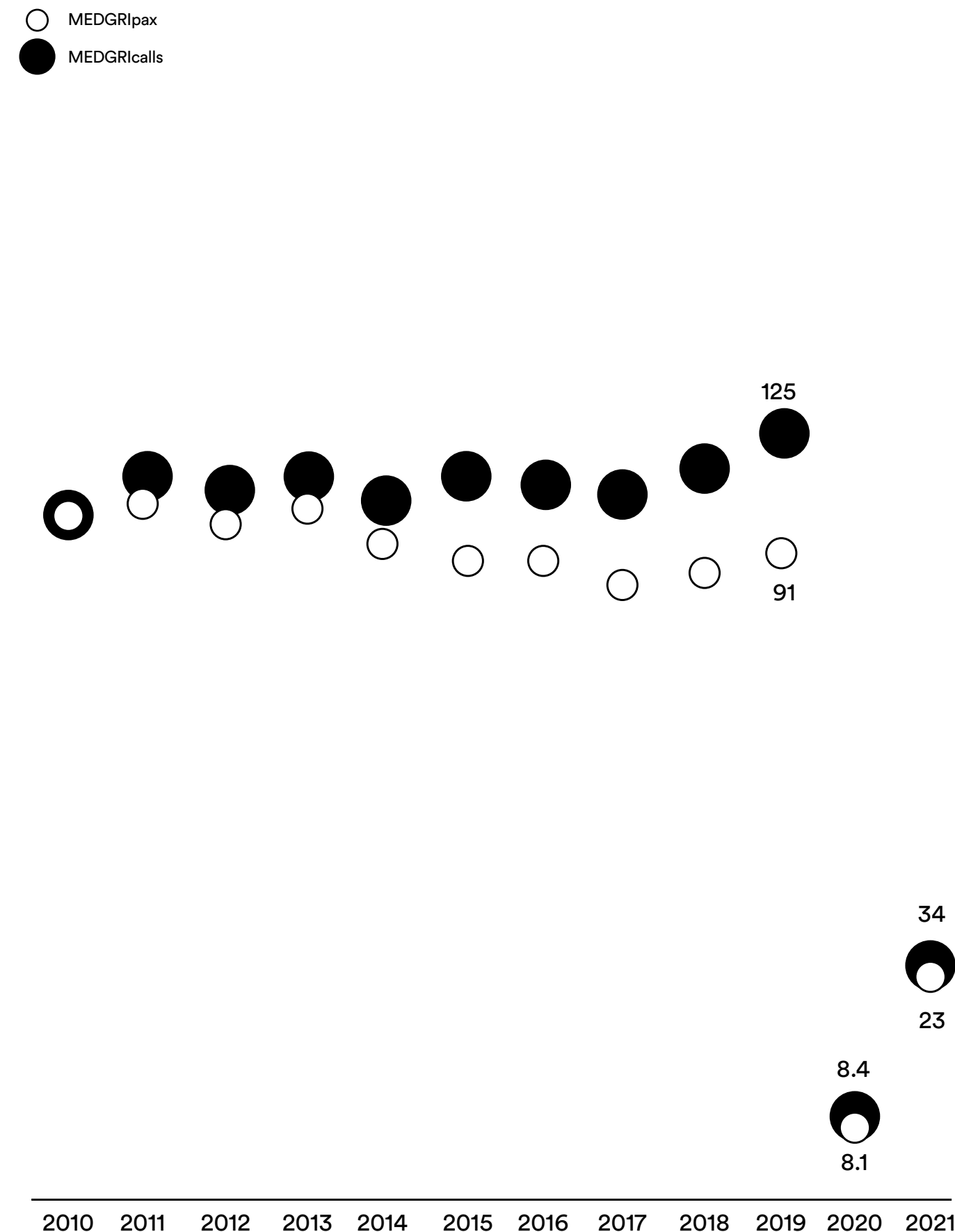


Figure 4.8 MEDGRI trends: the pax movements MedCruise growth index per region (2010=100)

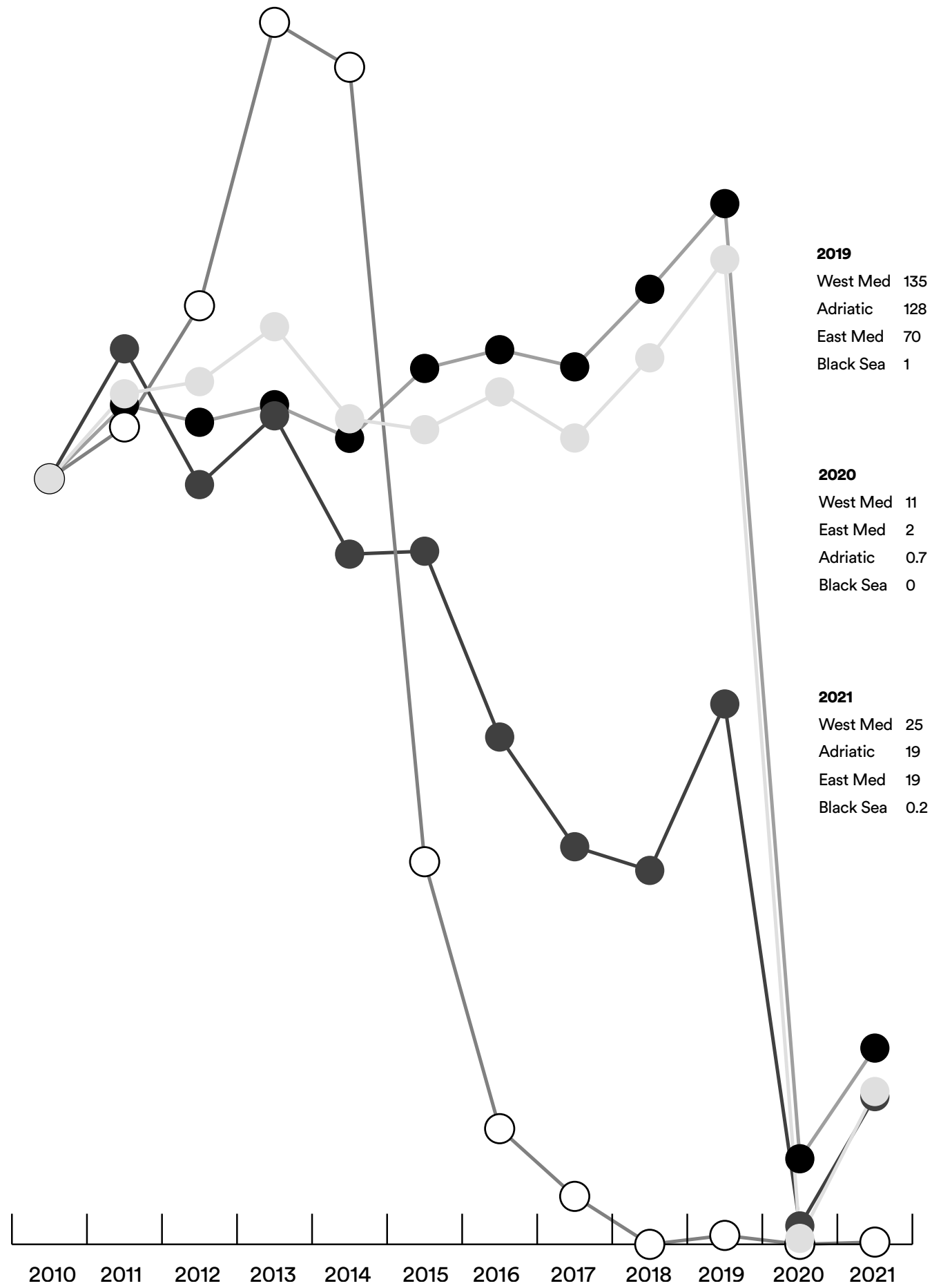
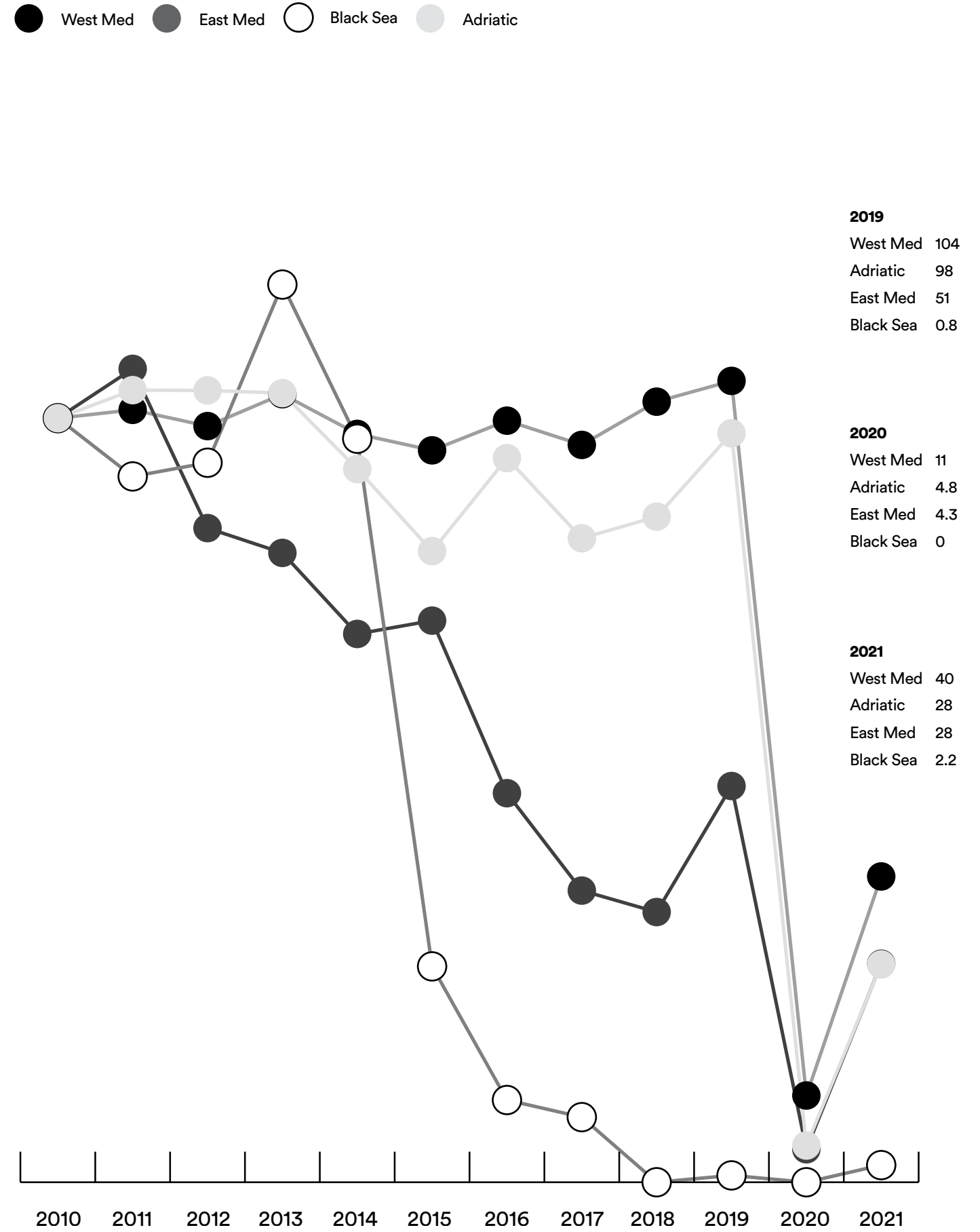


Figure 4.9 MEDGRI trends: MedCruise growth of calls index per region (2010=100)

● West Med ● East Med ○ Black Sea ● Adriatic



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 2021 with those of 2020, as well as a similar comparison with the passenger movements and calls that had been recorded in 2019.

Table 4.6 Major ports per region: Total cruise pax movements

REGION	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
West Med	Barcelona	326,896	130,077	151.31%	1,384,696	-76.39%
West Med	Civitavecchia, Fiumicino, Gaeta	320,006	137,077	133.45%	1,540,861	-79.23%
West Med	Tenerife Ports	272,598	241,577	12.84%	857,190	-68.20%
Adriatic	Corfu	178,029	7,768	2191.83%	699,318	-74.54%
Adriatic	Dubrovnik, Korcula	111,505	4,306	2489.53%	731,771	-84.76%
Adriatic	Bari, Brindisi, Manfredonia, Monopoli	107,106	7,128	1402.61%	493,320	-78.29%
East Med	Piraeus	167,726	13,018	1188.42%	687,579	-75.61%
East Med	Heraklion	69,364	8,035	763.27%	260,323	-73.35%
East Med	Souda/Chania	45,619	105	43346.67%	265,956	-82.85%
Black Sea	Burgas	128	0	100.00%	0	100.00%
Black Sea	Varna	59	0	100.00%	0	100.00%
Black Sea	Odessa	59	0	100.00%	750	-92.13%

Table 4.7 Major ports per region: Total cruise calls

REGION	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
West Med	Tenerife Ports	411	182	125.82%	511	-19.57%
West Med	Barcelona	271	53	411.32%	800	-66.13%
West Med	Civitavecchia, Fiumicino, Gaeta	258	99	160.61%	800	-67.75%
Adriatic	Corfu	200	10	1900.00%	420	-52.38%
Adriatic	Dubrovnik, Korcula	191	64	198.44%	622	-69.29%
Adriatic	Bari, Brindisi, Manfredonia, Monopoli	125	16	681.25%	301	-58.47%
East Med	Piraeus	379	32	1084.38%	622	-39.07%
East Med	Heraklion	118	24	391.67%	204	-42.16%
East Med	Cyprus Ports	78	24	225.00%	94	-17.02%
Black Sea	Burgas	2	0	100.00%	0	100.00%
Black Sea	Varna	1	0	100.00%	0	100.00%
Black Sea	Constantza	1	0	100.00%	1	100.00%
Black Sea	Odessa	1	0	100.00%	1	100.00%

Table 4.8 Major ports per region: Total cruise pax movements

REGION	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
West Med	Genoa, Savona	325,906	117,058	178.41%	1,096,742	-70.28%
West Med	Barcelona	193,958	68,765	182.06%	1,753,222	-88.94%
West Med	Civitavecchia, Fiumicino, Gaeta	170,338	69,890	143.72%	1,111,542	-84.68%
East Med	Piraeus	135,939	3,622	3653.15%	410,512	-66.89%
East Med	Heraklion	50,566	11,963	322.69%	46,720	8.23%
East Med	Jeddah, Yanbu, Al Wajh	49,296	n/a	100.00%	n/a	100.00%
Adriatic	Bari, Brindisi, Manfredonia, Monopoli	112,599	1,373	8100.95%	269,875	-58.28%
Adriatic	Corfu	56,670	0	100.00%	107,879	-47.47%
Adriatic	Venice	27,059	4,226	540.30%	1,390,153	-98.05%

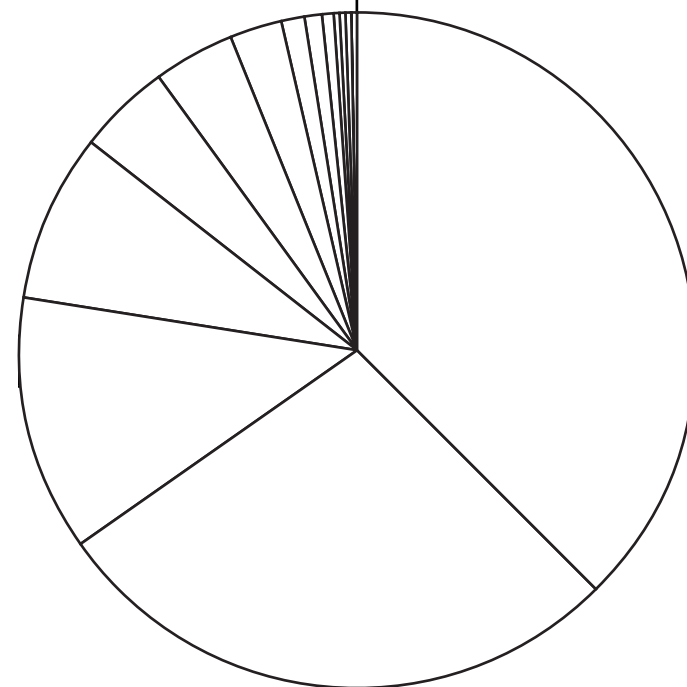
Table 4.9 Major ports per region: Total transit cruise pax movements

REGION	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
West Med	Barcelona	326,896	130,077	151.31%	1,384,696	-76.39%
West Med	Civitavecchia, Fiumicino, Gaeta	320,006	137,077	133.45%	1,540,861	-79.23%
West Med	Tenerife Ports	272,598	241,577	12.84%	857,190	-68.20%
Adriatic	Corfu	178,029	7,768	2191.83%	699,318	-74.54%
Adriatic	Dubrovnik, Korcula	111,505	4,306	2489.53%	731,771	-84.76%
Adriatic	Bari, Brindisi, Manfredonia, Monopoli	107,106	7,128	100.00%	493,320	100.00%
East Med	Piraeus	167,726	13,018	1188.42%	687,579	-75.61%
East Med	Heraklion	69,364	8,035	100.00%	260,323	-73.35%
East Med	Souda/Chania	45,619	105	43346.67%	265,956	-82.85%
Black Sea	Burgas	128	0	100.00%	0	100.00%
Black Sea	Varna	59	0	100.00%	0	100.00%
Black Sea	Odessa	59	0	100.00%	750	-92.13%

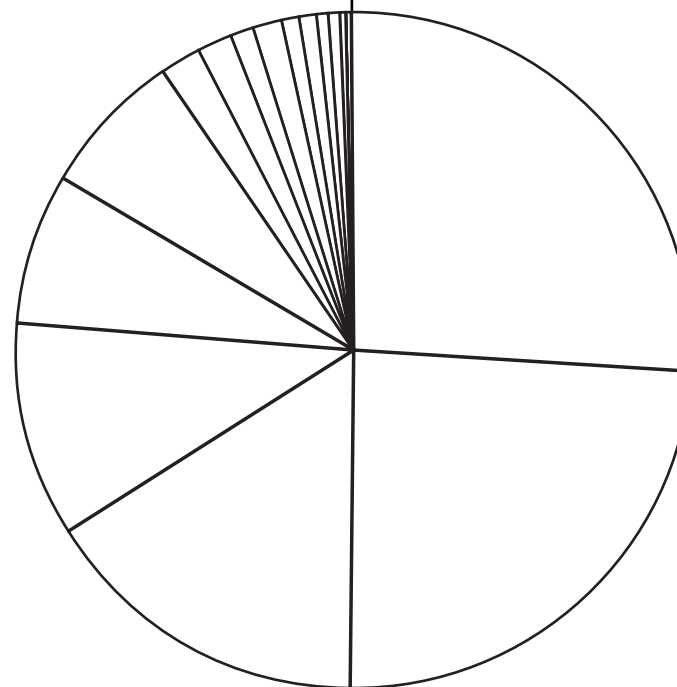
4.5 Cruise traffic per country

Figure 4.10. Cruise traffic per country

Counties	Passenger movements
Italy	37.67%
Spain	27.71%
Greece	12.32%
France	8.04%
Portugal	4.51%
Croatia	3.82%
Malta	2.50%
Saudi Arabia	1.05%
Cyprus	0.86%
Egypt	0.47%
Gibraltar	0.38%
Turkey	0.25%
Cabo Verde	0.19%
Montenegro	0.16%
Slovenia	0.08%

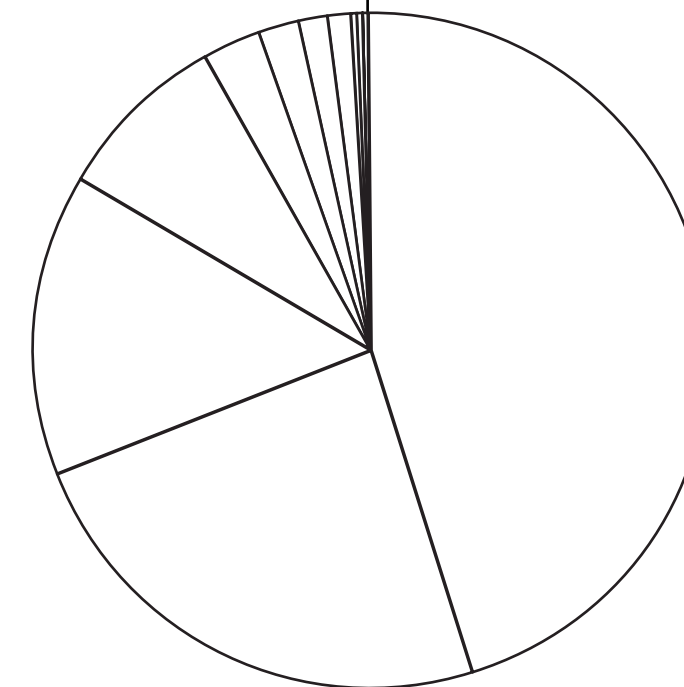


Counties	Cruise calls
Spain	26.36%
Italy	24.08%
Greece	15.90%
France	10.27%
Croatia	7.14%
Portugal	6.85%
Malta	2.06%
Cyprus	1.51%
Saudi Arabia	1.37%
Montenegro	1.24%
Gibraltar	0.85%
Turkey	0.75%
Egypt	0.73%
Cabo Verde	0.58%
Slovenia	0.21%
Bulgaria	0.06%
Ukraine	0.02%
Romania	0.02%



MedCruise members spread in 22 different countries in the Mediterranean and its adjoining seas. The fact that MedCruise members represent in most cases the vast majority of the total cruise activities per country allows meaningful conclusions on the trends observed. It is acknowledged though this is not in all cases the total traffic within the country, as the numbers of reporting might not always correspond to the total of cruise ports in the respective country. Figures below present the shares of cruise activities per major country.

Counties	Home in/out passenger movements
Italy	45.36%
Spain	23.89%
Greece	14.43%
France	8.40%
Saudi Arabia	2.86%
Cyprus	1.73%
Portugal	1.52%
Malta	1.08%
Croatia	0.32%
Turkey	0.23%
Egypt	0.16%
Montenegro	0.01%
Cabo Verde	0.01%



Counties	Transit passenger movements
Italy	34.50%
Spain	29.29%
Greece	11.45%
France	7.89%
Portugal	5.74%
Croatia	5.27%
Malta	3.08%
Egypt	0.60%
Gibraltar	0.53%
Cyprus	0.51%
Saudi Arabia	0.30%
Cabo Verde	0.27%
Turkey	0.25%
Montenegro	0.21%
Slovenia	0.11%

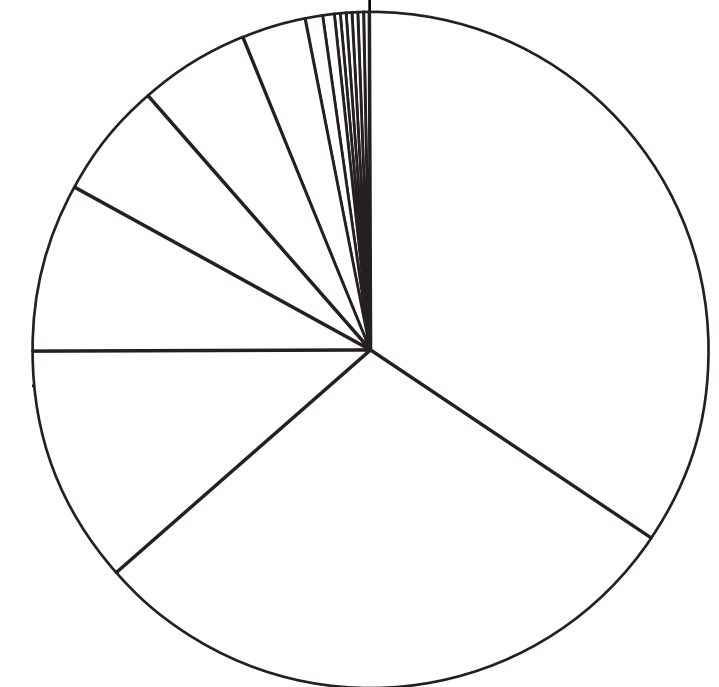


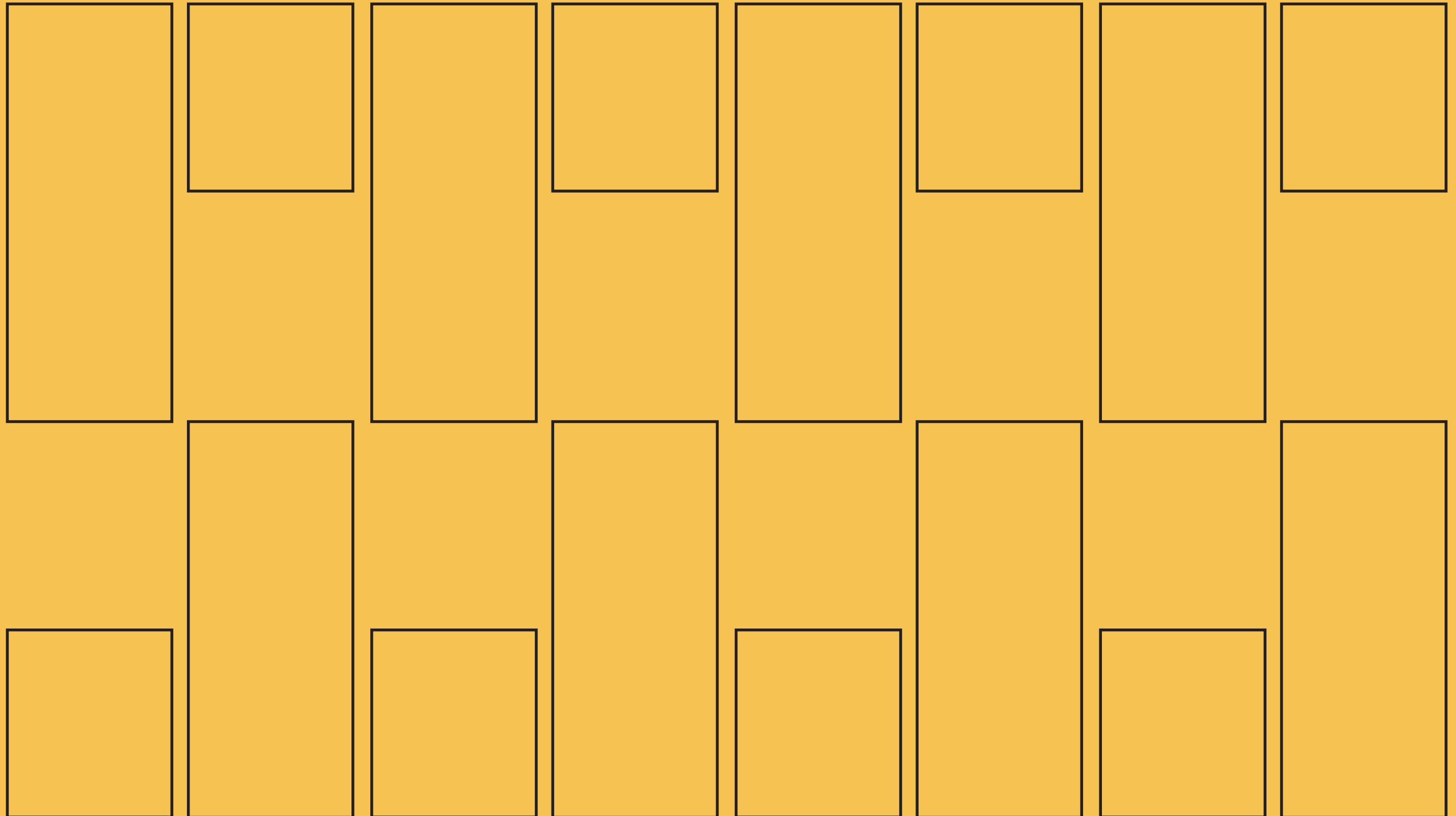
Table 4.10 Cruise pax movements per MedCruise country

COUNTRY	2021	2020	VARIATION 2021/2020	SUM OF TP 19	VARIATION 2021/2019
Italy	2,219,919	633,631	250.35%	11,800,317	-81.19%
Spain	1,632,874	829,087	96.95%	8,237,308	-80.18%
Greece	725,809	44,739	1522.32%	2,500,758	-70.98%
France	473,806	147,054	222.20%	2,866,876	-83.47%
Portugal	265,463	229,737	15.55%	1,428,608	-81.42%
Croatia	225,354	6,959	3138.31%	1,408,141	-84.00%
Malta	147,132	59,180	148.62%	902,425	-83.70%
Saudi Arabia	61,666	n/a	100.00%	n/a	100.00%
Cyprus	50,927	12,086	321.37%	132,828	-61.66%
Egypt	27,788	20,060	38.52%	72,964	-61.92%
Gibraltar	22,225	10,002	122.21%	328,057	-93.23%
Turkey	14,552	1,824	697.81%	201,093	-92.76%
Cabo Verde	11,193	18,872	-40.69%	49,878	-77.56%
Montenegro	9,139	3,009	203.72%	614,747	-98.51%
Slovenia	4,450	0	100.00%	115,581	-96.15%
Bulgaria	187	0	100.00%	0	100.00%
Ukraine	59	0	100.00%	750	-92.13%
Romania	57	0	100.00%	450	-87.33%
Tunisia	0	0	100.00%	648	-100.00%
Israel	0	9,622	-100.00%	264,717	-100.00%
Morocco	0	6,837	-100.00%	36,986	-100.00%
Monaco	0	1,105	-100.00%	183,468	-100.00%
Total	5,892,600	2,033,804		31,146,600	

Table 4.11 Cruise calls per MedCruise country

COUNTRY	2021	2020	VARIATION 2021/2020	SUM OF TP 19	VARIATION 2021/2019
Spain	1,366	342	299.42%	2,953	-53.74%
Italy	1,248	336	271.43%	4,060	-69.26%
Greece	824	81	917.28%	1,420	-41.97%
France	532	129	312.40%	1,075	-50.51%
Croatia	370	105	252.38%	1,162	-68.16%
Portugal	355	120	195.83%	910	-60.99%
Malta	107	32	234.38%	372	-71.24%
Cyprus	78	24	100.00%	94	100.00%
Saudi Arabia	71		n/a		n/a
Montenegro	64	9	611.11%	464	-86.21%
Gibraltar	44	5	780.00%	197	-77.66%
Turkey	39	5	680.00%	238	-83.61%
Egypt	38	13	192.31%	55	-30.91%
Cabo Verde	30	33	-9.09%	146	-79.45%
Slovenia	11	0	100.00%	72	-84.72%
Bulgaria	3	0	100.00%	0	100.00%
Ukraine	1	0	100.00%	1	0.00%
Romania	1	0	100.00%	1	0.00%
Monaco	0	1	100.00%	163	-100.00%
Morocco	0	3	-100.00%	49	-100.00%
Tunisia	0	0	0.00%	1	-100.00%
Israel	0	16	-100.00%	163	-100.00%
Total	5,182	1,254		13,596	

Seasonality analysis



5.1 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 region where a port is located.

Figure 5.1 illustrates the shares of passenger movements and cruise calls per month in 2021. This has been a special year, the main feature of which was the progressive restart of cruise activities that had been halted following the pandemic outbreak in 2020. Thus, the majority of cruise activities in the Med and its adjoining seas happened in the second half of 2021. The number of calls in the first three

months of the year was less than 70 per month and passenger movements less than 60,000. This number started increasing in May and even more in June and especially July when 471 calls resulted in over half a million cruise passenger movements.

Notable percentage of cruise activities also occurred in September and November. The highest share of both cruise passenger movements and calls was recorded in October (25.8% and 25.7%, respectively). Rather than the regular pattern of services in the region (i.e. in 2019 around 73% and 71% of pax movements and calls happened from May to October) in 2021, 79.8% of cruise calls took place from September to December.

Table 5.1 Total cruise traffic per month, 2021

MONTH	TOTAL CRUISE PAX	% OF TOTAL PAX	TOTAL CRUISE CALLS	% OF TOTAL CRUISE CALLS	PAX/CALL
January	20,517	0.35%	39	0.75%	526
February	41,113	0.70%	49	0.95%	839
March	46,226	0.78%	49	0.95%	943
April	54,848	0.93%	70	1.35%	784
May	161,951	2.75%	146	2.82%	1,109
June	218,910	3.71%	250	4.82%	876
July	558,960	9.49%	471	9.09%	1,187
August	912,987	15.49%	633	12.22%	1,442
September	1,050,535	17.83%	904	17.45%	1,162
October	1,522,300	25.83%	1330	25.67%	1,145
November	880,335	14.94%	838	16.17%	1,051
December	423,918	7.19%	403	7.78%	1,052

Figure 5.1 Cruise traffic shares per month, 2021



Figure 5.2 Total pax movements traffic per month, 2020-2021

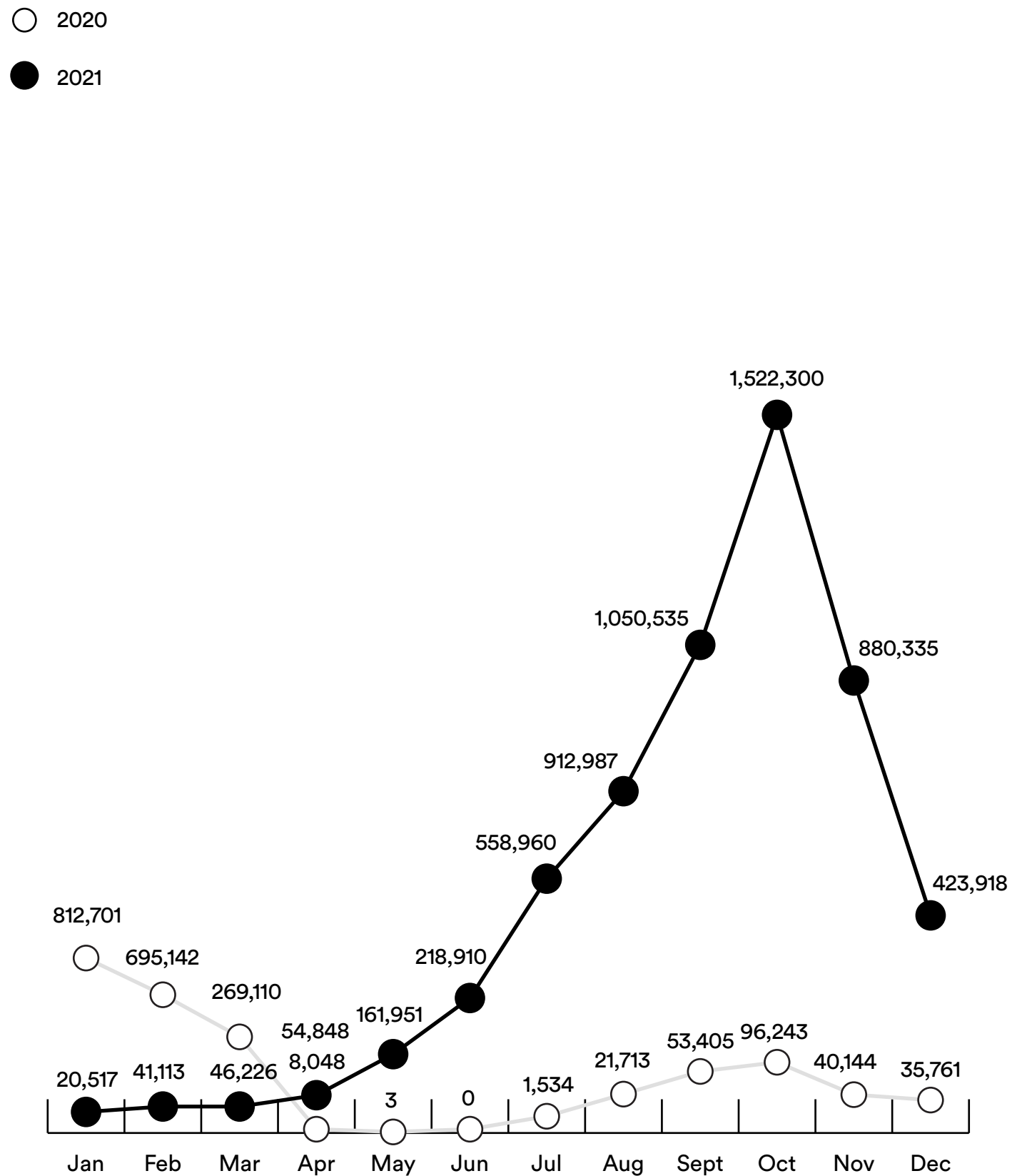


Figure 5.3 Total cruise call traffic per month, 2020-2021

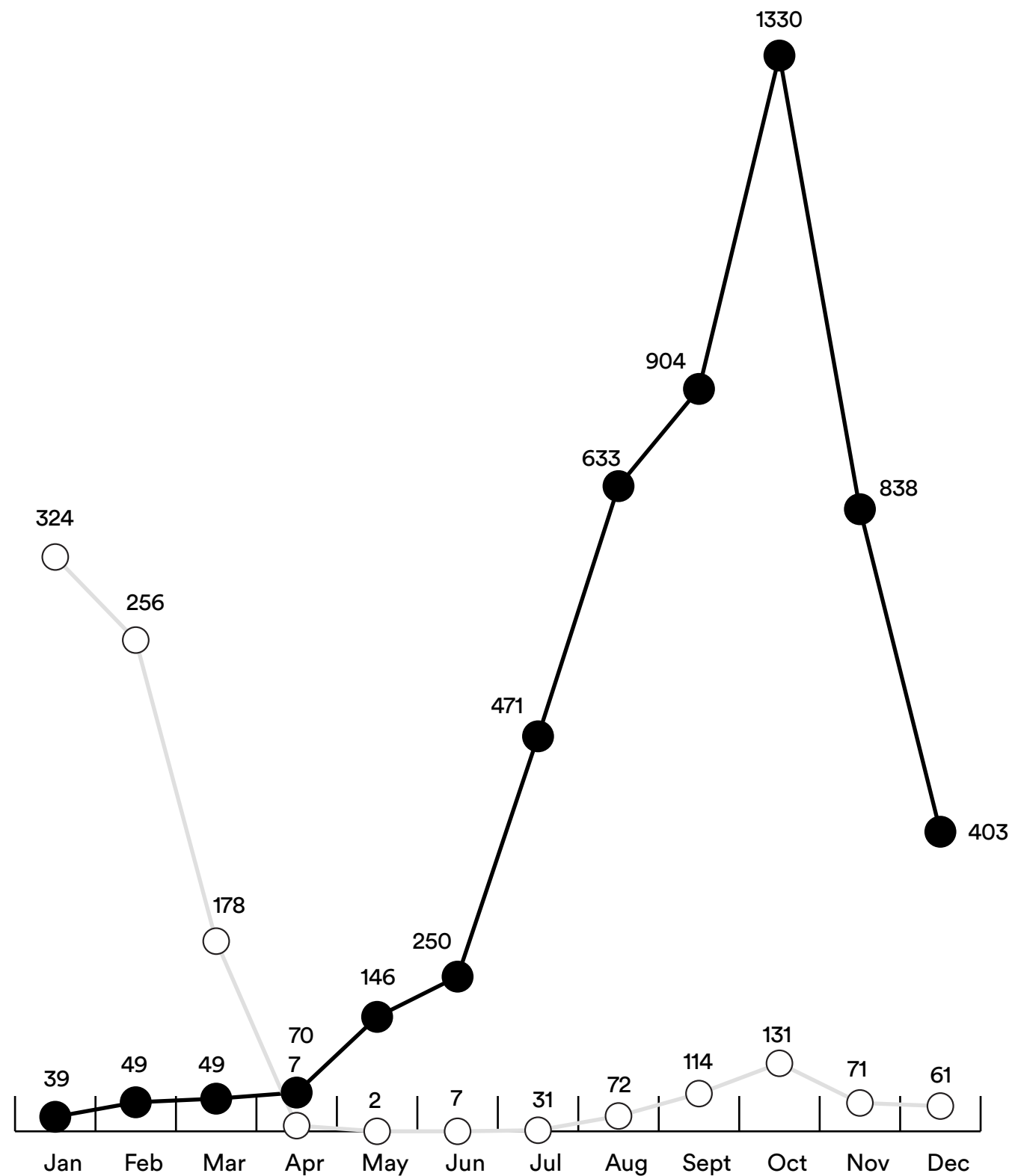
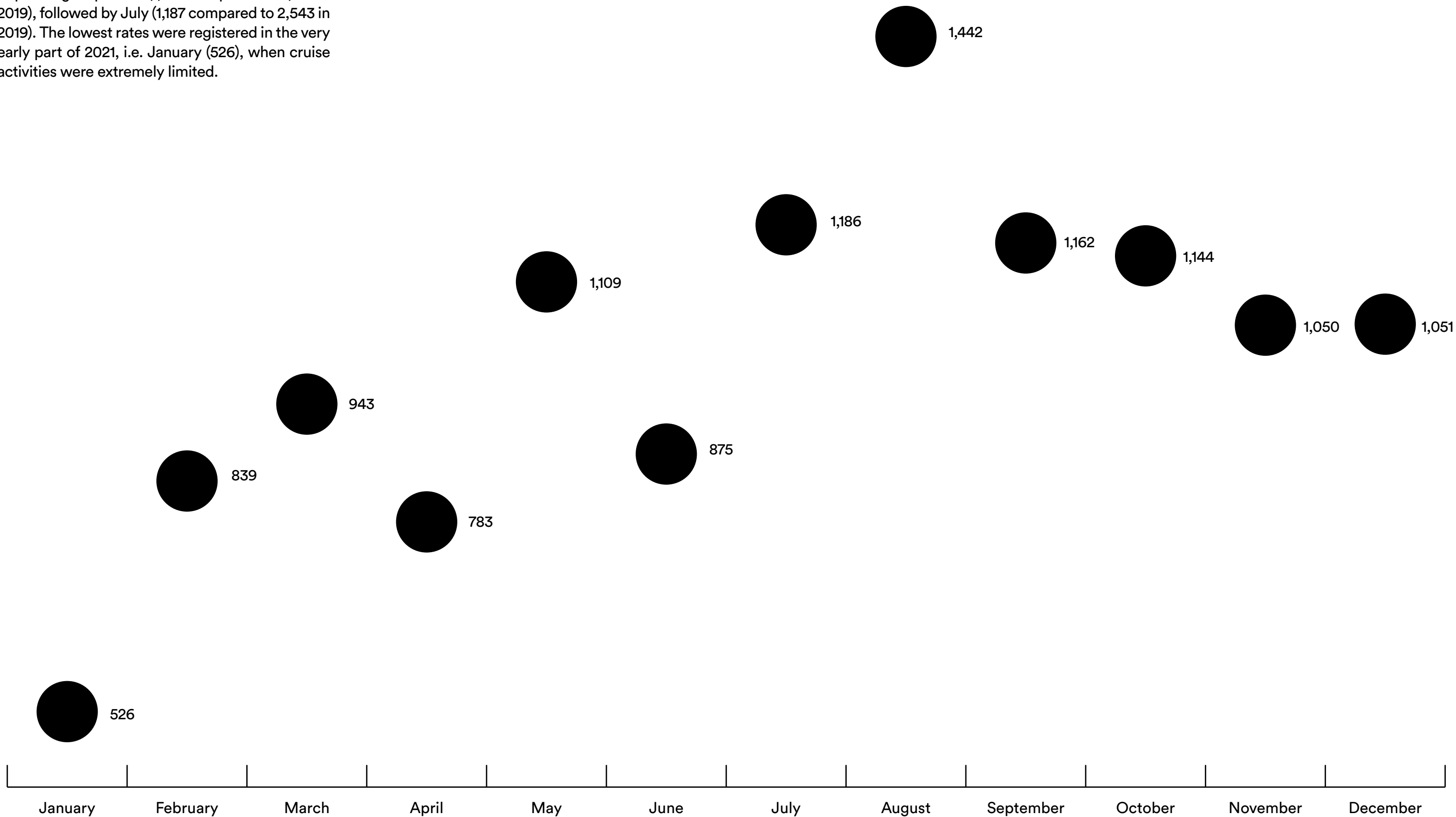


Figure 5.4 presents the average number of passengers per cruise call during each month of the year. The variations per month, as expected, are significant and follow the ones of the total traffic except for the months of January and February. August is the month of 2021 with the highest rate of passengers per call (1,452 compared to 2,651 in 2019), followed by July (1,187 compared to 2,543 in 2019). The lowest rates were registered in the very early part of 2021, i.e. January (526), when cruise activities were extremely limited.

Figure 5.4 Average call per month



5.2 Seasonality by region in 2021

The four distinctive regions in which MedCruise membership spreads (West Med, Adriatic, East Med, Black Sea) register different seasonality trends distributions (Table 5.2).

In West Med the cruise traffic 61% of the passenger movements is concentrated in the autumn months (September-November), while 23.1% takes place during the summer. In the Adriatic and in the East Med, cruise traffic is concentrated mostly during the second and third trimester of the year, in particular, the period commencing in June and ending in November. The passenger movements in the Adriatic and in the East Med during the winter months (Dec-Feb) correspond to a minimum of 0.3% and 2.9% of the total passenger movements took place in the respective regions on an annual basis.

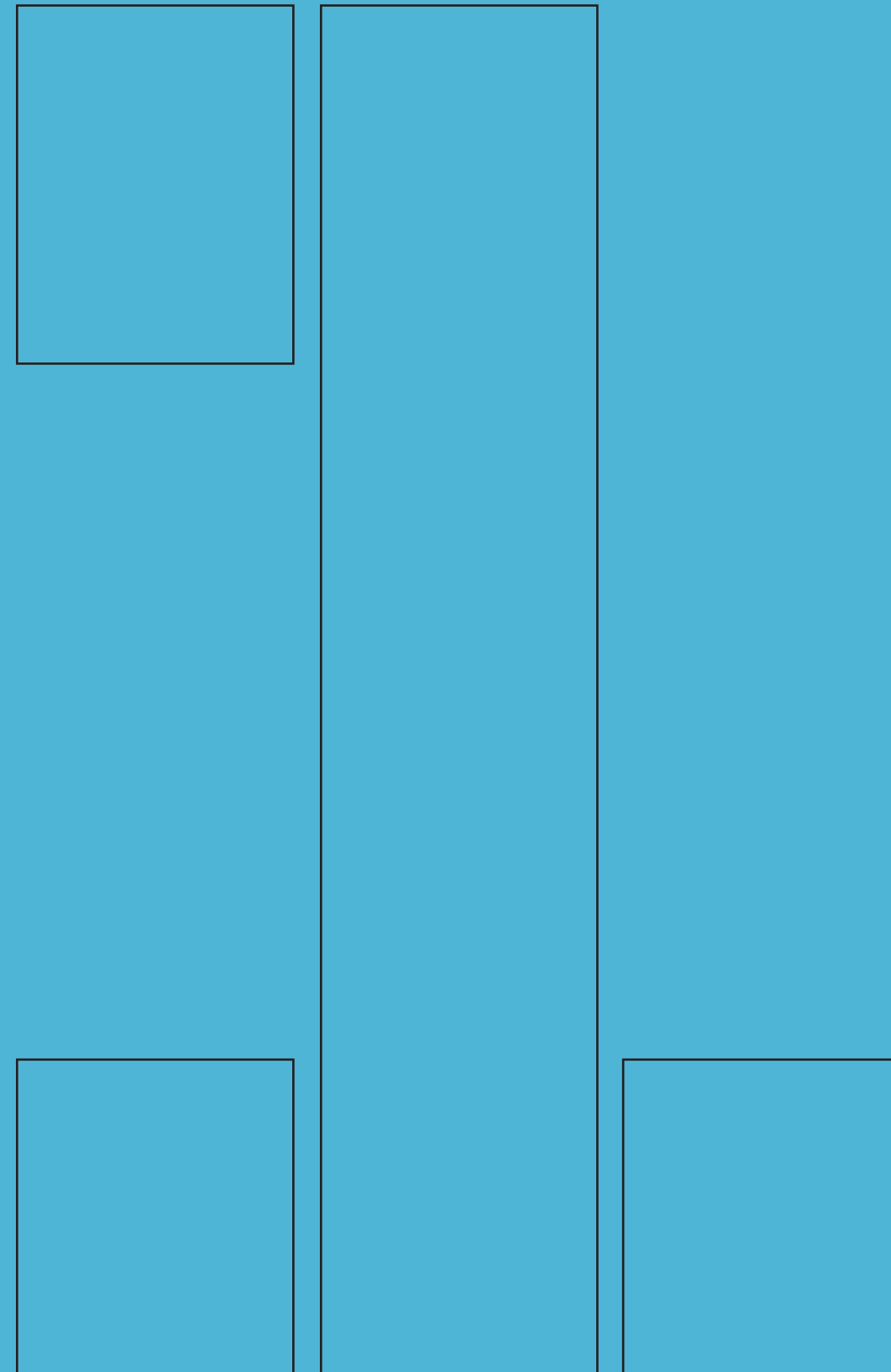
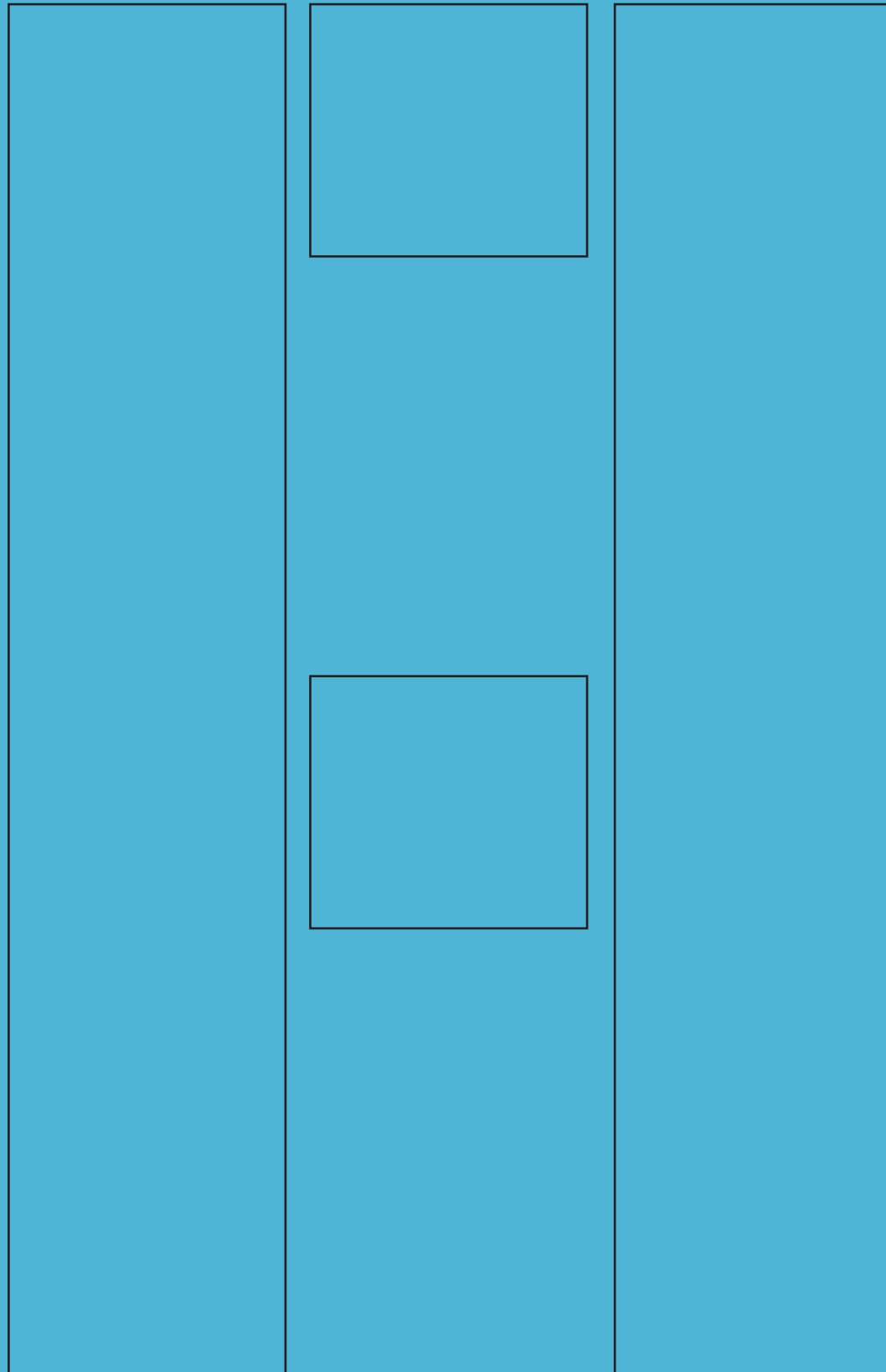
Table 5.2 Shares of cruise traffic within the MedCruise regions in 2021

REGION	TOTAL PAX MOVEMENTS				TOTAL CALLS			
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	5.37%	23.08%	61.00%	10.54%	6.58%	18.21%	62.83%	12.38%
Adriatic	1.66%	48.50%	49.57%	0.26%	1.71%	43.62%	52.51%	2.16%
East Med	1.96%	41.11%	53.99%	2.94%	2.71%	40.35%	51.65%	5.29%
Black Sea	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%	100.00%	0.00%
Total	4.46%	28.69%	58.60%	8.24%	5.11%	26.13%	59.27%	9.48%

REGION	HOME IN/OUT PAX MOVEMENTS				TRANSIT PAX MOVEMENTS			
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	4.70%	25.97%	61.57%	7.77%	5.62%	21.99%	60.79%	11.60%
Adriatic	1.90%	54.70%	43.38%	0.02%	1.57%	46.17%	51.90%	0.35%
East Med	2.00%	43.59%	51.52%	2.88%	1.93%	39.24%	55.84%	2.98%
Black Sea	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	0.00%
Total	3.89%	32.65%	57.51%	5.94%	4.70%	27.06%	59.05%	9.19%

Appendix 1

MedCruise ports: Total cruise pax movements, 2019-2021



Appendix I MedCruise ports: Total cruise pax movements, 2019-2021

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
1	Alanya	116	91	27.47%	14,138	-99.18%
2	Ancona, Ortona, Pesaro	37,396	1,364	2641.64%	101,981	-63.33%
3	Antalya	1,413	n/a	n/a	n/a	n/a
4	Ashdod	0	0	0.00%	27,433	-100.00%
5	Azores	21,266	21,011	1.21%	148,973	-85.72%
6	Balearic Islands	345,065	156,757	120.13%	2,658,156	-87.02%
7	Barcelona	520,854	198,842	161.94%	3,137,918	-83.40%
8	Bari, Brindisi, Manfredonia, Monopoli	219,705	8,501	2484.46%	763,195	-71.21%
9	Burgas	128	0	100.00%	0	100.00%
10	Cabo Verde	11,193	18,872	-40.69%	49,878	-77.56%
11	Cadiz	133,427	40,679	228.00%	n/a	n/a
12	Canarian ports	1,159	0	100.00%	1,930	-39.95%
13	Cartagena	70,087	18,862	271.58%	250,058	-71.97%
14	Castellon	1,079	0	100.00%	5,452	-80.21%
15	Catania, Augusta	14,187	4,206	237.30%	208,509	-93.20%
16	Ceuta	150	0	100.00%	9,351	-98.40%
17	Civitavecchia, Fiumicino, Gaeta	490,344	206,967	136.92%	2,652,403	-81.51%
18	Constantza	57	0	100.00%	450	-87.33%
19	Corfu	234,699	7,768	2921.36%	807,197	-70.92%
20	Corsica Ports	45,884	5,719	702.31%	23,454	95.63%
21	Costa Brava Cruise Ports	3,947	0	100.00%	56,731	-93.04%

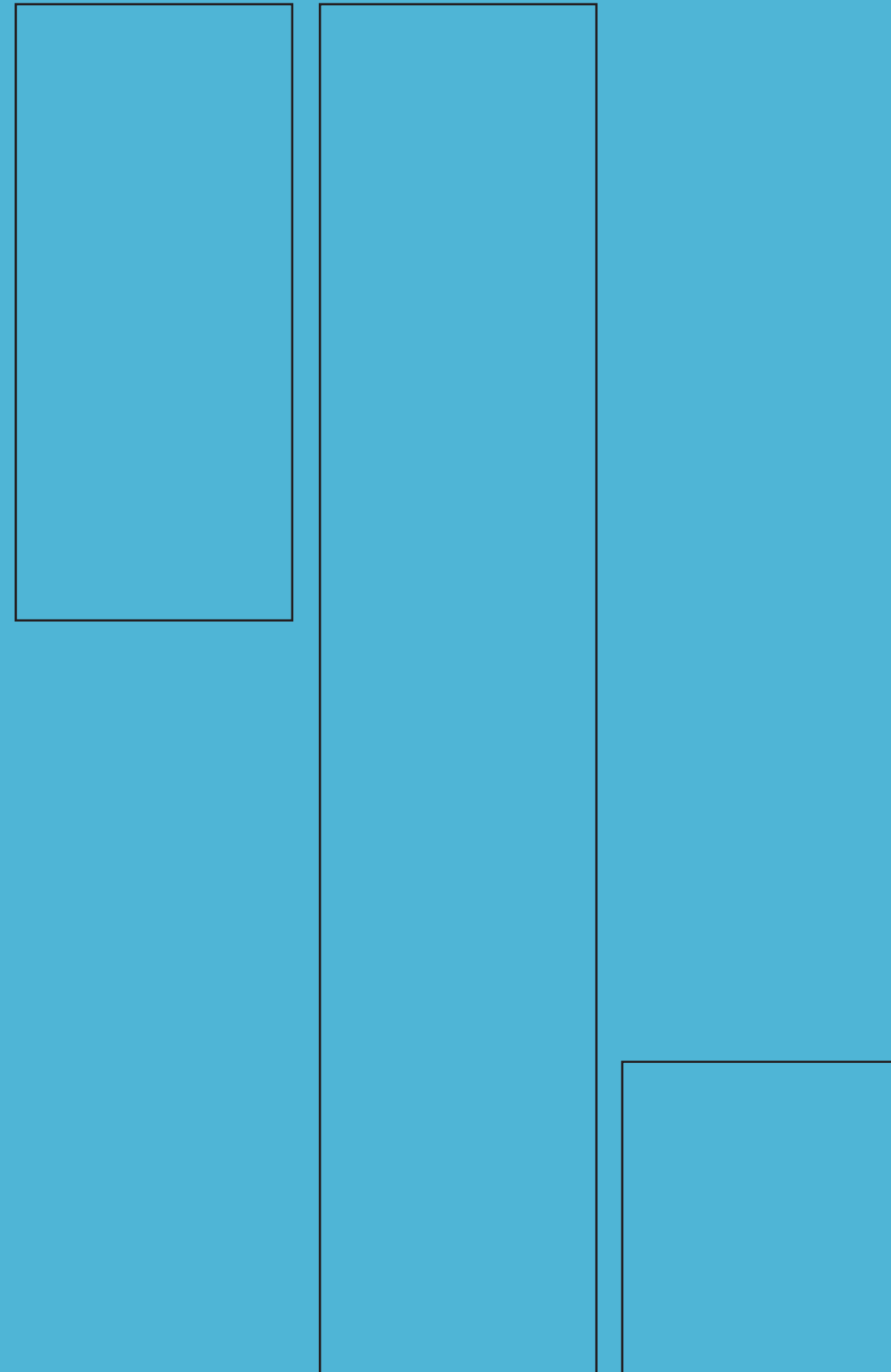
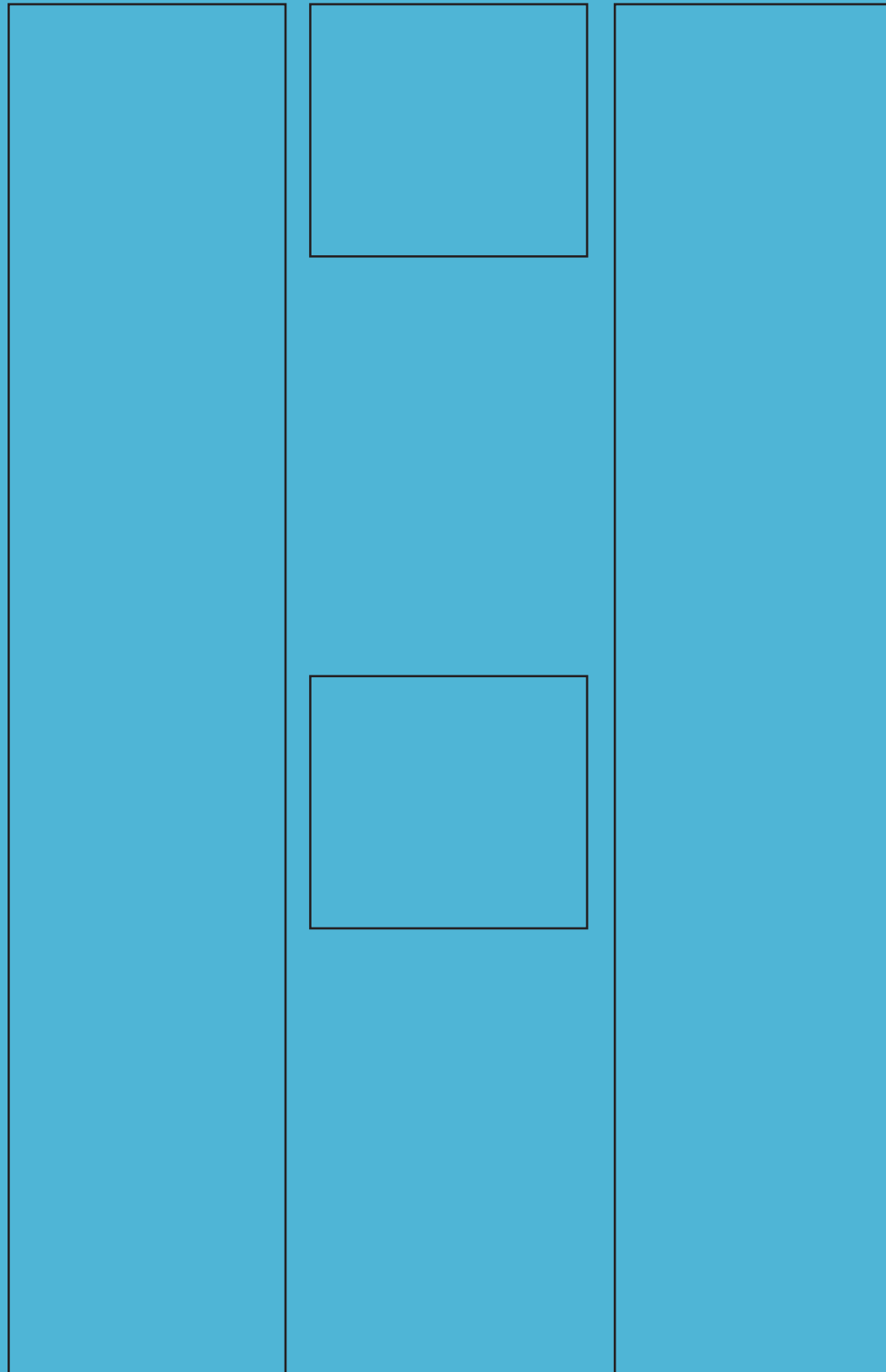
NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
22	Cyprus Ports	50,927	12,086	321.37%	132,828	-61.66%
23	Dubrovnik, Korcula	116,975	5,041	2220.47%	804,881	-85.47%
24	Egyptian Ports	27,788	20,060	38.52%	72,964	-61.92%
25	French Riviera Ports	60,280	5,475	1001.00%	697,361	-91.36%
26	Genoa, Savona	591,391	206,689	186.13%	2,018,847	-70.71%
27	Gibraltar	22,225	10,002	122.21%	328,057	-93.23%
28	Gioia Tauro	600	1,562	-61.59%	5,250	-88.57%
29	Haifa	0	9,622	-100.00%	237,284	-100.00%
30	Heraklion	119,930	19,998	499.71%	307,043	-60.94%
31	Huelva	584	934	-37.47%	1,409	-58.55%
32	Igoumenitsa	558	102	447.06%	1,053	-47.01%
33	Istanbul	4,248	0	100.00%	0	100.00%
34	Jeddah, Yanbu, Al Wajh	61,666	n/a	n/a	n/a	n/a
35	Kavala	938	28	3250.00%	2,699	-65.25%
36	Koper	4,450	0	100.00%	115,581	-96.15%
37	Kotor	9,139	3,009	203.72%	614,747	-98.51%
38	Kusadasi, Bodrum	8,775	1,733	406.35%	186,955	-95.31%
39	La Spezia, Marina Di Carrara	107,820	53,996	99.68%	649,588	-83.40%
40	Leixoes	8,941	6,210	43.98%	88,697	-89.92%
41	Lisbon	115,984	50,064	131.67%	571,259	-79.70%
42	Livorno, Piombino, Portoferraio	56,338	19,430	189.95%	888,346	-93.66%

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
43	Madeira Ports	117,289	152,452	-23.06%	596,818	-80.35%
44	Malaga	118,330	40,172	194.56%	475,745	-75.13%
45	Marseille	351,887	123,604	184.69%	1,865,918	-81.14%
46	Messina, Milazzo, Reggio Calabria	156,449	13,580	1052.05%	422,732	-62.99%
47	Monaco	0	1,105	-100.00%	183,468	-100.00%
48	Motril-Granada	1,567	0	100.00%	9,413	-83.35%
49	Naples, Salerno, Castellammare di Stabia	263,435	28,176	834.96%	1,454,023	-81.88%
50	Odessa	59	0	100.00%	750	-92.13%
51	Palermo	107,084	75,235	42.33%	532,973	-79.91%
52	Patras	674	0	100.00%	1,219	-44.71%
53	Piraeus	303,665	16,640	1724.91%	1,098,091	-72.35%
54	Port-Vendres	471	n/a	n/a	n/a	n/a
55	Portimao	1,983	0	100.00%	22,861	-91.33%
56	Rijeka	903	0	100.00%	41,137	-97.80%
57	Sardinian Ports	63,176	8,688	627.16%	481,924	-86.89%
58	Sete	5,445	0	100.00%	111,837	-95.13%
59	Sibenik	8,164	701	1064.62%	19,134	-57.33%
60	Souda/Chania	45,619	105	43346.67%	265,956	-82.85%
61	Split	89,148	503	17623.26%	359,955	-75.23%
62	Tangier	0	6,837	-100.00%	36,986	-100.00%
63	Taranto	80,309	0	100.00%	9,205	772.45%
64	Tarragona	1,348	1,462	-7.80%	128,089	-98.95%

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
65	Tenerife Ports	304,408	345,093	-11.79%	1,067,440	-71.48%
66	Thessaloniki	11,777	28	41960.71%	4,926	139.08%
67	Toulon-Var Provence	9,839	12,256	-19.72%	168,306	-94.15%
68	Trabzon	0	0	0.00%	0	0.00%
69	Tunisian Ports	0	0	0.00%	648	-100.00%
70	Valencia	130,869	26,286	397.87%	435,616	-69.96%
71	Valletta	147,132	59,180	148.62%	902,425	-83.70%
72	Varna	59	0	100.00%	0	100.00%
73	Venice	31,685	5,237	505.02%	1,611,341	-98.03%
74	Volos	7,949	70	11255.71%	12,574	-36.78%
75	Zadar	10,164	714	1323.53%	183,034	-94.45%

Appendix 2

MedCruise ports: Total cruise calls, 2019-2021



Appendix II MedCruise ports: Total cruise calls, 2019-2021

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
1	Alanya	1	1	0.00%	26	-96.15%
2	Ancona, Ortona, Pesaro	28	2	1300.00%	93	-69.89%
3	Antalya	4	n/a	n/a	n/a	n/a
4	Ashdod	0	0	0.00%	32	-100.00%
5	Azores	97	14	592.86%	142	-31.69%
6	Balearic Islands	226	39	479.49%	819	-72.41%
7	Barcelona	271	53	411.32%	800	-66.13%
8	Bari, Brindisi, Manfredonia, Monopoli	125	16	681.25%	301	-58.47%
9	Burgas	2	0	100.00%	0	100.00%
10	Cabo Verde	30	33	-9.09%	146	-79.45%
11	Cadiz	130	24	441.67%	n/a	n/a
12	Canarian ports	6	0	100.00%	3	100.00%
13	Cartagena	79	10	690.00%	166	-52.41%
14	Castellon	2	0	100.00%	5	-60.00%
15	Catania, Augusta	21	8	162.50%	113	-81.42%
16	Ceuta	3	0	100.00%	6	-50.00%
17	Civitavecchia, Fiumicino, Gaeta	258	99	160.61%	800	-67.75%
18	Constantza	1	0	100.00%	1	0.00%
19	Corfu	200	10	1900.00%	420	-52.38%
20	Corsica Ports	201	59	240.68%	77	161.04%
21	Costa Brava Cruise Ports	9	0	100.00%	50	-82.00%
22	Cyprus Ports	78	24	225.00%	94	-17.02%

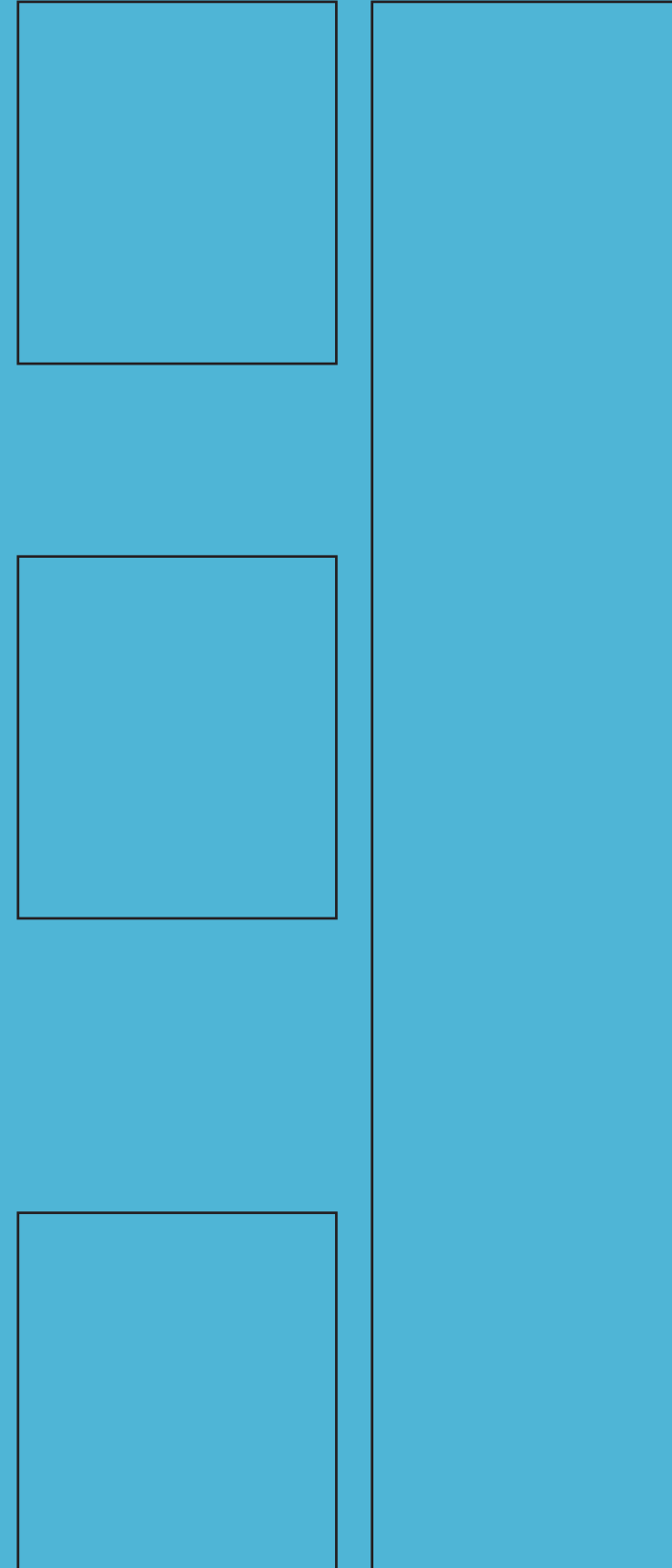
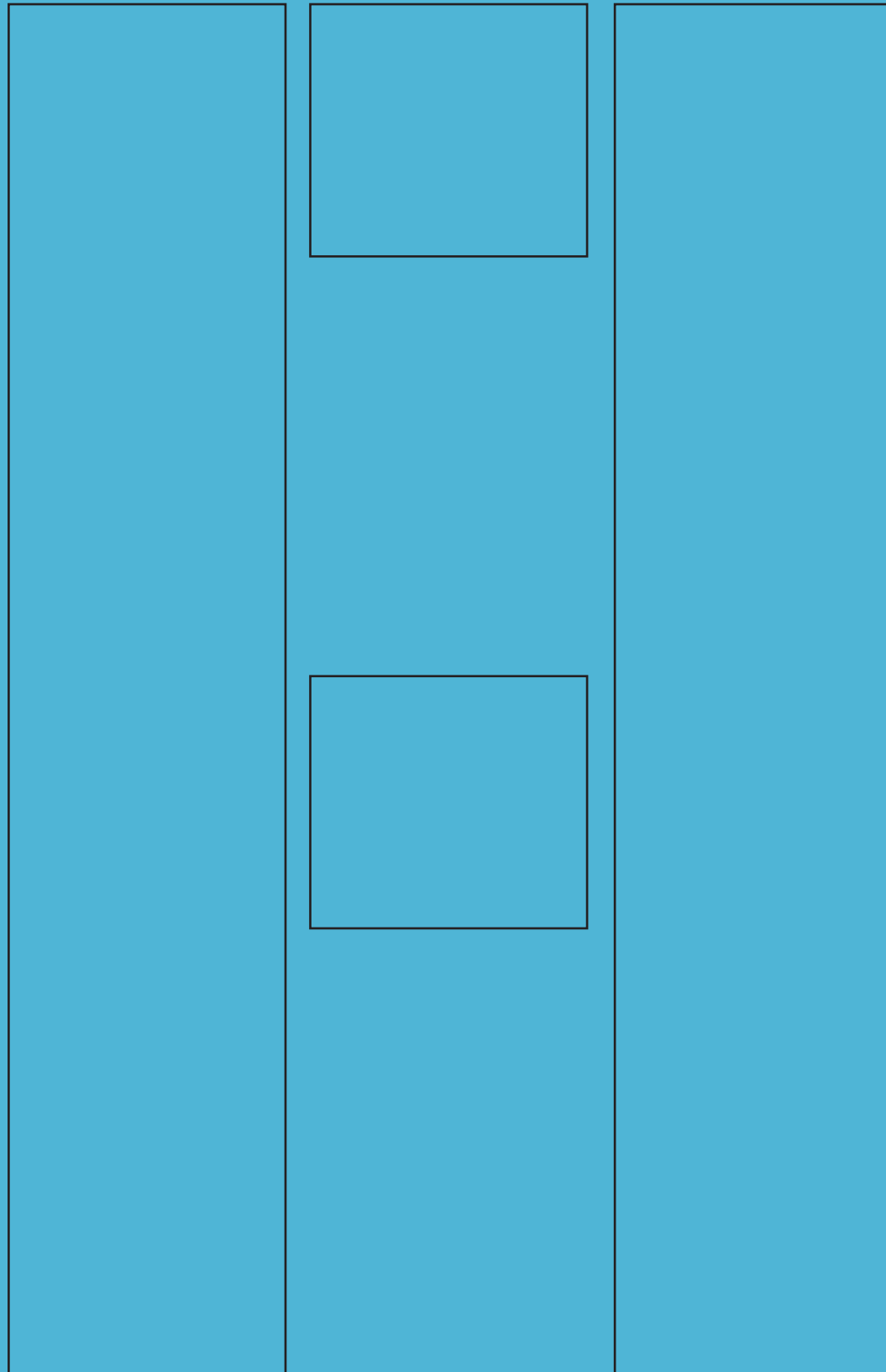
NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
23	Dubrovnik, Korcula	191	64	198.44%	622	-69.29%
24	Egyptian Ports	38	13	192.31%	55	-30.91%
25	French Riviera Ports	135	32	321.88%	346	-60.98%
26	Genoa, Savona	209	73	186.30%	435	-51.95%
27	Gibraltar	44	5	780.00%	197	-77.66%
28	Gioia Tauro	1	3	-66.67%	9	-88.89%
29	Haifa	0	16	-100.00%	131	-100.00%
30	Heraklion	118	24	391.67%	204	-42.16%
31	Huelva	5	2	150.00%	7	-28.57%
32	Igoumenitsa	2	1	100.00%	5	-60.00%
33	Istanbul	9	0	100.00%	0	100.00%
34	Jeddah, Yanbu, Al Wajh	71	n/a	n/a	n/a	n/a
35	Kavala	3	1	200.00%	7	-57.14%
36	Koper	11	0	100.00%	72	-84.72%
37	Kotor	64	9	611.11%	464	-86.21%
38	Kusadasi, Bodrum	25	4	525.00%	212	-88.21%
39	La Spezia, Marina Di Carrara	59	23	156.52%	186	-68.28%
40	Leixoes	23	4	475.00%	101	-77.23%
41	Lisbon	97	33	193.94%	310	-68.71%
42	Livorno, Piombino, Portoferraio	58	12	383.33%	477	-87.84%
43	Madeira Ports	125	69	81.16%	300	-58.33%
44	Malaga	113	19	494.74%	288	-60.76%

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
45	Marseille	161	36	347.22%	497	-67.61%
46	Messina, Milazzo, Reggio Calabria	73	19	284.21%	170	-57.06%
47	Monaco	0	1	-100.00%	163	-100.00%
48	Motril-Granada	8	0	100.00%	32	-75.00%
49	Naples, Salerno, Castellammare di Stabia	172	27	537.04%	526	-67.30%
50	Odessa	1	0	100.00%	1	0.00%
51	Palermo	104	34	205.88%	228	-54.39%
52	Patras	8	0	100.00%	2	300.00%
53	Piraeus	379	32	1084.38%	622	-39.07%
54	Port-Vendres	5	n/a	n/a	n/a	n/a
55	Portimao	13	0	100.00%	57	-77.19%
56	Rijeka	1	0	100.00%	24	-95.83%
57	Sardinian Ports	60	14	328.57%	215	-72.09%
58	Sete	19	0	100.00%	69	-72.46%
59	Sibenik	43	17	152.94%	103	-58.25%
60	Souda/Chania	76	10	660.00%	132	-42.42%
61	Split	105	11	854.55%	282	-62.77%
62	Tangier	0	3	-100.00%	49	-100.00%
63	Taranto	28	0	100.00%	7	300.00%
64	Tarragona	8	1	700.00%	63	-87.30%
65	Tenerife Ports	411	182	125.82%	511	-19.57%
66	Thessaloniki	17	1	1600.00%	6	183.33%
67	Toulon-Var Provence	11	2	450.00%	86	-87.21%

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
68	Trabzon	0	0	0.00%	0	0.00%
69	Tunisian Ports	0	0	0.00%	1	-100.00%
70	Valencia	95	12	691.67%	203	-53.20%
71	Valletta	107	32	234.38%	372	-71.24%
72	Varna	1	0	100.00%	0	100.00%
73	Venice	52	6	766.67%	500	-89.60%
74	Volos	21	2	950.00%	22	-4.55%
75	Zadar	30	13	130.77%	131	-77.10%

Appendix 3

MedCruise ports: Total home in/out pax movements, 2019-2021



Appendix III MedCruise ports: Total home in/out pax movements, 2019-2021

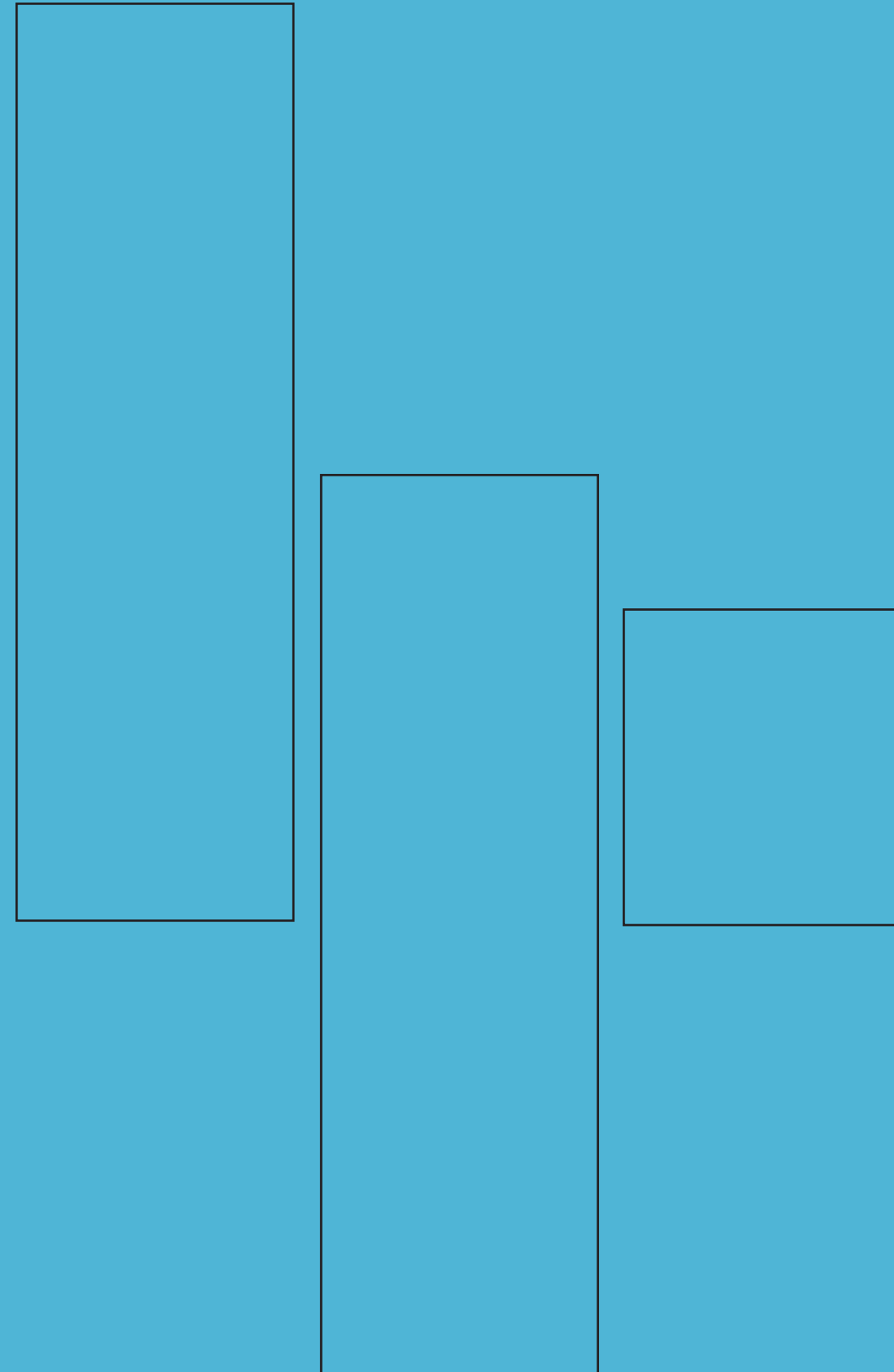
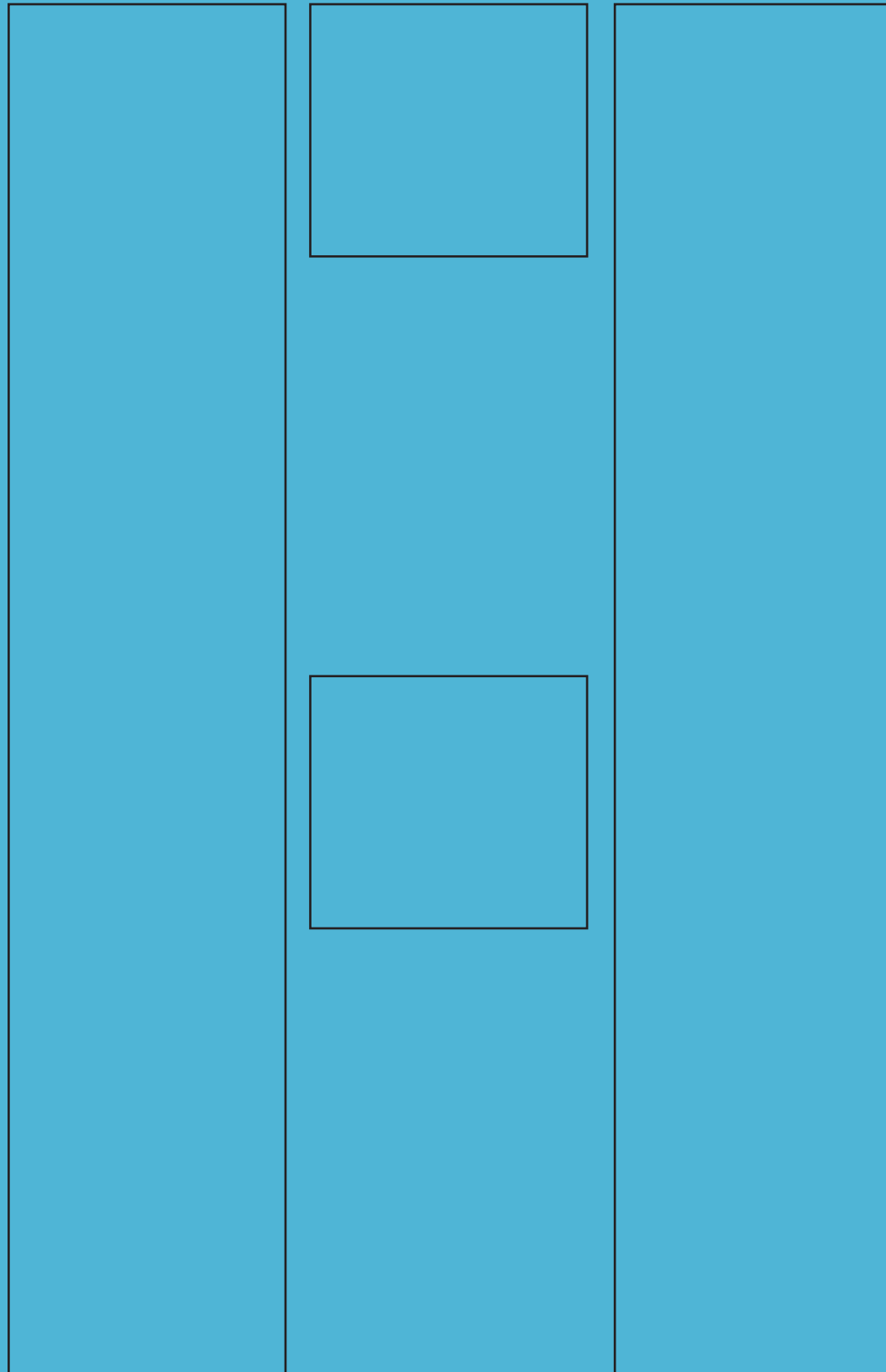
NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
1	Alanya	0	0	0.00%	0	0.00%
2	Ancona, Ortona, Pesaro	11,825	0	n/a	15,246	-22.44%
3	Antalya	1,379	n/a	n/a	n/a	n/a
4	Ashdod	0	0	0.00%	0	0.00%
5	Azores	617	100	517.00%	2,042	-69.78%
6	Balearic Islands	148,165	100,048	48.09%	982,697	-84.92%
7	Barcelona	193,958	68,765	182.06%	1,753,222	-88.94%
8	Bari, Brindisi, Manfredonia, Monopoli	112,599	1,373	8100.95%	269,875	-58.28%
9	Burgas	0	0	0.00%	0	0.00%
10	Cabo Verde	127	629	-79.81%	612	-79.25%
11	Cadiz	303	0	n/a	n/a	n/a
12	Canarian ports	1,159	0	n/a	0	100.00%
13	Cartagena	0	0	0.00%	0	0.00%
14	Castellon	0	0	0.00%	0	0.00%
15	Catania, Augusta	1,052	651	61.60%	12,357	-91.49%
16	Ceuta	0	0	0.00%	0	0.00%
17	Civitavecchia, Fiumicino, Gaeta	170,338	69,890	143.72%	1,111,542	-84.68%
18	Constantza	0	0	0.00%	0	0.00%
19	Corfu	56,670	0	100.00%	107,879	-47.47%
20	Corsica Ports	0	0	0.00%	0	0.00%
21	Costa Brava Cruise Ports	0	0	0.00%	0	0.00%
22	Cyprus Ports	29,837	4,845	515.83%	25,518	16.93%

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
23	Dubrovnik, Korcula	5,470	735	644.22%	73,110	-92.52%
24	Egyptian Ports	2,800	0	100.00%	0	100.00%
25	French Riviera Ports	17,888	5,416	230.28%	57,969	-69.14%
26	Genoa, Savona	325,906	117,058	178.41%	1,096,742	-70.28%
27	Gibraltar	0	0	0.00%	0	0.00%
28	Gioia Tauro	0	0	0.00%	0	0.00%
29	Haifa	0	0	0.00%	165,895	-100.00%
30	Heraklion	50,566	11,963	322.69%	46,720	8.23%
31	Huelva	0	0	0.00%	0	0.00%
32	Igoumenitsa	0	0	0.00%	0	0.00%
33	Istanbul	2,555	0	100.00%	0	100.00%
34	Jeddah, Yanbu, Al Wajh	49,296	n/a	n/a	n/a	n/a
35	Kavala	0	0	0.00%	0	0.00%
36	Koper	0	0	0.00%	0	0.00%
37	Kotor	224	2	11100.00%	1,426	-84.29%
38	Kusadasi, Bodrum	8	0	100.00%	29,131	-99.97%
39	La Spezia, Marina Di Carrara	8,431	2,133	295.26%	3,842	119.44%
40	Leixoes	687	153	349.02%	1,432	-52.03%
41	Lisbon	21,273	1,787	1090.43%	72,830	-70.79%
42	Livorno, Piombino, Portoferraio	28	49	-42.86%	12,344	-99.77%
43	Madeira Ports	3,465	9,289	-62.70%	6,052	-42.75%
44	Malaga	17,713	5,948	197.80%	43,189	-58.99%

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
45	Marseille	125,903	n/a	n/a	452,774	-72.19%
46	Messina, Milazzo, Reggio Calabria	29,806	1,169	2449.70%	19,517	52.72%
47	Monaco	0	1,087	-100.00%	32,935	-100.00%
48	Motril-Granada	0	0	0.00%	0	0.00%
49	Naples, Salerno, Castellammare di Stabia	62,756	9,474	562.40%	230,611	-72.79%
50	Odessa	0	0	0.00%	0	0.00%
51	Palermo	14,567	9,084	60.36%	82,900	-82.43%
52	Patras	349	0	100.00%	0	100.00%
53	Piraeus	135,939	3,622	3653.15%	410,512	-66.89%
54	Port-Vendres	0	n/a	n/a	n/a	n/a
55	Portimao	116	0	100.00%	2,043	-94.32%
56	Rijeka	0	0	0.00%	0	0.00%
57	Sardinian Ports	0	0	0.00%	21,713	-100.00%
58	Sete	0	0	0.00%	0	0.00%
59	Sibenik	0	0	0.00%	0	0.00%
60	Souda/Chania	0	0	0.00%	0	0.00%
61	Split	0	0	0.00%	0	0.00%
62	Tangier	0	0	0.00%	0	0.00%
63	Taranto	16,177	0	100.00%	0	0.00%
64	Tarragona	8	5	60.00%	31,473	-99.97%
65	Tenerife Ports	31,810	103,516	-69.27%	210,250	-84.87%
66	Thessaloniki	4,706	0	100.00%	122	3757.38%

NO	PORT	2021	2020	VARIATION 2021/2020	2019	VARIATION 2021/2019
67	Toulon-Var Provence	736	0	100.00%	11,519	-93.61%
68	Trabzon	0	0	0.00%	0	0.00%
69	Tunisian Ports	0	0	0.00%	0	0.00%
70	Valencia	17,998	99	18079.80%	69,132	-73.97%
71	Valletta	18,542	358	5079.33%	273,456	-93.22%
72	Varna	0	0	0.00%	0	0.00%
73	Venice	27,059	4,226	540.30%	1,390,153	-98.05%
74	Volos	0	0	0.00%	0	0.00%
75	Zadar	0	0	0.00%	1,369	-100.00%

Appendix 4 MedCruise ports: Total transit pax movements, 2019-2021



Appendix IV MedCruise ports: Total transit pax movements, 2019-2021

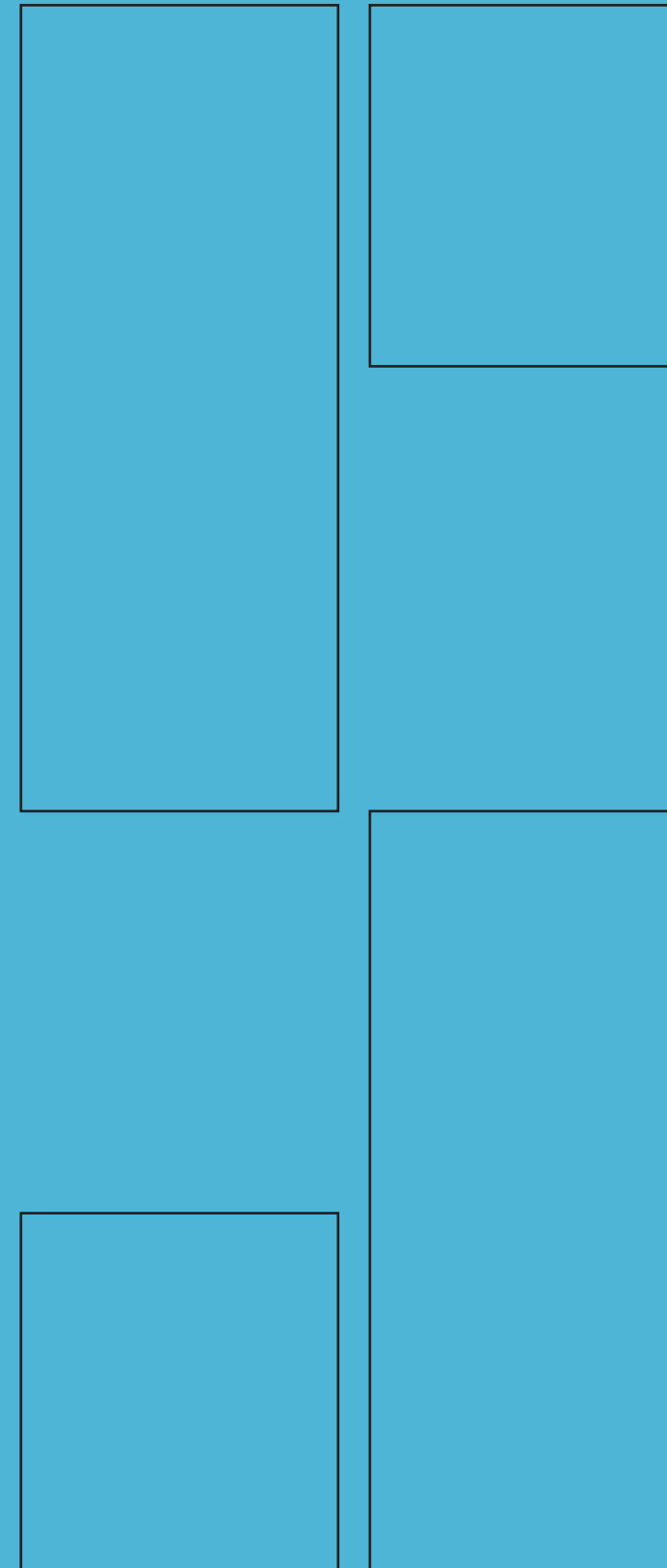
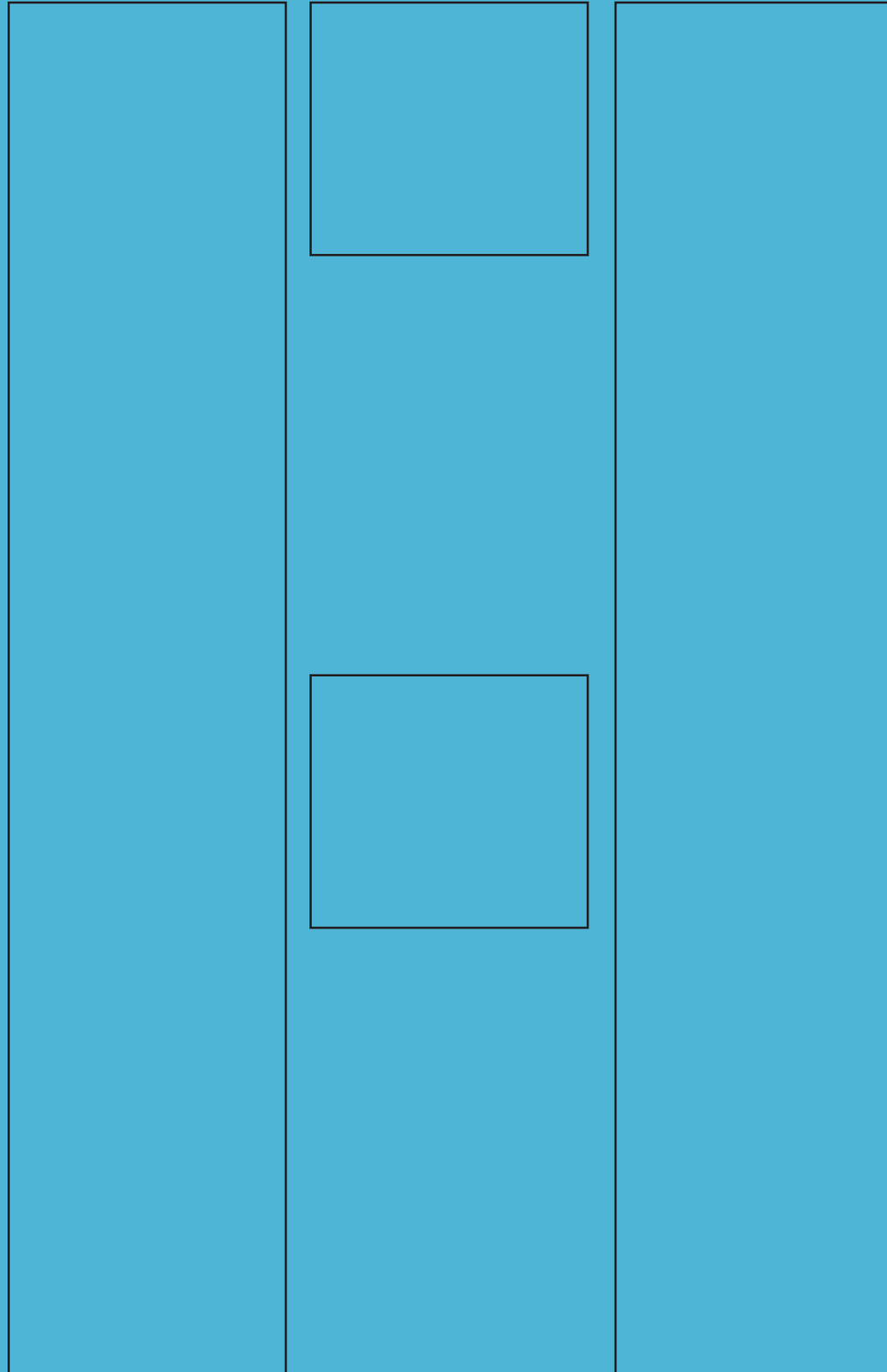
NO	PORT	TRANSIT 21	TRANSIT 20	VARIATION 2021/2020	TRANSIT 19	VARIATION 2021/2019
1	Alanya	116	91	27.47%	14,138	-99.18%
2	Ancona, Ortona, Pesaro	25,571	1,364	1774.71%	86,735	-70.52%
3	Antalya	34	n/a	n/a	n/a	n/a
4	Ashdod	0	0	0.00%	27,433	-100.00%
5	Azores	20,649	20,911	-1.25%	146,931	-85.95%
6	Balearic Islands	196,900	56,709	247.21%	1,675,459	-88.25%
7	Barcelona	326,896	130,077	151.31%	1,384,696	-76.39%
8	Bari, Brindisi, Manfredonia, Monopoli	107,106	7,128	1402.61%	493,320	-78.29%
9	Burgas	128	0	100.00%	0	100.00%
10	Cabo Verde	11,066	18,243	-39.34%	49,266	-77.54%
11	Cadiz	133,124	40,679	227.25%	n/a	n/a
12	Canarian ports	0	0	0.00%	1,930	-100.00%
13	Cartagena	70,087	18,862	271.58%	250,058	-71.97%
14	Castellon	1,079	0	100.00%	5,452	-80.21%
15	Catania, Augusta	13,135	3,555	269.48%	196,152	-93.30%
16	Ceuta	150	0	100.00%	9,351	-98.40%
17	Civitavecchia, Fiumicino, Gaeta	320,006	137,077	133.45%	1,540,861	-79.23%
18	Constantza	57	0	100.00%	450	-87.33%
19	Corfu	178,029	7,768	2191.83%	699,318	-74.54%
20	Corsica Ports	45,884	5,719	702.31%	23,454	95.63%
21	Costa Brava Cruise Ports	3,947	0	100.00%	56,731	-93.04%
22	Cyprus Ports	21,090	7,241	191.26%	107,310	-80.35%

NO	PORT	TRANSIT 21	TRANSIT 20	VARIATION 2021/2020	TRANSIT 19	VARIATION 2021/2019
23	Dubrovnik, Korcula	111,505	4,306	2489.53%	731,771	-84.76%
24	Egyptian Ports	24,988	20,060	24.57%	72,964	-65.75%
25	French Riviera Ports	42,392	59	71750.85%	639,392	-93.37%
26	Genoa, Savona	265,485	89,631	196.20%	922,105	-71.21%
27	Gibraltar	22,225	10,002	122.21%	328,057	-93.23%
28	Gioia Tauro	600	1,562	-61.59%	5,250	-88.57%
29	Haifa	0	9,622	-100.00%	71,389	-100.00%
30	Heraklion	69,364	8,035	763.27%	260,323	-73.35%
31	Huelva	584	934	-37.47%	1,409	-58.55%
32	Igoumenitsa	558	102	447.06%	1,053	-47.01%
33	Istanbul	1,693	0	100.00%	0	100.00%
34	Jeddah, Yanbu, Al Wajh	12,370	n/a	n/a	n/a	n/a
35	Kavala	938	28	3250.00%	2,699	-65.25%
36	Koper	4,450	0	100.00%	115,581	-96.15%
37	Kotor	8,915	3,007	196.47%	613,321	-98.55%
38	Kusadasi, Bodrum	8,767	1,733	405.89%	157,824	-94.45%
39	La Spezia, Marina Di Carrara	99,389	51,863	91.64%	645,746	-84.61%
40	Leixoes	8,254	6,057	36.27%	87,265	-90.54%
41	Lisbon	94,711	48,277	96.18%	498,429	-81.00%
42	Livorno, Piombino, Portoferraio	56,310	19,381	190.54%	876,002	-93.57%
43	Madeira Ports	113,824	143,163	-20.49%	590,766	-80.73%
44	Malaga	100,617	34,224	194.00%	432,556	-76.74%

NO	PORT	TRANSIT 21	TRANSIT 20	VARIATION 2021/2020	TRANSIT 19	VARIATION 2021/2019
45	Marseille	225,984	n/a	n/a	1,413,144	-84.01%
46	Messina, Milazzo, Reggio Calabria	126,643	12,411	920.41%	403,215	-68.59%
47	Monaco	0	18	-100.00%	150,533	-100.00%
48	Motril-Granada	1,567	0	100.00%	9,413	-83.35%
49	Naples, Salerno, Castellammare di Stabia	200,679	18,702	973.03%	1,223,412	-83.60%
50	Odessa	59	0	100.00%	750	-92.13%
51	Palermo	92,517	66,151	39.86%	450,073	-79.44%
52	Patras	325	0	100.00%	1,219	-73.34%
53	Piraeus	167,726	13,018	1188.42%	687,579	-75.61%
54	Port-Vendres	471	n/a	n/a	n/a	n/a
55	Portimao	1,867	0	100.00%	20,818	-91.03%
56	Rijeka	903	0	100.00%	41,137	-97.80%
57	Sardinian Ports	63,176	8,688	627.16%	460,211	-86.27%
58	Sete	5,445	0	100.00%	111,837	-95.13%
59	Sibenik	8,164	701	1064.62%	19,134	-57.33%
60	Souda/Chania	45,619	105	43346.67%	265,956	-82.85%
61	Split	89,148	503	17623.26%	359,955	-75.23%
62	Tangier	0	6,837	-100.00%	36,986	-100.00%
63	Taranto	64,132	0	100.00%	9,205	596.71%
64	Tarragona	1,340	1,457	-8.03%	96,616	-98.61%
65	Tenerife Ports	272,598	241,577	12.84%	857,190	-68.20%
66	Thessaloniki	7,071	28	25153.57%	4,804	47.19%
67	Toulon-Var Provence	9,103	12,256	-25.73%	156,787	-94.19%

NO	PORT	TRANSIT 21	TRANSIT 20	VARIATION 2021/2020	TRANSIT 19	VARIATION 2021/2019
68	Trabzon	0	0	0.00%	0	0.00%
69	Tunisian Ports	0	0	0.00%	648	-100.00%
70	Valencia	112,871	26,187	331.02%	366,484	-69.20%
71	Valletta	128,590	58,822	118.61%	628,969	-79.56%
72	Varna	59	0	100.00%	0	100.00%
73	Venice	4,626	1,011	357.57%	221,188	-97.91%
74	Volos	7,949	70	11255.71%	12,574	-36.78%
75	Zadar	10,164	0	100.00%	181,665	-94.41%

Appendix 5 Seasonality of cruise activities in MedCruise ports



Appendix V Seasonality of cruise activities in MedCruise ports

WEST MED	MAR-MAY	JUN-AUG	SEPT-MOV	DEC-FEB
Azores	0.00%	7.25%	89.15%	3.61%
Balearic Islands	0.00%	27.03%	67.59%	5.38%
Barcelona	0.00%	21.88%	71.75%	6.37%
Cabo Verde	6.90%	0.00%	44.29%	48.82%
Cadiz	0.00%	8.75%	76.38%	14.87%
Canarian ports	11.73%	4.66%	72.56%	11.04%
Cartagena	0.00%	11.85%	77.70%	10.44%
Castellon	0.00%	0.00%	100.00%	0.00%
Catania, Augusta	0.00%	42.95%	57.05%	0.00%
Ceuta	0.00%	0.00%	100.00%	0.00%
Civitavecchia, Fiumicino, Gaeta	8.45%	26.50%	59.79%	5.26%
Corsica Ports	0.00%	41.22%	58.78%	0.00%
Costa Brava Cruise Ports	0.00%	0.00%	100.00%	0.00%
French Riviera Ports	0.00%	26.67%	68.47%	4.86%
Genoa, Savona	7.04%	32.02%	55.35%	5.59%
Gibraltar	0.00%	1.62%	74.97%	23.42%
Gioia Tauro	0.00%	0.00%	100.00%	0.00%
Huelva	0.00%	0.00%	100.00%	0.00%
La Spezia, Marina Di Carrara	5.85%	28.11%	56.77%	9.27%
Leixoes	0.00%	1.62%	86.11%	12.27%
Lisbon	0.00%	0.41%	73.40%	26.19%
Livorno, Piombino, Portoferraio	0.00%	4.14%	88.73%	7.13%

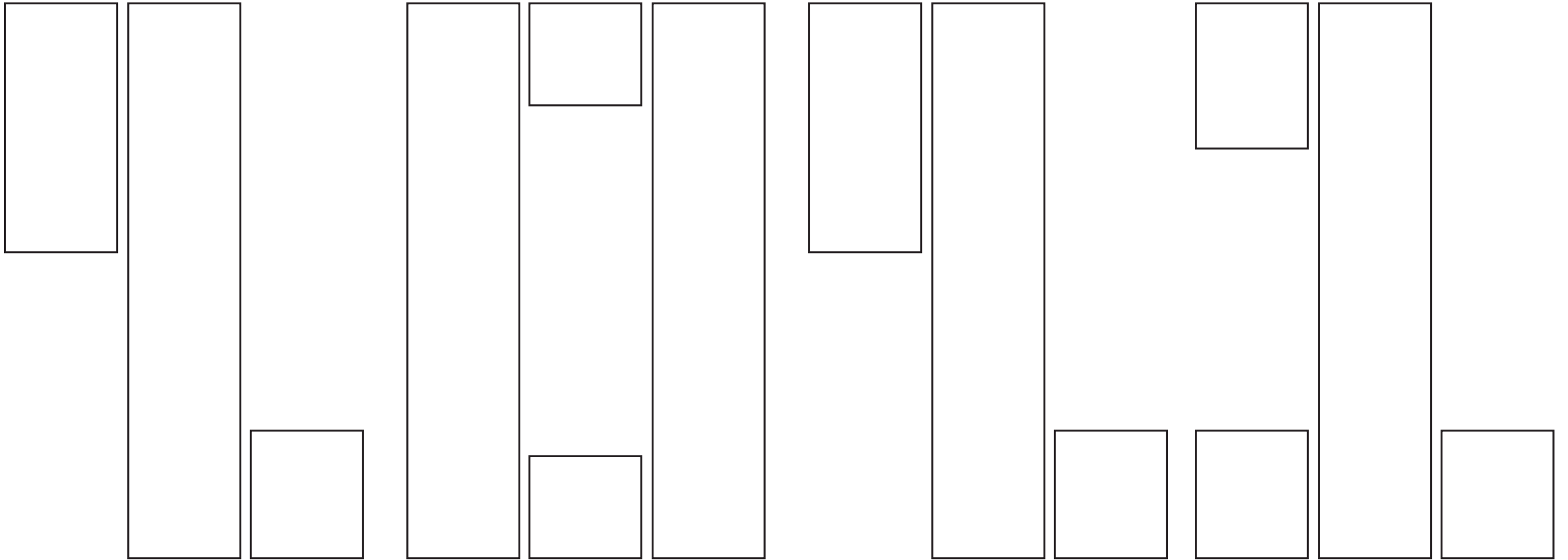
Note (*): All tables include only ports that provided seasonality data for 2021

WEST MED	MAR-MAY	JUN-AUG	SEPT-MOV	DEC-FEB
Madeira Ports	0.00%	0.38%	60.32%	39.30%
Malaga	0.00%	9.51%	83.22%	7.27%
Marseille	0.00%	27.30%	66.62%	6.08%
Messina, Milazzo, Reggio Calabria	5.43%	35.76%	56.27%	2.54%
Monaco	0.00%	0.00%	0.00%	0.00%
Motril-Granada	0.00%	0.70%	99.30%	0.00%
Naples, Salerno, Castellammare di Stabia	9.65%	27.52%	55.38%	7.44%
Palermo	10.41%	38.53%	32.39%	18.67%
Port-Vendres	0.00%	14.01%	85.99%	0.00%
Portimao	0.00%	0.00%	90.82%	9.18%
Sardinian Ports	11.06%	38.82%	47.19%	2.93%
Sete	0.00%	13.77%	86.23%	0.00%
Tangier	0.00%	0.00%	0.00%	0.00%
Tarragona	0.00%	0.00%	100.00%	0.00%
Tenerife Ports	24.02%	4.90%	32.43%	38.64%
Toulon-Var Provence	0.00%	0.00%	76.54%	23.46%
Tunisian Ports	0.00%	0.00%	0.00%	0.00%
Valencia	0.00%	24.44%	70.57%	4.99%
Valletta	14.18%	29.91%	43.39%	12.52%

ADRIATIC	MAR-MAY	JUN-AUG	SEPT-MOV	DEC-FEB
Ancona, Ortona, Pesaro	0.00%	70.37%	29.63%	0.00%
Bari, Brindisi, Manfredonia, Monopoli	1.22%	57.22%	41.56%	0.00%
Corfu	2.14%	44.69%	52.46%	0.71%
Dubrovnik, Korcula	0.00%	45.10%	54.79%	0.11%
Koper	0.00%	1.64%	98.36%	0.00%
Kotor	0.00%	44.56%	54.70%	0.74%
Rijeka	0.00%	0.00%	100.00%	0.00%
Sibenik	0.00%	38.65%	60.23%	1.13%
Split	0.00%	41.90%	58.03%	0.08%
Taranto	7.83%	43.58%	48.59%	0.00%
Venice	0.00%	56.94%	42.42%	0.63%
Zadar	0.00%	13.52%	86.48%	0.00%

EAST MED	MAR-MAY	JUN-AUG	SEPT-MOV	DEC-FEB
Alanya	0.00%	0.00%	100.00%	0.00%
Antalya	0.00%	0.00%	100.00%	0.00%
Ashdod	0.00%	0.00%	0.00%	0.00%
Cyprus Ports	0.00%	50.27%	48.47%	1.26%
Egyptian Ports	0.00%	26.67%	67.46%	5.88%
Haifa	0.00%	0.00%	0.00%	0.00%
Heraklion	5.89%	43.86%	49.95%	0.29%
Igoumenitsa	0.00%	0.00%	100.00%	0.00%
Istanbul	0.00%	0.00%	100.00%	0.00%
Jeddah, Yanbu, Al Wajh	0.00%	34.16%	51.87%	13.97%
Kavala	0.00%	0.00%	100.00%	0.00%
Kusadasi, Bodrum	0.00%	0.00%	93.14%	6.86%
Patras	0.00%	24.04%	75.96%	0.00%
Piraeus	1.53%	44.09%	52.79%	1.58%
Souda/Chania	2.08%	31.00%	64.43%	2.49%
Thessaloniki	0.00%	77.21%	17.63%	5.16%
Volos	0.00%	20.35%	72.02%	7.62%

BLACK SEA	MAR-MAY	JUN-AUG	SEPT-MOV	DEC-FEB
Burgas	0.00%	0.00%	100.00%	0.00%
Constantza	0.00%	0.00%	100.00%	0.00%
Odessa	0.00%	0.00%	100.00%	0.00%
Trabzon	0.00%	0.00%	0.00%	0.00%
Varna	0.00%	0.00%	100.00%	0.00%





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