20 YEARS MEDCRUISE

Cruise Activities in Medcruise Ports:

STATISTICS 2015

A MedCruise Report

Piraeus 2016

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in Medcruise Ports:

STATISTICS 2015

A MedCruise Report

Produced by:
Dr. Thanos Pallis, MedCruise Secretary General
Mrs. Kleopatra Arapi, MedCruise
Mrs. Aimilia Papachristou, MedCruise

Coordinated by:
Mrs Carla Salvadó, MedCruise President

Published in: Piraeus, Greece
First Published: March 2016

MEDCRUISE
The Association of Mediterranean Cruise Ports

MedCruise Association
10 Akti Miaouli Str., Office 233, 18538, Piraeus, Greece
E-mail: secretariat@medcruise.com - Website: www.medcruise.com

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PREFACE

I am delighted to welcome you to the 2016 edition annual statistical report "*Cruise activities in MedCruise ports*".

This is a special edition of the flagship MedCruise publication, as we celebrate the 20th year of the Association representing cruise ports in the Med and its adjoining seas. Established in Rome in 1996, the MedCruise membership spans today in 20 countries and three different continents, namely Africa, Asia and Europe.

We are proud that the report outlines another successful year for cruise ports in the Mediterranean and its adjoining seas.

A total of 27,3 million cruise movements were hosted in MedCruise member ports in 2015. At the turn of the century the very same ports had recorded 'only' 8,6 million passengers.

I invite you to read how this traffic has evolved per port, and examine in detail cruise developments in West Med, Adriatic, East Med and Black Sea ports. Explore the trends per size of the port, information about seasonality, variations on previous years and market concentration. Visit comparisons with data recorded the immediate previous years, as well as longer term comparisons extract the registered cruise trends.

Cruise activities in MedCruise Ports: Statistics 2015 is an internal production of MedCruise. It was prepared by the MedCruise secretariat with the contribution of data provided by the members of the Association. The reported data have been collected by port authorities and/or cruise terminal operators where applicable. Data produced by a third source and used in the report are duly acknowledged.

The report is part of a series of studies conducted or commissioned by MedCruise. The aim is to advance cruise ports competitiveness via benchmarking and sharing of knowledge on industry trends.

The second biggest cruise region of the world demonstrated a remarkable capacity for growth - generating the much needed investments and jobs across the ports - and respective port-cities and destinations - that are represented in our Association.

This very same growth has also transformed MedCruise to the biggest cruise port Association beyond the Caribbean - and a reliable partner of cruise lines, destinations, public institutions and other stakeholders.

The test is to allow for cruising in the Med and its adjoining seas to sustain as the most exciting way of vacations, while creating the background for socially responsible future growth.

I am confident that, like our Association, this report works towards this end.

Enjoy the reading!!!

Carla Salvadó,
MedCruise President

I. INTRODUCTION

1.1 MedCruise

MedCruise is the Association of cruise ports in the Mediterranean and its adjoining seas.

The Association was established in Rome in 1996, aiming to assist its members in benefiting from the growth of the cruise industry by providing networking, promotional and professional development tools and opportunities. In 2016, MedCruise celebrates its 20 years, with a membership spanning in 20 countries and three different continents, namely Africa, Asia and Europe.

Beyond facilitating the interaction of its member ports with cruise lines, MedCruise formulates common positions on questions of common interest on cruise-related policies. It also represents the interests of its membership in international fora. Since 2014, MedCruise is a member of the established within the European Sea Port Organisation (ESPO) *Network of Cruise and Ferry Ports*.

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 the adjoining seas.

The Association serves ports of different sizes from diverse regions, countries and cultures in one of the most dynamic cruise regions of the world.

Map 1.1: MedCruise Ports

1.2 The Report

The annual MedCruise statistical report "*Cruise activities in MedCruise ports*" is among the flagship publications of the Association. The report details the actual picture of cruise activities in the Med and its adjoining seas over the past year, reveals the trends and enables the understanding of the present challenges.

This report 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, it 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.

The report is part of a series of studies conducted or commissioned by MedCruise that examine issues relevant to cruise ports. These studies increase the efficiency of member ports and associate members, by advancing information exchanges on industry developments, organisation, administration and management and, thus promoting best practices.

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 discussed internally. They 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.

1.3 MedCruise Membership

MedCruise membership continues to grow in numbers, while it also expands geographically. In 2016, the Association celebrates 20 years since its establishment in Rome on the 11th of June 1996, by a collaborative agreement between 16 ports located in seven different countries.

MedCruise membership spreads today in 20 countries, and three different continents, namely Africa, Asia and Europe (**Table 1.1**).

Table 1.1: Countries represented in MedCruise

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

At the end of 2015, the Association has 74 port members, representing more than 100 ports in the Mediterranean region, including the Black Sea, the Red Sea and the Near Atlantic. A decade ago (2006) this membership was standing at half. Four distinctive regions are identified within the broader region. These are West Med, Adriatic Sea, East Med and Black Sea (**Table 1.2**).

Reflecting the organizational heterogeneity of port governance and organization, members in several cases represent more than one port in the same geographical area. The total of ports that have joined the MedCruise family are well above 100.

Moreover, 33 associate members, representing, tourist boards, ship agents, port agents, as well as other local cruise related activities, also share the benefits of being part of the MedCruise family. The list of the Associate members is detailed in **Table 1.3**.

Table 1.2: MedCruise Port Members

West Med	Alicante Azores Balearic Islands Barcelona Bastia/North Corsica Cagliari Cartagena Castellón Ceuta Civitavecchia	French Riviera Ports Genoa Gibraltar Gioia Tauro Huelva La Spezia Lisbon Livorno Madeira Ports Málaga	Marseille Messina Monaco Motril-Granada Naples North Sardinian Ports Palamós Palermo Portimao Portoferraio	Portofino Savona Sète Tarragona Tenerife Ports Toulon-Var Provence Tunisian Ports Valencia Valletta
Adriatic	Bari Brindisi Corfu Dubrovnik/Korcula	Koper Kotor Ravenna Rijeka	Sibenik Split Taranto Venice	Zadar
East Med	Alanya Cyprus Ports Egyptian Ports Heraklion	Igoumenitsa Istanbul Kavala Kusadasi/Bodrum/Antalya	Lattakia Mersin Patras Piraeus	Souda/Chania Thessaloniki Volos
Black Sea	Batumi Burgas	Constantza Odessa	Sinop Sochi	Trabzon

NOTE: MedCruise Membership as of 1st January 2016

Table 1.3: MedCruise Associate Members

Allegra Montenegro	Idu Shipping & Services	Navigator Travel & Tourist Services
Aloschi & Bassani	Inflot World Wide Sochi	Patronat de Turisme Costa Brava
B&A Europe	Intercruises	Perez y Cia
Cemar	Karavanmar	Salamis Shipping
Cruise Services Monaco	Kvarner County Tourism Office	Samer & Co Shipping
Council of Sant Carles de la Rápita	La Goulette Cruise Terminal	SNEAL
D'Alessandro Travel	Livorno Port Authority	Tartus Tours
Donomis Cruise Services	Mediterranean Unique Experience	Transcoma
Dubrovnik County Port Authority	Medov S.r.l	Tura Turizm
Hugo Trumpy	MMS	Turisme de Barcelona
Iberoservice	MH Bland	World Synergy Travel

NOTE: MedCruise Membership as of 1st January 2016

The rest of Section I provides a presentation of all data collected since 2000, recording the evolution of MedCruise port members in terms of cruise traffic hosted by its membership; a valuable representation of the expansion of cruising in the Med and its adjoining seas.

1.4 Evolution of Cruise Activity in MedCruise members

The total of cruise passenger visits at the 73 MedCruise port members for which data are available in 2015 reached 27,4 million.

Comparing to the previous year, this number is 6,2% higher (**Figure 1.1**), as the cruise passenger movements that had taken place in 2014 at the very same ports were 25,8 million.

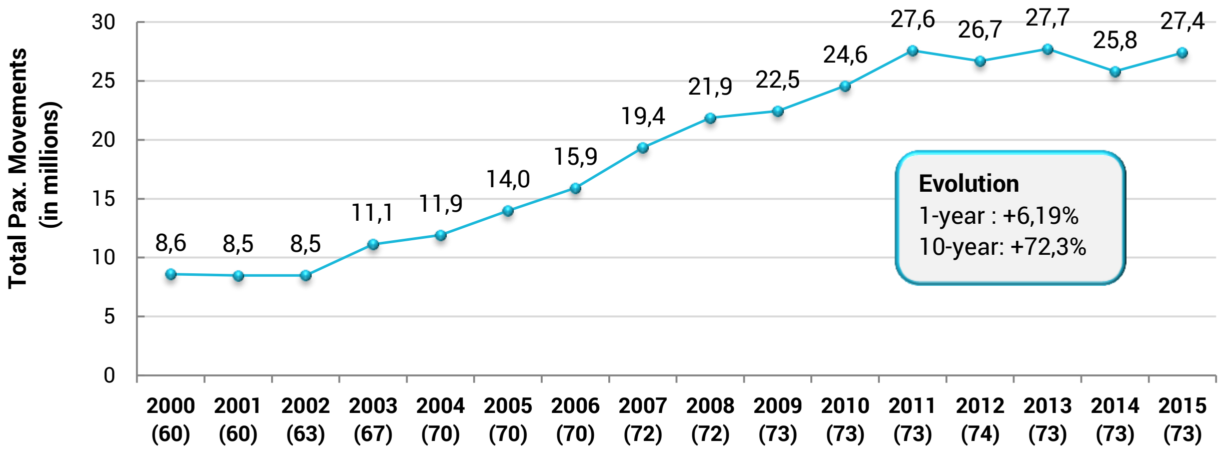
This is the third time in the last five years that MedCruise members record a total of passenger movements that exceed 27,0 million. The year when all records were broken is 2013 yet the Mediterranean region had a strong 2015 indicating that this remains a well demanded cruise area.

The long-term trends make evident that cruise in the Mediterranean and the adjoining seas are performing remarkably well in a demanding economic context and in some, yet rare, cases uncertain political climate. The last 10 years (2006-2015) cruising around the Med experienced growth and resilience in the face of challenges. The recorded statistical data reflect this, as cruise passenger movements of 2015 total 27,4 million, or 11,4% more than those that had taken place in 2010.

The aforementioned data of the period 2010-2015 refer to a sample that lags from the total 73 port members of MedCruise.

The instability and special conditions that Syria has experienced in the recent past resulted in the absence of on time data collection for Lattakia during the last three years. As Batumi did not provide data on time for printing, the traffic for 2015 is estimated to be same as in 2014.

Figure 1.1: Cruise Passenger Movements in MedCruise port members (2000-2015)



Looking further back in the past, two conclusions might be reached when comparing the data of 2015 with those registered a decade before (2006).

The first one is brought forward by the comparison of the total of passenger visits at the MedCruise port members for which data are available for all these years (that means all cruise port members of 2015 except Azores and Portofino). The 15,9 million passengers that visited these 70 ports within 2006 increased to 27,4 million in 2015, a passenger growth of 11,5 million passenger movements, or 72,3%, within the decade 2006-2015. The Mediterranean and the adjoining seas have been among the most dynamic cruise regions of the world.

The second major conclusion refers to the progressive strengthening of the Association itself. A decade ago, in 2006, the total of port members listed in the sample of **Table 1.2** were associated in MedCruise was just 48. That year these ports registered 11,1 million passenger movements. Since then, these ports succeeded in benefiting from the rise of cruise activities, not least because they acted effectively and responded through strategies enabling them to generate the best conditions for hosting cruise activities. A decade later, in 2015, MedCruise is further empowered by the fact that 26 more ports have decided to join the association.

As a result, MedCruise is today one of the major in size and most significant for the cruise sector port associations around the globe.

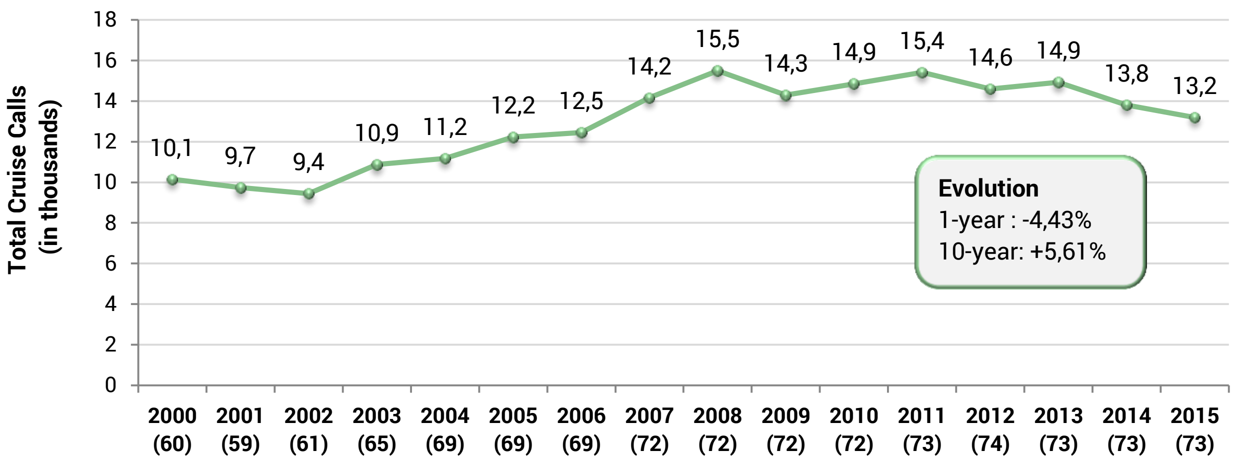
The total of cruise ship calls in MedCruise ports in 2015 reached 13.194 (Figure 1.2). This represents a total that is lower by 4,4% of the 13.813 cruise calls recorded in 2013.

The number of cruise calls recorded in 2015 was also 2.034 calls shy of the calls of 2008, which stands as the all times record year in terms of cruise ships calls in the Med and its adjoining seas.

The trend of cruise vessels becoming bigger in size - as cruise lines jockey to enjoy economies of scale - has been deterministic insofar as the number of cruise calls is concerned even when comparing long-term trend.

Recalling that since the turn of the century the average size of cruise vessels increased by more than 1.000 passengers per vessel (more information in Section 2 of this report), and that 53 vessels with capacity bigger than 3.000 passengers have been delivered since 2000, makes evident that the fundamentals lead to a continuous slowing down of the number of cruise ship calls per year, and this happens even though passenger movements increase.

Figure 1.2: Cruise Calls in MedCruise port members (2000-2015)



The changing structures of the cruise industry are further illustrated when comparing the annual total number of cruise calls in MedCruise members with the total passenger movements that took place the very same year (**Figure 1.3**). The hosting of more passenger visits per each cruise call is evident; and this increase has taken place every single year.

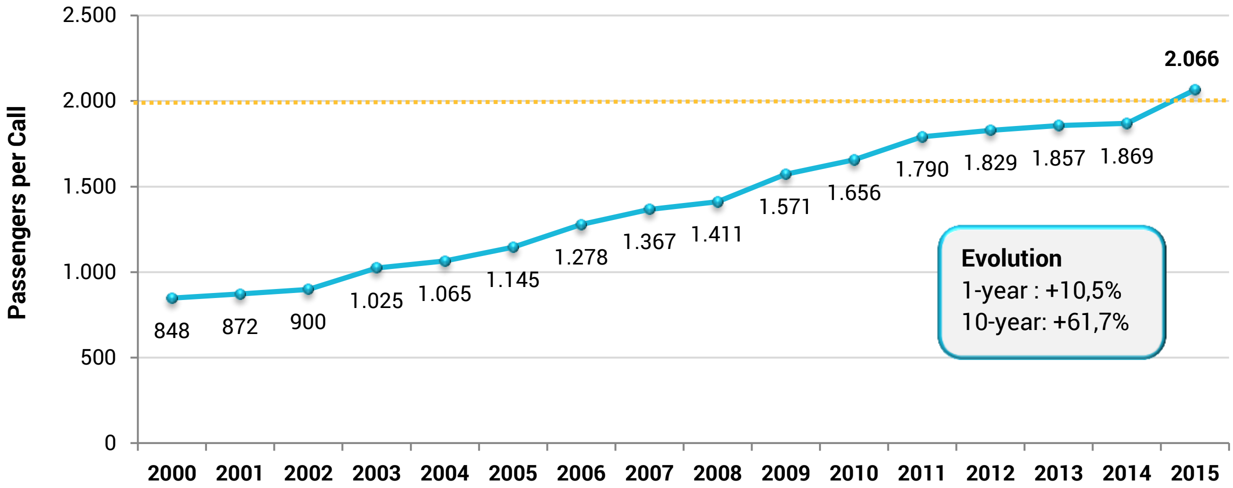
Year 2015 is the first year ever that the average number of passengers per cruise call in the Med and its adjoining seas was higher than 2.000.

The growth within a year only stands at 10,5%, while the growth of the last decade equals to the remarkable 61,7%. In absolute numbers, 2.066 passenger movements per cruise call were recorded in 2015, comparing to 1.278 in 2006.

This trend demonstrates the commendable adaptability that MedCruise port members have demonstrated since the turn of the century. In the beginning of the 21st century, a hosting cruise port had to provide operations to welcome, on average, 848 passenger visits per cruise call. It was only in 2003 that this average exceeded for the first time the 1.000 passenger milestone.

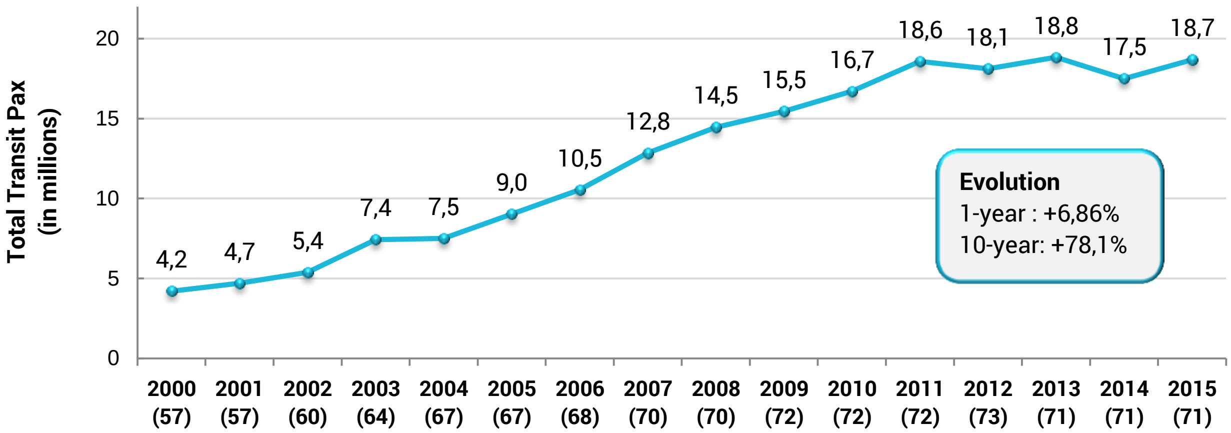
Port infrastructure projects are costly, demand a long-term planning, equally long construction period, and have a long life span. Yet, the cruise ports in the Med and its adjoining seas have managed to proceed to such projects wherever needed, collaborate with destination institutions and all relevant stakeholders, and adjust their business models to the needs of the cruise lines. Thus, they are currently able to host operations of a different scale in an efficient and effective way.

Figure 1.3: Average Pax/Call in MedCruise port members (2000-2015)



The total number of transit passengers in 2015 was 18,7 million passenger movements. This equals to 6,86% higher than the previous year. It also marks a recovery back to almost the 18,8 million passenger movements that had visited MedCruise ports in 2013, that remains the record year ever (**Figure 1.4**). A substantial growth of passenger movements happened within the last decade. The 10-year growth stands at 78,1%, as ‘only’ 10,5 million transit passengers cruised the Mediterranean and its adjoining seas in 2006. The latter was the year that the number of transit cruise passenger movements in the respective ports exceeded for the first time the 10 million milestone.

Figure 1.4: Transit Cruise Passengers in MedCruise port members (2000-2015)

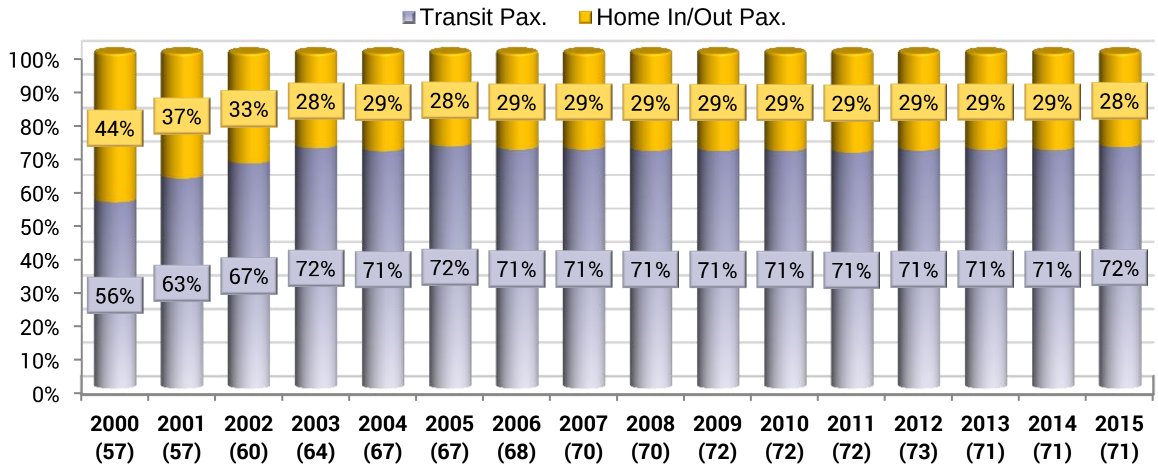


The fact that in the beginning of the century this number was standing at 4,2 further confirms the dynamic and impressive growth that cruise activities in the Med have experienced in the first 15 years of the 21st century.

As **Figure 1.5** illustrates, the ratio of transit passenger movements and passengers home-porting from MedCruise ports stands at 72/28. This ratio remains stable over time, and, on average, precisely the same one is observed for the last decade. The industry structures are relevant for the earlier variation, as is to a certain extent the different sample of ports included in the respective measuring.

This combination exists because fewer ports were hosting cruise calls in the beginning of the century, and the various itineraries of deployed vessels per year were significantly less than those that exist today.

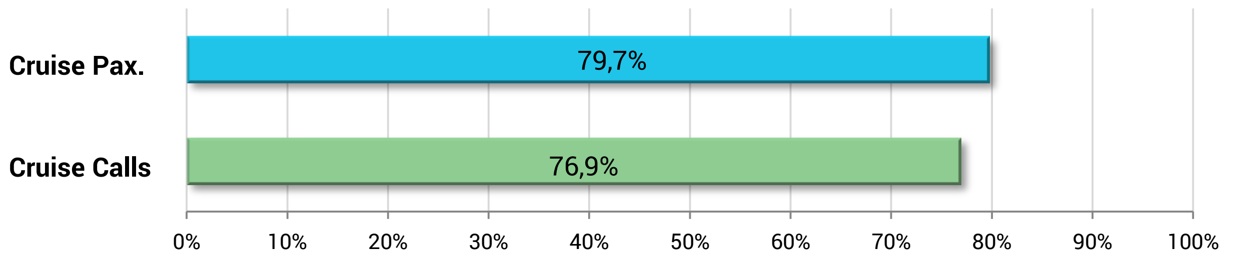
Figure 1.5: Distribution of Cruise Passenger Movements in MedCruise port members (2000-2015)



Consulting external data, as regards the total passenger and cruise calls traffic in the total of the ports in the Mediterranean and its adjoining seas, it is estimated that through its membership MedCruise represents a share of approximately 80% of the total cruise passenger movements in 226 registered ports of any size (i.e. even one cruise call per year), and 77% of the cruise calls that took place in 2015 (**Figure 1.6**).

At the time of publication, discussions with potential port members were at an advanced stage, and are expected to formally conclude during the forthcoming 48th MedCruise General Assembly to be hosted in Odessa, in June 2015. The ports that are in the process of joining MedCruise will further increase the share of cruise passenger movements and cruise calls that are associated with MedCruise.

Figure 1.6: Estimated MedCruise ports share of total cruise traffic in the Mediterranean in 2015

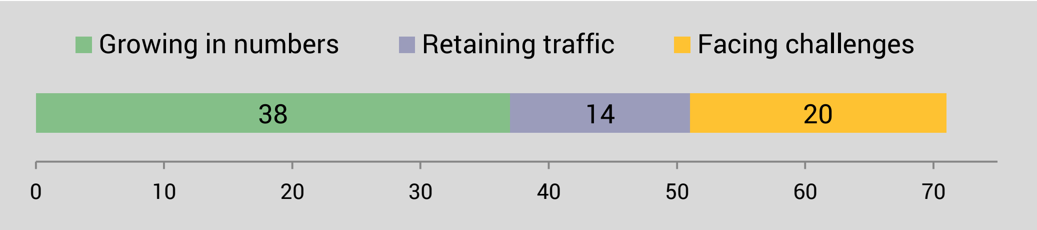


Source: *MedCruise members for MedCruise ports; For the total of traffic in the rest of the ports in the Med and its adjoining seas: Cruise Market Watch*

1.5 Cruise passenger movements in MedCruise Ports in 2015

Table 1.4 presents an overview of cruise traffic recorded at each MedCruise member port in 2015 comparing with 2014. In 38 port members, the growing numbers are higher than the average growth of the MedCruise region. 14 other member ports have retained the levels of cruise members that they had observed the year before, whereas 20 other members faced in 2015 challenges in retaining the numbers of cruise passenger movements that had been hosted in 2014.

Table 1.4: MedCruise member ports cruise traffic overview in 2015



MedCruise
27,4 million
(+6,2%)

Alanya Turkey 22.321 (+16,9%)	**Alicante** Spain 82.296 (+138,0%)	**Azores** Portugal 141.846 (+48,1%)	**Balearic Islands** Spain 1.996.533 (+25,8%)	**Barcelona** Spain 2.540.302 (+7,4%)	**Bari** Italy 368.281 (-34,4%)
Bastia/North Corsica Italy 53.024 (-8,5%)	**Brindisi** Italy 151.922 (+496,9%)	**Burgas** Bulgaria 7.575 (-81,9%)	**Cagliari** Italy 263.247 (+221,6%)	**Cartagena** Spain 151.195 (+9,6%)	**Castellón** Spain 366 (+181,5%)
Ceuta Spain 1.613 (-33,7%)	**Civitavecchia** Italy 2.271.652 (+6,2%)	**Constantza** Romania 31.856 (-54,4%)	**Corfu** Greece 647.346 (-3,7%)	**Cyprus Ports** Cyprus 173.309 (-5,6%)	**Dubrovnik** Croatia 830.684 (-7,1%)
Egyptian Ports Egypt 189.823 (+344,7%)	**French Riviera Ports** France 546.199 (-8,3%)	**Genoa** Italy 848.227 (+2,9%)	**Gibraltar** 344.140 (+14,7%)	**Gioia Tauro** Italy 13.868 (+317,7)	**Heraklion** Greece 219.805 (-9,5%)
Huelva Spain 4.788 (n.d)	**Igoumenitsa** Greece 3.090 (-0,2%)	**Istanbul** Turkey 589.314 (0,0%)	**Kavala** Greece 12.783 (-2,3%)	**Koper** Slovenia 57.893 (-1,8%)	**Kotor** Montenegro 442.029 (+42,9%)
Kusadasi/ Bodrum/ Antalya Turkey 808.446 (+6,1%)	**La Spezia** Italy 667.446 (+38,0%)	**Lisbon** Portugal 512.128 (+2,2%)	**Livorno** Italy 697.955 (+11,4%)	**Madeira Ports** Portugal 580.348 (+21,9%)	**Malaga** Spain 419.121 (+2,4%)

Marseille France 1.451.059 (+10,7%)	**Mersin** Turkey 1.593 (n.d)	**Messina** Italy 327.702 (+2,5%)	**Monaco** 259.325 (+29,6%)	**Motril-Granada** Spain 6.481 (-66,9%)	**Naples** Italy 1.259.571 (+14,0%)
N. Sardinian Ports Italy 22.321 (+16,9%)	**Odessa** Ukraine 6.563 (-22,8%)	**Palamos** Spain 40.800 (+5,7%)	**Palermo** Italy 546.884 (+2,9%)	**Patras** Greece 1.090 (+46,3%)	**Piraeus** Greece 980.149 (-7,1%)
Portimao Portugal 14.786 (+1,0%)	**Portoferraio** Italy 37.486 (+37,0%)	**Portofino** Italy 30.696 (+42,2%)	**Ravenna** Italy 39.964 (-10,4%)	**Rijeka** Croatia 9.082 (+0,6%)	**Savona** Italy 982.226 (-3,6%)
Sete France 20.555 (+107,2%)	**Sibenik** Croatia 17.562 (+38,4%)	**Sinop** Turkey 1.615 (-90,2%)	**Sochi** Russia 19.501 (-43,1%)	**Souda** Greece 96.612 (+190,1%)	**Split** Croatia 271.445 (+47,5%)
Taranto Italy 358 (-38,5%)	**Tarragona** Spain 11.600 (+512,5%)	**Tenerife Ports** Spain 933.154 (+11,1%)	**Thessaloniki** Greece 26.356 (+33,7%)	**Toulon-Var Provence** France 240.833 (-29,4%)	**Trabzon** Turkey 2.280 (-86,7%)
Tunisian Ports Tunisia 53.780 (-87,8%)	**Valencia** Spain 371.197 (-0,5%)	**Valletta** Malta 668.277 (+29,1%)	**Venice** Italy 1.582.481 (-8,7%)	**Volos** Greece 67.096 (+16,0%)	**Zadar** Croatia 74.660 (+38,8%)

Table 1.5 details the data recorded at each MedCruise member port as regards cruise traffic that took place in 2015. 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 in the 2010s.

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

For reasons of consistency, and therefore for meaningful results, in the subsequent sections the analysis will refer to the sample of 71 MedCruise port members for which all data since 2010 are available.

Table 1.5: MedCruise Ports Cruise Traffic data 2015

No	Port	MedCruise Region	Total Pax.	Total Calls	Home In Pax.	Home Out Pax.	Transit Pax.
1	Alanya	East Med	22.321	34	0	0	22.321
2	Alicante	West Med	82.296	50	0	0	82.296
3	Azores	West Med	141.846	138	795	992	140.059
4	Balearic Islands	West Med	1.996.533	788	553.928		1.442.605
5	Barcelona	West Med	2.540.302	749	678.847	684.907	1.176.548
6	Bari	Adriatic	368.281	148	41.026	44.288	282.967
7	Bastia/North Corsica	West Med	53.024	90	0	0	53.024
8	Batumi	Black Sea	n.a.	n.a.	n.a.	n.a.	n.a.
9	Brindisi	Adriatic	151.922	60	10.168	10.731	131.023
10	Burgas	Black Sea	7.575	5	1	1	7.573
11	Cagliari	West Med	263.247	97	8.533	8.003	246.711
12	Cartagena	West Med	151.195	108	0	0	151.195
13	Castellón	West Med	366	2	0	0	366
14	Ceuta	West Med	1.613	4	0	0	1.613
15	Civitavecchia	West Med	2.271.652	794	435.235	432.908	1.403.509
16	Constantza	Black Sea	31.856	25	338	329	31.189
17	Corfu	Adriatic	647.346	407	34.795	35.131	577.420
18	Cyprus Ports	East Med	173.309	167	33.109	33.011	107.189
19	Dubrovnik/Korcula	Adriatic	830.684	475	31.158	30.639	768.887
20	Egyptian Ports	East Med	189.823	n.a.	n.a.	n.a.	n.a.
21	French Riviera Ports	West Med	546.199	343	55.302		490.897
22	Genoa	West Med	848.227	198	280.413	285.274	282.540
23	Gibraltar	West Med	344.140	204	305	278	343.557
24	Gioia Tauro	West Med	13.868	12	58	89	13.721
25	Heraklion	East Med	219.805	170	1.567	1.777	216.461
26	Huelva	West Med	4.788	6	0	0	4.788
27	Igoumenitsa	East Med	3.090	6	0	0	3.090
28	Istanbul	East Med	589.314	331	99.524	103.611	386.179
29	Kavala	East Med	12.783	22	0	0	12.783
30	Koper	Adriatic	57.893	49	56	26	57.811
31	Kotor	Adriatic	442.029	411	1.838	1.083	439.108
32	Kusadasi/Bodrum/ Antalya*	East Med	808.446	660	93.809	106.391	608.246
33	La Spezia	West Med	667.446	175	48.847	48.034	570.565
34	Lattakia	East Med	n.a.	n.a.	n.a.	n.a.	n.a.
35	Lisbon	West Med	512.128	306	21.740	20.796	469.592
36	Livorno	West Med	697.955	369	2.065	2.116	693.774
37	Madeira Ports	West Med	580.348	312	1.814	1.907	576.627
38	Malaga	West Med	419.121	233	16.938	15.554	386.629
39	Marseille	West Med	1.451.059	442	252.391	250.934	947.734

No	Port	MedCruise Region	Total Pax.	Total Calls	Home In Pax.	Home Out Pax.	Transit Pax.
40	Mersin	East Med	1.593	2	0	0	1.593
41	Messina	West Med	327.702	160	8.542	8.526	310.634
42	Monaco	West Med	259.325	209	14.255	15.308	229.761
43	Motril-Granada	West Med	6.481	27	0	0	6.481
44	Naples	West Med	1.269.571	445	62.306	64.366	1.142.899
45	North Sardinian Ports	West Med	238.256	149	0	0	238.256
46	Odessa	Black Sea	6.563	13	10	5	6.548
47	Palamos	West Med	40.800	37	0	0	40.800
48	Palermo	West Med	546.884	200	32.352	33.230	481.302
49	Patras	East Med	1.090	3	0	0	1.090
50	Piraeus	East Med	980.149	621	144.892	139.349	695.908
51	Portimao	West Med	14.786	47	161	77	14.548
52	Portoferraio	West Med	37.486	112	0	0	37.486
53	Portofino	West Med	30.696	80	0	0	30.696
54	Ravenna	Adriatic	39.964	34	30	77	39.857
55	Rijeka	Adriatic	9.082	7	0	0	9.082
56	Savona	West Med	982.226	231	323.677	323.687	334.862
57	Sete	West Med	20.555	31	82	67	20.406
58	Sibenik	Adriatic	17.562	83	0	0	17.562
59	Sinop	Black Sea	1.615	5	0	0	1.615
60	Sochi	Black Sea	19.501	18	2.744	2.867	13.890
61	Souda**	East Med	96.612	59	0	0	96.612
62	Split	Adriatic	271.445	261	0	0	271.445
63	Taranto	Adriatic	358	3	0	0	358
64	Tarragona	West Med	11.600	11	1	10	11.589
65	Tenerife Ports	West Med	933.154	506	n.a.	n.a.	n.a.
66	Thessaloniki	East Med	26.356	35	22	29	26.305
67	Toulon-Var Provence	West Med	240.833	124	11.193	10.064	219.576
68	Trabzon	Black Sea	2.280	10	0	0	2.280
69	Tunisian Ports	West Med	53.780	15	0	0	53.780
70	Valencia***	West Med	371.197	174	33.487	31.411	306.299
71	Valletta	West Med	668.277	306	70.444	70.068	527.765
72	Venice	Adriatic	1.582.481	521	684.228	679.816	218.437
73	Volos	East Med	67.096	57	0	0	67.096
74	Zadar	Adriatic	74.660	96	537	527	73.596

* *Cruise pax. movements hosted in 2015: Kusadasi: 567.291; Bodrum: 70.038; Antalya: 171.117; Cruise calls: Kusadasi 513; Bodrum: 92; Antalya: 55.*

** *Chania harbour welcomed an additional number of cruise calls (7) carrying 4.786 transit pax.*

*** *Provisional data for November and December for the Port of Valencia.*

II. CRUISE ACTIVITY TRENDS

2.1 Trends in the Global Cruise Market

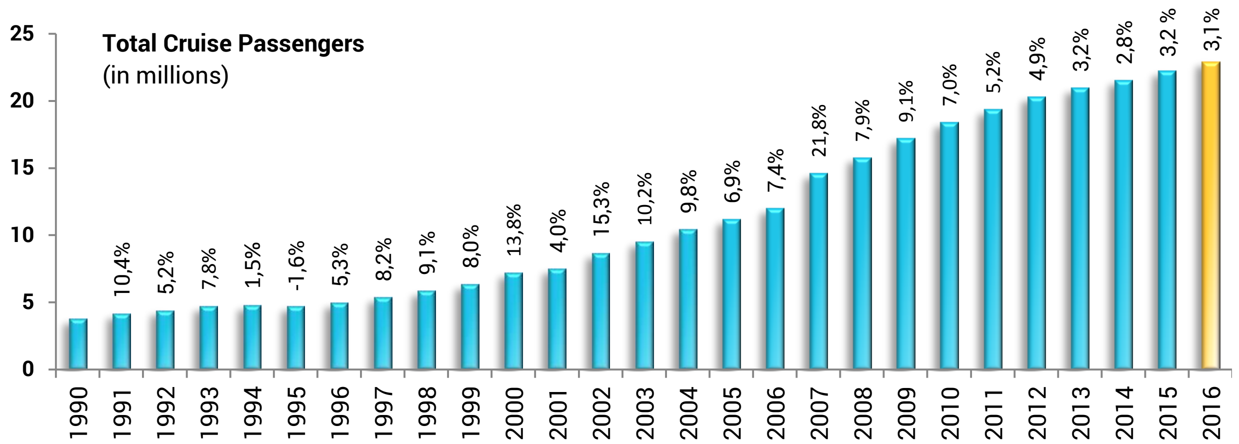
Within the first 15 years of the 21st century cruise recorded an admirable growth. The global growth rate of the cruise industry has been enduring and stable, in spite of the economic cycles of growth and recession.

A total of 22,2 million people took cruise vacations within 2015, as the cruise sector around the globe continued to strengthen. The total number of passengers that cruised in 2015 are 3,2% more than the number of passengers that had cruised the year before.

This pace of growth was faster than the one observed in 2014, yet when examining the trend of the 2010s it seems that a specific development partner, slower than the one that happened in 2000s, is in place.

Figure 2.1 visualises the global cruise passenger growth since 1990. For most other industries both the short-term picture and the long-term one of sustainable growth every single year would be an achievement. The year 1997 was the first year ever that more than 5 million people took a cruise, whereas 2004 was the first year that more than 10 million people decided to take a cruise. The number of people that cruised at the turn of the century in 2000 stood at just one third of today's cruisers. The number of single cruise passengers in 2015 is double comparing to the one recorded a decade before; 11,2 million passengers cruised in 2005.

Figure 2.1: Global Cruise Passenger Growth (1990-2016)



Source: *Cruise Market Watch*

The UN World Tourism Organisation Barometer reports that 5% of global tourists arrived at their destinations by water, cruise and ferry. That said, international tourist arrivals grew slightly more than cruise within 2015: this growth was 4,4% in 2015 to reach a total of 1.184 million in 2015. Some 50 million more tourists (overnight visitors) travelled to international destinations around the world last year as compared to 2014. Since 1990, over 280 million passengers have taken a two or more days cruise, with each of them visiting more than one port.

These trends confirm the remarkable dynamics of the cruise industry and its resilience in the face of the economic, social, political, or any other crises that regularly challenge the tourism sector.

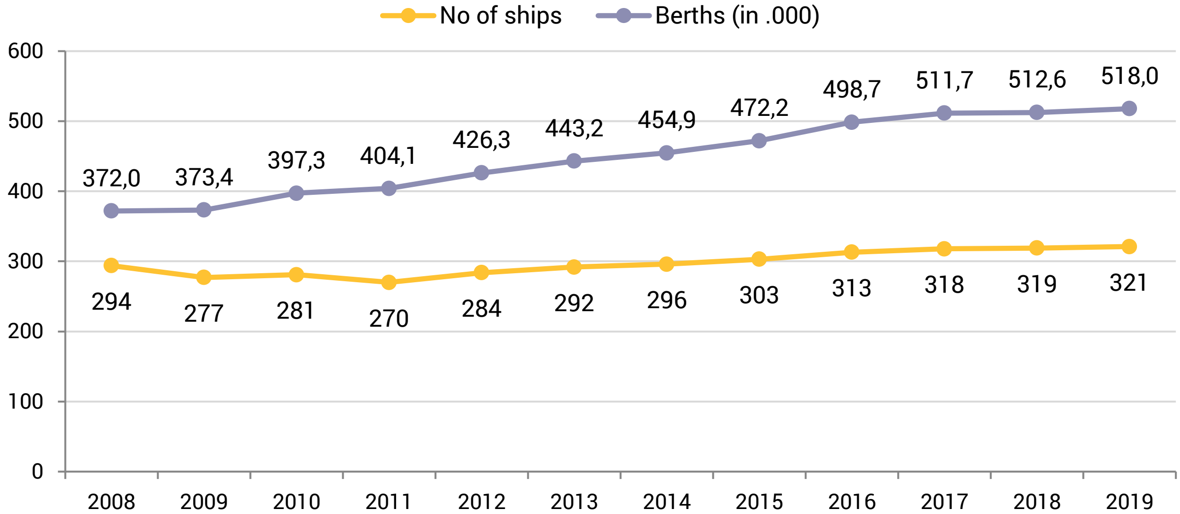
Given the strong consumer interest in cruising, the expansion of destinations and itineraries, and not least the further modernisation of the cruise fleet and cruise product (seven new ships will be delivered in 2016), stakeholders look forward to an additional positive year of growth. With eight out of ten member travel agents stating that they are expecting an increase in sale, Cruise Lines International Association (CLIA) in its 2015 annual state of the cruise industry report is projecting stronger growth (i.e. 4,35%) for the cruise industry in 2016 than the one portrayed in **Figure 2.1**.

Looking at longer-term projections, the same factors are expected to contribute in sustaining growth. In his report '*End of the Beginning for Cruising*' published by Seatrade Communications Ltd, T. Peisly estimated in 2014 that in 2018 global passengers will exceed 25 millions for the first time in cruise history, whereas it will take six more years to surpass, in 2024, the 30 million unique cruise passengers milestone. This is associated with a renewal of the cruise vessels, and thus the berths offered, with the latter increasing to 790.000 berths in 2024. It is also associated with the resumption of the American market, the continuation of growth in Europe and Australia, and the rapid growth in the China and the rest of the Asian market. If the latter is associated with local brands, the 40 million cruise passengers target seems to be genuinely feasible.

2.2 Global Cruise fleet

A fleet of 303 cruise vessels was deployed worldwide in 2015, having a passenger capacity of more than 470 thousand berths (**Figure 2.2**). The total of berths deployed increased by 26,5% within the last seven years, from 373.400 in 2009 to 472.200 in 2015.

Figure 2.2: Global Cruise Fleet 2008-2019 (Ships & Berths)

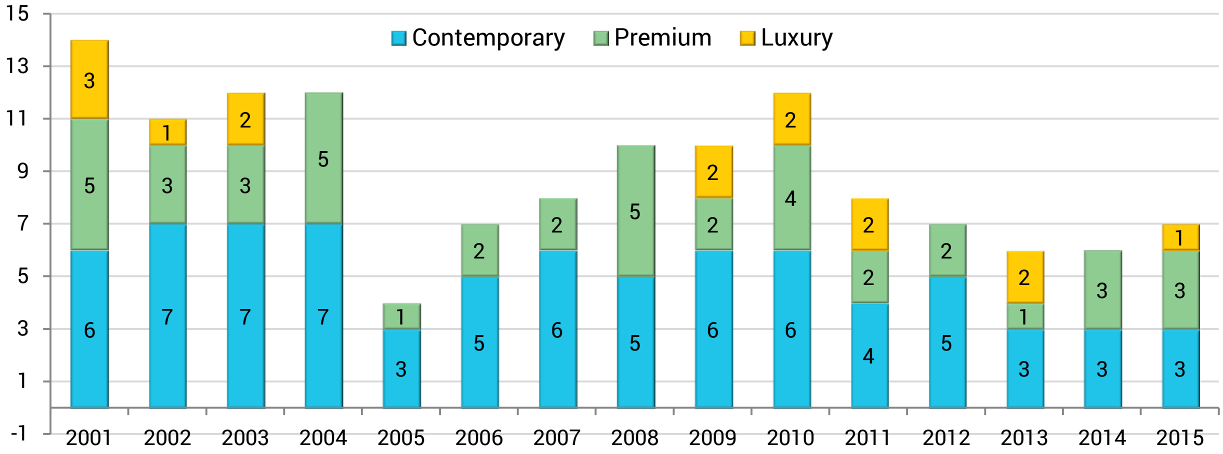


Source of data: *Cruise Industry News 2014-2015 Annual Report*

The major fleet renewal has been a core foundation of the continuous growth of the cruise industry, and this story is hardly evident when noting the numbers of ships. The global cruise fleet increased by just nine during 2008-2015, and this happened even though 56 new cruise vessels were delivered over the same period. In absolute numbers, the global fleet of cruise vessels remains rather stable over time. The order book suggest that 2016 will be among the busiest years for cruise ship introduction in at least 10 year, with ship sizes ranging from 763-passenger vessels to 5.400-passengers, with newly built cruise vessels will be deployed around the globe, replacing older vessels.

The growth of cruising continues to lead to market segmentation. Different types of vessels, associated with different amenities offered on board and ashore, and itineraries, define types of cruises offered, in turn having as target different groups of potential cruisers. In an attempt to broaden the group of potential customers, cruise lines, or specific brands of the bigger corporations, provide and market their presence in one -or in some case more- of the major segments, namely contemporary, premium and luxury cruises, or the fourth distinctive one, that of speciality cruises. An estimation of the different types of newly built cruise ships delivered in the 21st century is provided in **Figure 2.3**.

Figure 2.3: New Ships by product sector (2001-2015)



Source: *Peisley T. (2014). End of the Beginning for Cruising. Seatrade Communications Ltd*

2.3 Deployment of Cruise Fleet

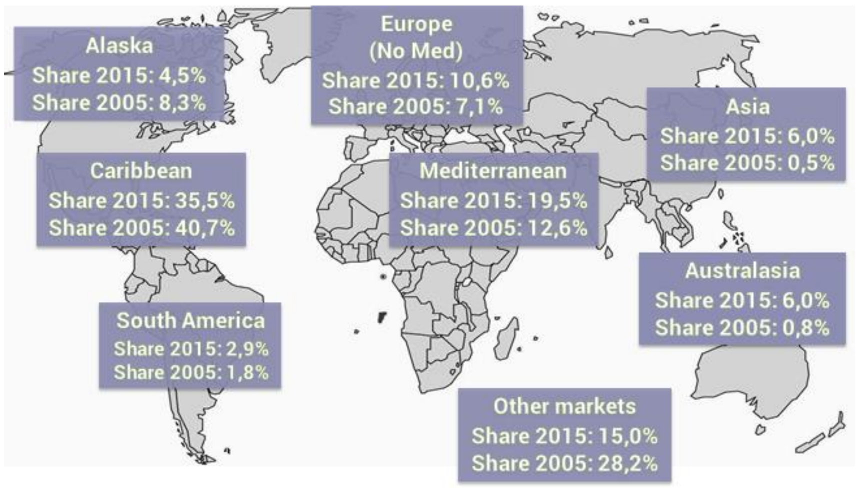
The Mediterranean and its adjoining seas have been one of the most dynamic cruise regions of the world in recent years.

The patterns of cruise fleet deployment around the globe since 2004 (**Figure 2.4**), indicate that the share of the Med increased from 12,6% of the total cruise fleet deployed in 2005 to 19,5% in 2015.

As a result, the Med stands today as the second biggest cruising region of the world, following Caribbean.

Today Caribbean and the Med account for approximately 55% of the global capacity for cruise.

Figure 2.4: Global Deployment Shares 2015/2005



Source: *CLIA*

These positive long-term trends are combined with a less encouraging short-term trend however. The share of the fleet deployed in the Med in the record year 2013 was 21,7% of the globally deployed fleet. As the trends in the other three cruise regions that experienced a continuous growth over that period (Asia, Australasia and South America) demonstrated, deployment patterns are shifting speedily. The last years Asia and Australasia gained shares. The decision of cruise lines to deploy more vessels in Far East, in search for a new dynamic market, and not least a new source market, led to a strong growth in market that till the recent past were only a minor market.

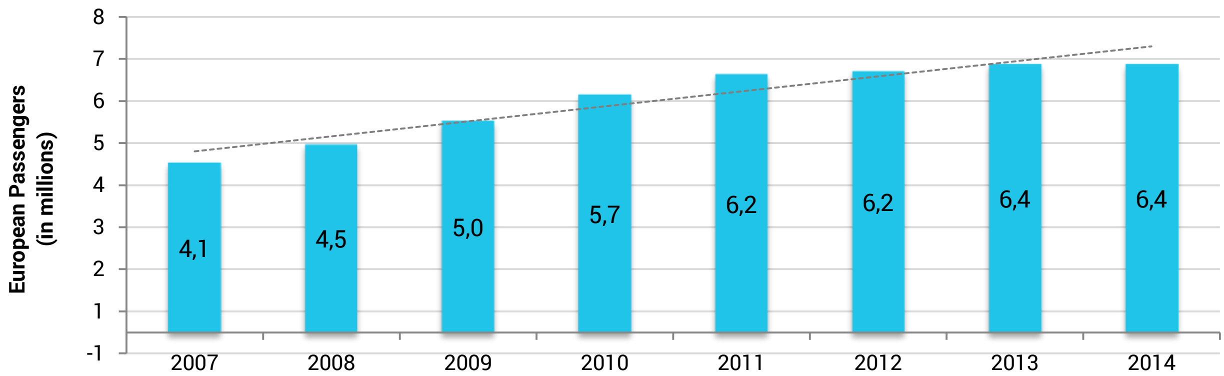
Apparently, the combination of increased demand and effective work by Med ports, destinations and other stakeholders to promote cruise activities have satisfactory served the increasing demand. Yet the short-term trend indicates that further efforts are essential in order for this growth to sustain.

2.4 Cruise Passenger Sourcing

North America remains the dominant source for cruise passengers, with 55% of the total passenger source share in 2014. Other source markets are demonstrating accelerated passenger demand for cruising. The significant growth of internationally sourced passengers includes Europeans (**Figure 2.6**). Since 2011, more than six million citizens depart from a European country to enjoy a cruise.

During the latest year for which data are available, in 2014, cruise operators around the globe hosted 6,4 million. European cruise passengers, a total that equals 28,9% of the passengers that cruised the specific year. The growth of cruising has taken place by expanding in new source markets, in particular the Asian one, and the increased attractiveness in traditional source markets that in recent times enjoyed better economic conditions than the European economy.

Figure 2.5: European-sourced Passenger Growth (2007-2014)



Source: *CLIA (2015): Contribution of Cruise Tourism to the Economies of Europe, 2015 Edition; CLIA (2014). The Global contribution of Cruise Tourism 2013. September 2014.*

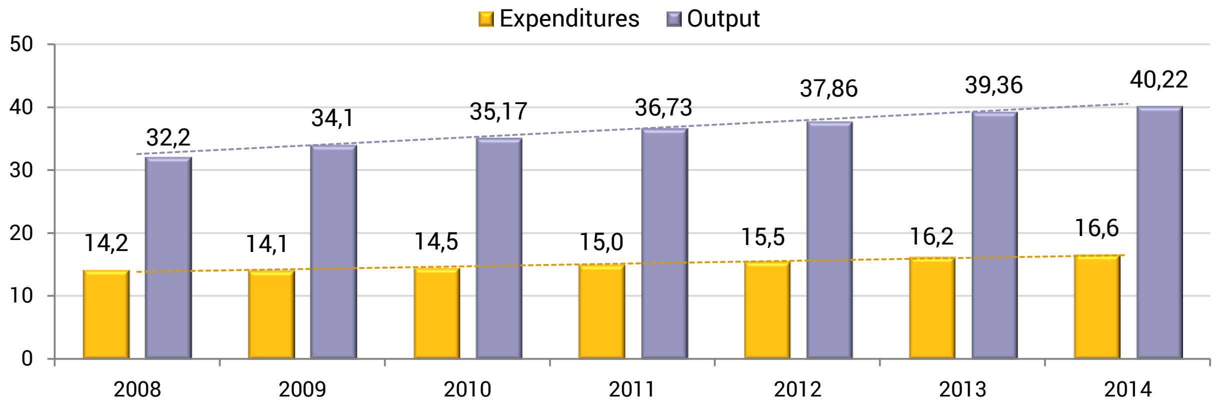
The growing markets in Asia in general and China in particular have been the centre of the attention of cruise lines that are banking on a potential million passengers market. Given the size of the population, and the potential numbers of passengers that small numbers of penetration would result in,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

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

2.5 Contribution to the European Economy

The cruise industry generated an estimated 16,6 billion euros in direct expenditures throughout Europe in 2014. These expenditures were derived by four sources (**Figure 2.6**). The first source is cruise passenger expenditures. The second is cruise line purchases in support of their operations. The third is the compensation of cruise line administrative staff and crew in Europe. The fourth one is the construction and maintenance of cruise ships. Shipbuilding alone is estimated to stand at around 15% of the direct economic contribution of the cruise industry in Europe, with the other 85% being the result of the other three sources.

Figure 2.6: Cruise Industry Expenditures and Outcome in Europe (2008 – 2014)



Source: *CLIA Europe, Contribution of Cruise Tourism to the Economies of Europe, 2014 & 2015 Edition*

Being the leading shipbuilder in cruise vessels in Europe, and the largest home-porting country, Italy enjoys the biggest share of these expenditures (**Table 2.1**). The second major benefiter is the UK, the largest source market in Europe. The other European Mediterranean countries that enjoy a substantial share of this direct expenditure are Spain, France, Greece, Portugal and Croatia.

In the case of the two countries that follow this ranking - Malta and Gibraltar - the absolute size of the cruise industry direct expenditure is lower. Yet, given the size of these small economies, the significance of the contribution of cruise activities to the respective gross domestic product of each country should not be underestimated. While the mentioned eight Mediterranean countries are included in the list of the top-15 countries where these expenditures are taking place, all the countries in the Mediterranean and its adjoining seas enjoy the benefits of increased cruise activities in the region.

Table 2.1: Direct Cruise Expenditures by Country (in million euros)

Country	2014	Share of Total in 2014	2013	Variation 2014/2013
Italy	4.601	27,7%	4.571	0,7%
Spain	1.208	7,3%	1.226	-1,5%
France	1.117	6,7%	1.076	3,8%
Greece	506	3,0%	574	-11,8%
Portugal	193	1,2%	197	-2,0%
Croatia	102	0,6%	n.a	n.a
Malta	86	0,5%	81	6,2%
Gibraltar	66	0,4%	61	8,2%

Source: *CLIA Europe, Contribution of Cruise Tourism to the Economies of Europe, 2014 & 2015 Edition*

III. TRENDS IN THE MEDITERRANEAN AND ITS ADJOINING SEAS

3.1 Evolution of Cruise Traffic in 2010s

The report provides in this section a statistical analysis of cruise passenger movements and cruise ship calls in ports in the Mediterranean and its adjoining seas.

This is an analysis of a consistent sample data recorded in 71 MedCruise port members, representing over 100 ports, and an estimated 80% of cruise calls and 77% of passengers that cruise the region per year. It therefore provides an accurate understanding of developments in the specific ports and illustrates the overall trends in the second biggest cruise region of the world.

- 27.206.023 cruise passenger movements were registered in 71 MedCruise port members in 2015.
- 5,62% passenger movements more than those recorded in 2014.

The full list of the ports included in this analysis, along with the raw material for passenger movements and cruise calls in 2015 and for the five previous years (2010-2015) can be found in the **Appendix** of the report. Batumi, Egyptian Ports, and Lattakia are not included in the analysis, as data are not available for all the respective years.

In total, 27.206.023 cruise passenger movements were registered in these MedCruise port members in 2015 (**Table 3.1**). This total represents a 5,62% increase of passenger movements comparing to the ones that had happened in 2014.

The variation of **cruise passenger movements** is positive when one relates the numbers recorded in 2015 with the one that had taken place at the beginning of the decade. In 2015 cruise ports in the Med and its adjoining seas hosted 10,7% more passenger movements than in 2010.

The scale of cruise passengers has exceeded 25 million movements per year every single year since 2011. While, the volatility of the total passenger movements on a year per year basis sustains, it seems that the decline of 2014 might be attributed to the comparatively slow growth of cruise activities around the globe of the particular year.

Despite the emphasis that cruise lines put on the growth of other regions of the world, i.e. the Asian market, the Med and its adjoining seas is a region that continues to generate increased interest of cruise passengers. The challenge for Med ports, destinations and all other stakeholders is to provide all those conditions that will transform this growth to a sustainable one and allow further growth.

Table 3.1: Evolution of cruise traffic in MedCruise port members in 2010s

Year	Total Pax.	% Variation on previous year	Total Calls	% Variation on previous year	Pax/Call	% Variation on previous year
2015	27.206.023	5,62%	13.082	-4,52%	2.080	10,64%
2014	25.758.252	-6,94%	13.701	-7,86%	1.880	1,02%
2013	27.678.358	3,93%	14.870	2,33%	1.861	1,53%
2012	26.632.949	-3,44%	14.532	-5,61%	1.833	2,29%
2011	27.582.043	12,25%	15.395	3,94%	1.792	8,02%
2010	24.570.992	9,54%	14.811	4,00%	1.659	5,33%
2009	22.431.783		14.242		1.575	
Variation 2015/2010		**10,72%**		**-11,67%**		**25,38%**

3.2 Major MedCruise Ports

The ten major ports in the Med and its adjoining seas hosted in 2015 a total of 6,2% more cruise passenger movements than those they had hosted a year before. This increase is slightly higher than the average of the respective increase that took place in all ports of the region (**Table 3.2**).

The picture for the individual ports that are included in the specific major-10 list is positive in the case of seven out of 10 ports. These ports recorded a growth of cruise passengers in 2015, with Balearic Islands recording the biggest growth of all (25,8%).

The same period a decline of passenger movements took place in three of the major ports included in the top-10; these ports are Piraeus, Savona, and Venice. Venice recorded the major decline of all cruise ports in the list (-8,7%), Genoa returned to the top-10, following a moderate growth of 2,9%, whereas Dubrovnik dropped out of the list following a decline by -7,1% in 2015.

- **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.
- **2000**: The 10th biggest port (Venice) hosted 337.000 passengers. It would rank as the 27th biggest port in the Med in 2015.

The major two ports in terms of passenger movements retained their ranking for another year. Barcelona remains the top port in the Mediterranean Sea. Hosting 2,54 million passenger movements in 2015 it recorded an annual growth of 7,4% comparing to the previous year. Following this growth Barcelona's traffic has exceeded 2,5 million passenger as it had done in 2013.

Civitavecchia remained as the only other cruise port in the Med that hosted more than two million cruise passenger movements in 2015. The short-term annual variation suggests a rise of the hosted cruise passenger movements by 6,1%. When focusing on the 2010-2015 variation Civitavecchia registers a sizeable growth of 16,8%, following an increase of passenger movements from 1,94 millions to 2,17 millions.

The third biggest cruise port of 2015 is Balearic Islands, which recorded the major annual increase of cruise passenger movements. Following a remarkable growth of 25,8%, it managed to surpass Venice and rise to the third place in the rankings for the first time. The trend suggests that there might soon be a third port surpassing the two million passenger movements threshold.

Venice stands as the fourth major cruise port in terms of total passenger movements, and this stands one position lower than the year before. The cruise passengers that moved via this port in 2015 decreased for the second year in a row, as the 2015 traffic was 8,7% lower than that of 2014. This means that the numbers of Venice are lower than those of the turn of 2010s, by 2,1%. As the city experienced a heated discussion on restrictions on the sailing of big in size cruise vessels down the Giudecca canal, it is worth monitoring the long-term effect that related decisions might have on the specific port, and not least on the broader region of the Adriatic and the Ionian Sea.

Marseille continues to register the most dynamic growth of all MedCruise ports within the last five years. The port managed to more than double its annual cruise passenger traffic. As a result, it sustains the fifth position in the rankings of major ports. Three years earlier, in 2012, this was the 9th biggest port of the ports under examination. Following a remarkable 33% rise of passenger movements within 2013 and 10,4% annual growth in 2014, it raised to the 5th position of this ranking. The evolution of traffic that happened in the major ports of the region the last five years suggests that the period 2010-2015 cruise passenger traffic growth in Marseille equals to 107%.

Naples, which stands as the sixth biggest port, returned to growth in 2015. Following 2014 when it experienced a moderate decline (-5,2%), this was one of the four major cruise ports that managed to register a double-digit growth (14%). Savona, which in 2013 was the new entry in the major-10 ports list, dropped just lower than the one million passenger movements per year milestone. Yet it stands as the 7th biggest port in the Med and its adjoining seas. Savona had entered the specific major-10 list in 2013, and rose to 8th in 2014. It is among those cruise ports that have experienced a major increase of passenger movements (25,8%) since 2010.

The fourth major port that saw the numbers of cruise passenger movements rising in 2014 by double digits is Tenerife. Hosting 933.149 passenger movements, a rise of 11,1% comparing to the previous year and 26,1% comparing to 2010, Tenerife now stands as the 9th major port. The port of Genoa, has re-joined and conclude the major-10 list, following a 2,9% annual growth in 2015. This was achieved as Dubrovnik faced challenges to retain cruise traffic for a second successive year; the drop of cruise passengers by 7,1% in 2015, followed a -21,3% drop in 2014, and its positioning just out of the major-10.

The other port that faced considerable decline in the number of passenger movements in 2015 is Piraeus. The traffic in the major Greek cruise port was -7,1% lower than the year before. This means that within the last two years Piraeus lost 322.000 passengers and hosts -14,43% less annual passengers than those it hosted in 2010.

Table 3.2: Major MedCruise Port Members (Cruise Pax Movements, 2015)

Rank 2015	(Rank 2014)	Port	Total Pax 2015	Total Pax 2014	2015/ 2014	Total Pax 2010	2015/ 2010
1	(1)	Barcelona	2.540.302	2.364.292	7,44%	2.350.283	8,08%
2	(2)	Civitavecchia	2.271.652	2.140.039	6,15%	1.944.723	16,81%
3	(4)	Balearic Islands	1.996.533	1.587.064	25,80%	1.546.739	29,08%
4	(3)	Venice	1.582.481	1.733.839	-8,73%	1.617.011	-2,14%
5	(5)	Marseille	1.451.059	1.311.284	10,66%	700.100	107,26%
6	(6)	Naples	1.269.571	1.113.762	13,99%	1.139.319	11,43%
7	(8)	Savona	982.226	1.018.794	-3,59%	780.680	25,82%
8	(7)	Piraeus	980.149	1.055.556	-7,14%	1.145.402	-14,43%
9	(10)	Tenerife Ports	933.154	840.268	11,05%	740.022	26,10%
10	(11)	Genoa	848.227	824.109	2,93%	860.290	-1,40%
Total (Major -10)			**14.855.354**	**13.989.007**	**6,19%**	**12.824.569**	**15,84%**

As regards the 10 major ports in terms of cruise calls per year (**Table 3.3**) the trend is different. The number of calls hosted in these ports in 2015 was -2,2% lower than the respective number of 2014. In absolute numbers calls in the 10 busiest ports of the Med and its adjoining seas in 2015 totalled 6.001 comparing to 6.138 in 2014 and 6.659 calls in 2013. To a major extent, this is because the increase of cruise passenger movements is associated in too many cases with calls from bigger vessels, rather than with an increased number of calls.

Six out of 10 ports listed in **Table 3.3** saw the number of cruise calls declining within 2015 comparing to 2014, with the percentage of this drop being double-digit in two of them. That said, there had been only one port of this list (Marseille) that in 2014 had managed a higher number of calls compared to 2013.

Civitavecchia retains the top position of this ranking with 794 calls in 2015. This equals to a decline by 37 calls, or 4,7% comparing to 2014. Following a remarkable increase of 16,2% Balearic Islands have climbed to second place in this ranking, standing only six calls shy (788) of the record of Civitavecchia.

Barcelona follows in the list, following a decrease by 18 calls (-2,3%). Beyond Balearic Islands, one more port has registered double digit percentage growth. This is Naples that moved from tenth in the ranking to ninth, following the increase of the calls hosted by 46. The annual growth is also considerable in Kusadasi/Bodrum/Antalya (9,1%), as well as in Venice (6,8%), which recovered following a decline of calls in 2014. Whilst it had not recovered in terms of visiting cruise passengers, Piraeus has recorded a rise of calls by 2,5%.

On the other hand, Dubrovnik experienced for the second successive year considerable challenges in its attempt to sustain the number of cruise ships that call at the port. Following a decline of calls by -36,8%, Dubrovnik hosted 475 calls and dropped from the third to the eight position in the list of ports with most cruise calls. Marseille also registered a notable decline by 11,1%, or 55 calls. Yet a note is needed in this case as this had been the only port that had registered growth in 2014; in fact the number of calls in 2015 (442) is almost equal to that of 2013 (440). Modest has been the decline also in the case of Tenerife (-1,3%).

Comparing the cruise vessel calls of 2015 with those of 2010 Marseille and Tenerife are the two ports that have seen the number of cruise calls rising by the remarkable 31,9% in the case of Marseille and the equally significant 30,7% in the case of Tenerife. Balearic Islands is the third case that recorded a rise of calls (9%). All other ports experienced a modest (Kusadasi/Bodrum/Antalya) or considerable decline in the number of calls. The decline was most significant in the cases of Dubrovnik, Piraeus and Venice, by 32,6%, 22,3% and 17,2% respectively. It has to be reminded though that while the number of calls has implications in the operations of the hosting cruise ports, it does not imply a negative trend in the number of hosted cruise passengers.

Table 3.3: Major MedCruise Port Members (Cruise Calls, 2015)

Rank 2015	(Rank 2014)	Port	Total Calls 2015	Total Calls 2014	2015/ 2014	Total Calls 2010	2015/ 2010
1	(1)	Civitavecchia	794	833	-4,68%	900	-11,78%
2	(4)	Balearic Islands	788	678	16,22%	723	8,99%
3	(2)	Barcelona	749	767	-2,35%	841	-10,94%
4	(6)	Kusadasi/Bodrum/Antalya*	660	605	9,09%	695	-5,04%
5	(5)	Piraeus	621	606	2,48%	799	-22,28%
6	(9)	Venice	521	488	6,76%	629	-17,17%
7	(7)	Tenerife Ports	506	513	-1,36%	387	30,75%
8	(3)	Dubrovnik	475	752	-36,84%	705	-32,62%
9	(10)	Naples	445	399	11,53%	537	-17,13%
10	(8)	Marseille	442	497	-11,07%	335	31,94%
Total (Major -10)			**6.001**	**6.138**	**-2,23%**	**6.551**	**-8,40%**

Note: *Kusadasi hosted 513 calls; Bodrum hosted 92 calls; Antalya hosted 55 calls.*

Observing trends in home-porting (**Table 3.4**), Venice remains the major port in the region, followed by Barcelona. After two successive years though, the number of passengers that used Venice as the embarking or disembarking port of their cruise in 2015 totals less than 1,5 million; in percentage this equals to a 9,6% drop comparing to 2014.

The second major port in terms of home-porting, Barcelona, recorded in 2015 11,6% more home in/out passengers than it had done a year before, with the absolute number standing just 290 passengers shy to those that used Venice as homeport.

Even most positive was the situation in the third major home-porting port, Civitavecchia, which hosted 18,8% more passengers of this type comparing to the respective number of 2014. The most impressive growth however in 2015 was observed in Istanbul, where developments led to a rise of passengers embarking to a cruise or disembarking from it by 37%, bringing the port back to the specific list at the expense of Bari, as the ninth port in terms of home in/out passengers.

Positive developments of scale were observed in the case of Piraeus as well (10,9%). Declined numbers witnessed in Balearic Islands (-8,7%), whereas the change in all other ports of the list was moderate, or even stable. In aggregate, the 10 biggest home-porting ports hosted within 2015 a total of 6,42 million home in/out passengers, a number that stands by 6,4% lower than the 6,86 million that they had hosted in 2014.

Comparing with six years earlier, the picture is more positive. The 6,42 million passengers that used the 10 major home-porting ports in the Med and its adjoining seas in 2015 were 7,4% more comparing to 5,98 million passengers of 2010. All four major home-porting ports hosted more passengers than in 2010, with the most remarkable growth registered in Civitavecchia (34,8%). Growth of home-porting was even more significant in the cases of Istanbul (120,4%), which tops the list in terms of growth, Marseille (87,5%) and Kusadasi/Bodrum/Antalya (74,6%). The only one of the ports in the list that experienced a decline is Piraeus (-33,3%), with the difficult economic and social conditions observed in Greece seemingly not irrelevant for this record.

Table 3.4: Major MedCruise Port Members (Home In/Out Pax, 2015)

Rank 2015	(Rank 2014)	Port	Home In/Out Pax 2015	Home In/Out Pax 2014	2015/ 2014	Home In/Out Pax 2010	2015/ 2010
1	(1)	Venice	1.364.044	1.509.097	-9,61%	1.312.895	3,90%
2	(2)	Barcelona	1.363.754	1.222.487	11,56%	1.265.613	7,75%
3	(3)	Civitavecchia	868.143	730.938	18,77%	643.772	34,85%
4	(4)	Savona	647.364	668.473	-3,16%	603.448	7,28%
5	(6)	Genoa	565.687	571.463	-1,01%	571.582	-1,03%
6	(5)	Balearic Islands	553.928	606.549	-8,68%	571.209	-3,03%
7	(7)	Marseille	503.325	506.412	-0,61%	268.451	87,49%
8	(8)	Piraeus	284.241	256.196	10,95%	426.147	-33,30%
9	(11)	Istanbul	203.135	148.297	36,98%	92.179	120,37%
10	(9)	Kusadasi/Bodrum/ Antalya	200.200	201.142	-0,47%	114.657	74,61%
Total (Major -10)			**6.424.813**	**6.863.965**	**-6,4%**	**5.980.919**	**7,4%**

The listing of the major ports in terms of transit cruise passengers (**Table 3.5**) details a rather different picture from that of the major home-ports. First, the aggregate in this case increased, notably at a pace that is double the average growth of cruise passenger movements in the Med and its adjoining seas. Second, the picture is far more dynamic, and this is both as regards the annual and mid-term volatility.

The outstanding growth of cruise passengers in the Balearic Islands is translated to a change at the list of ports hosting most transit passengers of all. Balearic Islands recorded 1,44 million passengers. This total is 47,1% higher than the one that had been recorded one year before and corresponds to the rise of Balearic Islands to the top of the list. Even though Civitavecchia sustained the number of visiting cruise passengers above 1,4 million passengers, it stands as second major cruise port in terms of transit passengers. Despite a 9% decrease comparing to 2013, Civitavecchia hosted in 2014 more than 1,4 million transit passengers. This total equals to 108.000 more passengers than those that had cruised transit the specific Italian port in 2010.

- **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 26th biggest port in the Med in 2015.

Barcelona dropped to the third position of the rankings; yet it is rather more significant than the visiting transit passengers increased by 3% within 2015. Three more among the most popular ports in the Med experienced a rising numbers of transit passengers by double-digit percentages. These ports are Naples, Marseille and Livorno (12,.6%, 17,8% and 11,1% growth respectively). The percentage of this growth was significant, even though of a single digit scale in the case of Kusadasi/ Bodrum/Antalya as well (8,5%), exchanging its ranking as one of the 10 major transit ports at the expense of French Riviera ports (11th position of the rankings) for a second time.

Dubrovnik saw the number of transit passengers to lower by approximately 99.000 transit cruise passengers, or 11,6%, less transit than in 2014, whereas the decline was of similar scale (approx. 96.000 transit passengers in the case of Piraeus). The other Greek port included in the specific list, Corfu, experienced a moderate decline of 3,8%.

Table 3.5: Major MedCruise Port Members (Transit Pax, 2015)

Rank 2015	(Rank 2014)	Port	Total Pax 2015	Total Pax 2014	2015/ 2014	Total Pax 2010	2015/ 2010
1	(4)	Balearic Islands	1.442.605	980.515	47,13%	975.530	47,88%
2	(1)	Civitavecchia	1.403.509	1.409.101	-0,40%	1.300.951	7,88%
3	(2)	Barcelona	1.176.548	1.141.805	3,04%	1.084.670	8,47%
4	(3)	Naples	1.142.899	1.014.339	12,67%	975.081	17,21%
5	(6)	Marseille	947.734	804.872	17,75%	431.649	119,56%
6	(5)	Dubrovnik	768.887	869.426	-11,56%	916.089	-16,07%
7	(7)	Piraeus	695.908	799.360	-12,94%	719.255	-3,25%
8	(8)	Livorno	693.774	624.268	11,13%	776.221	-10,62%
9	(11)	Kusadasi/Bodrum /Antalya	608.246	560.770	8,47%	547.657	11,06%
10	(9)	Corfu	577.420	600.487	-3,84%	541.572	6,62%
Total (Major -10)			**9.457.530**	**8.804.943**	**7,41%**	**8.268.675**	**14,38%**

In the middle of the decade of 2010s the 10 major Med ports in terms of transit passengers hosted within a year almost 1,2 million more passenger movements (9,46 million) than those they had hosted in the beginning of the decade (8,27 million). Marseille is the port that tops the list in terms of percentage growth, as the numbers of 2015 are more than double of those of 2010. It is followed by Balearic Islands that own their rise to the records of the very last year. The only port of the list that recorded a lower number of transit passengers in 2015 comparing to 2010 is Livorno - yet, Livorno hosted an increased number of transit passengers in 2015, indicating a trend of recovering speedily this cruise traffic.

3.3 Major Variations in MedCruise Ports

The following tables portray 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 (**Table 3.8**) and transit (**Table 3.9**) passengers. In order to better understand the trends, these tables provide both a short-term view by comparing data of 2015 with those of 2014, as well as a medium term perspective by comparing cruise passengers and cruise call statistics of 2015 with those of 2010.

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 to only MedCruise ports having a minimum of 20 cruise calls and/or 10.000 cruise passengers in 2015 have been included in the matrices below.

The ports that have not reached any of these thresholds and have been excluded from the analysis of variations are Burgas, Castellón, Ceuta, Huelva, Igoumenitsa, Mersin, Odessa, Patras, Rijeka, Sinop Taranto, and Trabzon. One of the ports that did not reach any threshold to be included in the analysis of variations, Burgas (5 calls and 7.575 passenger movements) joined MedCruise in 2015, as part of a strategy to advance their presence in cruise market. Gioia Tauro and Tarragona were in this list a year ago, but have succeeded to generate cruise traffic, and are thus ‘delisted’. Both Gioia Tauro and Taranto are ports that joined MedCruise in September 2014, as part of their strategy to advance their presence in cruise market.

It is also notable that in the case of these smaller in terms of cruise activities ports, Huelva, two years after joining MedCruise hosted in 2015 six cruise calls and 4.788 passengers. Trabzon, which also joined MedCruise in 2015, reached 10 calls but just 2.280 passengers as small vessels cruise the Black Sea. The latter version has been affected by puzzling social and economic conditions, which resulted in Odessa falling after many years of cruise growth to the relative small numbers of 13 calls and 6.563 passengers. Another notable case is Igoumenitsa that was a destination port for half calls of 2014 (6 calls in 2015 comparing to 13 in 2014) yet the number of passengers hosted remains the same (3.090).

Remarkable variations of the total passenger movements hosted by each port in the Med were observed within just one year (**Table 3.6**). In 2014, three of the smaller ports, Tarragona, Gioia Tauro, and Souda/Chania, enjoyed growth of cruise passenger visits at impressive extends. The same is true in the case of two other Italian ports as well, Brindisi and Cagliari. The former has reached a different scale as it hosted more than 250.000 cruise passengers in 2015. The same stands true for Brindisi that hosted more than 150.000 cruise passengers comparing to just over 25.000 a year earlier. Noteworthy that this increase in the case of Brindisi happened the very same year that the neighbouring port of Bari experienced an even bigger decline, hinting the continuation of interest of cruisers to call and visit the region of Puglia.

Examining the trend of the last years (2010-2015), the list of ports that experienced major growth includes four Italian ports. This time, Gioia Tauro, which emerged as cruise port in these particular years, and Brindisi, that has enjoyed a continuous uptrend, are joined by La Spezia that has experience a transformation since 2010 (from 44.000 passengers per year in the beginning of the decade to more than 660.000 in the middle of the 2010s) and Ravenna. Evidently, with the attention being on variations, rather than absolute numbers, the volatility is higher in small ports and extreme cases rather than else.

At the other end of the spectrum, the list of those cases that ports make efforts to sustain or increase the number of cruise passengers includes Heraklion where cruise passengers per year declined by 85.000 - a number that matches the increase observed in neighbouring Souda/Chania – Malaga, Cyprus Ports, and the comparatively smaller Portuguese port of Portimao. Tunisian ports stand at bottom of the list as in 2015 they were visited by just over 55.000 cruise passengers. Recalling the events observed in the recent past, it is evident that the reasons for this decline are well beyond the managing and operational capacity of the country or the interest of people who might cruise the region.

Table 3.6: Total Cruise Passengers - Major Variations 2015/2014 and 2015/2010

Total Cruise Passengers Major variations 2015/2014				
	Port	2015	2014	Var. 2015/ 2014
+	Tarragona	11.600	1.894	512%
+	Brindisi	151.922	25.450	497%
+	Gioia Tauro	13.868	3.320	318%
+	Cagliari	263.247	81.844	222%
+	Souda/Chania	96.612	33.304	190%
-	Bari	368.281	561.602	-34%
-	Sochi	19.501	34.299	-43%
-	Constantza	31.856	69.910	-54%
-	Motril-Granada	6.481	19.589	-67%
-	Tunisian Ports	53.780	440.433	-88%

Total Cruise Passengers Major variations 2015/2010				
	Port	2015	2010	Var. 2015/ 2010
+	Gioia Tauro	13.868	600	2211%
+	La Spezia	667.446	44.874	1387%
+	Souda/Chania	96.612	11.509	739%
+	Brindisi	151.922	28.489	433%
+	Ravenna	39.964	9.153	337%
-	Heraklion	219.805	305.675	-28,09%
-	Malaga	419.121	659.123	-36,41%
-	Cyprus Ports	173.309	378.909	-54,26%
-	Portimao	14.786	33.843	-56,31%
-	Tunisian Ports	53.780	895.403	-93,99%

Table 3.7 presents the major variations observed in 2015 as regards the number of cruise calls per year. The list is quite similar with the one referring to passenger trends, as Tarragona, Brindisi, Gioia Tauro top the list of ports that enjoyed the biggest positive variations when comparing 2015 calls with those of the previous year. These ports are joined by Alicante, which in 2015 hosted 21 more calls than those of 2014, a total that equals to a 72% annual increase. On the contrary, the number of calls were substantially less in Dubrovnik (-37%) and even more in Toulon-Var Provence (-52%). The decline was more significant in the Black Sea ports of Sochi (-71%) and Constantza (-73%), two ports that were affected by a wave of redeployment of vessels by cruise lines with the unrest in the Eastern parts of the Black Sea being the reasoning for this choice. Tunisian ports hosted just 15 calls for the reasons explained above.

When examining the longer period trends, the 'small' cruise ports that were the success stories of 2015, Tarragona and Gioia Tauro, also top the rankings of ports that hosted substantial more calls in 2015 than those they had hosted in 2010. The other three ports that recorded a remarkable growth since 2010 are La Spezia (298%), Souda/Chania (181%) and Azores (130%).

Table 3.7: Total Cruise Calls - Major Variations 2015/2014 and 2015/2010

Total Cruise Calls Major variations 2015/2014				
	Port	2015	2014	Var. 2015/ 2014
+	Tarragona	11	3	267%
+	Brindisi	60	22	173%
+	Gioia Tauro	12	6	100%
+	Cagliari	97	54	80%
+	Alicante	50	29	72%
-	Dubrovnik	475	752	-37%
-	Toulon-Var Provence	124	257	-52%
-	Sochi	18	63	-71%
-	Constantza	25	92	-73%
-	Tunisian Ports	15	175	-91%

Total Cruise Calls Major variations 2015/2010				
	Port	2015	2010	Var. 2015/ 2010
+	Tarragona	11	2	450%
+	Gioia Tauro	12	3	300%
+	La Spezia	175	44	298%
+	Souda/Chania	59	21	181%
+	Azores	138	60	130%
-	Istanbul	331	536	-38%
-	Toulon-Var Provence	124	235	-47%
-	Cyprus Ports	167	378	-56%
-	Constantza	25	58	-57%
-	Tunisian Ports	15	406	-96%

On the negative side, the list of ports that experienced considerable decline of cruise calls in 2015 comparing to the records of the previous year includes Tunisian Ports (-96%), Constantza (-56%), Cyprus Ports (-56%), Toulon-Var Provence (-47%), and Istanbul (-38%). It remains to see to what extent the number of total calls in the Med will continue to decline, as a result of increase in the vessels size and deployment partners, or the trend will at some point reverse.

Table 3.8 illustrates the major variations of home in/out passengers in MedCruise ports. In this case, Brindisi and Cagliari top the list. Both ports established them as home-ports in 2015, as they had not any such calls the year before. Major increase of home-porting traffic was observed in 2015 in two other ports that had already hosted such cruise passengers in previous years. One of them is the more 'traditional' home-porting port of Dubrovnik, and the other is the comparatively recently established port of La Spezia. Livorno is the fifth port that in 2015 at least doubled the accommodated home-porting passengers, yet the numbers are comparatively small. At the other end of the spectrum, Heraklion has seen almost the total of its home-porting traffic evaporating, Sochi (-61%), Malaga (-56%) and Bari (-44%), hosted half the home-porting passengers, and Toulon-Var Provence (-27%) saw significantly lower passengers.

Only MedCruise ports having a minimum of 3.000 home in/out cruise passengers in 2015 have been included in the matrix below; 15 ports have hosted less or no home In/out cruise passengers (Azores; Burgas; Constantza; Gibraltar; Gioia Tauro; Koper; Odessa; Portimao; Ravenna; Sete; Tarragona; Tenerife Ports; Thessaloniki; and Zadar).

Considering the data that had been recorded in 2010, the situation is quite different. This time Valletta tops the list as it has manage to attract the interest of 140.000 cruise passengers, when in 2010 just 30.000 were departing or ending their cruise at the specific port. Three other ports that were not listed as home-ports in 2010 managed to accommodate in 2015 mentionable home-porting traffic. These are La Spezia, Brindisi and Cagliari, which are deservedly included in the list of ports with major positive variations of home-port visits.

Table 3.8: Total Home In/Out Passengers - Major Variations 2015/2014 and 2015/2010

Total Home In/Out Passengers Major variations 2015/2014					Total Home In/Out Passengers Major variations 2015/2010				
	Port	2015	2014	Var. 2015/2014		Port	2015	2010	Var. 2015/2010
+	Brindisi	20.899	48		+	Valletta	140.512	29.362	379%
+	Cagliari	16.536	133		+	Dubrovnik	61.797	19.700	214%
+	Dubrovnik	61.797	24.790	149%	+	La Spezia	96.881	0	n/d
+	La Spezia	96.881	40.280	141%	+	Brindisi	20.899	0	n/d
+	Livorno	4.181	2.088	100%	+	Cagliari	16.536	0	n/d
-	Toulon-Var Provence	21.257	28.974	-27%	-	Bari	85.314	203.145	-58%
-	Bari	85314	152056	-44%	-	Madeira	3.721	9.841	-62%
-	Malaga	32492	74170	-56%	-	Malaga	32.492	239.867	-86%
-	Sochi	5611	14509	-61%	-	Livorno	4.181	46.333	-91%
-	Heraklion	3344	23925	-86%	-	Heraklion	3.344	45.945	-93%

At the other end, the list of the ports that have experienced a major negative variation since 2010 includes Heraklion, a port that had lost half of its home-porting by 2014 and the situation deteriorated in 2015 when only 3.344 embarked on a cruise via the specific port. Similar is the case of Malaga that in 2010 had hosted 200.000 more than those it did in 2015. Livorno, and Bari also lost significant numbers of home-porting passengers hosted per year, and thus record most negative variations. Madeira ports, which today maintain a marginal home-porting activity is included in the list, though the numbers of home-porting passengers are too small in scale.

As for the growth in transit passenger movements, which is detailed in **Table 3.9**, Tarragona tops the list followed by Brindisi (which notably had positioned at the top of this list a year earlier), Gioia Tauro, Cagliari and Souda/Chania. Not surprisingly, Gioia Tauro, Souda/Chania and Brindisi are in the list of major (2010-2015) positive variations insofar transit passengers are concerned with reference to the medium-term variations. Gioia Tauro recorded the major growth of all ports, whereas Gioia Tauro and Ravenna, also recorded remarkably positive changes since 2010.

Table 3.9: Total Transit Passengers - Major Variations 2015/2014 and 2015/2010

Total Transit Passengers Major variations 2015/2014					Total Transit Passengers Major variations 2015/2010				
Port		2015	2014	Var. 2015/ 2014	Port		2015	2010	Var. 2015/ 2010
+	Tarragona	11.600	1.894	512%	+	Gioia Tauro	13.868	600	2211%
+	Brindisi	151.922	25.450	497%	+	La Spezia	667.446	44.874	1387%
+	Gioia Tauro	13.868	3.320	318%	+	Souda/Chania	96.612	11.509	739%
+	Cagliari	263.247	81.844	222%	+	Brindisi	151.922	28.489	433%
+	Souda/Chania	96.612	33.304	190%	+	Ravenna	39.964	9.153	337%
-	Bari	368.281	561.602	-34,42%	-	Heraklion	219.805	305.675	-28,09%
-	Sochi	19.501	34.299	-43,14%	-	Malaga	419.121	659.123	-36,41%
-	Constantza	31.856	69.910	-54,43%	-	Cyprus Ports	173.309	378.909	-54,26%
-	Motril-Granada	6.481	19.589	-66,92%	-	Portimao	14.786	33.843	-56,31%
-	Tunisian Ports	53.780	440.433	-87,79%	-	Tunisian Ports	53.780	895.403	-93,99%

The list of ports that in 2015 experienced major decline in the annual transit passenger movements includes Tunisian Ports (-88%), Motril-Granada (-67%), Constantza (-54%), Sochi (-43%) and Bari (-34%). As regards the medium-term trend (2010-2015) the list of ports that experienced the major negative variation is different in all respects bar the case of Tunisian ports. Beyond the latter (-94% variation since 2010), the other four ports with the major drop of transit passenger movements since 2010 are Portimao (-56%), Cyprus Ports (-54%), Malaga (-36%) and Heraklion (-28%).

3.4 Passengers per Call

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

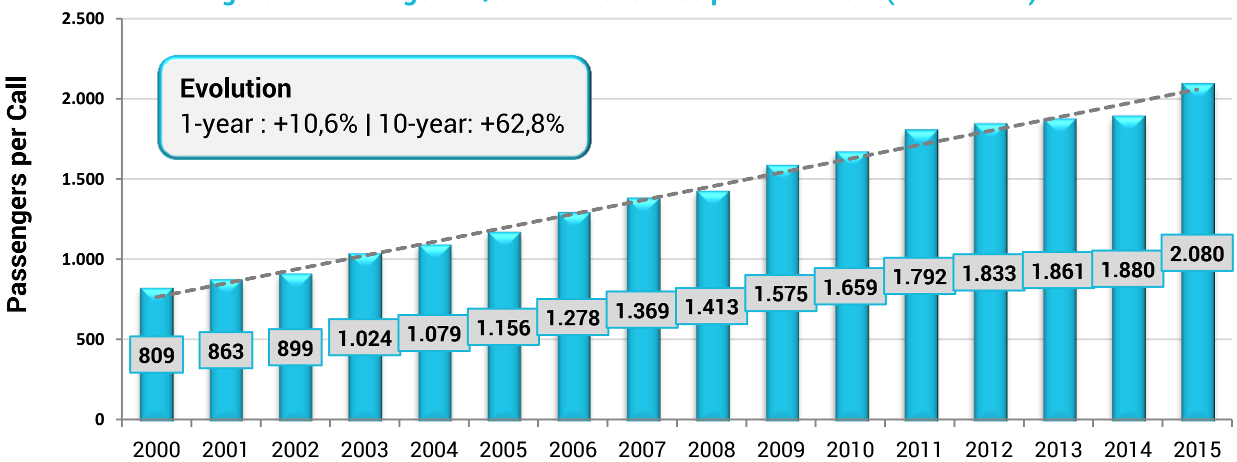
In 2015 the average number of hosted cruise passengers per cruise call surpassed for the first time in history 2.000 passengers; in fact this number stands at 2.080 passengers precisely. Even though the standard deviation from this average is significant, thus a note of caution essential, this is a milestone in all respects. Within a year this average increased by 200 passengers per call.

The increase within the last decade is even more impressive. In 2006 each cruise call was resulting on average 1.278 passenger movements, or 802 less passengers than those associated with a call in 2015. Within 10 years, the average number of passengers per call increased by 25,4% (**Figure 3.1**).

The trends observed in the shipbuilding order book are expected to affect the specific numbers and sustain the overall trend of growing numbers of cruise passengers per visit. Larger cruise ships tend to have lower average labour costs than smaller ships - for example, a 5.000 plus-cruise vessel has one crew member for every 2,6 passengers, while a 2.000 passenger one has one crew member for every 2,1 passengers – while they also offer more amenities to cruisers.

Economies of scale, the search for increased amenities and economies of scope insofar entertainment of passengers is concerned, along with technological and shipbuilding advancement are expected to lead to the continuation of the increase of cruise ships size. This trend is already confirmed by the order book and, as has been announced or reported, several of the bigger vessels will be deployed in the Med.

Figure 3.1: Average Pax/Call in MedCruise port members (2000-2015)



This overall trend is further evident when focusing on the growth of passengers per call in the 20 MedCruise ports that maintain the highest passengers/call ratio (**Table 3.10**). For the first time in history the average size of call in any port in the Med exceeded the 4.000 passengers average. In fact this happened to both Genoa and the neighboring Savona.

In total, seven ports hosted more than 3.000 passengers/call in 2015, whereas only five had done so in 2014. A total of 17 ports hosted more than 2.000 passengers/call, whereas 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.
- **2015**: 7 ports hosted more than 3.000 pax/call. Only 5 had done so in 2014.
- **2015**: 17 ports hosted more than 2.000 pax/call. Only 11 ports had done so in 2014.
- **2010:** The average pax/call was less than 1.000 in 33 ports. In 2015 this dropped to 22 ports
- **2003**: Pax/call exceeded 1.000 for the first time.

Genoa tops the list with 4.284 pax/call following a major 8,6% annual increase of passengers/call in 2015, or by an even more impressive 30% when the focus is on the variation between vessels calling at the port in 2015 comparing to 2010. Savona is the only other port where the average number of visiting passengers per call exceeds 4.000. This average has always been high in this particular port that is extensively used as a home-port. In fact, calls in Savona were at a different scale because of the characteristics of these home-porting calls. Savona is the only port among the ones in the list that is not registering any growth of passengers/call since 2010. La Spezia, Tunisian Ports, Barcelona, Marseille and Venice are the other five ports hosting more than 3.000 passengers/call.

There are only two ports where the number of passengers/call declined in 2015. The first one is Venice (-14,5%), where local preferences and related regulatory developments have put cap to the size of visiting cruise ships and resulted in a restructuring of the deployment partners, so as to avoid the presence of very big vessels. The second is the port of Bari (3.820 passengers/call), which has seen its home-port status being challenged in 2015. As a result, the average passengers/call was dropped by 34,9%, and Bari, which had standing second in the particular list in 2014 is now moved out of the particular major-10 listing. Notably, only due to the last year development, Bari joins Savona as the only ports that cruise ships visits are associated with less passengers than those associated with calls that happened in 2010. In the latter port though the decline is moderate, or rather insignificant.

Table 3.10: Cruise Pax/Cruise Call - Major 20

No	Port	Pax/Calls 2015	Pax/Calls 2014	Variation 2015/2014	Pax/Calls 2010	Variation 2015/2010
1	Genoa	4.284	3.943	8,64%	3.296	29,97%
2	Savona	4.252	3.652	16,44%	4.487	-5,23%
3	La Spezia	3.814	1.904	100,34%	1.020	273,97%
4	Tunisian Ports	3.585	2.517	42,46%	2.205	62,57%
5	Barcelona	3.392	3.083	10,03%	2.795	21,36%
6	Marseille	3.283	2.638	24,43%	2.090	57,09%
7	Venice	3.037	3.553	-14,51%	2.571	18,15%
8	Civitavecchia	2.861	2.569	11,36%	2.161	32,41%
9	Naples	2.853	2.791	2,21%	2.122	34,47%
10	Palermo	2.734	2.406	13,65%	2.146	27,41%
Major-10		**3.410**	**2.906**	**17,35%**	**2.489**	**36,98%**
11	Cagliari	2.714	1.516	79,06%	2.064	31,49%
12	Balearic Islands	2.534	2.341	8,24%	2.139	18,43%
13	Brindisi	2.532	1.157	118,88%	750	237,73%
14	Bari	2.488	3.820	-34,87%	3.340	-25,50%
15	Valletta	2.184	1.714	27,42%	1.763	23,85%
16	Valencia	2.133	1.913	11,53%	1.616	32,00%
17	Messina	2.048	1.938	5,69%	1.726	18,70%
18	Toulon-Var Provence	1.942	1.327	46,32%	1.321	47,01%
19	Livorno	1.891	1.837	2,98%	1.619	16,82%
20	Madeira Ports	1.860	1.670	11,38%	1.669	11,42%
Major-20		**2.821**	**2.414**	**16,85%**	**2.145**	**31,52%**

Looking at the major-20 list, the average annual growth (16,8%) does not differ from the trend in the major-10 (growth of 17,3%). The rise of vessels size affects the entire region, and all ports to a quite similar extent. The major annual growth in 2015 was observed in Brindisi, which has expanded its home-porting activities, a development producing a doubling of the scale of operations and of the number of passengers per call. The other port where the average passengers/call doubled within 2015 is La Spezia. The rise of this index in the particular port was remarkable for a second successive year. La Spezia had experienced the biggest rise of passengers/call in 2014 as well; in 2013 the passengers/call at the specific port were 'just' 1.904; Cagliari (79,1%) where the average passengers/call increased from 1.516 to 2.714, Toulon-Var Provence (46,3%), and Valletta (27,4%) are the other ports that the passengers/call increased well beyond the average increase in the Med.

The comparison of 2015 records with those of 2010 detail that the average number of passengers visiting the 20 biggest in terms of passengers/call cruise ports has increased by one third within six years only (31,5%). The pace is slightly faster in the case of the 10 cruise ports that top this list, as this group has registered a growth of 37%. Brindisi and La Spezia are the two ports that have seen the major rise of the passengers/call whereas only two ports – namely Savona and Bari – saw this average dropping to a lesser or bigger extent.

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 is for any concentration to increase.

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

No	Port	Total Pax. 2015	2015	2014	2013	2012	2011	2010
1	Barcelona	2.540.302	9,34%	9,18%	9,39%	9,04%	9,63%	9,57%
2	Civitavecchia	2.271.652	8,35%	8,31%	9,17%	8,99%	9,34%	7,91%
3	Balearic Islands	1.996.533	7,34%	6,16%	5,57%	5,04%	5,83%	6,29%
4	Venice	1.582.481	5,82%	6,73%	6,56%	6,67%	6,48%	6,58%
5	Marseille	1.451.059	5,33%	5,09%	4,29%	3,34%	2,94%	2,85%
Major 5 – SUM		**9.842.027**	**36,18%**	**35,47%**	**34,98%**	**33,08%**	**34,23%**	**33,21%**
6	Naples	1.269.571	4,67%	4,32%	4,25%	4,87%	4,70%	4,64%
7	Savona	982.226	3,61%	3,96%	3,39%	3,04%	3,44%	3,18%
8	Piraeus	980.149	3,60%	4,10%	4,71%	4,50%	5,39%	4,66%
9	Tenerife Ports	933.154	3,43%	3,26%	2,87%	3,33%	3,00%	3,01%
10	Genoa	848.227	3,12%	3,20%	3,79%	2,99%	2,90%	3,50%
Major 10 – SUM		**14.855.354**	**54,60%**	**54,31%**	**53,99%**	**51,81%**	**53,65%**	**52,19%**
11	Dubrovnik	830.684	3,05%	3,47%	4,11%	3,69%	3,66%	3,81%
12	Kusadasi/Bodrum/Antalya	808.446	2,97%	2,96%	2,82%	2,92%	2,95%	2,70%
13	Livorno	697.955	2,57%	2,43%	2,66%	3,90%	3,56%	3,35%
14	Valletta	668.277	2,46%	2,01%	1,73%	2,27%	2,02%	2,01%
15	La Spezia	667.446	2,45%	1,88%	0,77%	0,19%	0,33%	0,18%
16	Corfu	647.346	2,38%	2,61%	2,69%	2,46%	2,25%	2,43%
17	Istanbul	589.314	2,17%	2,29%	2,47%	2,12%	2,40%	2,00%
18	Madeira Ports	580.348	2,13%	1,85%	1,74%	2,23%	1,97%	2,00%
19	Palermo	546.884	2,01%	2,06%	1,48%	1,33%	2,06%	1,61%
20	French Riviera Ports	546.199	2,01%	2,31%	2,22%	2,63%	2,41%	2,74%
Major 20 – SUM		**21.438.253**	**78,80%**	**78,18%**	**76,68%**	**75,54%**	**77,26%**	**75,02%**

Six ports hosted in 2015 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. There are also 15 more ports that hosted more than 500.000 passenger movements within 2015, i.e. all those listed in **Table 3.11** plus Lisbon which was visited by 512.128 passengers and is the biggest Med port not included in the list. 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.

In aggregate, the major-5 ports in terms of passenger movements had in 2015 a share standing at 36,2% of the total passenger movements in the Med and its adjoining seas. This is 3% higher than the share of the major-5 cruise ports in 2010. The same trend is observed when focusing on the major-20 ports. This group of ports increased in 2015 their share by 3,8% since in 2015 they hosted 78,8% of the total cruise passengers movements in the region (comparing to the 75% of the respective total in 2010). The growth of cruising has spread proportionally in all ports of different size.

Cruise calls in the Med and its adjoining seas record a lower level concentration than the accommodated passenger movements. There are five ports that host over 600 cruise calls per year in 2015, one less than in 2014. The total of ports that hosted more than 300 cruise calls stands at 18, which is three more than those that did so in 2014. The major-20 ports hosted in 2014 a total of 9.280 calls, which is 89 shy of the total of calls in the top-20 of 2014.

In 2015, the five cruise ports with most calls per year hosted 3.612 calls (20 less than a year before), or 27,6% of the total ca;;s in the region. This percentage is slightly lower than the 26,8% that they had shared five years before (2010). The picture is similar irrespective of whether the focus is on the major-10 ports only (45,9%, or 6.001 calls in 2015, with this share being 44,2% in 2010), or expands to include all major-20 ports (70,9% or 9.280 calls in 2015, comparing with a share of 69,4% in 2010).

Table 3.12: Major 20 MedCruise Ports - Cruise Calls Concentration

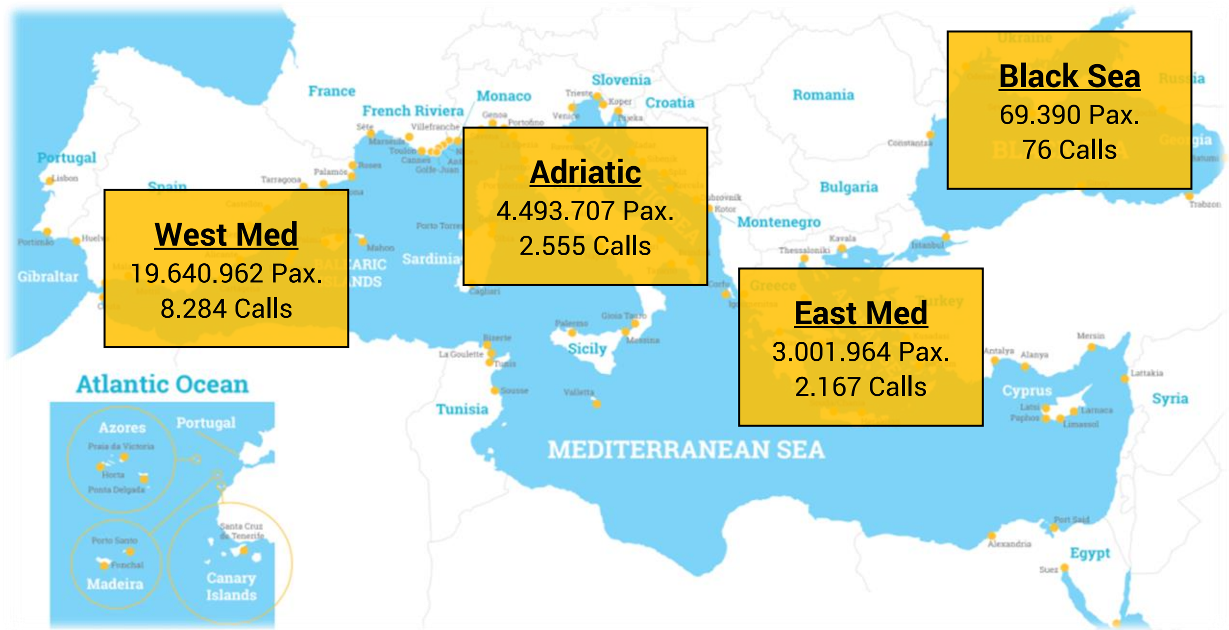
No	Port	Total Calls 2015	2015	2014	2013	2012	2011	2010
1	Civitavecchia	794	6,07%	6,08%	6,45%	7,16%	6,51%	6,08%
2	Balearic Islands	788	6,02%	4,95%	4,70%	4,35%	3,98%	4,88%
3	Barcelona	749	5,73%	5,60%	5,62%	5,33%	5,72%	5,68%
4	Kusadasi/Bodrum/Antalya	660	5,05%	4,42%	4,42%	4,70%	4,59%	4,69%
5	Piraeus	621	4,75%	4,42%	4,78%	5,25%	6,08%	5,39%
Major 5 – SUM		**3.612**	**27,61%**	**25,47%**	**25,97%**	**26,78%**	**26,89%**	**26,72%**
6	Venice	521	3,98%	3,56%	3,69%	4,55%	4,25%	4,25%
7	Tenerife Ports	506	3,87%	3,74%	3,50%	3,67%	2,99%	2,61%
8	Dubrovnik	475	3,63%	5,49%	5,67%	4,53%	4,42%	4,76%
9	Naples	445	3,40%	2,91%	2,96%	3,63%	3,42%	3,63%
10	Marseille	442	3,38%	3,63%	3,01%	2,44%	2,73%	2,26%
Major 10 – SUM		**6.001**	**45,87%**	**44,80%**	**44,78%**	**45,60%**	**44,70%**	**44,23%**
11	Kotor	411	3,14%	2,58%	2,60%	2,36%	2,05%	2,09%
12	Corfu	407	3,11%	2,88%	3,23%	3,34%	2,94%	2,90%
13	Livorno	369	2,82%	2,49%	2,82%	3,20%	3,23%	3,43%
14	French Riviera Ports	343	2,62%	2,69%	2,82%	2,66%	2,77%	3,35%
15	Istanbul	331	2,53%	2,42%	2,74%	3,34%	3,73%	3,62%
16	Madeira Ports	312	2,38%	2,08%	1,96%	2,33%	2,01%	1,99%
17	Lisbon	306	2,34%	2,33%	2,37%	2,16%	2,14%	2,02%
18	Valletta	306	2,34%	2,20%	1,86%	2,15%	2,03%	1,89%
19	Split	261	2,00%	1,70%	1,51%	1,85%	1,64%	1,74%
20	Malaga	233	1,78%	1,66%	1,67%	2,02%	2,02%	2,17%
Major 20 – SUM		**9.280**	**70,94%**	**67,83%**	**68,38%**	**71,02%**	**69,27%**	**69,42%**

IV. ANALYSIS PER MEDCRUISE REGION

4.1 The MedCruise Regions

MedCruise membership spreads in four distinctive geographical regions, each of them having its own dynamics. These regions are the West Med, the Adriatic, the East Med, and the Black Sea respectively. 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 2015



A total of 39 MedCruise members are located in the West Med region (**Table 4.1**). The total of cruise passenger movements that took place in these ports in 2015 reached 19,96 millions. This total equals to 8,94% increase comparing to 2014 passenger movements. It also equals to a growth of 13,6% comparing to 2010 (**Table 4.2**). The number of cruise calls in the West Med ports was 8.284. This represents a decrease of 1,6% comparing to 2014, or 5,3% comparing to the 2010 cruise calls (**Table 4.3**). This is the biggest region of the four in terms of the share of cruise activities hosted, as West Med ports in 2015 accommodated 72,1% of the total passenger movements that took place in the Med, and a 63,3% share of the respective number of cruise calls (**Figure 4.1**).

Table 4.1: Total Cruise Traffic 2015

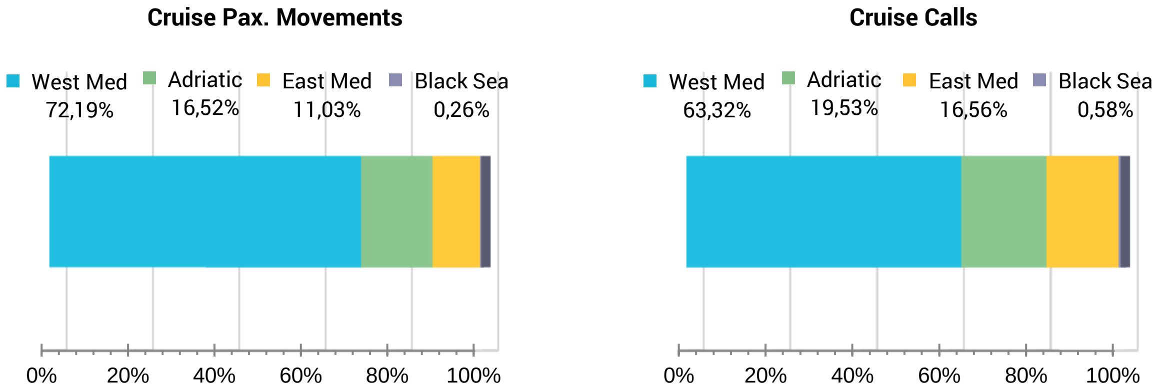
Region	No. of members	Total Cruise Pax.	Total Cruise Calls	Home In/Out Pax.	Transit Pax.
West Med	39	19.640.962	8.284	5.222.317	13.485.490
Adriatic	13	4.493.707	2.555	1.606.154	2.887.553
East Med	13	3.001.964	2.167	757.091	2.244.873
Black Sea	6	69.390	76	6.295	63.095

The number of cruise ports that are located in the Adriatic Sea is 13. This is the second biggest cruise region, hosting 16,5% of the total passenger movements and 19,5% of the total cruise calls in the Med and its adjoining seas (**Figure 4.1**). In 2015 these ports hosted 4,49 million cruise passenger movements. This number was 1,5% lower than the number of passenger movements that the same ports had recorded in 2014; yet it is higher by 9,7% comparing to the respective number of passenger movements happened in 2010.

There are also 14 MedCruise member ports located in the East Med, with the trends observed in all bar Lattakia analysed in this section. Based on the 2015 data, these 13 East Med ports share 11% of the passenger movements and 16,5% of the cruise calls that take place in the Med and its adjoining seas within a year. In particular, these ports registered in 2015 a total of 3,0 million cruise passenger movements, a number that is 0,7% higher than the cruise passengers that they had hosted in 2014. This total also represents a stable number of cruise visitors since 2010; these ports experienced a minor decline of 1,9%, or just less than 60.000 passengers, comparing to 2010. The annual number of calls in the East Med ports during 2015 increased to 2.167 (or by 2,6%) - yet this record is 21,9% lower than the calls that had taken place in the region in 2010.

The Black Sea is the smallest distinctive geographical port region as regards the magnitude of cruise activities. This region represented in 2015 only 0,3% of the annual passenger movements and 2,9% of the annual cruise calls. The latter percentage results by the deployment of smaller cruise ships in the Black Sea comparing to the vessels deployed in other regions. Cruise activities it the Black Sea recorded a severe decline in 2015; with cruise lines plan 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 2015.

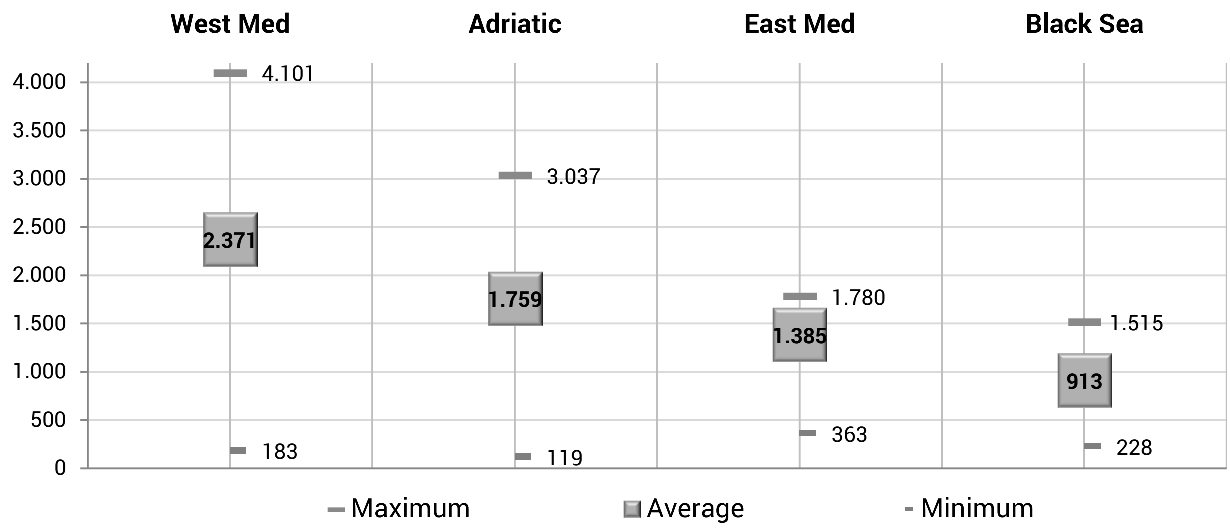
Figure 4.1: Cruise Passenger Traffic Shares 2015 per region



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 2.371. As expected the standard deviation from this number is remarkable as there are ports that host more than 4.000 passengers per call and others that host less than 200. The Adriatic is the region where the second highest average of passengers/call is recorded (1.759), with the maximum observed at an Adriatic port being 3.037 passengers. Cruise ships deployed in the East Med are even smaller, i.e. 1.385, without any port exceeding an average of 1.780 passengers/call. The region where the smaller cruise ships of all deployed is the Black Sea (average 913 vessels per call).

Figure 4.2: Average Cruise Passengers/Call 2015 per region



4.2 Cruise traffic evolution per region

Table 4.2 details the evolution and variation of cruise passenger movements per region since 2010, providing a picture of the mid term trends. Following a 13,6% growth since 2010, the West Med stands as the most dynamic region of all. 72,2% of the total cruise passenger movements in the region happened in the West Med, a percentage higher than the respective 70,4% of 2010 (**Figure 4.3**).

Table 4.2: Total Cruise Passenger Movements per region

Region	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
West Med	19.640.962	18.029.458	8,94%	17.291.165	13,59%
Adriatic	4.493.707	4.560.528	-1,47%	4.095.609	9,72%
East Med	3.001.964	2.980.148	0,73%	3.060.567	-1,91%
Black Sea	69.390	188.118	-63,11%	123.651	-43,88%
Total	**27.206.023**	**25.758.252**	**5,62%**	**24.570.992**	**10,72%**

The annual change in the Adriatic Sea ports was moderately lower than the year before (-1,5%). Nonetheless, the Adriatic Sea is the second region that enjoyed an almost double-digit percentage increase (9,8%) during this six years period. As a result its share of the total passenger movements stands almost equal to the respective share it represented in 2010 (16,5%).

The East Med ports accommodated within 2015 a total of cruise passenger movements that were slightly less (-1,5%) than in 2010. The fact that some parts of the region experienced within these years several cases of economic, social and/or political instability, and the special conditions is not irrelevant of the trends observed in the East Med as a whole. Notably comparing the records of 2015 with those of the previous year, the total of cruise passengers increased by 0,7% surpassing for one more year the milestone of 3 million passenger movements per annum.

A year ago, in 2014, the same comparison would result in the Black Sea standing as the most dynamic region since 2010. This creates the background for return to growth and expectations that a durable stable external environment might help the cruise activities to re-emerge in the near future. In 2015 though only 69.390 cruise passenger movements were registered in the region.

Following this 63,1% annual drop the growth evaporated. In 2015 the Black Sea region recorded just 0,3% of the total cruise passenger movements that had taken place, as the ports of the region hosted almost half the passenger movements they had hosted in 2010 (-43,9%).

As regards the total number of cruise calls per region (**Table 4.3**), all regions bar the East Med registered lower numbers in 2015 comparing to the calls registered a year earlier.

Figure 4.3: Cruise Pax. Movements Evolution per region

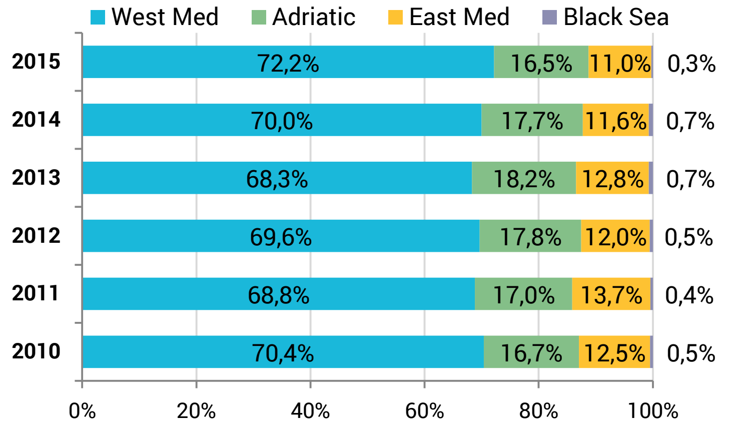


Table 4.3: Total Cruise Calls per region

Region	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
West Med	8.284	8.421	-1,63%	8.748	-5,30%
Adriatic	2.555	2.893	-11,68%	3.048	-16,17%
East Med	2.167	2.111	2,65%	2.775	-21,91%
Black Sea	76	276	-72,46%	240	-68,33%
Total	**13.082**	**13.701**	**-4,52%**	**14.811**	**-11,67%**

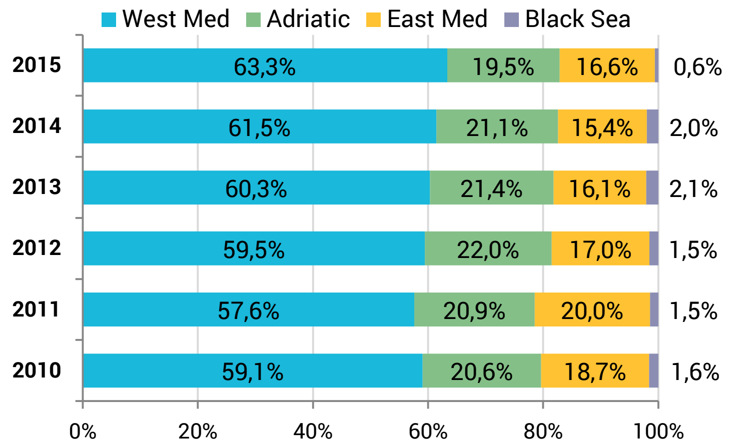
In the West Med the total of calls in 2015 was 8.284 comparing to 8.421 a year before. The decline in the region where the majority of cruise calls is taking place (63,3% of the total comparing to 59,1% in 2010) has been minor (-1,6% comparing to the year before). The number of cruise calls declined further in the Adriatic Sea by 11,7%.

In absolute numbers, the Adriatic ports registered 3.048 comparing to 2.555, and represented 19,5% of the total calls in the Med and its adjoining seas.

In East Med, cruise calls increased by 56. They reached 2.167 in total, a sum that is 2,6% higher than that of 2014. Still, this number is 21,9% lower than the calls that had taken place in 2010.

The share of the region (**Figure 4.4**) stands at 16,6% of the total cruise calls in the Med and its adjoining seas. In 2010 this share was higher, standing at 18,7% of the total.

Figure 4.4: Cruise Calls Evolution per region



Due to postponements of scheduled calls, the Black Sea region also experienced in 2015 a decline in the number of calls comparing to 2014. Only 76 calls took place in 2015, or 0,6% of the calls that took place in the Med and its adjoining seas. Two years ago this percentage was standing at more than 2%. With the number of calls recorded in the Black Sea being 250 in 2013 and at 332 in 2014, it is worth monitoring the trends to follow in coming years.

The West Med is the region where most home-porting activities are happening (**Table 4.4**). Home-porting is taking place in 24 different ports in the West Med, and the total of passengers that embarked on a cruise in these ports in 2015 was 5,22 million passengers. Nine other ports that are located in the Adriatic region registered home in/out passengers within 2015, whereas five additional home-porting ports are located in the East Med. The number of home in/out passengers was 1,61 million in the case of the Adriatic, and 757 thousands in the East Med. As regards the Black Sea, most of the cruise passengers that visited its ports in 2015 were transit passengers, as even the few cruises that had used the region for home-porting in 2014 were not repeated in 2015.

Table 4.4: Total Home In/Out Passengers per region

Region	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
West Med	5.222.317	4.922.458	6,09%	4.714.955	10,76%
Adriatic	1.606.154	1.772.352	-9,38%	1.616.585	-0,65%
East Med	757.091	706.613	7,14%	790.654	-4,24%
Black Sea	6.295	19.602	-67,89%	2.454	156,52%
Total	**7.591.857**	**7.421.025**	**2,30%**	**7.124.648**	**6,56%**

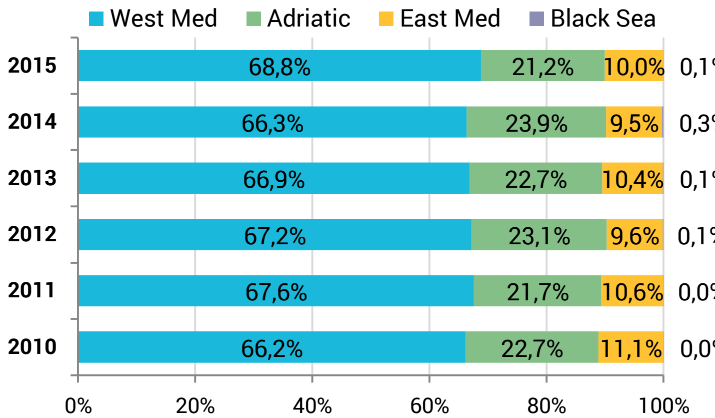
The total of home in/out passenger movements recorded in 2015 in the 71 cruise ports in the Med and its adjoining seas was higher by 2,3% comparing to the year before. The medium-term trend is also positive as the ports of the sample hosted in 2015 6,6% more passengers that they had done in 2010. In absolute numbers, 7,59 million passengers embarked, or concluded, a cruise at a port in the Med, whereas this total was 7,12 in 2010.

Figure 4.5 illustrates the shares of home in/out passengers per MedCruise region since 2010.

Within this period the share of the West Med increased by 2,6% to 68,8% of the total. This occurred at the expense of the home-porting traffic in both the Adriatic and the East Med.

The share of the Adriatic lowered from 22,7% to 21,2% of the total. The share of East Med, declined from 11,1% in 2010 to 10% in 2015.

Figure 4.5: Home In/Out Passengers Evolution per region



The Black Sea started recording some home-porting activities in 2012, yet today the region hosts a marginal share (0,1%) in 2015.

West Med ports registered in 2015 a total of 13,48 million transit passenger movements (**Table 4.5**). Following this 2,9% increase comparing to the movements that had taken place in 2014, the share of the region as regards the overall transit traffic in the Mediterranean and its adjoining seas increased to 72,2% (**Figure 4.6**).

Table 4.5: Total Transit Passengers per region

Region	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
West Med	13.485.490	13.107.000	2,89%	11.835.752	13,94%
Adriatic	2.887.553	2.788.176	3,56%	2.478.698	16,49%
East Med	2.244.873	2.273.535	-1,26%	2.274.512	-1,30%
Black Sea	63.095	168.516	-62,56%	121.197	-47,94%
Total	**18.681.011**	**18.337.227**	**1,87%**	**16.710.159**	**11,79%**

Cruise ports located in Adriatic recorded in 2015 the biggest annual growth of all regions as regards the number of transit passengers. The growth was 3,6% as the Adriatic ports hosted 2,89 million transit passengers comparing to 2,79 the year before. Comparing to 2010, transit passengers increased by 16,5% (**Table 4.5**). The number of transit passengers in East Med ports in 2015 was 1,23% less than in 2014. As a result, the total of 2015, which was 2.244.873 passengers, was just less than 30.000 shy of the transit passengers cruising the region in 2010.

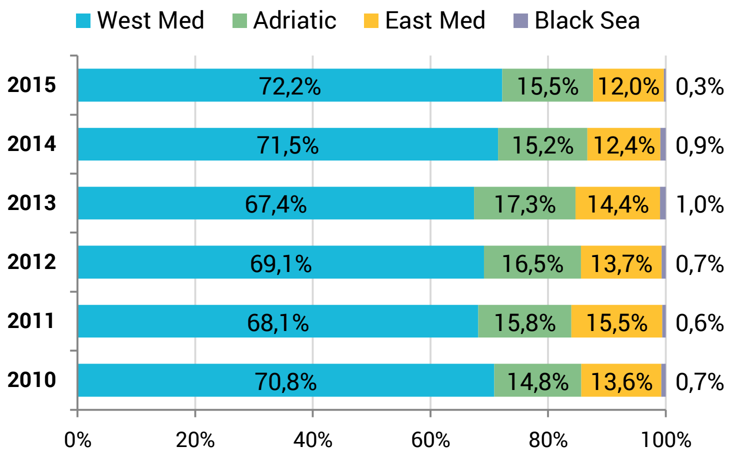
The Black Sea ports have seen considerably lower numbers of passengers cruising the region in 2015, with the traffic standing at almost half this of 2010 (-47,9%) The trend is different when focusing on the last five years evolution though. In 2014, Black Sea ports registered a decrease of transit passengers by -24,4%, largely to the negative trend observed in Odessa;

In total, on an annual basis transit passengers in the Med and its adjoining seas increased in 2015 by 1,9% and equal to 18.681.011 passengers. Comparing to 2010 the growth in this six years period stands at 11,8%.

A result of these developments is the increase of the share of the Adriatic ports from 14,8% in 2010 to 15,5% of the total transit passenger movements in 2015 (**Figure 4.6**).

West Med ports have also seen their share surging within this six years period from 70,8% to 72,2% of the total. Conversely, the East Med ports share of the total transit passenger movements in 2015 was 12% of the total, whereas in 2010 this share was standing at 13,6%. The share of Black Sea remains small standing at 0,3% of the total.

Figure 4.6: Transit Passengers Evolution per region



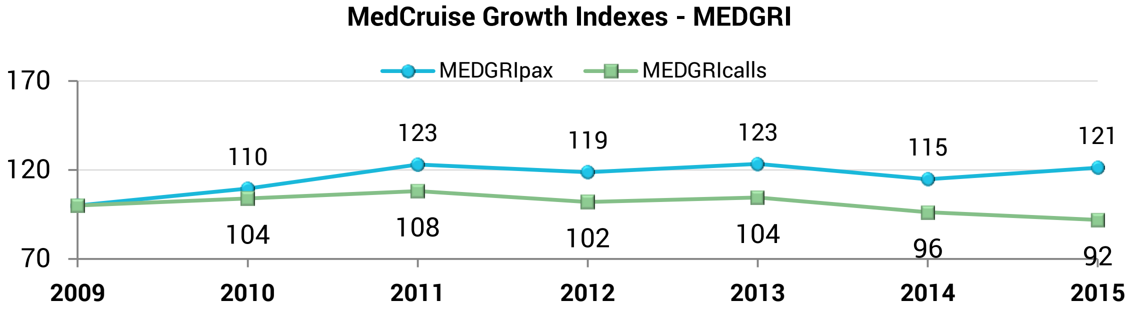
4.3 The MedCruise Growth Indexes (MEDGRI)

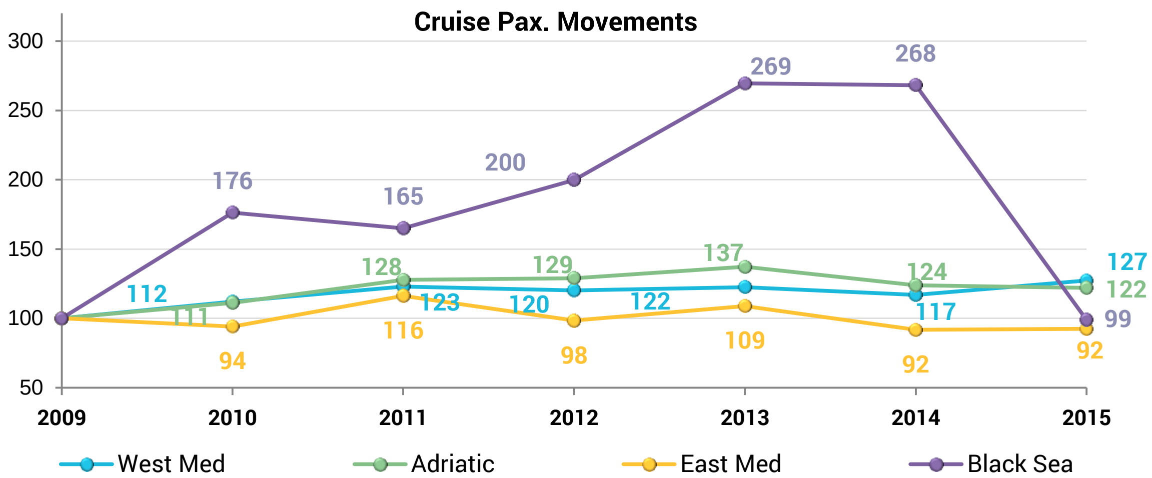
In order to facilitate the monitoring of cruise activities trends in the Mediterranean and its adjoining seas, MedCruise established two indexes aiming to give a clear picture of the evolution of cruise passenger movements and cruise calls respectively, in each of the four MedCruise regions, as well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

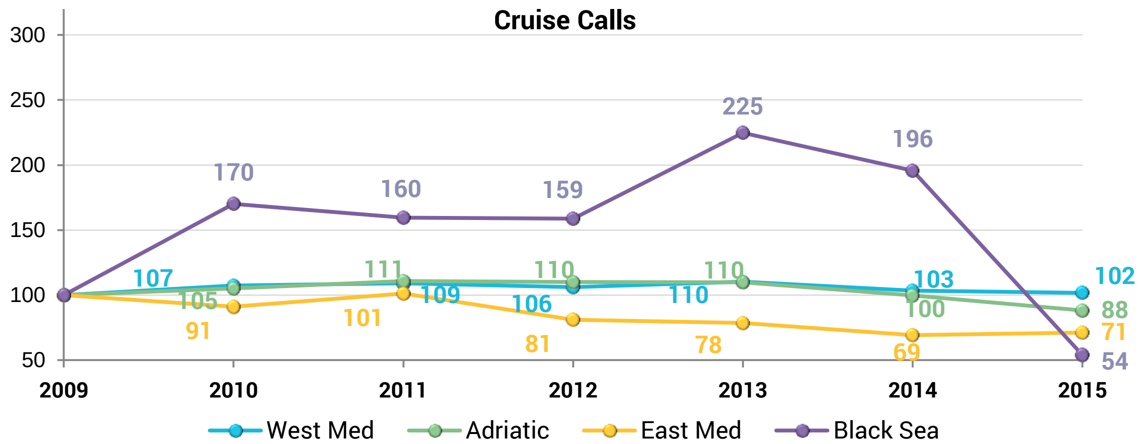
MEDGRI$_{pax}$ is the index that monitors the annual trend of cruise passenger movements in the Med and, and in each of the four regions in terms of passenger movements. The index has 2009 as the basis year

($MEDGRI_{pax}$=100). **Figure 4.7** presents the evolution since the base year, illustrating the imbalanced nature of this growth. Following a setback in 2014 ($MEDGRI_{pax}$ = 115) the index returned to higher levels ($MEDGRI_{pax}$=121) in 2015. Looking at regional trends Black Sea ports that had experienced the most remarkable growth of all regions, returned in 2015 to the levels of 2009 (as the index in the particular case stands at 99). The index however is lower (92) in the case of East Med region, as the region continues to host slightly less cruisers than those it was hosting in 2009. On the other hand the $MEDGRI_{pax}$ in the cases of West Med (127) and the Adritic (122) stands at higher level than in 2009.

Figure 4.7: Trends in MedCruise regions: The MedCruise Growth Indexes (2009=100)





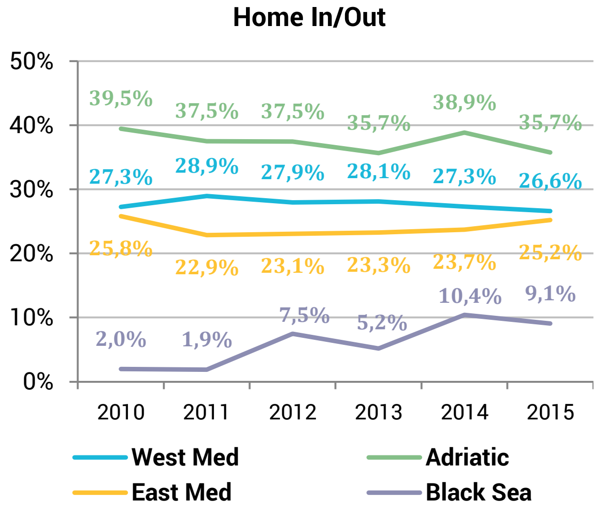


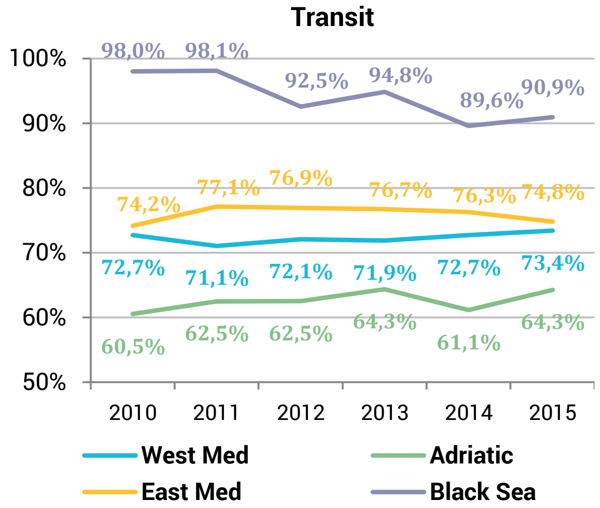
MEDGRI$_{calls}$ monitors the annual trend of cruise calls in the Med, and in each of the four regions, having again 2009 as the basis year (MEDGRI$_{calls}$ =100). The evolution of MEDGRI$_{calls}$, which is depicted in **Figure 4.7** is associated with the size of the deployed vessels, as well as with the better utilization 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 2009 in all regions bar the West Med where the number remains stable (a 2015 MEDGRI$_{calls}$=102). This association is highlighted in the index referring to the other regions. In East Med, the decline of the number of cruise calls is comparatively bigger than that of the decline of cruise passenger movements. Black Sea ports had seen in previous years the size of visiting cruise ships doubling but in 2015 this has reversed.

Figure 4.8 provides visualised information of 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 per year, in each of the four MedCruise regions. Evidently, home-porting is a major part of the activities taking place in the Adriatic (35,7% in 2015), the West Med (26,6%) and the East Med (25,2%), but not in the Black Sea (9,1% in 2015 comparing to 10,4% in 2014).

Comparing the records of 2015 with the respective ones of 2010, all cases bar the Black Sea ports have seen a slight decrease of the relative share of home in/out passenger movements, while the number of transit passengers continues to rise.

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 2015 with those of 2014, as well as a similar comparison with the passenger movements and calls that had been recorded in 2010.

Table 4.6 presents the three major ports of each region as regards total passenger movements, **Table 4.7** the three major ones as regards cruise calls.

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

Region	No	Port	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
West Med	1	Barcelona	2.540.302	2.364.292	7,44%	2.350.283	8,08%
	2	Civitavecchia	2.271.652	2.140.039	6,15%	1.944.723	16,81%
	3	Balearic Islands	1.996.533	1.587.064	25,80%	1.546.739	29,08%
Adriatic	1	Venice	1.582.481	1.733.839	-8,73%	1.617.011	-2,14%
	2	Dubrovnik	830.684	894.216	-7,10%	936.115	-11,26%
	3	Corfu	647.346	672.368	-3,72%	596.902	8,45%
East Med	1	Piraeus	980.149	1.055.556	-7,14%	1.145.402	-14,43%
	2	Kusadasi/Bodrum/ Antalya	808.446	761.912	6,11%	662.314	22,06%
	3	Istanbul	589.314	589.353	-0,01%	491.796	19,83%
Black Sea	1	Constantza	31.856	69.910	-54,43%	21.286	49,66%
	2	Sochi	19.501	34.299	-43,14%	22.509	-13,36%
	3	Burgas	7.575	41.763	-81,86%	0	

Table 4.7: Major Ports per region: Total Cruise Calls

Region	No	Port	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
West Med	1	Civitavecchia	794	833	-4,68%	900	-11,78%
	2	Balearic Islands	788	678	16,22%	723	8,99%
	3	Barcelona	749	767	-2,35%	841	-10,94%
Adriatic	1	Venice	521	488	6,76%	629	-17,17%
	2	Dubrovnik	475	752	-36,84%	705	-32,62%
	3	Kotor	411	353	16,43%	309	33,01%
East Med	1	Kusadasi/Bodrum/ Antalya	660	605	9,09%	695	-5,04%
	2	Piraeus	621	606	2,48%	799	-22,28%
	3	Istanbul	331	331	0,00%	536	-38,25%
Black Sea	1	Constantza	25	92	-72,83%	58	-56,90%
	2	Sochi	18	63	-71,43%	27	-33,33%
	3	Odessa	13	32	-59,38%	132	-90,15%

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

In the West Med, Barcelona hosted 1.363 million home in/out passengers, which is more than any other port. Civitavecchia accommodated 868.143 home in/out passengers. Six more ports recorded more than 100.000 cruise passengers of this type in 2015. These were Savona, Genoa, Balearic Islands, Marseille, Valletta and Naples. A year before, the number of ports that had hosted more than 100.000 passengers was lower by two (Valletta and Naples). Five more ports – La Spezia, Palermo, Valencia and French Riviera Ports - hosted more than 50.000 home in/out passengers in 2015. The region saw the aggregate home in/out passengers increasing within 2015 by 6,1%. The increase since 2010 stands at 10,8%.

Venice is the major port of all in the Med and its adjoining seas as regards the hosting of passengers embarking and disembarking a cruise, and the only one hosting more than 1,36 million home in/out passengers within a year. Bari (85.314 home in/out passengers), Corfu (69.926) and Dubrovnik (61.797) are the other three major home-porting ports of the Adriatic region, in terms of hosting such type of passengers. In aggregate, the Adriatic ports registered 9,4% less home in/out passengers comparing to a year before, thus returning to the levels of 2010.

The major East Med homeport is Piraeus (256.196 home in/out passengers in 2015), followed by Istanbul (203.135). Two other groups of ports Kusadasi/Bodrum/Antalya (200.200 home in/out passengers), and Cyprus ports (66.120 home in/out passengers), host significant levels of home in/out passengers. Comparing to the respective numbers of home in/out passengers hosted in 2014, Piraeus and Istanbul experienced a growth of home-porting activities in 2015. This growth stands at 28.000 passengers in Piraeus and 55.000 in Istanbul. With Kusadasi/ Bodrum/Antalya standing at the same levels of 2014, and Cyprus ports hosting 10.000 home in/out passengers less, the region registered 7,1% more passengers of this type comparing to the year before. The total of 2015 home in/out passengers in the region was 4,2% lower than the total of 2010.

Sochi was the only port of the Black Sea region that hosted over 5.000 home in/out passenger movements. Constantza is the only other port in the region that recorded a home-porting cruise activity (668 passengers). Due to the geopolitical developments, Odessa failed for a second successive year to register any such calls thus it remains to be seen whether conditions will allow the return of home-porting in the near future (**Table 4.8**).

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

Region	No	Port	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
West Med	1	Barcelona	1.363.754	1.222.487	11,56%	1.265.613	7,75%
	2	Civitavecchia	868.143	730.938	18,77%	643.772	34,85%
	3	Savona	647.364	668.473	-3,16%	603.448	7,28%
Adriatic	1	Venice	1.364.044	1.509.097	-9,61%	1.312.895	3,90%
	2	Bari	85.314	152.056	-43,89%	203.145	-58,00%
	3	Corfu	69.926	71.881	-2,72%	55.330	26,38%
East Med	1	Piraeus	284.241	256.196	10,95%	426.147	-33,30%
	2	Istanbul	203.135	148.297	36,98%	92.179	120,37%
	3	Kusadasi/Bodrum/ Antalya	200.200	201.142	-0,47%	114.657	74,61%
Black Sea	1	Sochi	5.611	14.509	-61,33%	2.454	128,65%
	2	Constantza	667	5.049	-86,79%	0	-
	3	Odessa	15	44	-65,91%	0	-

Following a major rise of transit passengers in 2015, 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 1,1 million transit passengers per year, as did Naples (1,14 million).

Dubrovnik sustains as the major port of the Adriatic region in terms of transit passenger movements. This is even though the 768.887 transit passengers that visited Dubrovnik in 2015 were 11,16% less that the cruisers visiting the port a year earlier (16,1% less than in 2010). Corfu that hosted just over 577.000 transit passengers in 2015 (3,8% less than in 2014 but 6,6% more than in 2010) and Kotor that following an impressive annual expansion by 41,9% hosted three times the total of 2010 (439.108 transit passengers) contributed significantly to the five-year positive change of transit passengers cruising the Adriatic Sea by 12,67%.

Piraeus, Kusadasi and Istanbul, are the leading ports in East Med (**Table 4.9**). Heraklion, which hosted 219.805 transit passengers in 2015, and Cyprus ports that hosted 173.309 passengers stand as the other East Med ports that achieved more than 100.000 transit cruise passengers last year.

In the Black Sea, when comparing the 2015 records to the 2010 ones, Odessa lost 91% of its cruise passenger traffic. Constantza, leads the ranking of ports that host most transit passengers in the Black Sea followed by Sochi, with Burgas standing as the third more popular port in the region.

Table 4.9: Major Ports per region: Total Transit Passengers

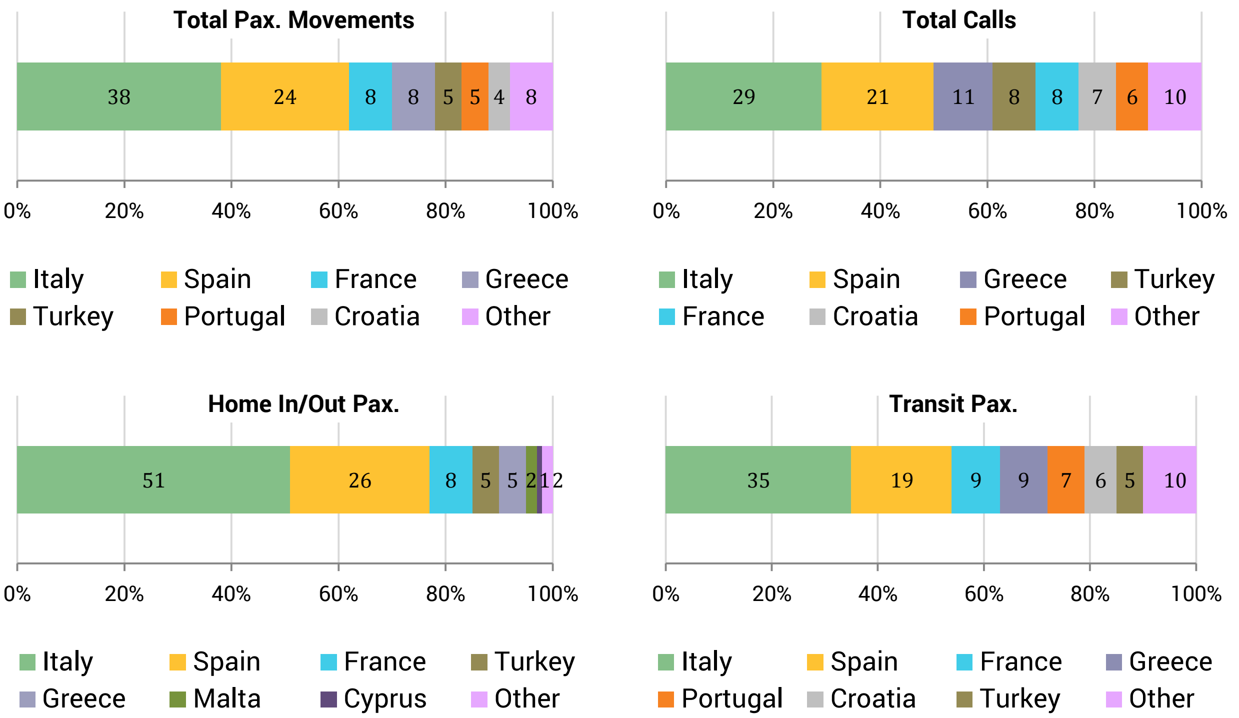
Region	No	Port	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
West Med	1	Balearic Islands	1.442.605	980.515	47,13%	975.530	47,88%
	2	Civitavecchia	1.403.509	1.409.101	-0,40%	1.300.951	7,88%
	3	Barcelona	1.176.548	1.141.805	3,04%	1.084.670	8,47%
Adriatic	1	Dubrovnik	768.887	869.426	-11,56%	916.089	-16,07%
	2	Corfu	577.420	600.487	-3,84%	541.572	6,62%
	3	Kotor	439.108	309.322	41,96%	145.185	202,45%
East Med	1	Piraeus	695.908	799.360	-12,94%	719.255	-3,25%
	2	Kusadasi/Bodrum/ Antalya	608.246	560.770	8,47%	547.657	11,06%
	3	Istanbul	386.179	441.056	-12,44%	404.216	-4,46%
Black Sea	1	Constantza	31.189	64.861	-51,91%	21.286	46,52%
	2	Sochi	13.890	19.790	-29,81%	20.055	-30,74%
	3	Burgas	7.573	41.763	-81,87%	0	-

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 do not always correspond to the total of the cruise ports of 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 (38%) and Spain (24%). France (8%), Greece (8%), Turkey (5%), Portugal (5%) and Croatia (4%) are the other countries hosting major shares.

Figure 4.9: Cruise Traffic per MedCruise Country (2015)



As regards the number of cruise calls, the share of Italy is 29% of the total calls, that of Spain 21% and that of Greece 11%. The other major (in terms of cruise calls per year) countries are Turkey (8%), France (8%), Croatia (7%) and Portugal (6%).

Home in/out passenger shares concentrate in Italy and Spain, with the two countries hosting 51% and 26% of the total respectively. France (8%), Turkey (5%) and Greece (5%), also register notable shares.

Transit passenger movements per country are more balanced. Italy (35%) and Spain (19%) host double-digit shares, with France (9%), Greece (9%), Portugal (7%), Croatia (6%) and Turkey (5%) retaining significant shares as well.

Table 4.10 lists the cruise passenger movements that were recorded in 2015 per country and the respective variations observed when comparing these data with those of previous years. Montenegro (42,9%), Monaco (29,6%), Malta (29,1%), Portugal (14,9%), and Spain (12,9%), are the countries that registered the biggest growth of annual passenger movements in 2015. Cruise activities in the case in Black Sea countries presented substantial variations in 2015, yet the instability observed in the region justifies the absence of any conclusions as regards cruise developments in the countries of the region. The same holds true for Tunisia records as well.

In some cases, the evolution of cruise traffic is quite different when comparing the variation of traffic since 2010. Mediterranean French ports saw their cruise passenger numbers increasing by 35,9%, since 2010. The respective increase in Portugal was 20,4%, in Turkey was 19,8%, in Italy 15,7% and in Spain 13,7%. Positive variations of remarkable size were recorded in Montenegro, Slovenia, Malta and Romania. The countries that have recorded a decline of cruise traffic include Russia, Monaco, and to a greater extent Cyprus (-54,3%). Greece has seen a moderate negative trend (-2,3%) and as a result stands as the only of the 10 most popular countries in the Med that failed to achieve any growth of visiting cruisers. For obvious reasons Tunisia, and Ukraine recorded in 2015 a tiny percentage of the cruise traffic comparing to that they had recorded in previous years.

Table 4.10: Cruise Passenger Movements per MedCruise Country

Country	2015	% Share in 2015	2014	Variation 2015/2014	2010	Variation 2015/2010
Italy	10.338.222	38,00%	9.725.259	6,30%	8.931.352	15,75%
Spain	6.559.446	24,11%	5.809.122	12,92%	5.768.609	13,71%
France	2.311.670	8,50%	2.315.942	-0,18%	1.701.064	35,90%
Greece	2.054.327	7,55%	2.098.652	-2,11%	2.102.391	-2,29%
Turkey	1.425.569	5,24%	1.403.997	1,54%	1.190.015	19,79%
Portugal	1.249.108	4,59%	1.087.226	14,89%	1.037.096	20,44%
Croatia	1.203.433	4,42%	1.153.788	4,30%	1.153.911	4,29%
Malta	668.277	2,46%	517.594	29,11%	493.748	35,35%
Montenegro	442.029	1,62%	309.322	42,90%	145.185	204,46%
Gibraltar	344.140	1,26%	299.923	14,74%	305.161	12,77%
Monaco	259.325	0,95%	200.039	29,64%	321.079	-19,23%
Cyprus	173.309	0,64%	183.507	-5,56%	378.909	-54,26%
Slovenia	57.893	0,21%	58.970	-1,83%	37.264	55,36%
Tunisia	53.780	0,20%	440.433	-87,79%	895.403	-93,99%
Romania	31.856	0,12%	69.910	-54,43%	21.286	49,66%
Russia	19.501	0,07%	34.299	-43,14%	22.509	-13,36%
Bulgaria	7.575	0,03%	41.763	-81,86%	0	n.a
Ukraine	6.563	0,02%	8.506	-22,84%	66.010	-90,06%

Considering the annual variation of cruise calls per country (**Table 4.11**), Montenegro (16,4%), Monaco (14,8%), Gibraltar (12,7%) and Portugal (10,3%) are the countries that in 2015 saw the number of calls hosted increasing, by more than 10%. Calls increased by a single digit variation in the four countries that host most calls of all. These are Italy (2%), Spain (3,8%), Greece (4,2%) and Turkey (2,1%). On the contrary, France (-17%) and Croatia (-34,2%) hosted significantly less cruise calls than a year before. For reasons that are already mentioned, we restrain from reaching conclusions on the trends in the Black Sea countries.

Table 4.11: Cruise Calls per MedCruise Country

Country	2015	% Share in 2015	2014	Variation 2015/2014	2010	Variation 2015/2010
Italy	3.788	28,96%	3.714	1,99%	4.014	-5,63%
Spain	2.695	20,60%	2.596	3,81%	2.617	2,98%
Greece	1.380	10,55%	1.324	4,23%	1.566	-11,88%
Turkey	1.042	7,97%	1.021	2,06%	1.284	-18,85%
France	1.030	7,87%	1.241	-17,00%	1.153	-10,67%
Croatia	922	7,05%	1.402	-34,24%	1.417	-34,93%
Portugal	803	6,14%	728	10,30%	706	13,74%
Montenegro	411	3,14%	353	16,43%	309	33,01%
Malta	306	2,34%	302	1,32%	280	9,29%
Monaco	209	1,60%	182	14,84%	235	-11,06%
Gibraltar	204	1,56%	181	12,71%	175	16,57%
Cyprus	167	1,28%	223	-25,11%	378	-55,82%
Slovenia	49	0,37%	45	8,89%	54	-9,26%
Romania	25	0,19%	92	-72,83%	58	-56,90%
Russia	18	0,14%	63	-71,43%	27	-33,33%
Tunisia	15	0,11%	175	-91,43%	406	-96,31%
Ukraine	13	0,10%	32	-59,38%	132	-90,15%
Bulgaria	5	0,04%	27	-81,48%	0	-

The medium-term trends of the number of cruise calls per country indicate a rather different picture. Malta, Gibraltar and Spain are the only countries that within the period 2010-2015 experienced an increase of the number of calls. In Gibraltar the number of calls per year increased by 16,6%, in Malta by 9,3% and in Spain by 3%. All other countries accommodated in 2015 significantly lower numbers of calls comparing to 2010. 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.

4.6 Measuring Market Concentration

In an industry with limited number of providers, it is worth calculating industry concentration. Given the number of firms in a market and their respective market shares, the Herfindahl Herfindahl - Hirschman Index (HHI) measures the size of firms, in relation to an industry and the amount of competition among them.

In the case of Med cruise ports, this index consists of the sum of squared market shares of the 50 largest ports (or summed over all the ports of the sample if there are fewer than 50). The result is proportional to the average market share, weighted by market share. As such, it can range from 0 to 1, moving from a huge number of very small firms to a single monopolistic provider of services. Increases in the HHI generally indicate a decrease in competition and an increase of market power. A HHI index below 0,01 indicates a highly competitive index, below 0,15 indicates an unconcentrated index, between 0,15 to 0,25 indicates moderate concentration, whereas above 0,25 indicates high concentration.

The index with reference to the aggregate market as well as the regional ones is detailed in **Table 4.12** and provides some interesting findings. When the total of the ports in Mediterranean and its adjoining seas are under examination, HHI suggests that the market as regards both cruise passenger movements (HHI=0,04) and cruise calls (HHI=0,03) is not concentrated.

Focusing on the extent of market concentration in each of the regions, this is not always the case. The West Med region is unconcentrated both in terms of total passenger movements (HHI=0,07) and cruise calls (HHI=0,05), but the picture is different in the other regions.

Table 4.12: HHI (Herfindahl - Hirschman Index) per region – Cruise Pax. Movements & Calls

Region	Total Pax Movements						Cruise Calls					
	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015
All four regions	0,04	0,04	0,04	0,04	0,04	0,04	0,03	0,03	0,03	0,03	0,03	0,03
West Med	0,06	0,07	0,06	0,07	0,06	0,07	0,05	0,05	0,05	0,05	0,05	0,05
Adriatic	0,25	0,23	0,22	0,22	0,23	0,20	0,15	0,14	0,14	0,15	0,15	0,14
East Med	0,24	0,24	0,24	0,23	0,24	0,23	0,21	0,21	0,23	0,21	0,21	0,21
Black Sea	0,35	0,41	0,35	0,34	0,24	0,31	0,38	0,36	0,35	0,30	0,21	0,22

The Adriatic has been a moderately concentrated market (HHI=0,20) as regards passenger movements, however this concentration declined in recent years. Since 2009 the region moved from a moderately concentrated market as regards cruise calls to an unconcentrated one. The East Med is a region representing a concentrated market in the case of passenger movements (HHI=0,23), and a moderate concentration in cruise calls (HHI=0,21). The Black Sea on the other hand is a concentrated market as regards passenger movements (HHI=0,31) but a moderate concentrated one (HHI = 0,22) as regards cruise calls.

Neither the home-porting scene nor the scene of ports-of-call that host transit passengers only are concentrated (**Table 4.13**). When focusing on the regional picture though some evidence of concentration at the 'regional' markets is present in the case of home-porting. The Adriatic appears to be a region where a concentrated market exists (HHI=0,73) whereas the East Med stands as a region with moderate levels of concentration (HHI=0,29). The picture is far less concentrated in the case of transit passengers, where the hints of any market concentration are minimal and rather irrelevant. The Med has growth to the second biggest cruise region being an open market that provides opportunities for all ports located in the region and destinations of interest.

Table 4.13: HHI (Herfindahl - Hirschman Index) per region – Home In/Out & Transit Pax.

Region	Home In/Out						Transit					
	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015
All four regions	0,10	0,11	0,11	0,11	0,11	0,10	0,04	0,04	0,04	0,04	0,04	0,04
West Med	0,14	0,15	0,15	0,16	0,14	0,15	0,06	0,06	0,06	0,06	0,05	0,06
Adriatic	0,68	0,69	0,67	0,72	0,73	0,73	0,22	0,19	0,19	0,20	0,19	0,16
East Med	0,35	0,35	0,29	0,26	0,27	0,29	0,22	0,22	0,23	0,23	0,23	0,21
Black Sea	1,00	0,60	1,00	0,92	0,61	0,81	0,36	0,41	0,33	0,32	0,25	0,32

V. 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 ports. The 74 port members of MedCruise are divided in two categories based on the total cruise passenger movements per year. Each of these categories contains an equal number of ports.

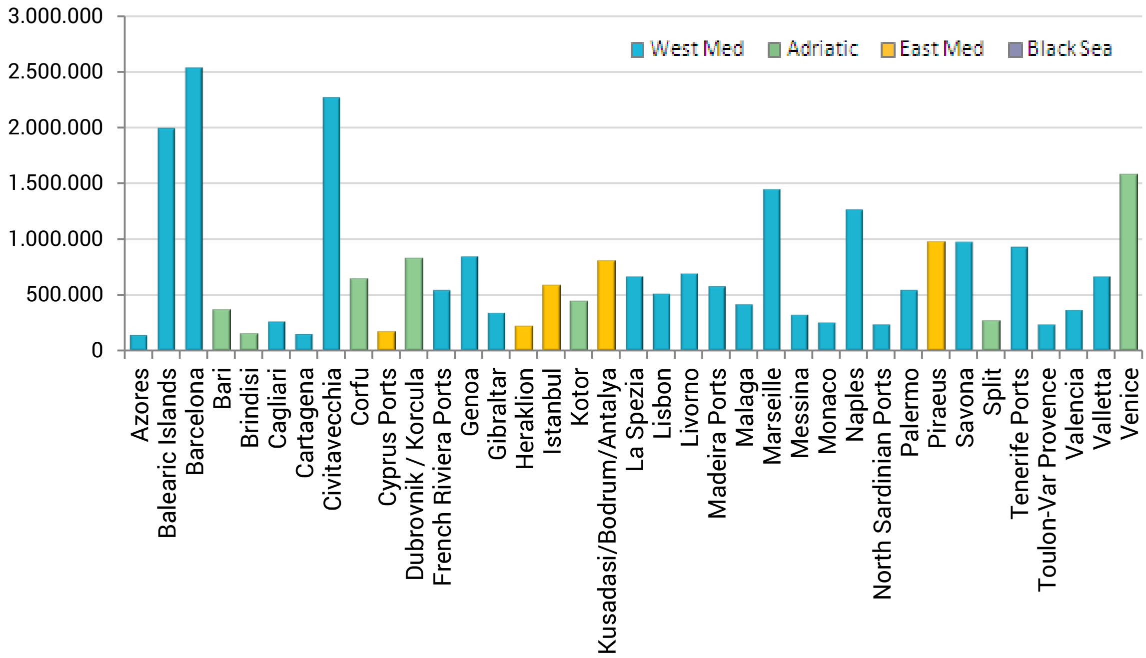
These two categories are:

Category A:	Port members with more than 100.000 cruise passenger traffic in 2015
Category B:	Port members with less than 100.000 cruise passenger traffic in 2015

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 ports included in Category A (see also the **Appendix** for the list of ports included in each of these categories).

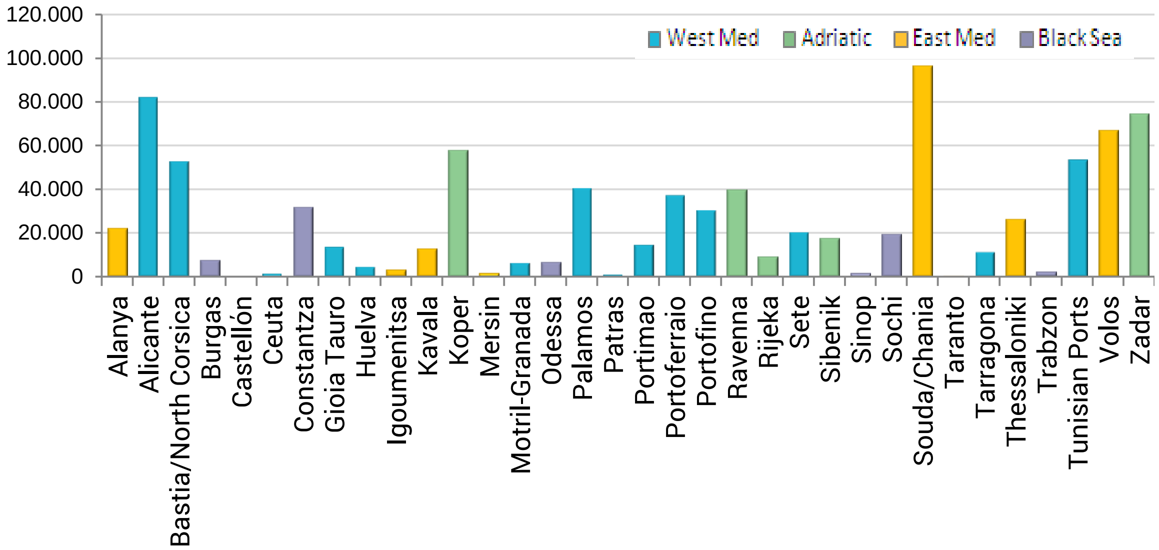
Figure 5.1: Category A - MedCruise Ports per region



In total, 25 of the 37 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 (1,58 million passenger movements). The other four, Barcelona (2,54 million), Civitavecchia (2,27 million), Balearic Islands (2 million) and Marseille (1,45 million) are all West Med ports. Seven ports located in the Adriatic are part of this group. Only five ports located in the East Med can be found in Category A, with Piraeus being the most visited one (980.149 passenger movements within 2015). There is no Black Sea port in this category as all ports in the region recorded less than 100.000 passenger movements in 2015.

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 14 West Med ports, eight East Med and six ports located in the Adriatic. The three larger cruise ports of Category B are located in three different regions. These are the East Med (Souda/Chania), the West Med (Alicante) and the Adriatic (Zadar).

Figure 5.2: Category B - MedCruise Ports per region



5.2 Cruise Traffic by size

Table 5.1 presents the major variations as regards total passengers, cruise calls, home in/out and transit passengers, in the case of each of the two size categories. In 2015, Category A ports registered a growth of total passenger movements by 7,2%, of home in/out passengers by 2,7% and of transit passengers by 3,7%. In terms of cruise calls Category A ports experienced a slight decrease standing at 1,2%. This short-term trend gets even stronger when examining the mid-term picture.

Table 5.1: Cruise Traffic Variations by size category

Category		2015	2014	Variation 2015/2014	2010	Variation 2015/2010
Total Pax.	A	26.334.034	24.571.180	7,2%	23.152.913	13,7%
	B	863.845	1.187.072	-27,2%	1.418.079	-39,1%
Cruise Calls	A	11.992	12.139	-1,2%	13.086	-8,4%
	B	1.090	1.562	-30,2%	1.725	-36,8%
Home In/Out Pax.	A	7.583.713	7.383.021	2,7%	7.090.874	7,0%
	B	8.144	38.004	-78,6%	33.774	-75,9%
Transit Pax.	A	17.817.166	17.188.159	3,7%	15.326.290	16,3%
	B	863.845	1.149.068	-24,8%	1.383.869	-37,6%

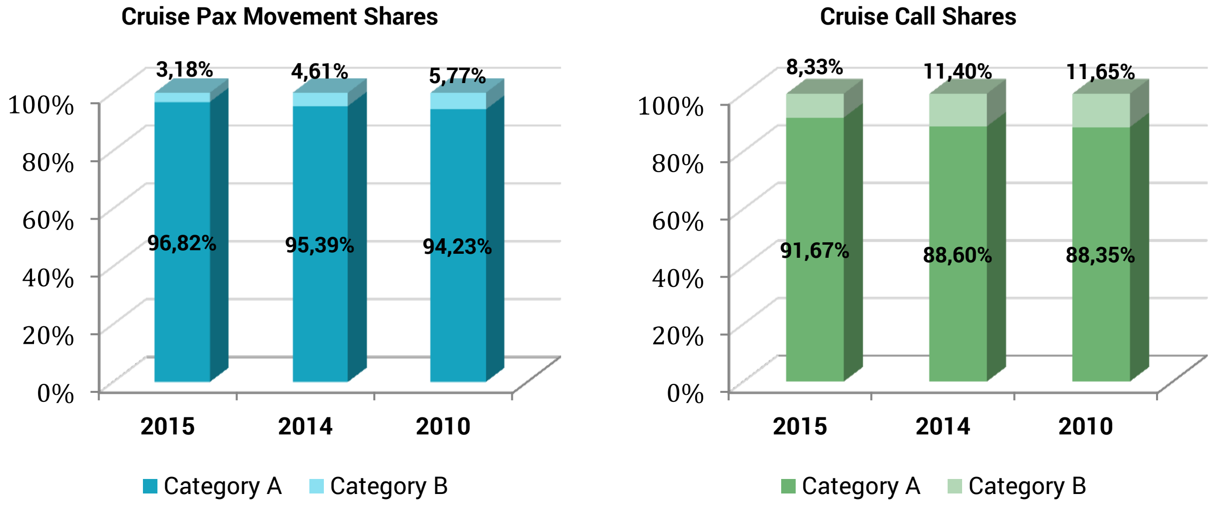
Focusing on the trend since 2010, variations reveal a 13,7% rise of cruise activities in Category A ports. The number of both Home in/out and transit passengers increased, with the growth of the former (7,0%) being lower than that of the latter (16,3%). Still, the number of cruise calls in 2015 was lower by 8,4% comparing to 2010.

Category B ports recorded a significant decrease as regards cruise passenger traffic in 2015. The total passenger movements dropped by 27,2%, home in/out passengers by 78,6% and transit passengers by 24,8% within a single year. The more volatile trend in the case of smaller ports is a common phenomenon. One year earlier, in 2014, all these trends had been quite similar with ports of Category B recording a decline in all three categories comparing to 2013 (passenger movements declined in 2014 by 17,7%, home in/out by 19,8%, and transit passengers by 6,8%). As regards cruise calls, the annual decline in Category B ports within 2015 stood at 30,2%.

The medium-term trends in Category B ports also reflect a picture of limited cruise activity. The total annual passenger movements decreased by 39,1%, with the decrease of home in/out passengers being substantially higher (75,9%) than the respective drop of transit passengers (37,6%). Cruise calls in 2015 were 36,8% less than the calls of 2010. Notably the ratio home in/out passengers: transit passengers in the case of Category A ports stands at 0,43 and is noticeably higher than the respective ratio of Category B ports (0,01).

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 2015, the share of Category B ports barely touches the 3,2% of the total. As regards the total cruise calls hosted per year, the share of Category B ports proves to be higher as it exceeds 8,3% in 2015.

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 2015 by the ports of each size category per region. It also compares these records with those of past years.

The picture of the evolution since 2010 suggests that Category A ports located in the West Med and the Adriatic regions have seen the total cruise passengers traffic growing by 19,2% and 7,3% respectively. Category A ports located in the East Med hosted in 2015 7,1% less passengers than six years ago. The short-term trend though is also negative for all regions bar West Med. The decline stands at 2% and 2,2% in the cases of the Adriatic and the East Med respectively, while the West Med records a double-digit increase standing at 11%. There are no cruise ports hosting more than 100.000 passengers per year in the Black Sea.

The case of Category B ports is quite different. West Med ports of this size category experienced a significant 44,7% annual traffic drop in 2015, which remains rather similar when examining medium-term trends (-67%). The six-year variations (2010-2015) conclude that Black Sea ports dropped by 49% whereas those in the Adriatic and the East Med recorded most substantial growth (115,9% and 201,9% respectively). The decrease in the Black Sea is due to the records of 2015 alone, as in previous years the variations of the annual records comparing to 2010 wre positive.

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

Size Category	Region	% of Total 2015	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
A	West Med	70,85%	19.268.823	17.357.042	11,0%	16.165.043	19,2%
	Adriatic	15,79%	4.294.188	4.380.859	-2,0%	4.003.774	7,3%
	East Med	10,19%	2.771.023	2.833.279	-2,2%	2.984.096	-7,1%
	Black Sea	0,00%	-	-	-	-	-
B	West Med	1,37%	371.594	672.416	-44,7%	1.126.122	-67,0%
	Adriatic	0,73%	198.266	179.669	10,4%	91.835	115,9%
	East Med	0,85%	230.890	146.869	57,2%	76.471	201,9%
	Black Sea	0,23%	63.095	188.118	-66,5%	123.651	-49,0%

As regards cruise calls (**Table 5.3**), the West Med ports of Category A hosted in 2015 7.760 calls, or 59,3% of the total calls in the Med and its adjoining seas. The number of calls in the case of these West Med ports declined since 2010 by 1,9%. However, its relative share of the total calls that take place in the Med increased. This is because the decline of calls in Category A ports has been bigger in all other regions. Category A Adriatic ports in 2015 hosted 2.283 calls, or 17,3% of the total calls in the Med. Following two successive years of decline of 2014 now cruise calls in these ports stand at 9,4% less than in 2010. East Med ports, hosted in 2015 14,9% of the total calls (1.949), a number that is slightly higher than the respective total recorded a year before. However, for this port group the five-year decline is substantially bigger, as it stands at 26,6%.

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

Size Category	Region	% of Total 2015	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
A	West Med	59,32%	7.760	7.824	-0,82%	7.911	-1,9%
	Adriatic	17,45%	2.283	2.390	-4,48%	2.520	-9,4%
	East Med	14,90%	1.949	1.925	1,25%	2.655	-26,6%
	Black Sea	0,00%	-	-	-	-	-
B	West Med	4,01%	524	597	-12,23%	837	-37,4%
	Adriatic	2,08%	272	503	-45,92%	528	-48,5%
	East Med	1,67%	218	186	17,20%	120	81,7%
	Black Sea	0,58%	76	276	-72,46%	240	-68,3%

Category B ports located in the East Med registered in 2015 more calls than the previous year and notably more than five years before. In particular, the number of calls in these regions was more than those of 2010 by 81,7%. On annual basis this variation was 17,2%. Over the last five years the Adriatic Sea and the West small ports recorded a decline of cruise calls, with the variation of last year being also negative in both these regions.

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 99% of passengers of this type. Thus they are the ones demanding closer consideration. Category A West Med ports were visited by 5,2 million home in/out passengers within 2015, a number that equals 68,8% of the total home in/out passengers in the Med. Another 21,1% (1,6 million passengers) is hosted in the Adriatic Category A ports and the rest 10% (758.000 passengers) in the biggest East Med ports. The records of 2015 are positive for both the West Med and the East Med ones. In the former case the annual change was 6,17% and in the latter case 7,2%. As a result the number of Home in/out passengers in the West Med stands 10,8% higher than in 2010, whereas in East Med the respective variation is -3,6%. Adriatic ports, hosted in 2015 50.000 or 8,7% less Home in/out passengers, following a year (2014) when they had experienced growth of home-porting movements. Following this volatility, the total of Home in/out passengers remains at the levels recorded in 2010 (0,9% growth). As regards Category B ports, the numbers of Home in/out passengers are of an insignificant scale.

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

Size Category	Region	% of Total 2015	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
A	West Med	68,78%	5.221.772	4.918.367	6,17%	4.714.198	10,8%
	Adriatic	21,14%	1.604.901	1.758.202	-8,72%	1.591.070	0,9%
	East Med	9,97%	757.040	706.452	7,16%	785.606	-3,6%
	Black Sea	0,00%	-	-	-	-	-
B	West Med	0,01%	545	4.091	-86,68%	757	-28,0%
	Adriatic	0,02%	1.253	14.150	-91,14%	25.515	-95,1%
	East Med	0,00%	51	161	-68,32%	5.048	-99,0%
	Black Sea	0,08%	6.295	19.602	-67,89%	2.454	156,5%

Analysing the trends of transit passenger movements in the case of Category A ports (**Table 5.5**) a sizeable increase took place in the biggest (in terms of movement) region of all, which is the West Med. In 2015 the big ports of West Med hosted 13,11 million transit passenger movements, or 70,2% of the total recorded throughout the Med and its adjoining seas. This number is lower than that of the previous year by 3,5% (12,04 million passengers). The situation is similar in the Adriatic where transit passengers increased form 2,62 million in 2014 to 2,69 million in 2015, o positive annual variation of 2,5%.

On the contrary, in 2015 the East Med Category A ports registered 5,3% less transit passengers. The six-years trend indicates however that the West Med has been the most dynamic of the three regions, recording a 22,4% increase of transit passengers. Transit passengers in the Adriatic big ports have grown by 11,5% within the same period, whereas in East Med ports transit passenger traffic declined during the last six years by 8,5%.

Interestingly, the changes of transit passenger movement observed in the case of small ports indicate the presence of a far more volatile market than in the case of the bigger ports. Ports that hosted in 2015 less than 100.000 cruise passengers have in most cases experienced double-digit variations within the six years period 2010-2015, They also did so when comparing traffic changes in the two most recent years. In the case of the West Med ports, of this category 2015 transit passengers were 44,4%, less than a year before. In contrast, the Adriatic ports recorded a rise of 19,8% within a single year. This annual rise was even more impressive in the case of the East Med, where the negative variation stands at 57,4%.

Contrasting the picture observed in the West Med, in the Adriatic and the East Med the five years trends are almost identical: In both regions transit passengers in Category B ports doubled since 2010. Only in the case of the West Med ports of Category B the medium-term change has been negative. Transit passengers that visited this group of ports declined by 67%. Yet a note of caution is required here: the cruise activities were not declined in the region. Rather than, to a great extent that they are now spread to more ports, that have not been included in the present part of the report and the related aggregates, due to thresholds that are used for the statistical analysis.

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

Size Category	Region	% of Total 2015	2015	2014	Variation 2015/2014	2010	Variation 2015/2010
A	West Med	70,20%	13.113.896	12.438.675	5,43%	10.710.823	22,4%
	Adriatic	14,40%	2.689.287	2.622.657	2,54%	2.412.378	11,5%
	East Med	10,78%	2.013.983	2.126.827	-5,31%	2.203.089	-8,6%
	Black Sea	0,00%	0	0	0,00%	0	0,0%
B	West Med	1,99%	371.594	668.325	-44,40%	1.124.929	-67,0%
	Adriatic	1,06%	198.266	165.519	19,78%	66.320	199,0%
	East Med	1,24%	230.890	146.708	57,38%	71.423	223,3%
	Black Sea	0,34%	63.095	168.516	-62,56%	121.197	-47,9%

5.4 Major Variations in MedCruise ports per size category and region

Categorising MedCruise ports per size category (Category A: big ports; Category B: small ports) and per region (four regions: West Med, Adriatic, East Med, Black Sea), this section presents the ports where the major positive and major negative variations took place in 2015 comparing (a) to 2014 and (b) to 2010. While the fist comparison illustrates the most recent dynamics in the ports under examination, the second one portrays the medium term trends in ports in the Med and its adjoining seas.

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

The threshold for the preparation of these listings remains the one applied throughout the report (10.000 passenger movements and 20 cruise calls in 2014). Whenever no port qualifies (i.e. there are no Category A Black Sea ports, or there were no Category A Adriatic ports recording growth in 2014) the respective reference is omitted.

As a result the following variations lists do not include Burgas (in 2015: 7.575 pax / 5 calls); Castellón (366 pax /2 calls) Ceuta (1.613 pax /4 calls); Huelva (4.788 pax / 6 calls); Igoumenitsa (3.090 pax / 6 calls) Mersin (1.593 pax / 2 calls) Odessa (6.563 pax /13 calls); Patras (1.090 pax / 3 calls); Rijeka (9.082 pax / 7 calls); Sinop (1615 pax / calls); Taranto (5.358 pax / 3 calls) and Trabzon (2.280 pax / 10 calls).

Table 5.6: Major Variations 2015/2014 (per size category/region) - Total Cruise Pax. Movements

Size Category		Region	Port	2015	2014	Variation 2015/2014
A	+	West Med	Cagliari	263.247	81.844	221,6%
		Adriatic	Brindisi	151.922	25.450	496,9%
		East Med	Kusadasi/Bodrum/Antalya	808.446	761.912	6,1%
B	+	West Med	Tarragona	11.589	1.894	511,9%
		Adriatic	Sibenik	17.562	12.693	38,4%
		East Med	Souda/Chania	96.612	33.304	190,1%
A	-	West Med	Toulon-Var Provence	240.833	341.128	-29,4%
		Adriatic	Bari	368.281	561.602	-34,4%
		East Med	Heraklion	219.805	242.951	-9,5%
B	-	West Med	Tunisian Ports	53.780	440.433	-87,8%
		Adriatic	Ravenna	39.857	44.607	-10,6%
		East Med	Kavala	12.783	13.087	-2,3%
		Black Sea	Sochi	13.890	34.299	-59,5%

Table 5.7: Major Variations 2015/2010 (per size category/region) - Total Cruise Pax. Movements

Size Category		Region	Port	2015	2010	Variation 2015/2010
A	+	West Med	La Spezia	667.446	44.874	1387,4%
		Adriatic	Brindisi	151.922	28.489	433,3%
		East Med	Kusadasi/Bodrum/Antalya	808.446	662.314	22,1%
B	+	West Med	Gioia Tauro	13.721	600	2186,8%
		Adriatic	Ravenna	39.857	9.153	335,5%
		East Med	Souda/Chania	96.612	11.509	739,4%
		Black Sea	Constantza	31.189	21.286	46,5%
A	-	West Med	Malaga	419.121	659.123	-36,4%
		Adriatic	Bari	368.281	507.694	-27,5%
		East Med	Cyprus Ports	173.309	378.909	-54,3%
B	-	West Med	Tunisian Ports	53.780	895.403	-94,0%
		Black Sea	Sochi	13.890	22.509	-38,3%

Table 5.8: Major Variations 2015/2014 (per size category/region) - Total Cruise Calls

Size Category		Region	Port	2015	2014	Variation 2015/2014
A	+	West Med	Cagliari	97	54	79,6%
		Adriatic	Brindisi	60	22	172,7%
		East Med	Kusadasi/Bodrum/Antalya	660	605	9,1%
B	+	West Med	Tarragona	11	3	266,7%
		Adriatic	Zadar	96	77	24,7%
		East Med	Souda/Chania	59	38	55,3%
A	-	West Med	Toulon-Var Provence	124	257	-51,8%
		Adriatic	Dubrovnik	475	752	-36,8%
		East Med	Cyprus Ports	167	223	-25,1%
B	-	West Med	Tunisian Ports	15	175	-91,4%
		Adriatic	Sibenik	83	93	-10,8%
		East Med	Kavala	22	26	-15,4%
		Black Sea	Constantza	25	92	-72,8%

Table 5.9: Major Variations 2015/2010 (per size category/region) - Total Cruise Calls

Size Category		Region	Port	2015	2010	Variation 2015/2010
A	+	West Med	La Spezia	175	44	297,7%
		Adriatic	Brindisi	60	38	57,9%
		West Med	Tarragona	11	2	450,0%
B	+	Adriatic	Ravenna	34	19	78,9%
		East Med	Souda/Chania	59	21	181,0%
		West Med	Toulon-Var Provence	124	235	-47,2%
A	-	Adriatic	Dubrovnik	475	705	-32,6%
		East Med	Cyprus Ports	167	378	-55,8%
		West Med	Tunisian Ports	15	406	-96,3%
B	-	Adriatic	Sibenik	83	109	-23,9%
		Black Sea	Constantza	25	58	-56,9%

Table 5.10: Major Variations 2015/2014 (per size category/region) - Home In/Out Pax.

Size Category		Region	Port	2015	2014	Variation 2015/2014
		West Med	Cagliari	16.536	133	12333,1%
A	+	Adriatic	Brindisi	20.899	48	43439,6%
		East Med	Istanbul	203.135	148.297	37,0%
		West Med	Malaga	32.492	74.170	-56,2%
A	-	Adriatic	Bari	85.314	152.056	-43,9%
		East Med	Heraklion	3.344	23.925	-86,0%
B	-	Black Sea	Sochi	5.611	14.509	-61,3%

Table 5.11: Major Variations 2015/2010 (per size category/region) - Home In/Out Pax.

Size Category		Region	Port	2015	2010	Variation 2015/2010
		West Med	Valletta	140.512	29.362	378,6%
A	+	Adriatic	Dubrovnik	61.797	19.700	213,7%
		East Med	Istanbul	203.135	92.179	120,4%
B	+	Black Sea	Sochi	5.611	2.454	128,6%
		West Med	Livorno	4.181	46.333	-91,0%
A	-	Adriatic	Bari	85.314	203.145	-58,0%
		East Med	Heraklion	3.344	45.945	-92,7%

Table 5.12: Major Variations 2015/2014 (per size category/region) - Transit Pax.

Size Category		Region	Port	2015	2014	Variation 2015/2014
A	+	West Med	Cagliari	246.711	81.711	201,9%
		Adriatic	Brindisi	131.023	25.402	415,8%
		East Med	Kusadasi/Bodrum/Antalya	608.246	560.770	8,5%
B	+	West Med	Tarragona	11.589	1.894	511,9%
		Adriatic	Zadar	73.596	52.028	41,5%
		East Med	Souda/Chania	96.612	33.304	190,1%
A	-	West Med	Toulon-Var Provence	219.576	312.154	-29,7%
		Adriatic	Bari	282.967	409.546	-30,9%
		East Med	Piraeus	695.908	799.360	-12,9%
B	-	West Med	Tunisian Ports	53.780	440.433	-87,8%
		Adriatic	Ravenna	39.857	41.293	-3,5%
		East Med	Kavala	12.783	13.087	-2,3%
		Black Sea	Constantza	31.189	64.861	-51,9%

Table 5.13: Major Variations 2015/2010 (per size category/region) - Transit Pax.

Size Category		Region	Port	2015	2010	Variation 2015/2010
A	+	West Med	La Spezia	570.565	44.874	1171,5%
		Adriatic	Brindisi	131.023	28.489	359,9%
		East Med	Kusadasi/Bodrum/Antalya	608.246	547.657	11,1%
B	+	West Med	Gioia Tauro	13.721	600	2186,8%
		Adriatic	Zadar	73.596	14.688	401,1%
		East Med	Souda/Chania	96.612	11.509	739,4%
		Black Sea	Constantza	31.189	21.286	46,5%
A	-	West Med	Toulon-Var Provence	219.576	293.544	-25,2%
		Adriatic	Venice	218.437	304.116	-28,2%
		East Med	Cyprus Ports	107.189	272.231	-60,6%
B	-	West Med	Tunisian Ports	53.780	895.403	-94,0%
		Adriatic	Sibenik	17.562	11.624	51,1%
		Black Sea	Sochi	13.890	20.055	-30,7%

VI. 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. The seasonality analysis is based on data provided by 70 MedCruise Ports – as at the time of the analysis relevant monthly data for the ports of Batumi, Egyptian Ports, Lattakia and the Ports of Tenerife were not available.

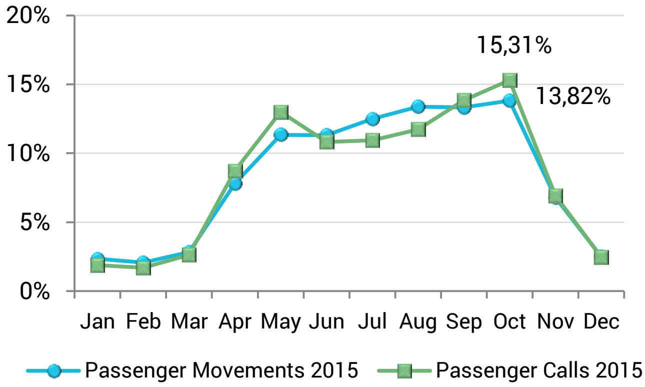
Figure 6.1 illustrates the shares of passenger movements and cruise calls per month in 2015.

The highest share of cruise passenger movements in 2015 was recorded in October (13,8%).

Notably, the same happened in 2014 and 2013 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%).

Figure 6.1: Cruise Traffic Shares per month (2015)



As regards cruise calls, the highest share was also registered in October (15,3%). A year earlier, October 2014 had hosted 14,7% of the total annual calls, being also the most populated month of the year. September 2015 was the second busiest month of last year, with 13,3% of annual passenger movements and 13,9% of annual cruise calls recorded during this month (**Table 6.1**).

Table 6.1: Total Cruise Traffic per month in 2015

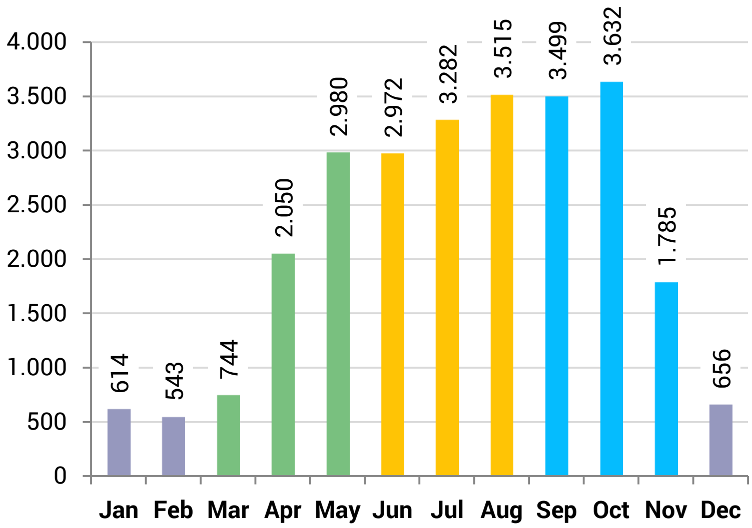
Month	Total Cruise Pax	% of Total Pax	Total Cruise Calls	% of Total Cruise Calls	Pax/Call
January	614.385	2,34%	236	1,88%	2.603
February	543.428	2,07%	212	1,69%	2.563
March	743.948	2,83%	331	2,63%	2.248
April	2.049.595	7,80%	1.098	8,73%	1.867
May	2.979.908	11,34%	1.635	13,00%	1.823
June	2.971.605	11,31%	1.362	10,83%	2.182
July	3.281.594	12,49%	1.376	10,94%	2.385
August	3.515.396	13,38%	1.475	11,73%	2.383
September	3.499.428	13,32%	1.742	13,85%	2.009
October	3.631.925	13,82%	1.925	15,31%	1.887
November	1.785.280	6,80%	873	6,94%	2.045
December	656.377	2,50%	311	2,47%	2.111

Each month of the May-October period hosts, in a most balanced way, passenger movement shares of 11-14%. In total, 75,7% of the 2015 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 2015 was 7,2%, whereas in 2014 the respective share equals to 7,5% of the total annual movements.

Figure 6.2 visualises the monthly distribution of the total cruise passengers per month that took place in the Med and its adjoining seas in 2015. July, August, September and October are the months when MedCruise ports recorded more than three million passenger movements per month.

From April to June 2015 this total ranged between 2 and 3 million. Almost 1,8 million passenger movements were recorded in November, while less than 700.000 passenger movements happened per winter month, and less than 800.000 in March.

Figure 6.2: Total Cruise Pax. per month (in thousands; 2015)



In 2015, the 37,2% of the total cruise passenger movements took place during the three summer months, while in 2014 the same percentage stood at 35,4%. This equals the respective share of summer 2013, but is considerably lower than the one of summer 2012 when 39,3% of the total cruise traffic took place.

Detailing the total number of cruise calls per month, **(Figure 6.3)** reveals the presence of a 'regular season' that starts in April, with 1.098 calls, and reaches its peak in October with almost 2.000 calls – this period hardly includes March, when less than 350 calls are recorded.

Less than 1.000 calls happen during November, whereas the three months of the winter total between 212 and 311 calls per month.

The monthly distribution of 2015 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 (2015)

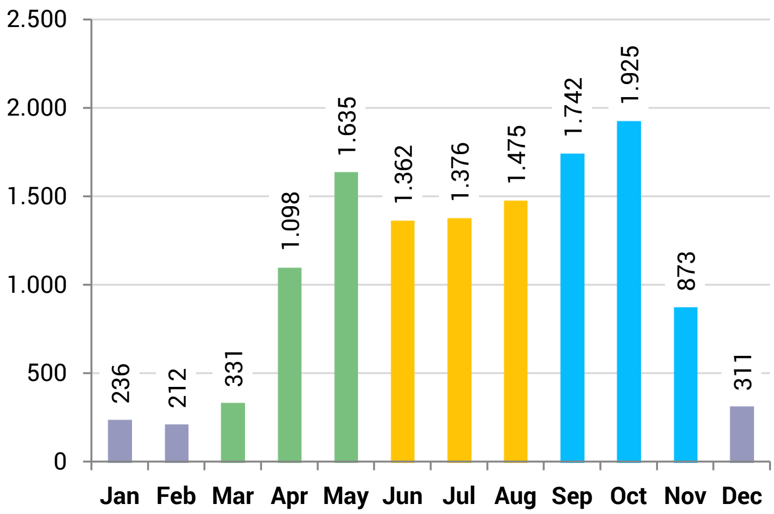
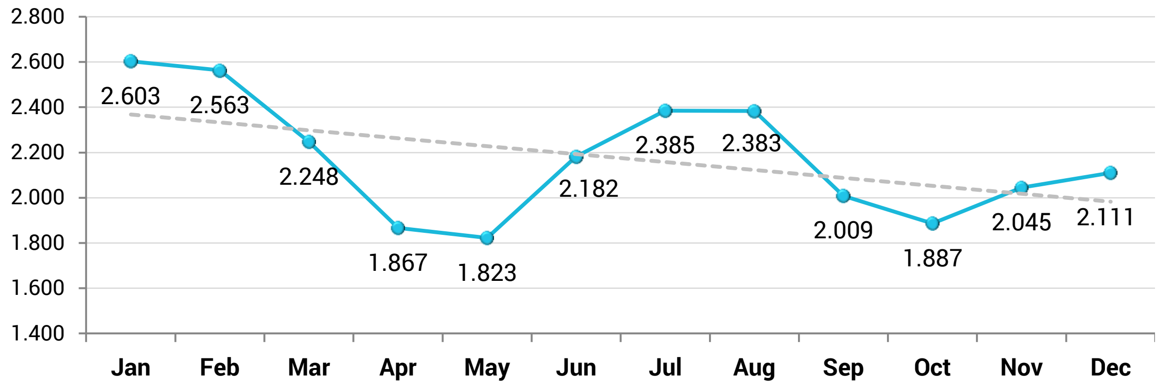


Figure 6.4 presents the average number of passengers per cruise call during each month of the year. The variations per month, as expected, are significant. In January the number of passengers per call appears to be 42,8% higher compared to the respective ratio of May. January is the month of 2015 with the highest rate of passengers per call (2.603), followed by February (2.563) and August (2.383). The lowest rates are registered in May (1.823) and April (1.867).

This picture is rather similar to the one observed the year before, when January (2.314), February (2.153) and December (2.095) occupied the first three places in terms of passengers per call, while May and October recorded the lowest pax/call rates, standing at 1.661 and 1.777 respectively.

Figure 6.4: Average Pax/Call per month (2015)



6.2 Seasonality by region in 2015

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 9,3% share of the total cruise passenger movements in the region, while 34,0% take place during the summer.

In the other three regions cruise traffic is concentrated mostly during the second half of the year, in particular the period commencing in June and ending in November. The Adriatic and East Med follow the same distribution patterns as regards calls per trimester. That said, in absolute numbers the passenger movements in the Adriatic during the winter time (Dec-Feb) are minimal as they barely exceed 10.000 and the ones that take place in East Med few (69.400).

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	23,46%	34,03%	33,24%	9,27%	26,56%	29,44%	35,84%	8,15%
Adriatic	17,77%	47,39%	34,62%	0,22%	19,84%	42,00%	35,15%	3,01%
East Med	19,39%	41,13%	37,17%	2,31%	21,87%	38,12%	37,79%	2,22%
Black Sea	6,15%	55,05%	38,80%	0,00%	22,37%	31,58%	46,05%	0,00%
Total	**21,97%**	**37,18%**	**33,94%**	**6,91%**	**24,36%**	**33,50%**	**36,10%**	**6,04%**
Region	**Home In/Out Passengers**				**Transit Passengers**			
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	24,10%	32,99%	33,76%	9,15%	23,21%	34,43%	33,04%	9,32%
Adriatic	17,90%	48,41%	33,61%	0,08%	17,69%	46,83%	35,17%	0,30%
East Med	19,95%	45,34%	34,53%	0,18%	19,20%	39,71%	38,06%	3,03%
Black Sea	0,03%	65,48%	34,49%	0,00%	6,76%	53,69%	39,55%	0,00%
Total	**22,36%**	**37,51%**	**33,81%**	**6,33%**	**21,82%**	**37,05%**	**33,99%**	**7,14%**

6.3 Seasonality by size in 2015

Table 6.3 details the shares of the total cruise traffic that correspond to each trimester of 2015 within the two different port size categories of MedCruise.

Category A ports (i.e., ports hosting more than 100.000 passenger movements in 2015) recorded a higher share of annual passenger movements hosted during the winter times (7,0%) comparing to the respective share observed in Category B ports (5,4%). One year earlier, in 2014, these percentages had been higher in the case of Category A ports (7,5%) and lower in the case of Category B ports (2,7%).

In the case of Category A ports the highest share of the cruise passenger traffic movements (37,2%) was registered during the summer months. For size Category B ports the autumn proved to be the most popular season, since almost 38% of the total passengers movements in these ports were registered from September to November.

As regards cruise calls, in Category A ports the number of calls reaches its peak in the autumn, as 35,8% of total calls occurred during these months. This percentage though is very similar to the one observed in summer months (33,7%). In the smaller in size Category B the peak happens during the summer months when 38,8% of the 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 one third of the total cruise passenger movements takes place. The only exception is the case of homeport activity in smaller ports, where a high concentration is observed during the summer months (52,8%). It is also notable that in terms of percentages Category B ports hosted more home in/out traffic from December to February (8,3%) than they did from March to May (6,1%). However, these numbers might be misleading, given that in absolute numbers the size of these movements is really tiny. On the contrary, for the ports of size Category A the respective shares proved to be closer to the expected; only 6,3% of the total is taking place in winter months, while 22,4% is recorded between March and May.

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

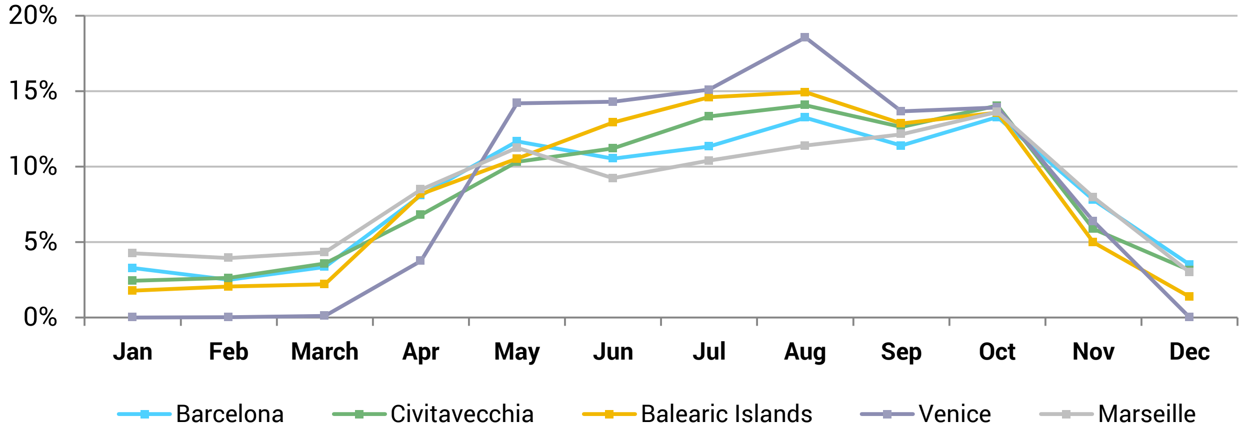
	Size Category	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Cruise Pax Movements	A	22,00%	37,24%	33,81%	6,96%
	B	21,37%	35,60%	37,66%	5,36%
Cruise Calls	A	24,32%	33,67%	35,84%	6,17%
	B	24,86%	31,74%	38,81%	4,59%
Home In/Out Pax	A	22,38%	37,49%	33,81%	6,33%
	B	6,05%	52,78%	32,88%	8,29%
Transit Pax	A	21,83%	37,13%	33,81%	7,23%
	B	21,52%	35,41%	37,73%	5,34%

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.

Barcelona and Civitavecchia register in January, February and December movements that exceed 2% of their total annual traffic, while Balearic Islands are also close to reach these numbers. Whereas in Marseille this percentage rises to more than 3%, Venice records an insignificant share of passenger movements during winter months.

Figure 6.5: Major 5 MedCruise Ports Cruise Pax Seasonality 2015



The concentration of traffic in the period May-August is far more evident in Venice (62,14% of its total traffic) rather than in any other major port.

Table 6.4 presents those MedCruise ports registering the major concentration of their cruise activities during springtime. The top port of this list is Alanya, which hosts more than 52% of its annual cruise traffic during this trimester. Azores and Tunisian Ports, both West Med port members, also benefit from spring months cruising; within this period the former hosts almost 44,5% of the total of its annual passenger movements, and the latter more than 38%. Six other ports host more than 30% of their annual movements during spring months, while in aggregate 579.843 passenger movements or 10% of the total that take place in MedCruise ports in spring months is registered in 10 port members.

Table 6.4: Highest Concentration of Passenger Movements (March/April/May 2015)

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	Alanya	East Med	B	52,13%	0,20%	11.637	11
2	Azores	West Med	A	44,47%	1,09%	63.084	76
3	Tunisian Ports	West Med	B	38,52%	0,36%	20.715	6
4	Portimao	West Med	B	34,91%	0,09%	5.162	21
5	Portofino	West Med	B	34,59%	0,18%	10.617	27
6	Palamós	West Med	B	31,67%	0,22%	12.920	10
7	Malaga	West Med	A	31,49%	2,29%	131.996	80
8	Motril-Granada	West Med	B	31,37%	0,04%	2.033	10
9	Palermo	West Med	A	28,78%	2,73%	157.387	57
10	Madeira Ports	West Med	A	28,31%	2,85%	164.292	95
TOTAL				-	**10,04%**	**579.843**	**393**

The picture is quite different in the case of the cruise passenger movements that take place during the summer months (**Table 6.5**). Several ports register more than 45% of their annual cruise passenger traffic during these months, with this percentage exceeding 50% in six cases. Cruising during these months seems to be slightly more concentrated, with the 1,11 million movements of the 10 most concentrated ports representing 11,4% of the share of all MedCruise ports during the summer months.

Table 6.5: Highest Concentration of Passenger Movements (June/July/August 2015)

No	Port	Region	Size	% share of the port's total traffic	% share of all MedCruise ports trimester traffic	Total Pax Jun-Aug	Total Calls Jun-Aug
1	Constantza	Black Sea	B	61,17%	0,20%	19.486	11
2	Portoferraio	West Med	B	59,29%	0,23%	22.227	42
3	Sochi	Black Sea	B	59,04%	0,12%	11.513	5
4	North Sardinian Ports	West Med	A	54,37%	1,33%	129.537	77
5	Zadar	Adriatic	B	50,94%	0,39%	38.030	41
6	Bastia/North Corsica	West Med	B	50,03%	0,27%	26.526	38
7	Tarragona	West Med	B	49,93%	0,06%	5.792	4
8	French Riviera Ports	West Med	A	49,65%	2,78%	271.207	127
9	Bari	Adriatic	A	49,39%	1,86%	181.893	69
10	Dubrovnik	Adriatic	A	48,95%	4,16%	406.602	201
TOTAL				-	**11,39%**	**1.112.813**	**615**

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; 9 of the 10 ports listed are Category B ports (less than 100.000 passengers per year), and only Lisbon is a Category A port. 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 2015)

No	Port	Region	Size	% share of the port's total traffic	% share of all MedCruise ports trimester traffic	Total Pax Sep-Nov	Total Calls Sep-Nov
1	Gioia Tauro	West Med	B	70,87%	0,11%	9.828	5
2	Motril-Granada	West Med	B	65,05%	0,05%	4.216	14
3	Kavala	East Med	B	63,75%	0,09%	8.149	15
4	Thessaloniki	East Med	B	63,16%	0,19%	16.647	19
5	Alicante	West Med	B	53,25%	0,49%	43.824	28
6	Volos	East Med	B	51,41%	0,39%	34.493	27
7	Souda/Chania	East Med	B	48,80%	0,53%	47.148	28
8	Tarragona	West Med	B	44,30%	0,06%	5.139	6
9	Lisbon	West Med	A	42,63%	2,45%	218.320	122
10	Sete	West Med	B	41,23%	0,10%	8.474	14
TOTAL				-	**4,44%**	**396.238**	**278**

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 most notable concentration during these months, as the registered 33.065 passenger movements equal to the 61,5% of its annual passenger traffic. Another West Med port member, namely Madeira Ports, registers 31,3% of its total movements in winter months that corresponds to 181.569 movements and 100 cruise calls.

The other eight ports of the list host shares of the range 10% to 20% of their total annual traffic during the months under examination. In total, 48,8% 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 2015)

No	Port	Region	Size	% share of the port's total traffic	% share of all MedCruise ports trimester traffic	Total Pax Dec-Feb	Total Calls Dec-Feb
1	Tunisian Ports	West Med	B	61,48%	1,82%	33.065	9
2	Madeira Ports	West Med	A	31,29%	10,01%	181.569	100
3	Azores	West Med	A	18,65%	1,46%	26.452	24
4	Malaga	West Med	A	15,86%	3,66%	66.481	28
5	Palermo	West Med	A	15,80%	4,76%	86.408	26
6	Genoa	West Med	A	14,53%	6,79%	123.245	26
7	Savona	West Med	A	14,42%	7,81%	141.653	36
8	Marseille	West Med	A	11,21%	8,97%	162.711	45
9	Lisbon	West Med	A	11,13%	3,14%	57.013	39
10	Volos	East Med	B	10,80%	0,40%	7.244	6
TOTAL				-	**48,83%**	**885.841**	**339**

6.5 Winter Cruise

With the potential of increased winter tourism being at the centre of attention for several stakeholders, it is worth presenting the trends of cruise activities as well those ports that recorded the most passenger movements and cruise calls during the winter period that lasted from December 2014 to February 2015.

Only 42 MedCruise Ports recorded any cruise activity between December 2014 and February 2015 (Batumi, Egyptian Ports, Lattakia and Tenerife Ports are excluded from the analysis of this section).

Extending the period under examination to a 5-months one (November 2014 - March 2015), the total of ports that had cruise activity rises to 57. The port members that did not record any cruise traffic at all during these five months were Gioia Tauro, Huelva, Igoumenitsa, Mersin, Odessa, Patras, Portofino, Ravenna, Rijeka, Sete, Sinop, Taranto, Tarragona.

The distribution of cruise activities within the five months period under examination is illustrated by **Figure 6.6.**

It is November when 39,2% of the total winter tourism took place, whereas December and March are two months having an equal share of the total winter cruising traffic.

Cruise activities taking place in the November-March period total between November 2014 and March 2015 4,28 million passenger movements, and 1.970 cruise calls (**Table 6.8**).

Figure 6.6: Cruise Pax. Movement Shares per month

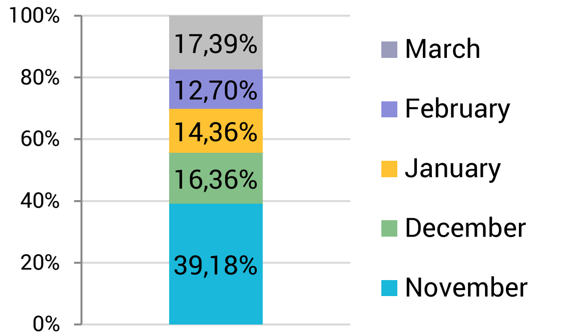


Table 6.8: Winter Cruise Traffic per Region

Region	Cruise Passenger Movements				Cruise Calls			
	Winter 2014-2015	Winter 2013-2014	Winter 2012-2013	1-Year Evolution	Winter 2014-2015	Winter 2013-2014	Winter 2012-2013	1-Year Evolution
West Med	3.751.408	3.808.446	3.245.286	-1,50%	1.525	1.701	1.562	-10,35%
Adriatic	227.764	286.039	330.734	-20,37%	217	289	278	-24,91%
East Med	295.726	332.708	402.473	-11,12%	221	263	354	-15,97%
Black Sea	2.701	13.700	7.486	-80,28%	7	12	7	-41,67%
Total	**4.277.599**	**4.440.893**	**3.985.979**	**-3,68%**	**1.970**	**2.265**	**2.201**	**-13,02%**

The West Med ports hosted the major share of this total (almost 3,8 million passenger movements). This region recorded in 2015 a slight decrease of passenger movements comparing to the previous year that stands at 1,5%. The decrease in terms of shares is even more significant in the case of the other three regions, yet the absolute numbers in these cases are comparatively small.

Figure 6.7 visualizes winter traffic per MedCruise region per month. This figure illustrates the dominant role of West Med in all months.

Both East Med region and Adriatic maintain a visible share in November. While, unlike Adriatic, East Med retains significant levels also during the other four months.

In the case of the Black Sea the size of the activities is comparatively insignificant during winter time, with the climate standing as a key factor leading to this trend.

Figure 6.7: Winter Cruise traffic per MedCruise region per month

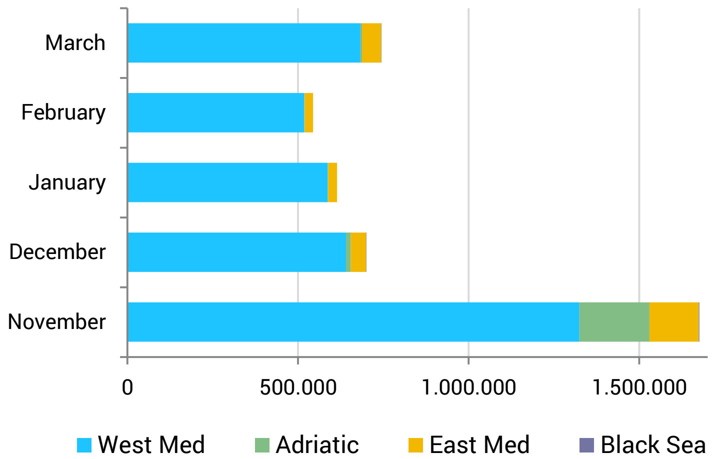


Table 6.9 presents the major ports in each region insofar winter cruising is concerned. Barcelona that tops the list in West Med experienced last year a decrease of its cruise activities within the months under examination (-12,6%). The same holds true for the second biggest port of the region, Civitavecchia (-17,4%). Marseille, the third major port, recorded an annual increase of 3,9%. In the case of the Adriatic, Venice and Dubrovnik experienced a decline, while Bari recorded a significant rise (15,7%) in terms of cruise passenger movements during these months.

The most remarkable increase is observed in the case of the East Med port of Istanbul and stands at 21,4%. The port of Istanbul welcomed this year almost 10.000 passengers more than the year before. Different trends were observed in the other two listed ports of the region. Piraeus, which is the major cruise port of East Med, recorded a 16,6% decline and Heraklion recorded a 6,7% increase.

The decline that occurred in the Black Sea port of Sochi (-90,7%) stands as the most significant of all, while in the case of the Black Sea ports of Constantza and Burgas the numbers are small, thus the variation is only indicative.

Table 6.9: Winter Cruise 2015 - Major MedCruise Ports per region

Region	No	Port	Nov 14-Mar 15	Nov 13-Mar 14	Nov 12-Mar 13	1-Year Evolution
West Med	1	Barcelona	472.883	541.263	329.255	-12,63%
	2	Civitavecchia	388.955	471.063	490.177	-17,43%
	3	Marseille	350.994	337.741	221.095	3,92%
Adriatic	1	Venice	89.583	90.561	131.983	-1,08%
	2	Dubrovnik	50.448	64.791	74.896	-22,14%
	3	Bari	37.827	32.708	44.638	15,65%
East Med	1	Piraeus	109.762	131.545	159.690	-16,56%
	2	Istanbul	56.091	46.192	52.100	21,43%
	3	Heraklion	49.328	46.223	49.326	6,72%
Black Sea	1	Sochi	901	9.697	0	-90,71%
	2	Constantza	896	982	964	-8,76%
	3	Burgas	640	0	0	-

Table 6.10 provides information on the distribution of traffic in the 15 ports hosting most cruise passenger movements in winter months. 13 of these ports are located in West Med, and only Piraeus in East Med and Venice in Adriatic.

Barcelona tops this list with 472.883 passengers, with Civitavecchia being the second one with 388.955 passengers. Both ports experienced a decrease comparing with the year before standing at 12,6% and 17,4% respectively. Naples (53,1%), La Spezia (41,3%), Palermo (35,5%), Genoa (17,6%), and Savona (8,7%) hosted significantly increased winter traffic during last year, while Piraeus (-16,6%), Lisbon (-10,5%) and Balearic Islands (-7,3%) saw their traffic decreasing considerably.

Table 6.10: Winter Cruise 2015 - Major 15 MedCruise Ports: Cruise Pax. Movements

No	Port	Nov 14-Mar 15	Nov 13-Mar 14	Nov 12-Mar 13	1-Year Evolution	Nov 2014	Dec 2014	Jan 2015	Feb 2015	Mar 2015
1	Barcelona	472.883	541.263	329.255	-12,63%	164.748	76.037	83.383	63.475	85.240
2	Civitavecchia	388.955	471.063	490.177	-17,43%	118.026	74.945	55.230	59.568	81.186
3	Marseille	350.994	337.741	221.095	3,92%	127.457	41.627	61.916	57.265	62.729
4	Savona	339.992	312.661	280.217	8,74%	135.870	52.083	51.357	40.927	59.755
5	Madeira Ports	315.135	308.170	328.234	2,26%	62.300	80.922	54.510	49.238	68.165
6	Genoa	272.900	232.049	197.674	17,60%	92.305	44.730	42.358	34.646	58.861
7	Balearic Islands	260.714	281.193	180.313	-7,28%	93.342	47.003	35.407	41.010	43.952
8	Naples	232.813	152.084	144.521	53,08%	81.890	43.143	40.256	35.731	31.793
9	Palermo	173.106	127.780	136.307	35,47%	45.615	26.532	21.964	31.944	47.051
10	Malaga	144.955	138.527	178.506	4,64%	63.346	16.517	22.058	17.496	25.538
11	Lisbon	111.529	124.674	156.945	-10,54%	43.056	23.814	22.051	11.532	11.076
12	Piraeus	109.762	131.545	159.690	-16,56%	50.757	18.958	11.229	11.841	16.977
13	La Spezia	90.995	64.409	827	41,28%	18.543	17.575	21.229	17.143	16.505
14	Valletta	90.365	92.397	87.968	-2,20%	53.974	15.696	9.027	3.499	8.169
15	Venice	89.583	90.561	131.983	-1,08%	81.537	5.971	0	336	1.739

Table 6.11 provides the respective list as far as cruise calls are concerned. In the top of this list one can find the ports of Madeira with 177 calls and an observed decrease of 6,8% comparing with the year

before. Three more ports, namely Barcelona (163), Civitavecchia (129) and Marseille (112), hosted more than 100 calls, with the calls in the other ports of the list standing within the 40-100 calls range.

Naples (34,9%) experienced the major positive annual variation in the most recent winter period, while on the other hand Dubrovnik experienced a major decline of calls (-27,9%), with Valencia recording a very similar result (-26,3%).

Table 6.11: Winter Cruise 2015 - Major 15 MedCruise Ports: Cruise Calls

No	Port	Nov 14-Mar 15	Nov 13-Mar 14	Nov 12-Mar 13	1-Year Evolution	Nov 2014	Dec 2014	Jan 2015	Feb 2015	Mar 2015
1	Madeira Ports	177	190	194	-6,84%	37	51	28	26	35
2	Barcelona	163	205	166	-20,49%	69	25	25	18	26
3	Civitavecchia	129	166	292	-22,29%	51	25	15	16	22
4	Marseille	112	126	76	-11,11%	51	13	18	14	16
5	Balearic Islands	91	115	78	-20,87%	42	14	10	10	15
6	Naples	89	66	73	34,85%	36	16	13	12	12
7	Savona	86	85	26	1,18%	37	14	12	9	14
8	Lisbon	81	86	92	-5,81%	32	17	15	9	8
9	Malaga	78	74	91	5,41%	40	8	10	7	13
10	Piraeus	74	76	91	-2,63%	32	9	7	8	18
11	Palermo	63	53	52	18,87%	22	11	7	9	14
12	Genoa	62	57	67	8,77%	26	11	8	6	11
13	Dubrovnik	57	79	69	-27,85%	33	10	2	6	6
14	Valletta	53	59	45	-10,17%	35	9	5	1	3
15	Valencia	42	57	32	-26,32%	27	4	5	2	4

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 2015.

APPENDIX I

MedCruise Ports: Total Cruise Passenger Movements 2010-2015

No	Port	Total Cruise Passenger Movements							
		2015	2014	Variation 2015/2014	2013	2012	2011	2010	Variation 2015/2010
1	Alanya	22.321	19.092	17%	57.454	36.703	42.108	21.924	2%
2	Alicante	82.296	34.583	138%	41.860	78.825	107.865	75.795	9%
3	Azores	141.846	95.765	48%	87.437	102.881	87.009	62.256	128%
4	Balearic Islands	1.996.533	1.587.064	26%	1.541.376	1.341.510	1.608.704	1.546.739	29%
5	Barcelona	2.540.302	2.364.292	7%	2.599.232	2.408.634	2.657.244	2.350.283	8%
6	Bari	368.281	561.602	-34%	604.781	618.882	586.848	507.694	-27%
7	Bastia/North Corsica	53.024	57.927	-8%	43.292	16.686	42.631	12.583	321%
8	Brindisi	151.922	25.450	497%	4.628	13.507	5.226	28.489	433%
9	Burgas	7.575	41.763	-82%	5.673	999	652	0	-
10	Cagliari	263.247	81.844	222%	146.003	80.555	232.118	158.930	66%
11	Cartagena	151.195	137.985	10%	134.225	83.917	88.081	104.294	45%
12	Castellón	366	130	182%	1.514	1.292	586	1.000	-63%
13	Ceuta	1.613	2.432	-34%	4.605	6.088	4.899	4.220	-62%
14	Civitavecchia	2.271.652	2.140.039	6%	2.538.259	2.393.570	2.577.438	1.944.723	17%
15	Constantza	31.856	69.910	-54%	54.614	34.010	23.878	21.286	50%
16	Corfu	647.346	672.368	-4%	744.651	655.764	620.474	596.902	8%
17	Cyprus Ports	173.309	183.507	-6%	271.673	248.356	303.086	378.909	-54%
18	Dubrovnik	830.684	894.216	-7%	1.136.503	981.448	1.009.698	936.115	-11%
19	Egyptian Ports	189.823	42.690	355%	43.799	63.833	n.a	n.a	-
20	French Riviera Ports	546.199	595.685	-8%	613.218	701.367	666.082	672.235	-19%
21	Genoa	848.227	824.109	3%	1.050.085	797.239	798.521	860.290	-1%
22	Gibraltar	344.140	299.923	15%	278.139	291.620	328.636	305.161	13%
23	Gioia Tauro	13.868	3.320	318%	2.590	1.600	800	600	2211%
24	Heraklion	219.805	242.951	-10%	270.020	215.700	224.571	305.675	-28%
25	Huelva	4.788	0	-	296	2.090	650	0	-
26	Igoumenitsa	3.090	3.096	0%	4.650	1.827	156	136	2172%
27	Istanbul	589.314	589.353	0%	683.598	564.555	662.792	491.796	20%
28	Kavala	12.783	13.087	-2%	6.995	4.323	2.708	4.237	202%
29	Koper	57.893	58.970	-2%	65.434	64.456	108.820	37.264	55%
30	Kotor	442.029	309.322	43%	317.746	246.623	189.426	145.185	204%
31	Kusadasi/Bodrum /Antalya	808.446	761.912	6%	780.804	777.791	812.773	662.314	22%
32	La Spezia	667.446	483.564	38%	213.858	50.239	90.408	44.874	1387%
33	Lisbon	512.128	500.872	2%	558.040	522.604	502.644	448.497	14%
34	Livorno	697.955	626.356	11%	736.516	1.037.849	982.928	822.554	-15%

No	Port	Total Cruise Passenger Movements							
		2015	2014	Variation 2015/2014	2013	2012	2011	2010	Variation 2015/2010
35	Madeira Ports	580.348	475.955	22%	482.112	593.550	542.789	492.500	18%
36	Malaga	419.121	409.298	2%	397.416	651.393	638.845	659.123	-36%
37	Marseille	1.451.059	1.311.284	11%	1.188.031	890.020	810.490	700.100	107%
38	Mersin	1.593	0	-	1.697	774	416	135	1080%
39	Messina	327.702	319.750	2%	501.316	438.379	500.636	374.441	-12%
40	Monaco	259.325	200.039	30%	249.806	232.921	284.914	321.079	-19%
41	Motril-Granada	6.481	19.589	-67%	16.809	10.606	9.711	2.742	136%
42	Naples	1.269.571	1.113.762	14%	1.175.018	1.297.233	1.297.232	1.139.319	11%
43	North Sardinian Ports	238.256	166.985	43%	206.140	276.941	141.632	184.107	29%
44	Odessa	6.563	8.506	-23%	91.949	72.516	68.353	66.010	-90%
45	Palamos	40.800	38.612	6%	29.775	33.400	38.770	27.500	48%
46	Palermo	546.884	531.712	3%	410.999	354.499	567.049	394.885	38%
47	Patras	1.090	745	46%	1.264	374	2.257	1.059	3%
48	Piraeus	980.149	1.055.556	-7%	1.302.581	1.198.047	1.485.828	1.145.402	-14%
49	Portimao	14.786	14.634	1%	20.141	18.506	44.841	33.843	-56%
50	Portoferraio	37.486	27.365	37%	16.828	23.099	19.273	24.473	53%
51	Portofino	30.696	21.579	42%	22.749	24.181	41.990	39.129	-22%
52	Ravenna	39.964	44.607	-10%	97.041	100.987	156.374	9.153	337%
53	Rijeka	9.082	9.026	1%	7.809	9.539	15.120	14.172	-36%
54	Savona	982.226	1.018.794	-4%	939.038	810.097	948.459	780.680	26%
55	Sete	20.555	9.918	107%	11.084	8.584	21.348	5.686	262%
56	Sibenik	17.562	12.693	38%	29.784	15.355	12.860	11.624	51%
57	Sinop	1.615	16.522	-90%	6.331	4.623	4.140	5.266	-69%
58	Sochi	19.501	34.299	-43%	21.384	20.080	13.678	22.509	-13%
59	Souda/Chania	96.612	33.304	190%	124.205	129.087	158.118	11.509	739%
60	Split	271.445	184.062	47%	189.107	245.451	181.963	172.378	57%
61	Taranto	358	582	-38%	446	311	604	0	-
62	Tarragona	11.600	1.894	512%	1.421	153	752	3.148	268%
63	Tenerife Ports	933.154	840.268	11%	794.151	885.623	828.590	740.022	26%
64	Thessaloniki	26.356	19.720	34%	14.591	8.004	11.520	16.036	64%
65	Toulon-Var Provence	240.833	341.128	-29%	385.971	346.795	221.842	310.460	-22%
66	Trabzon	2.280	17.118	-87%	9.032	7.949	5.019	8.580	-73%
67	Tunisian Ports	53.780	440.433	-88%	511.065	528.708	313.267	895.403	-94%
68	Valencia	371.197	372.975	0%	473.114	599.130	378.463	253.743	46%
69	Valletta	668.277	517.594	29%	477.759	604.014	556.551	493.748	35%
70	Venice	1.582.481	1.733.839	-9%	1.815.823	1.775.944	1.786.416	1.617.011	-2%
71	Volos	67.096	57.825	16%	20.227	11.926	72.796	21.435	213%
72	Zadar	74.660	53.791	39%	34.575	20.640	28.677	19.622	280%

APPENDIX II

MedCruise Ports: Total Cruise Calls 2010-2015

No	Port	Total Cruise Calls							
		2015	2014	Variation 2015/2014	2013	2012	2011	2010	Variation 2015/2010
1	Alanya	34	23	48%	53	31	35	30	13%
2	Alicante	50	29	72%	32	43	58	46	9%
3	Azores	138	90	53%	92	122	94	60	130%
4	Balearic Islands	788	678	16%	699	632	613	723	9%
5	Barcelona	749	767	-2%	835	774	881	841	-11%
6	Bari	148	147	1%	171	206	209	152	-3%
7	Bastia/North Corsica	90	94	-4%	92	51	92	71	27%
8	Brindisi	60	22	173%	15	36	7	38	58%
9	Burgas	5	27	-81%	5	1	1	0	-
10	Cagliari	97	54	80%	94	72	152	77	26%
11	Cartagena	108	109	-1%	115	76	77	77	40%
12	Castellón	2	1	100%	3	2	2	2	0%
13	Ceuta	4	8	-50%	8	10	10	12	-67%
14	Civitavecchia	794	833	-5%	959	1.040	1.002	900	-12%
15	Constantza	25	92	-73%	69	41	43	58	-57%
16	Corfu	407	395	3%	480	485	453	430	-5%
17	Cyprus Ports	167	223	-25%	255	247	454	378	-56%
18	Dubrovnik	475	752	-37%	843	659	681	705	-33%
19	Egyptian Ports	n.a	29	-	39	54	n.a	n.a	-
20	French Riviera Ports	343	369	-7%	420	387	427	496	-31%
21	Genoa	198	209	-5%	298	213	252	261	-24%
22	Gibraltar	204	181	13%	179	173	187	175	17%
23	Gioia Tauro	12	6	100%	7	7	2	3	300%
24	Heraklion	170	160	6%	177	156	209	247	-31%
25	Huelva	6	0	-	1	3	1	0	-
26	Igoumenitsa	6	13	-54%	14	4	1	1	500%
27	Istanbul	331	331	0%	408	486	574	536	-38%
28	Kavala	22	26	-15%	14	10	10	11	100%
29	Koper	49	45	9%	54	46	78	54	-9%
30	Kotor	411	353	16%	387	343	316	309	33%
31	Kusadasi/Bodrum/Antalya	660	605	9%	657	683	707	695	-5%
32	La Spezia	175	254	-31%	149	72	82	44	298%
33	Lisbon	306	319	-4%	353	314	330	299	2%

No	Port	Total Cruise Calls							
		2015	2014	Variation 2015/2014	2013	2012	2011	2010	Variation 2015/2010
34	Livorno	369	341	8%	420	465	497	508	-27%
35	Madeira Ports	312	285	9%	291	339	309	295	6%
36	Malaga	233	227	3%	248	293	311	321	-27%
37	Marseille	442	497	-11%	447	354	420	335	32%
38	Mersin	2	0	-	4	2	2	2	-
39	Messina	160	165	-3%	228	187	257	217	-26%
40	Monaco	209	182	15%	221	185	214	235	-11%
41	Motril-Granada	27	30	-10%	28	27	25	18	50%
42	Naples	445	399	12%	440	527	527	537	-17%
43	North Sardinian Ports	149	98	52%	117	141	70	93	60%
44	Odessa	13	32	-59%	148	121	122	132	-90%
45	Palamos	37	36	3%	38	26	36	31	19%
46	Palermo	200	221	-10%	189	156	250	184	9%
47	Patras	3	2	50%	2	3	3	2	50%
48	Piraeus	621	606	2%	711	763	936	799	-22%
49	Portimao	47	34	38%	42	36	59	52	-10%
50	Portoferraio	112	101	11%	102	89	66	81	38%
51	Portofino	80	56	43%	67	82	115	97	-18%
52	Ravenna	34	38	-11%	74	67	79	19	79%
53	Rijeka	7	247	-97%	221	276	269	254	-97%
54	Savona	231	279	-17%	241	207	232	174	33%
55	Sete	31	24	29%	28	20	24	16	94%
56	Sibenik	83	93	-11%	100	84	113	109	-24%
57	Sinop	5	31	-84%	18	12	11	8	-38%
58	Sochi	18	63	-71%	49	27	29	27	-33%
59	Souda/Chania	59	38	55%	47	54	72	21	181%
60	Split	261	233	12%	225	269	252	257	2%
61	Taranto	3	3	0%	2	5	6	0	-
62	Tarragona	11	3	267%	3	1	2	2	450%
63	Tenerife Ports	506	513	-1%	520	534	461	387	31%
64	Thessaloniki	35	31	13%	18	11	19	22	59%
65	Toulon-Var Provence	124	257	-52%	266	238	84	235	-47%
66	Trabzon	10	31	-68%	28	22	19	15	-33%
67	Tunisian Ports	15	175	-91%	201	227	135	406	-96%
68	Valencia	174	195	-11%	223	204	203	157	11%
69	Valletta	306	302	1%	277	312	313	280	9%
70	Venice	521	488	7%	548	661	654	629	-17%
71	Volos	57	53	8%	31	21	61	33	73%
72	Zadar	96	77	25%	69	59	98	92	4%

APPENDIX III

MedCruise Ports: Total Home In/Out Passengers 2010-2015

No	Port	Total Home In/Out Passenger Movements							
		2015	2014	Variation 2015/2014	2013	2012	2011	2010	Variation 2015/2010
1	Alanya	0	0	-	0	0	0	0	-
2	Alicante	0	144	-100%	0	286	1.682	0	-
3	Azores	1.787	833	115%	473	1.487	1.161	603	196%
4	Balearic Islands	553.928	606.549	-9%	490.631	466.385	587.048	571.209	-3%
5	Barcelona	1.363.754	1.222.487	12%	1.506.286	1.438.383	1.499.534	1.265.613	8%
6	Bari	85.314	152.056	-44%	165.031	196.423	166.690	203.145	-58%
7	Bastia/North Corsica	0	0	-	0	0	0	0	-
8	Brindisi	20.899	48	43440%	119	143	1.007	0	-
9	Burgas	2	0	-	0	0	0	0	-
10	Cagliari	16.536	133	12333%	5.731	0	0	0	-
11	Cartagena	0	0	-	0	0	26	10	-100%
12	Castellón	0	0	-	0	0	0	0	-
13	Ceuta	0	0	-	0	0	0	0	-
14	Civitavecchia	868.143	730.938	19%	989.998	920.612	972.850	643.772	35%
15	Constantza	667	5.049	-87%	388	0	0	0	-
16	Corfu	69.926	71.881	-3%	70.735	64.165	53.909	55.330	26%
17	Cyprus Ports	66.120	76.892	-14%	100.905	90.511	91.905	106.678	-38%
18	Dubrovnik	61.797	24.790	149%	24.840	24.632	22.900	19.700	214%
19	Egyptian Ports	n.a	n.a	-	n.a	n.a	n.a	n.a	-
20	French Riviera Ports	55.302	34.791	59%	56.523	33.549	47.684	44.795	23%
21	Genoa	565.687	571.463	-1%	649.282	530.872	562.492	571.582	-1%
22	Gibraltar	583	0	-	0	0	0	0	-
23	Gioia Tauro	147	0	-	0	0	0	0	-
24	Heraklion	3.344	23.925	-86%	55.443	47.594	6.756	45.945	-93%
25	Huelva	0	0	-	0	0	0	0	-
26	Igoumenitsa	0	0	-	0	0	0	0	-
27	Istanbul	203.135	148.297	37%	168.790	102.819	167.300	92.179	120%
28	Kavala	0	0	-	0	0	0	0	-
29	Koper	82	47	74%	56	164	5.315	6.409	-99%
30	Kotor	2.921	0	-	0	1.774	0	0	-
31	Kusadasi/Bodrum /Antalya	200.200	201.142	0%	190.087	167.424	143.913	114.657	75%
32	La Spezia	96.881	40.280	141%	1.507	0	0	0	-
33	Lisbon	42.536	41.465	3%	50.834	44.006	49.364	52.613	-19%

No	Port	Total Home In/Out Passenger Movements							
		2015	2014	Variation 2015/2014	2013	2012	2011	2010	Variation 2015/2010
34	Livorno	4.181	2.088	100%	4.991	70.525	42.122	46.333	-91%
35	Madeira Ports	3.721	3.421	9%	3.975	11.889	15.832	9.841	-62%
36	Malaga	32.492	74.170	-56%	71.249	220.217	221.295	239.867	-86%
37	Marseille	503.325	506.412	-1%	381.318	313.322	264.703	268.451	87%
38	Mersin	0	0	-	0	0	0	0	-
39	Messina	17.068	19.951	-14%	36.190	29.413	38.579	21.862	-22%
40	Monaco	29.563	33.093	-11%	35.909	28.280	18.887	32.164	-8%
41	Motril-Granada	0	0	-	0	0	0	0	-
42	Naples	126.672	99.423	27%	110.689	160.219	160.209	164.238	-23%
43	North Sardinian Ports	0	0	-	0	0	0	0	-
44	Odessa	15	44	-66%	9.389	10.448	1.588	0	-
45	Palamos	0	0	-	0	0	0	0	-
46	Palermo	65.582	65.935	-1%	42.869	37.109	59.013	51.765	27%
47	Patras	0	0	-	0	0	0	0	-
48	Piraeus	284.241	256.196	11%	308.705	329.168	454.284	426.147	-33%
49	Portimao	238	1.130	-79%	88	257	587	757	-69%
50	Portoferraio	0	0	-	0	0	0	0	-
51	Portofino	0	0	-	0	0	0	0	-
52	Ravenna	107	3.314	-97%	16.827	36.313	48.343	0	-
53	Rijeka	0	9.026	-100%	7.124	9.539	15.120	14.172	-100%
54	Savona	647.364	668.473	-3%	670.031	638.706	719.219	603.448	7%
55	Sete	149	2.817	-95%	8	0	0	0	-
56	Sibenik	0	0	-	0	0	0	0	-
57	Sinop	0	0	-	0	0	0	0	-
58	Sochi	5.611	14.509	-61%	0	0	606	2.454	129%
59	Souda/Chania	0	0	-	0	0	0	0	-
60	Split	0	330	-100%	1.301	1.085	0	0	-
61	Taranto	0	0	-	0	0	0	0	-
62	Tarragona	11	0	-	0	0	0	0	-
63	Tenerife Ports	n.a	n.a	-	n.a	n.a	n.a	n.a	-
64	Thessaloniki	51	161	-68%	6	7	40	5.048	-99%
65	Toulon-Var Provence	21.257	28.974	-27%	27.087	22.483	6.618	16.916	26%
66	Trabzon	0	0	-	0	0	0	0	-
67	Tunisian Ports	0	0	-	0	0	0	0	-
68	Valencia	64.898	73.907	-12%	74.348	118.897	114.981	79.754	-19%
69	Valletta	140.512	93.581	50%	102.034	94.880	111.780	29.362	379%
70	Venice	1.364.044	1.509.097	-10%	1.512.596	1.444.100	1.448.622	1.312.895	4%
71	Volos	0	0	-	0	0	0	0	-
72	Zadar	1.064	1.763	-40%	1.636	769	2.183	4.934	-78%

APPENDIX IV

MedCruise Ports: Total Transit Passengers 2010-2015

No	Port	Total Transit Passengers							
		2015	2014	Variation 2015/2014	2013	2012	2011	2010	Variation 2015/2010
1	Alanya	22.321	19.092	17%	57.454	36.703	42.108	21.924	2%
2	Alicante	82.296	34.439	139%	41.860	78.539	106.183	75.795	9%
3	Azores	140.059	94.932	48%	86.964	101.394	85.848	61.653	127%
4	Balearic Islands	1.442.605	980.515	47%	1.050.745	875.125	1.021.656	975.530	48%
5	Barcelona	1.176.548	1.141.805	3%	1.092.966	970.251	1.157.710	1.084.670	8%
6	Bari	282.967	409.546	-31%	439.750	422.459	420.158	304.549	-7%
7	Bastia/North Corsica	53.024	57.927	-8%	43.292	16.686	42.631	12.583	321%
8	Brindisi	131.023	25.402	416%	4.509	13.364	4.219	28.489	360%
9	Burgas	7.573	41.763	-82%	5.673	999	652	0	-
10	Cagliari	246.711	81.711	202%	140.272	80.555	232.118	158.930	55%
11	Cartagena	151.195	137.985	10%	134.225	83.917	88.055	104.284	45%
12	Castellón	366	130	182%	1.514	1.292	586	1.000	-63%
13	Ceuta	1.613	2.432	-34%	4.605	6.088	4.899	4.220	-62%
14	Civitavecchia	1.403.509	1.409.101	0%	1.548.261	1.472.958	1.604.588	1.300.951	8%
15	Constantza	31.189	64.861	-52%	54.226	30.739	23.878	21.286	47%
16	Corfu	577.420	600.487	-4%	673.916	591.599	566.565	541.572	7%
17	Cyprus Ports	107.189	106.615	1%	170.768	157.845	211.181	272.231	-61%
18	Dubrovnik	768.887	869.426	-12%	1.111.663	956.816	985.398	916.089	-16%
19	Egyptian Ports	n.a	n.a	-	n.a	n.a	n.a	n.a	-
20	French Riviera Ports	490.897	560.894	-12%	556.695	667.818	618.398	627.440	-22%
21	Genoa	282.540	252.646	12%	400.803	266.367	236.029	288.708	-2%
22	Gibraltar	343.557	299.923	15%	278.139	291.620	328.636	305.161	13%
23	Gioia Tauro	13.721	3.320	313%	2.590	1.600	800	600	2187%
24	Heraklion	216.461	219.026	-1%	214.577	168.106	217.815	259.730	-17%
25	Huelva	4.788	0	-	296	2.090	650	0	-
26	Igoumenitsa	3.090	3.096	0%	4.650	1.827	156	136	2172%
27	Istanbul	386.179	441.056	-12%	514.808	479.371	452.983	404.216	-4%
28	Kavala	12.783	13.087	-2%	6.995	4.323	2.708	4.237	202%
29	Koper	57.811	58.923	-2%	65.378	64.292	103.505	30.855	87%
30	Kotor	439.108	309.322	42%	317.746	244.849	189.426	145.185	202%
31	Kusadasi/Bodrum /Antalya	608.246	560.770	8%	583.506	610.367	668.860	547.657	11%
32	La Spezia	570.565	443.284	29%	212.351	50.239	90.408	44.874	1171%
33	Lisbon	469.592	459.407	2%	507.206	478.598	453.280	395.884	19%
34	Livorno	693.774	624.268	11%	731.525	967.324	940.806	776.221	-11%

No	Port	Total Transit Passengers							
		2015	2014	Variation 2015/2014	2013	2012	2011	2010	Variation 2015/2010
35	Madeira Ports	576.627	472.534	22%	478.137	581.661	526.957	482.659	19%
36	Malaga	386.629	335.128	15%	326.167	431.176	417.550	419.256	-8%
37	Marseille	947.734	804.872	18%	806.713	576.698	545.787	431.649	120%
38	Mersin	1.593	0	-	1.697	774	416	135	1080%
39	Messina	310.634	299.799	4%	465.126	408.966	462.057	352.579	-12%
40	Monaco	229.761	166.946	38%	213.897	204.641	266.027	288.915	-20%
41	Motril-Granada	6.481	19.589	-67%	16.809	10.606	9.711	2.742	136%
42	Naples	1.142.899	1.014.339	13%	1.064.329	1.137.014	1.137.023	975.081	17%
43	North Sardinian Ports	238.256	166.985	43%	206.140	276.941	141.632	184.107	29%
44	Odessa	6.548	8.462	-23%	82.560	62.068	66.765	66.010	-90%
45	Palamos	40.800	38.612	6%	29.775	33.400	38.770	27.500	48%
46	Palermo	481.302	465.777	3%	368.130	317.390	508.036	343.120	40%
47	Patras	1.090	745	46%	1.264	374	2.257	1.059	3%
48	Piraeus	695.908	799.360	-13%	993.876	868.879	1.031.544	719.255	-3%
49	Portimao	14.548	13.504	8%	20.053	18.249	44.254	33.086	-56%
50	Portoferraio	37.486	27.365	37%	16.828	23.099	19.273	24.473	53%
51	Portofino	30.696	21.579	42%	22.789	24.641	42.082	38.693	-21%
52	Ravenna	39.857	41.293	-3%	80.214	64.674	108.031	9.153	335%
53	Rijeka	9.082	0	-	685	0	0	0	-
54	Savona	334.862	350.321	-4%	269.007	171.391	229.240	177.232	89%
55	Sete	20.406	7.101	187%	11.076	8.584	21.348	5.686	259%
56	Sibenik	17.562	12.693	38%	29.784	15.355	12.860	11.624	51%
57	Sinop	1.615	16.522	-90%	6.331	4.623	4.140	5.266	-69%
58	Sochi	13.890	19.790	-30%	21.384	20.080	13.072	20.055	-31%
59	Souda/Chania	96.612	33.304	190%	124.205	129.087	158.118	11.509	739%
60	Split	271.445	183.732	48%	187.806	244.366	181.963	172.378	57%
61	Taranto	358	582	-38%	446	311	604	0	-
62	Tarragona	11.589	1.894	512%	1.421	153	752	3.148	268%
63	Tenerife Ports	n.a	n.a	-	n.a	n.a	n.a	n.a	-
64	Thessaloniki	26.305	19.559	34%	14.585	7.997	11.480	10.988	139%
65	Toulon-Var Provence	219.576	312.154	-30%	255.824	324.312	215.224	293.544	-25%
66	Trabzon	2.280	17.118	-87%	9.032	7.949	5.019	8.580	-73%
67	Tunisian Ports	53.780	440.433	-88%	511.065	528.708	313.267	895.403	-94%
68	Valencia	306.299	299.068	2%	398.766	480.233	263.482	173.989	76%
69	Valletta	527.765	424.013	24%	375.785	509.134	444.771	464.386	14%
70	Venice	218.437	224.742	-3%	303.227	331.844	337.794	304.116	-28%
71	Volos	67.096	57.825	16%	20.227	11.926	72.796	21.435	213%
72	Zadar	73.596	52.028	41%	32.939	19.871	26.494	14.688	401%

APPENDIX V

MedCruise Ports per Size Category

Category A (>100.000 pax.)			Category B (≤100.000 pax.)		
No	**Port**	**Cruise Pax. 2015**	**No**	**Port**	**Cruise Pax. 2015**
1	Azores	141.846	1	Alanya	22.321
2	Balearic Islands	1.996.533	2	Alicante	82.296
3	Barcelona	2.540.302	3	Bastia/North Corsica	53.024
4	Bari	368.281	4	Batumi(2)	n.a
5	Brindisi	151.922	5	Burgas	7.575
6	Cagliari	263.247	6	Castellón	366
7	Cartagena	151.195	7	Ceuta	1.613
8	Civitavecchia	2.271.652	8	Constantza	31.856
9	Corfu	647.346	9	Egyptian Ports(3)	189.823
10	Cyprus Ports	173.309	10	Gioia Tauro	13.868
11	Dubrovnik	830.684	11	Huelva	4.788
12	French Riviera Ports	546.199	12	Igoumenitsa	3.090
13	Genoa	848.227	13	Kavala	12.783
14	Gibraltar	344.140	14	Koper	57.893
15	Heraklion	219.805	15	Lattakia(2)	n.a
16	Istanbul	589.314	16	Mersin	1.593
17	Kotor	442.029	17	Motril-Granada	6.481
18	Kusadasi/Bodrum/Antalya(1)	808.446	18	Odessa	6.563
19	La Spezia	667.446	19	Palamos	40.800
20	Lisbon	512.128	20	Patras	1.090
21	Livorno	697.955	21	Portimao	14.786
22	Madeira Ports	580.348	22	Portoferraio	37.486
23	Malaga	419.121	23	Portofino	30.696
24	Marseille	1.451.059	24	Ravenna	39.964
25	Messina	327.702	25	Rijeka	9.082
26	Monaco	259.325	26	Sete	20.555
27	Naples	1.269.571	27	Sibenik	17.562
28	North Sardinian Ports	238.256	28	Sinop	1.615
29	Palermo	546.884	29	Sochi	19.501
30	Piraeus	980.149	30	Souda/Chania	96.612
31	Savona	982.226	31	Taranto	358
32	Split	271.445	32	Tarragona	11.600
33	Tenerife Ports	933.154	33	Thessaloniki	26.356
34	Toulon-Var Provence	240.833	34	Trabzon	2.280
35	Valencia	371.197	35	Tunisian Ports	53.780
36	Valletta	668.277	36	Volos	67.096
37	Venice	1.582.481	37	Zadar	74.660

1 Cruise pax. movements hosted in 2015: Kusadasi: 567.291; Bodrum: 70.038; Antalya: 171.117

2 Batumi Cruise Pax. 2014: 16.233; Lattakia Cruise Pax. 2012: 1.459

3 MedCruise member Egyptian ports includes a number of small ports (7), but are registered and report statistics as one member due to institutional reasons

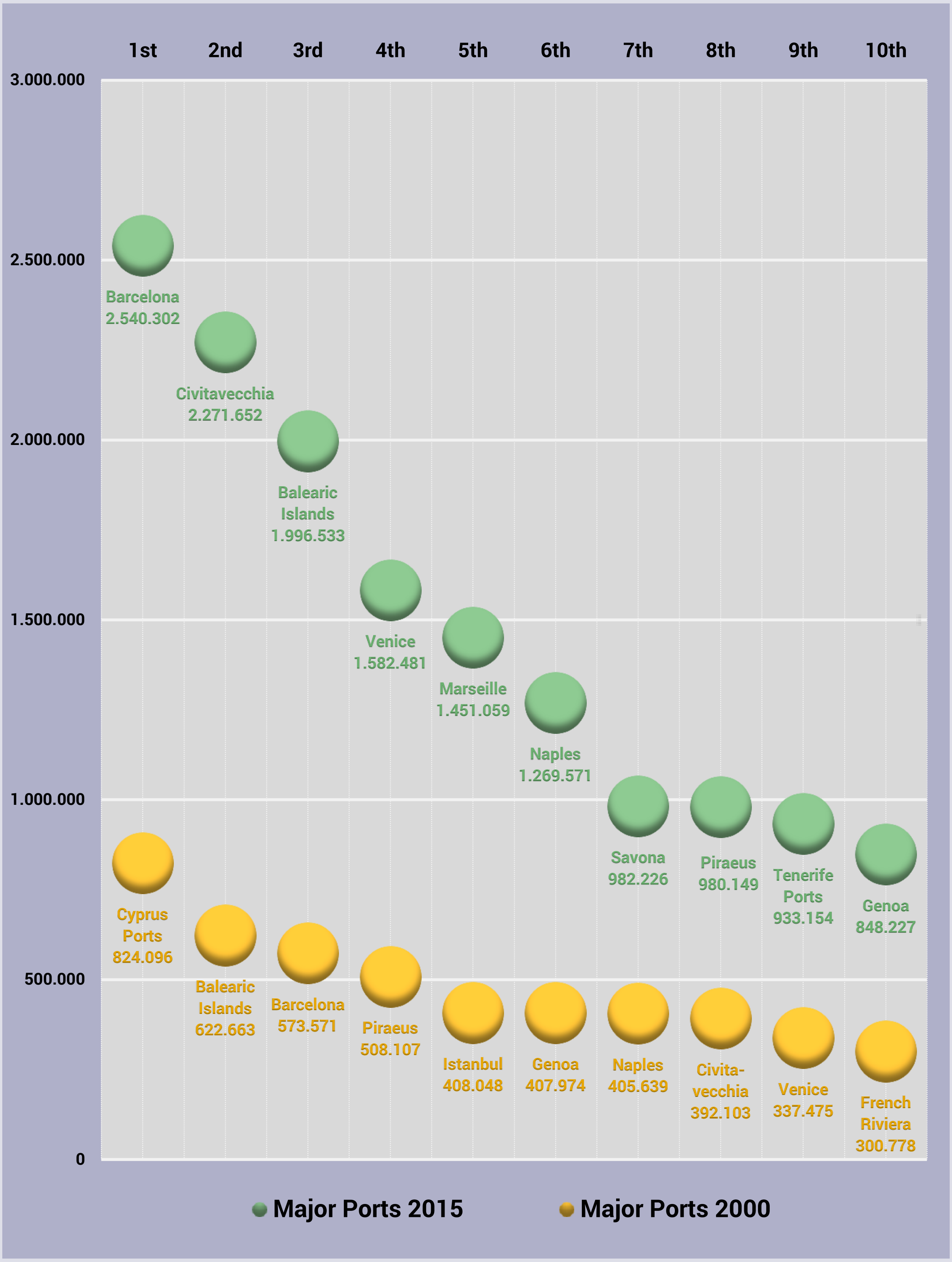
APPENDIX VI

Seasonality of cruise activities in MedCruise Ports

(Cruise Pax Shares of MedCruise Ports per region – Shares per trimester in 2015)

Region	Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	Alicante	24,98%	17,85%	53,25%	3,92%
	Azores	44,47%	3,20%	33,68%	18,65%
	Balearic Islands	20,91%	42,46%	31,43%	5,20%
	Barcelona	23,12%	35,11%	32,47%	9,29%
	Bastia/North Corsica	25,96%	50,03%	24,01%	0,00%
	Cagliari	27,09%	27,65%	38,87%	6,39%
	Cartagena	25,37%	32,82%	39,32%	2,49%
	Castellon	76,50%	0,00%	23,50%	0,00%
	Ceuta	37,07%	0,00%	62,93%	0,00%
	Civitavecchia	20,68%	38,59%	32,54%	8,19%
	French Riviera Ports	19,97%	49,65%	29,49%	0,89%
	Genoa	26,92%	25,36%	33,20%	14,53%
	Gibraltar	24,11%	33,32%	36,09%	6,48%
	Gioia Tauro	6,06%	23,07%	70,87%	0,00%
	Huelva	34,96%	0,00%	65,04%	0,00%
	La Spezia	16,91%	45,20%	29,87%	8,02%
	Lisbon	26,76%	19,48%	42,63%	11,13%
	Livorno	21,06%	44,99%	31,20%	2,75%
	Madeira Ports	28,31%	7,17%	33,23%	31,29%
	Malaga	31,49%	12,64%	40,01%	15,86%
	Marseille	24,04%	31,02%	33,73%	11,21%
	Messina	22,02%	35,61%	39,03%	3,35%
	Monaco	26,45%	37,28%	32,66%	3,61%
	Motril-Granada	31,37%	3,58%	65,05%	0,00%
	Naples	19,47%	42,49%	29,59%	8,45%
	North Sardinian Ports	18,97%	54,37%	26,23%	0,43%
	Palamos	31,67%	36,93%	30,41%	1,00%
	Palermo	28,78%	31,12%	24,30%	15,80%
	Portimao	34,91%	27,38%	34,87%	2,84%
	Portoferraio	12,65%	59,29%	28,06%	0,00%
	Portofino	34,59%	36,01%	29,40%	0,00%
	Savona	28,06%	20,69%	36,83%	14,42%
	Sete	17,21%	38,50%	41,23%	3,06%
	Tarragona	5,77%	49,93%	44,30%	0,00%
	Tenerife Ports	n.a	n.a	n.a	n.a
	Toulon-Var Provence	17,48%	40,81%	37,56%	4,15%
	Tunisian Ports	38,52%	0,00%	0,00%	61,48%
	Valencia	25,24%	28,17%	38,62%	7,97%
	Valletta	26,77%	28,78%	38,93%	5,52%

Region	Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Adriatic	Bari	14,18%	49,39%	36,43%	0,00%
	Brindisi	18,95%	47,53%	33,52%	0,00%
	Corfu	16,21%	47,25%	35,67%	0,87%
	Dubrovnik	16,86%	48,95%	34,09%	0,10%
	Koper	26,12%	41,35%	32,53%	0,00%
	Kotor	17,32%	47,09%	35,47%	0,12%
	Ravenna	25,17%	46,15%	28,68%	0,00%
	Rijeka	16,73%	40,73%	42,55%	0,00%
	Sibenik	25,53%	46,56%	21,63%	6,27%
	Split	23,78%	38,27%	37,71%	0,24%
	Taranto	0,00%	7,54%	92,46%	0,00%
	Venice	18,06%	47,95%	33,95%	0,04%
	Zadar	19,11%	50,94%	29,05%	0,90%
East Med	Alanya	52,13%	27,24%	20,62%	0,00%
	Cyprus Ports	24,71%	35,70%	39,39%	0,20%
	Heraklion	20,05%	31,96%	40,33%	7,66%
	Igoumenitsa	23,27%	2,82%	73,92%	0,00%
	Istanbul	19,99%	46,24%	32,57%	1,20%
	Kavala	12,86%	23,39%	63,75%	0,00%
	Kusadasi/Bodrum/Antalya	18,84%	43,85%	36,59%	0,73%
	Mersin	0,00%	0,00%	100,00%	0,00%
	Patras	0,00%	0,00%	100,00%	0,00%
	Piraeus	19,03%	41,47%	36,24%	3,27%
	Souda/Chania	12,31%	38,89%	48,80%	0,00%
	Thessaloniki	7,29%	29,55%	63,16%	0,00%
	Volos	15,97%	21,83%	51,41%	10,80%
Black Sea	Burgas	0,00%	42,34%	57,66%	0,00%
	Constantza	4,47%	61,17%	34,36%	0,00%
	Odessa	8,94%	59,53%	31,53%	0,00%
	Sinop	18,51%	3,10%	78,39%	0,00%
	Sochi	5,53%	59,04%	35,43%	0,00%
	Trabzon	38,46%	1,71%	59,82%	0,00%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Piraeus 980.149
Tenerife Ports 933.154
Genoa 848.227
Cyprus Ports 824.096
Balearic Islands 622.663
Barcelona 573.571
Piraeus 508.107
Istanbul 408.048
Genoa 407.974
Naples 405.639
Civita-vecchia 392.103
Venice 337.475
French Riviera 300.778
Major Ports 2015
Major Ports 2000

Activities map

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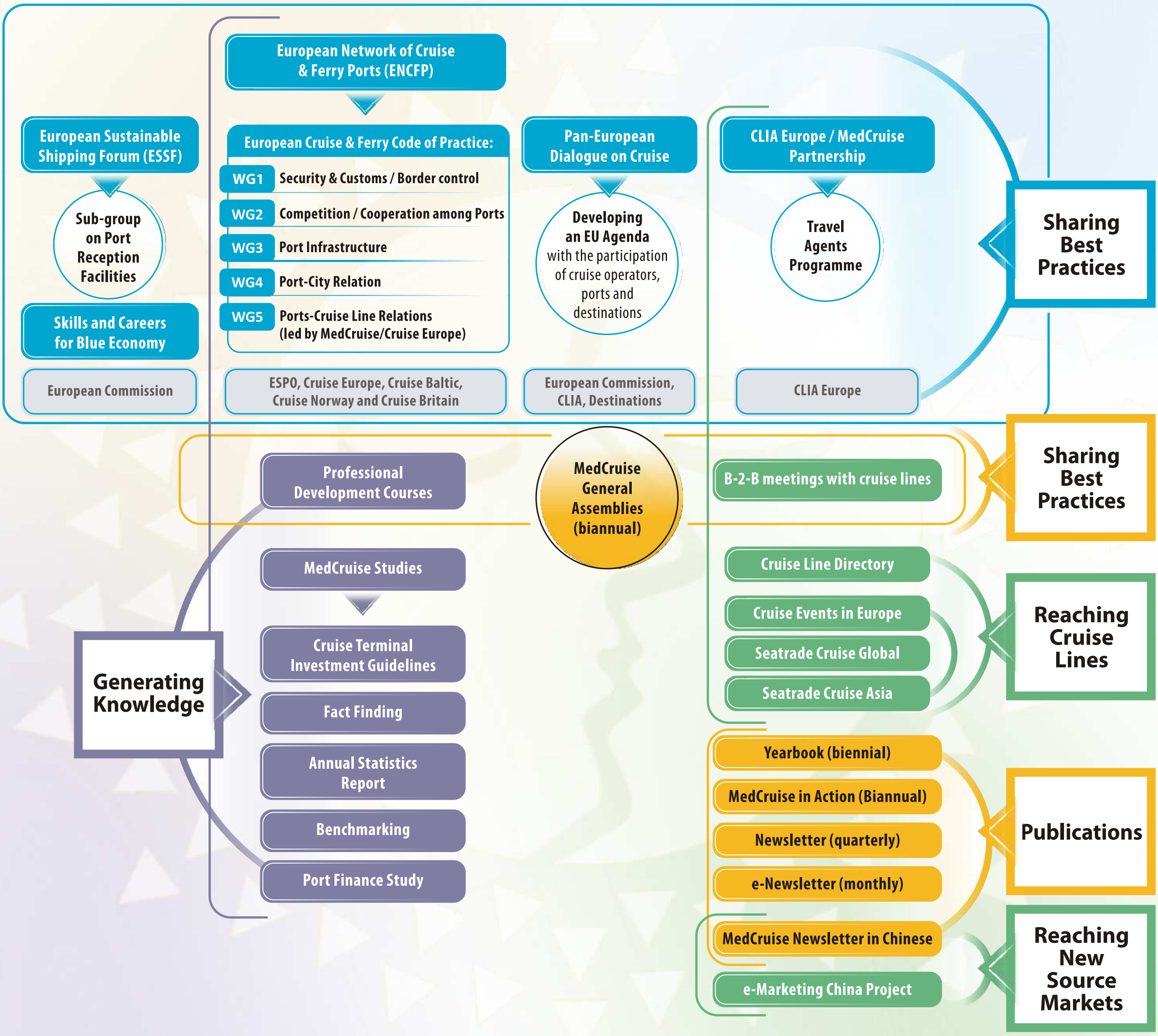
The Association of Mediterranean Cruise Ports



Blue: Shaping policies | Green: Promoting the cruise industry in the Med | Yellow: Sharing best practices and information | Purple: Generating knowledge

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The MedCruise Team

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

The members of the MedCruise Secretariat that prepared the report:

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