a MedCruise report

2019 Statistics

Cruise Activities in MedCruise Ports

Cruise Activities in MedCruise Ports **Statistics Report 2019**

A MedCruise Report produced by

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Version based on previous editions by Secretariat team.

PREFACE

I am proud to introduce to the cruise industry world the 2020 edition of the MedCruise statistical report Cruise Activities in MedCruise ports: Statistics Report 2019.

Published in May 2020, this report provides a well-known statistical analysis to the industry. This annual report reveals the previous year cruise activity and the mid-term trends in the Med and its adjoining seas, enabling an understanding of the present and future challenges.

It is an honour, as the President of such a great Association, to thank all members that contributed in making this publication possible and congratulate the MedCruise Secretariat for their excellent contribution in presenting the work of our Association. Cruise Activities in MedCruise ports: Statistics Report 2019 is among the flagship publications of MedCruise Association, being one of the studies conducted or commissioned by MedCruise to analyse the cruise industry in the second biggest region of the world.

This report analyses information of MedCruise members as well as details annual figures and trends of the four regions that compose our Association –West Med, Adriatic, East Med and Black Sea. It also contains analysis per port size and seasonality as well as comparisons with data recorded and provided by our members from the previous year. This report does not include the chapter on the cruise traffic forecast of 2020 due to the COVID-19 sanitary crisis. The impact of this outbreak will be analysed in next editions.

MedCruise members welcomed more than 31 million cruise passenger movements -which means an 12% increase compared to the previous year- and 13,692 cruise calls in 2019. The statistics reveal the positive features in several parts of the Med and its adjoining seas. MedCruise launched two Working Groups focused on promoting the cruise industry in the regions where some ports have experienced a decline due to the economic, social and/or political instability.

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

Once again, I would like to highlight the extraordinary work that our members had done in 2019 in collaboration with other stakeholders and, above all, encourage them to continue working together and generating new opportunities with MedCruise for the future.

#PortsTogether

Airam Díaz Pastor
MedCruise President

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1 Introduction

1.1 MedCruise is the Association of the Mediterranean Cruise Ports and its Adjoining Seas since 1996

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

Today, the Association has grown up to 73 members from 21 countries and 3 continents representing more than 135 ports around the Mediterranean regions, including the West Med, Adriatic, East Med and Black Sea; plus 33 associate members, representing associations, tourist boards, ship/port agents and other cruise industry companies.

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

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

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

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

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

1.2 **The Report**

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

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

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

The present edition of "**Cruise activities in MedCruise ports: Statistics report 2019** " has been conducted by the Secretariat, and analyses the statistical data recorded and reported by the members of the Association.

This edition is part of a long series produced by the Association for many years.

1.3 MedCruise Membership

Table 1.1 Countries Represented in MedCruise

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

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

Table 1.2 MedCruise Port Members

73 MEMBERS, +135 CRUISE PORTS

West Med

Azores, Balearic Islands, Barcelona, Bastia / North Corsica, Cabo Verde, Canarian ports, Cartagena, Castellón, Catania / Augusta, Ceuta, Civitavecchia / Fiumicino /Gaeta, Costa Brava Cruise Ports, French Riviera Ports, Genoa / Savona, Gibraltar, Gioia Tauro, Huelva, La Spezia / Marina Di Carrara, Leixoes (Porto), Lisbon, Livorno 2000, Livorno / Piombino / Portoferraio, Madeira Ports, Málaga, Marseille, Messina, Monaco, Motril-Granada, Naples / Salerno / Castellammare di Stabia, Palermo, Portimao, Portofino, Sardinian Ports, Sète, Tangier, Tarragona, Tenerife Ports, Toulon-Var Provence, Tunisian Ports, Valencia, Valletta

Adriatic

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

East Med

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

Black Sea

Burgas, Constantza, Odessa, Trabzon, Varna

In many cases, members are entities that manage and represent more than one port in the same region, which reflects the organisational heterogeneity of port governance and organisation. The total amount of ports that make up the MedCruise family is well above 135.

Moreover, 33 associate members, representing tourist boards, ship agents, port agents as well as other cruise-industry-related- organisations, also share the benefits of being part of the MedCruise family. MedCruise is in the process of a major upgrade of its associate members program, aiming to increase the prospect of the respective destinations. The list of the Associate members as of 01 January 2020 is detailed in Table 1.3.

Table 1.3 MedCruise Associate Members

Algeria Cruise Services	Cemar- Genoa	Council of Sant Carles de la Rapita
Cruise services- Monaco	Ceuta Tourism	Cyprus Deputy Ministry of Tourism
DP World- Limassol	Dubrovnik County Port Authority	Intercruises Shoreside & Ports Services
Kyriakakis Travel	Kvarner County Tourism Office	Lanzarote tourism
La Goulette Cruise Terminal	Medov S.r.I- Venice	Mercantile Marine Shipping
MH Bland - Gibraltar	Pan Marine Group	Patronat Turisme Costa Brava
Peninsula Tours	Perez y Cia	Puertos del Estado
Seaway Shipping	Salamis Shipping	Samer & Co Shipping -Trieste
SNEAL	Terminal Napoli	Tenerife Tourism Corporation
TRAINOSE	Transcoma Cruise & Travel	Tura Turizm-Sinop
Turisme de Barcelona	Turkish Chamber of Shipping (TCS)	Var Provence Cruise Club

33 ASSOCIATE MEMBERS

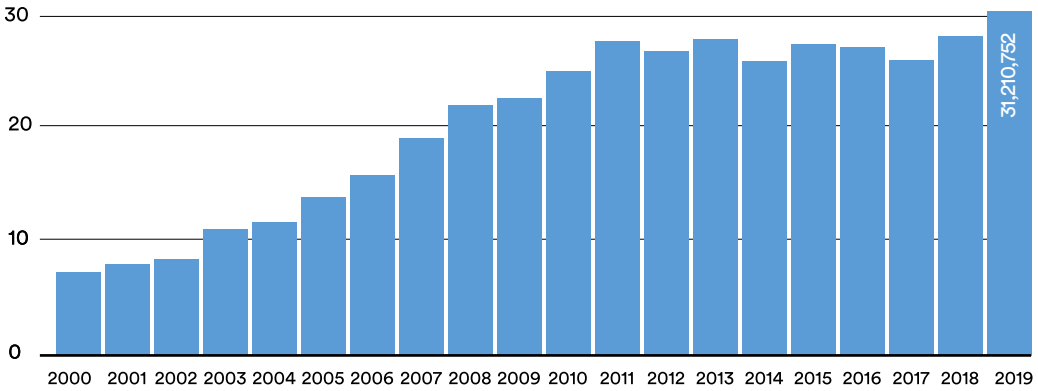
1.4 Evolution of the Cruise Activity in MedCruise Ports

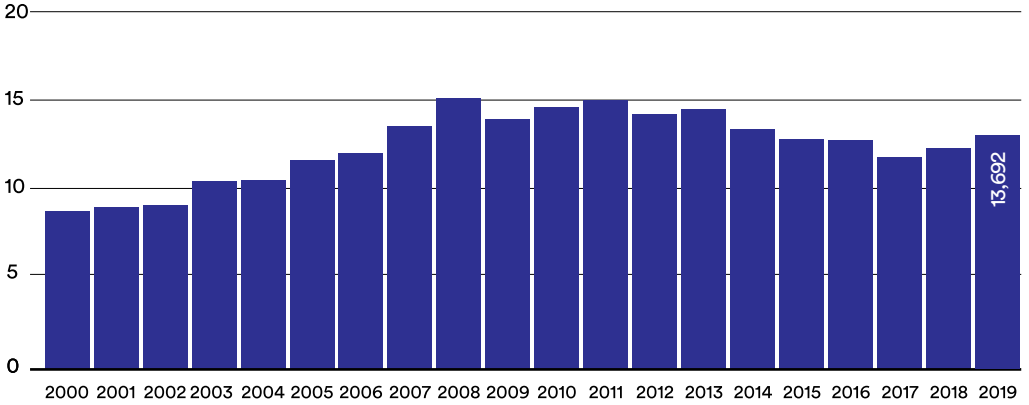
The total number of cruise passenger movements at MedCruise Ports during 2019 reached more than 31 million. It's a record signed thanks to a +11.51% growth on the cruise passenger movements that took place in 2018 at the same ports. Since 2011, the total number of cruise passengers that visited MedCruise Ports never went below of 25 million.

The total number of cruise ship calls in MedCruise Ports in 2019 reached 13,692 (Figure 1.2). This figure means a +8.55% increase compared to the 12,613 cruise calls recorded in 2018. It is the second time since 2013 that the ship calls register a positive variation on the previous year, consequence of the added capacity deployed by the cruise companies in the Med.

Figures 1.1 and 1.2 Cruise Passenger Movements (millions) and Cruise Calls (miles) in MedCruise Ports, 2000-2019

Since 2000 Pax. Movements Grew by 325%





+ 11.51% → 1 year (2019/2018)
+ 25.39% → 10 years (2019/2010)

+ 8.55% → 1 year (2019/2018)
- 8.68% → 10 years (2019/2010)

The ratio of Transit passengers to passengers home-porting from MedCruise port members stands at 71/29. This ratio remains stable over time, as it is almost the same throughout the last 10 years. Interesting to notice how in the first year of the Association the ratio was 50/50 with homeport traffic to double in 20 years while Transit port is now more than 4 times bigger than that.

Figure 1.3: Cruise Passengers Kind Ratio (2000-2019)

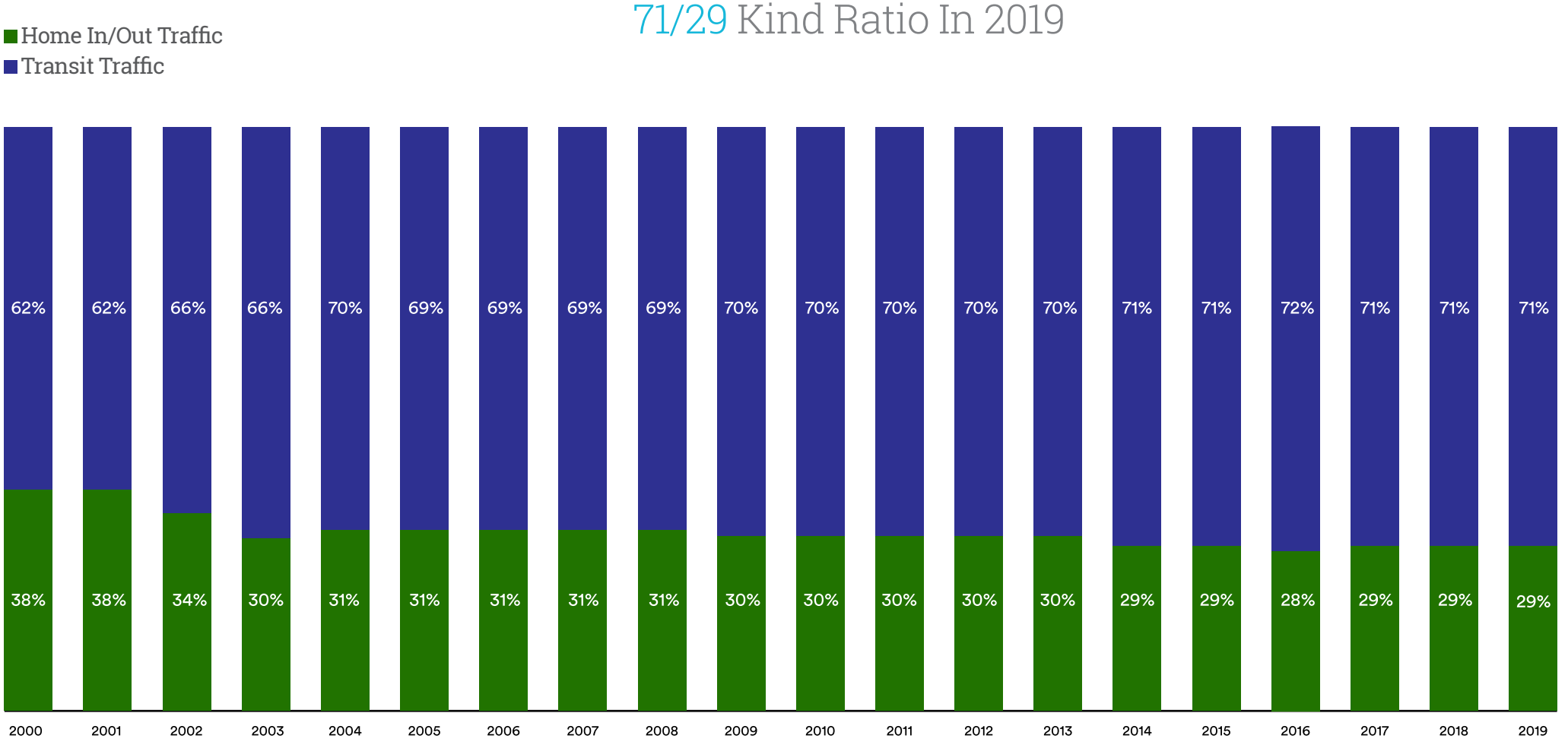
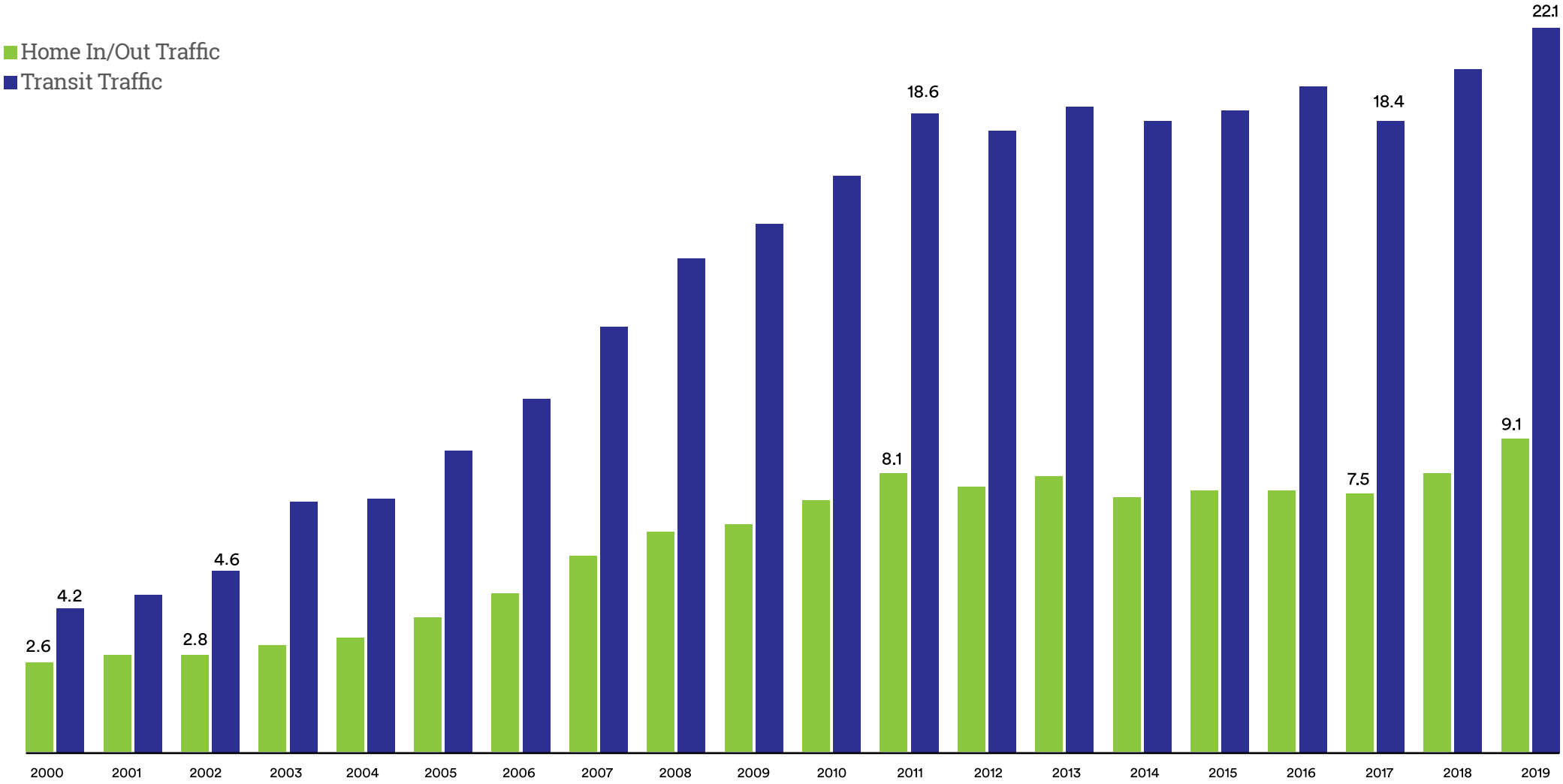


Figure 1.4: Cruise Passengers Kind, Absolute Values (2000-2019) in millions

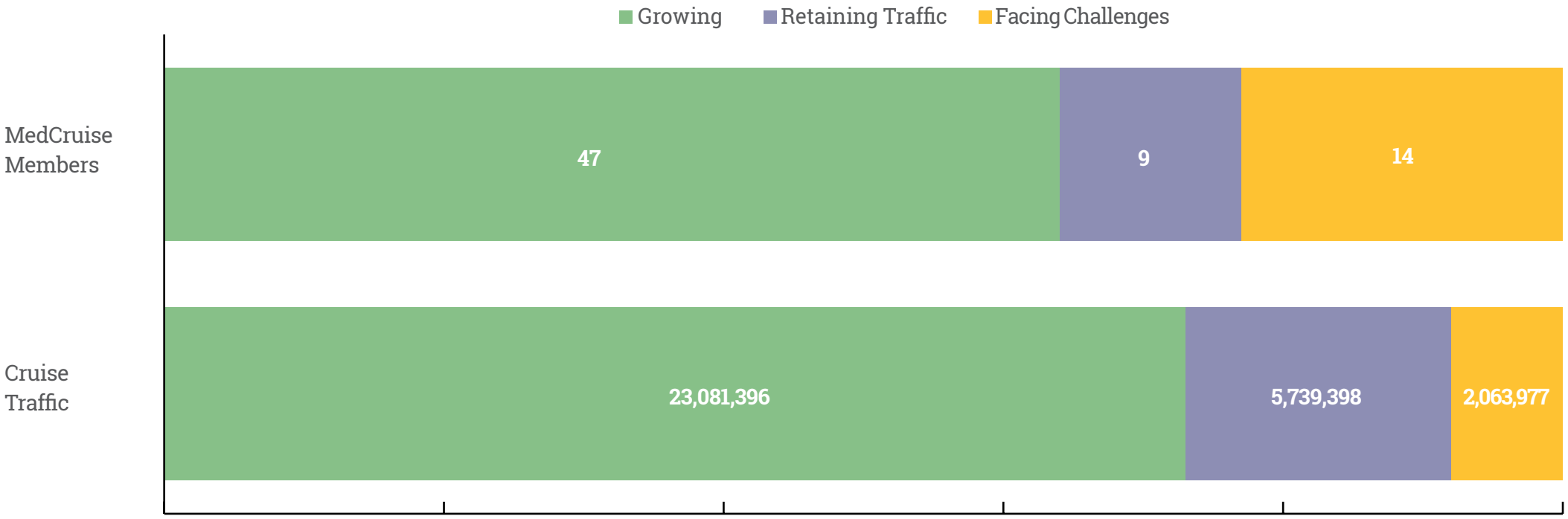
2019 as the greatest year in the Med for transit traffic



1.5 Cruise Passenger Movements in MedCruise Ports in 2019

Figure 1.5 presents an overview of cruise traffic recorded at each MedCruise port member in 2019 and the annual variation comparing to 2018. In 47 MedCruise port members, the recorded cruise passenger visits increased over the past year. 9 other port members retained the levels of cruise passengers that they had recorded the year before (a port belongs to this group when its traffic's variation on the previous year is between -3% and +3%), whereas 14 members faced challenges in retaining in 2019 the numbers of cruise passenger movements hosted in 2018. In line with the MedCruise Constitution, a MedCruise Port Member might administer or operate multiple ports of the same geographical region. This might occasionally affect to specific results of the statistical analysis, for instance rankings or averages.

Figure 1.5
Cruise Passengers Kind, Absolute Values, 2000-2019



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

Alanya ↑ 14,138 367%	Ancona, Ortona, Pesaro ↑ 101,981 52%	Antalya/ Bodrum/ Kusadasi ↑ 186,955 41%	Ashod ↑ 27,433 33%	Azores ↓ 148,973 -9%	Balearic Islands ↑ 2,658,156 9%	Barcelona = 3,137,918 3%	Bari / Brindisi ↑ 763,195 12%	Bastia / North Corsica ↓ 23,454 -31%
Burgas = 0 0%	Cabo Verde ↑ 49,878 689%	Canarian Ports ↑ 1,930 39%	Cartagena ↑ 250,058 9%	Castellón ↑ 5,452 863%	Catania ↑ 208,509 65%	Ceuta ↓ 9,351 -41%	Civitavecchia/ Fiumicino/Gaeta ↑ 2,652,403 9%	Constantza ↑ 450 100%
Corfu ↑ 807,197 10%	Costa Brava Cruise Ports ↑ 56,731 11%	Cyprus Ports ↑ 132,828 327%	Dubrovnik/ Korcula ↑ 804,881 10%	Egyptian Ports ↑ 72,964 6190%	French Riviera Ports ↑ 697,361 14%	Genoa/Savona ↑ 2,018,847 9%	Gibraltar ↓ 328,057 -19%	Gioia Tauro ↓ 5,250 -38%
Haifa 237,284 n/a	Heraklion = 307,043 3%	Huelva ↓ 1,409 -88%	Igoumenitsa ↓ 1,053 -92%	Istanbul = 0 0%	Kavala ↑ 2,699 33%	Koper ↑ 115,581 14%	Kotor ↑ 614,747 25%	La Spezia/ Marina Di Carrara ↑ 649,568 38%
Leixoes 88,697 n/a	Lisbon = 571,259 -1%	Livorno/ Piombino/ Portoferraio ↑ 888,346 9%	Madeira Ports ↑ 596,818 10%	Málaga ↓ 475,745 -6%	Marseille ↑ 1,865,918 9%	Messina ↑ 422,732 14%	Monaco ↑ 183,468 8%	Motril-Granada ↑ 9,413 77%
Naples/Salerno /Castellammare di Stabia ↑ 1,454,023 24%	Odessa ↑ 750 n/a	Palermo ↓ 532,973 -12%	Patras ↓ 1,219 -26%	Piraeus ↑ 1,098,091 14%	Portimao ↓ 22,861 -38%	Portofino ↑ 64,152 78%	Rijeka ↑ 41,137 277%	Sardinian Ports ↓ 481,924 -6%
Sète = 111,837 -2%	Sibenik ↓ 19,134 -46%	Souda/Chania ↑ 265,956 90%	Split ↑ 359,955 17%	Tangier ↑ 36,986 18%	Taranto ↑ 9,205 1299%	Tarragona ↑ 128,089 31%	Tenerife Ports ↑ 1,067,440 5%	Thessaloniki ↑ 4,926 265%
Toulon-Var Provence ↑ 168,306 56%	Trabzon = 0 0%	Tunisian Ports ↑ 648 n/a	Valencia ↑ 435,616 6%	Valletta ↑ 902,425 27%	Varna = 0 0%	Venice = 1,611,341 3%	Volos ↓ 12,574 -60%	Zadar ↑ 183,034 10%

MedCruise Ports reached in Total 31.21 million cruise pax (+11.51%)

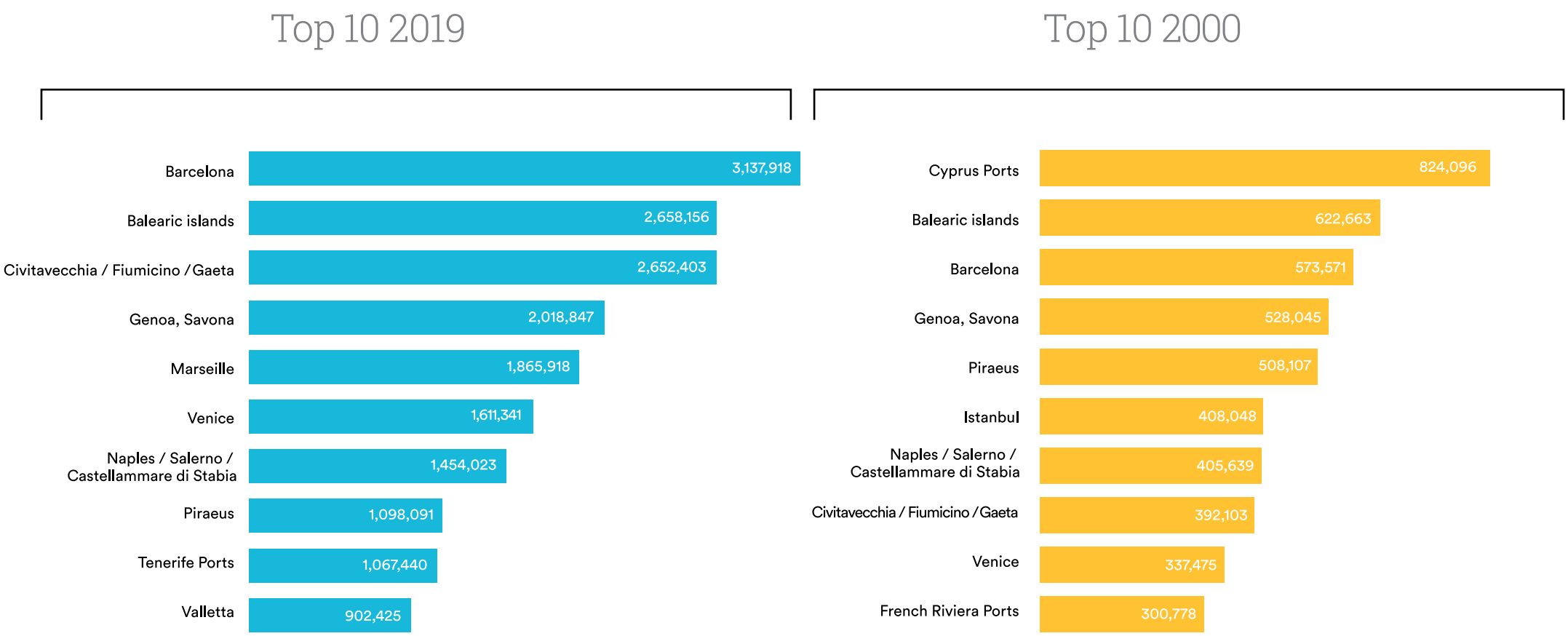
Table 1.4 MedCruise Ports Cruise Traffic Data 2019

No.	Port	MedCruise Region	Total Pax.	Total Calls	Home In Pax.	Home Out Pax.	Transit Pax
1	Alanya	East Med	14,138	26	0	0	14,138
2	Ancona, Ortona, Pesaro	Adriatic	101,981	93	7,973	7,273	86,735
3	Antalya / Bodrum / Kusadasi	East Med	186,955	212	10,425	18,706	157,824
4	Ashdod	East Med	27,433	32	0	0	27,433
5	Azores	West Med	148,973	142	1,055	987	146,931
6	Balearic Islands	West Med	2,658,156	819	982,697		1,675,459
7	Barcelona	West Med	3,137,918	800	877,622	875,600	1,384,696
8	Bari / Brindisi	Adriatic	763,195	301	133,676	136,199	493,320
9	Bastia / North Corsica	West Med	23,454	77	0	0	23,454
10	Burgas	Black Sea	0	0	0	0	0
11	Cabo Verde	West Med	49,878	146	354	258	49,266
12	Canarian ports	West Med	1,930	3	0	0	1,930
13	Cartagena	West Med	250,058	166	0	0	250,058
14	Castellón	West Med	5,452	5	0	0	5,452
15	Catania	West Med	208,509	113	6,430	5,927	196,152
16	Ceuta	West Med	9,351	6	0	0	9,351
17	Civitavecchia / Fiumicino /Gaeta	West Med	2,652,403	800	554,609	556,933	1,540,861
18	Constantza	Black Sea	450	1	0	0	450
19	Corfu	Adriatic	807,197	420	35,213	72,666	699,318
20	Costa Brava Cruise Ports	West Med	56,731	50	0	0	56,731
21	Cyprus Ports	East Med	132,828	94	13,122	12,396	107,310
22	Dubrovnik / Korcula	Adriatic	804,881	622	35,953	37,157	731,771
23	Egyptian Ports	East Med	72,964	55	0	0	72,964

24	French Riviera Ports	West Med	697,361	346	28,026	29,943	639,392
25	Genoa / Savona	West Med	2,018,847	435	549,815	546,927	922,105
26	Gibraltar	West Med	328,057	197	0	0	328,057
27	Gioia Tauro	West Med	5,250	9	0	0	5,250
28	Haifa	East Med	237,284	131	82,949	82,946	71,389
29	Heraklion	East Med	307,043	204	23,124	23,596	260,323
30	Huelva	West Med	1,409	7	0	0	1,409
31	Igoumenitsa	East Med	1,053	5	0	0	1,053
32	Istanbul	East Med	0	0	0	0	0
33	Kavala	East Med	2,699	7	0	0	2,699
34	Koper	Adriatic	115,581	72	0	0	115,581
35	Kotor	Adriatic	614,747	464	707	719	613,321
36	La Spezia / Marina Di Carrara	West Med	649,588	186	0	3,842	645,726
37	Leixoes	West Med	88,697	101	689	743	87,265
38	Lisbon	West Med	571,259	310	36,272	36,558	498,429
39	Livorno / Piombino / Portoferraio	West Med	888,346	477	6,365	5,979	876,002
40	Madeira Ports	West Med	596,818	300	3,060	2,992	590,766
41	Málaga	West Med	475,745	288	23,757	19,432	432,556
42	Marseille	West Med	1,865,918	497	452,774		1,413,144
43	Messina	West Med	422,732	170	9,604	9,913	403,215
44	Monaco	West Med	183,468	163	16,294	16,641	150,533
45	Motril-Granada	West Med	9,413	32	0	0	9,413
46	Naples / Salerno / Castellammare di Stabia	West Med	1,454,023	526	114,753	115,858	1,223,412
47	Odessa	Black Sea	750	1	0	0	750
48	Palermo	West Med	532,973	228	41,084	41,816	450,073
49	Patras	East Med	1,219	2	0	0	1,219
50	Piraeus	East Med	1,098,091	622	206,864	203,648	687,579
51	Portimao	West Med	22,861	57	972	1,071	20,818
52	Portofino	West Med	64,152	96	0	0	64,152
53	Rijeka	Adriatic	41,137	24	0	0	41,137
54	Sardinian Ports	West Med	481,924	215	10,751	10,962	460,211
55	Sète	West Med	111,837	69	0	0	111,837
56	Sibenik	Adriatic	19,134	103	0	0	19,134

57	Souda/Chania	East Med	265,956	132	0	0	265,956
58	Split	Adriatic	359,955	282	0	0	359,955
59	Tangier	West Med	36,986	49	0	0	36,986
60	Taranto	Adriatic	9,205	7	0	0	9,205
61	Tarragona	West Med	128,089	63	15,579	15,894	96,616
62	Tenerife Ports	West Med	1,067,440	511	210,250		857,190
63	Thessaloniki	East Med	4,926	6	61		4,804
64	Toulon-Var Provence	West Med	168,306	86	5,720	5,799	156,787
65	Trabzon	Black Sea	0	0	0	0	0
66	Tunisian Ports	West Med	648	1	0	0	648
67	Valencia	West Med	435,616	203	33,889	35,243	366,484
68	Valletta	West Med	902,425	372	136,848	136,608	628,969
69	Varna	Black Sea	0	0	0	0	0
70	Venice	Adriatic	1,611,341	500	695,093	695,060	221,188
71	Volos	East Med	12,574	22	0	0	12,574
72	Zadar	Adriatic	183,034	131	659	710	181,665
	Total		**31,210,752**	**13,692**	**4,542,228**	**4,589,924**	**22,078,601**

Figure 1.6 Comparing MedCruise TOP 10: 2000 vs 2019



2 Cruise Activity Trends

2.1 Global Cruise Fleet and Deployment of Cruise Fleet

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

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

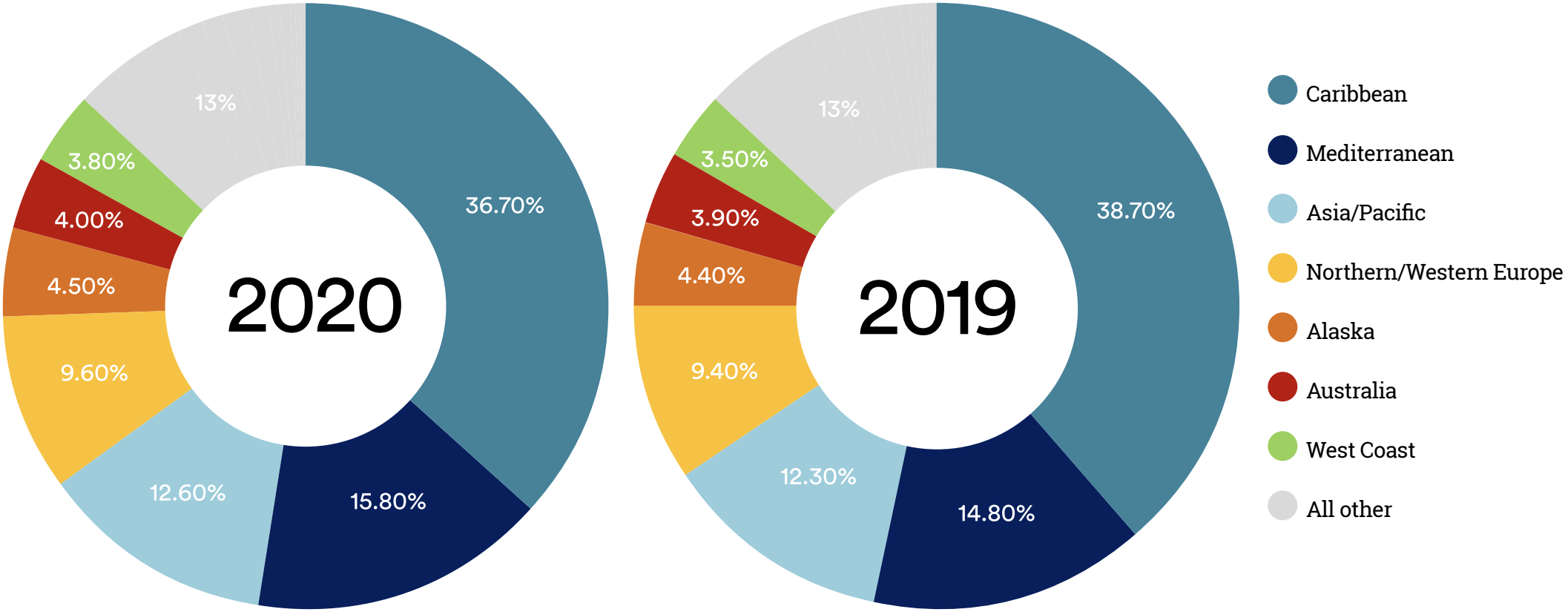
*Berths in thousands

Source: Cruise Industry News 2020-2021 Annual Report

The Mediterranean continued in 2019 being the second largest cruise destination, counting the 16.8% worldwide deployment including the Canary Islands (2%).

Figure 2.2 Global Deployment Shares, 2019 and 2020

One More Year Mediterranean Sea is the Second Region in the World



Source: Cruise Industry News 2020-2021 Annual Report

Source: Cruise Industry News 2019-2020 Annual Report

2.2 Contribution to the Global Economy

The cruise sector should generate more than $133 billion in the world. Europe will account for 38.7% of this value. Regarding employment figures, in Europe had been estimated 403.621 FTE jobs (36.4% on total in the world). All indicators show a positive variation in comparison to 2016 confirming the strengths of this sector and the relevance in all parts of the world.

Table 2.1 Total Cruise Sector Economic Contribution, 2017

Cruise Economic Contribution Is Growing.

Category	Global	Regional Markets		
		North America	Europe (EU+3)	Rest of World
Output($ Billion)	**$82.15**	$34.38	$36.66	$11.11
Share of Global		41.8%	44.6%	13.5%
Income($ Billion)	**$28.62**	$16 .19	$8.73	$3.7
Share of Global		56.6%	30.5%	12.9%
Employment	**607.000**	303.000	222.000	82.000
Share of Global		49.9%	36.6%	13.5%
Percent Change from 2017				
Output($ Billion)	12.6%	5.1%	20,2%	14.3%
Income ($ Billion)	10.0%	5.3%	19.4%	11.2%
Employment	5.0%	2.9%	6.5%	9.0%

Source: CLIA 2017 Global Economic Impact Study.

3 Trends in the Mediterranean and its Adjoining Seas

3.1 Evolution of Cruise Traffic (2015-2019)

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

The full list of ports included in this analysis, along with the raw material for passenger movements and cruise calls for 2019 as well as for the five previous years (2015-2019) can be found in the Appendix of this report. In total, 31,210,752 cruise passenger movements were registered in MedCruise Ports in 2019 (Table 3.1), which means a 11.51% increase in passenger movements compared to the previous year. The 5-year-variation of cruise passenger movements represents also an increase (+14.49%). It helps to reiterate that 2019 passenger movements represent the record at the time.

- 31,210,752 cruise passenger movements were registered in MedCruise port members in 2019.
- Annual variation: 11.51% more cruise passenger movements than in 2018.
- In 2019 for the first time more than 31 million passengers' movements recorded in the Mediterranean and its adjoining seas

Table 3.1 Evolution of Cruise Traffic in MedCruise Ports, 2015-2019

Year	Total Pax	% variation on previos year	Total Calls	% variation on previos year	Pax/Call	% variation on previos year
2019	31,210,752	11.51%	13,692	8.55%	2,279	12.72%
2018	27,989,197	8.00%	12,613	3.90%	2,219	3.94%
2017	25,915,573	-4.12%	12,139	-7.33%	2,135	3.46%
2016	27,028,895	-0.85%	13,099	-0.21%	2,063	-0.64%
2015	27,260,071	5.83%	13,127	-4.19%	2,077	10.48%
Variation 2019/2015		**14.49%**		**4.30%**		**9.77%**

3.2 Major MedCruise Ports

In 2019 the 10 major MedCruise Ports - in terms of cruise passengers - hosted a total of 18.5 million passenger movements, for a strong +9.23% variation over 2018 (Table 3.2).

All ports included in the top 10 registered positive variations over 2018, ranging from the 26.92% of Valletta member to the 3.15% of Barcelona.

For the second year the Port of Barcelona exceeds the threshold of 3 million cruise passenger movements. For the first time, the second biggest cruise port in the Med was Balearic Islands. The Port of Valletta enters the top10 this year (it ranked 13 in 2018).

The 5-year-variation, considering the similar traffic data of 2018 and 2015, is also around +19%, with Valletta to lead the ranking with +35.04% followed by Balearic Islands (+33.14%) and Marseille (+28.59%).

2019:
The major Mediterranean cruise port, Barcelona, reaches an all-time record, for the second consecutive year, hosting more than 3 million passenger movements.

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

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

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

Table 3.2 Major MedCruise Port Members per Cruise Pax Movements, 2019

Rank 2019	(Rank 2018)	Port	Total Pax 2019	Total Pax 2018	2019/2018	Total Pax 2015	2019/2015
1	(1)	Barcelona	3,137,918	3,041,963	3.15%	2,540,302	23.53%
2	(3)	Balearic Islands	2,658,156	2,431,153	9.34%	1,996,533	33.14%
3	(2)	Civitavecchia / Fiumicino /Gaeta	2,652,403	2,441,737	8.63%	2,271,652	16.76%
4	(4)	Genoa, Savona	2,018,847	1,854,273	8.88%	1,830,453	10.29%
5	(5)	Marseille	1,865,918	1,716,184	8.72%	1,451,059	28.59%
6	(6)	Venice	1,611,341	1,560,579	3.25%	1,582,481	1.82%
7	(7)	Naples / Salerno / Castellammare di Stabia	1,454,023	1,171,764	24.09%	1,269,571	14.53%
8	(9)	Piraeus	1,098,091	961,632	14.19%	980,149	12.03%
9	(8)	Tenerife Ports	1,067,440	1,015,150	5.15%	933,154	14.39%
10	(13)	Valletta	902,425	711,018	26.92%	668,277	35.04%
		Total (Major -10)	**18,466,562**	**16,905,453**	**9.23%**	**15,523,631**	**18.96%**

As far as the cruise calls are concerned, the 10 MedCruise major ports reached a total of 6,174 (Table 3.3), a +5% up on the previous year. At the first 3 positions the same members of 2018: Balearic Islands, Barcelona and Civitavecchia/Fiumicino/Gaeta. The highest variation 2019/2018 is the one of Dubrovnik / Korcula as well as the biggest positive 2019/2015.

Balearic Islands reached the top position of this ranking with 819 calls in 2019. This equals a decrease of 40 calls, or 4.66% comparing to 2018. Barcelona and Civitavecchia / Fiumicino / Gaeta go right below on the list, with 800 calls each one.

Cruise Calls

2019
The most called Mediterranean cruise member is Balearic Islands with an average of 2.2 call each day of the year.

2019
Cruise calls got back to the 2014 value.

Table 3.3 Major MedCruise Port Members per Cruise Calls, 2019

Rank 2019	Ranks 2018	Port	Total Calls 2019	Total Calls 2018	2019/2018	Total Calls 2015	2019/2015
1	(1)	Balearic Islands	819	859	-4.66%	788	3.93%
2	(2)	Barcelona	800	830	-3.61%	749	6.81%
3	(3)	Civitavecchia / Fiumicino /Gaeta	800	760	5.26%	794	0.76%
4	(5)	Piraeus	622	524	18.70%	621	0.16%
5	(10)	Dubrovnik / Korcula	622	438	42.01%	475	30.95%
6	(9)	Naples / Salerno / Castellammare di Stabia	526	458	14.85%	445	18.20%
7	(4)	Tenerife Ports	511	546	-6.41%	506	0.99%
8	(7)	Venice	500	502	-0.40%	521	-4.03%
9	(6)	Marseille	497	505	-1.58%	442	12.44%
10	(8)	Livorno / Piombino / Portoferraio	477	458	4.15%	481	-0.83%
		Total (Major -10)	**6,174**	**5,880**	**5.00%**	**5,822**	**6.05%**

In total, 38 cruise ports recorded home-porting activities in 2019, embarking and disembarking passengers. The 10 biggest of them hosted, in aggregate, a total of almost 8 million Home In/Out passengers, 810,367 more (+11.32%) than in 2018 (Table 3.4).

Barcelona remains as the most popular cruise home-port in the Med, with more than 86,000 Home In/Out passengers compared to 2018. Venice also remains at the second position with a 5.23% positive variation in the previous year. Civitavecchia/Fiumicino/Gaeta reached, together as member, the third position, overcoming Genoa/Savona.

Comparing with 2015, the 2019 top10 MedCruise members per Home In/Out passengers show a total significantly higher (+22.19%). In a top10 characterized by positive variations, the negative ones have been collected by Genoa / Savona together with Marseille.

Home in/ Home out

•In 2019: all MedCruise Members of the TOP10 recorded growth in home-port traffic with the entire area growing as cruise destination.

Table 3.4 Major MedCruise Port Members per Home In/Out pax, 2019

There Is a High Concentration of Turnaround Traffic in Few Cruise Ports

(Half of Home In/Out Cruisers are in the First 4 Port Members)

Rank 2019	Rank 2018	Port	Home In/Out Pax 2019	Home In/Out Pax 2018	2019/2018	Home In/Out Pax 2015	2019/2015
1	(1)	Barcelona	1,753,222	1,666,767	5.19%	1,363,754	28.56%
2	(2)	Venice	1,390,153	1,321,006	5.23%	1,364,044	1.91%
3	(4)	Civitavecchia / Fiumicino /Gaeta	1,111,542	956,758	16.18%	868,143	28.04%
4	(3)	Genoa / Savona	1,096,742	1,078,401	1.70%	1,213,051	-9.59%
5	(5)	Balearic Islands	982,697	858,435	14.48%	553,928	77.41%
6	(6)	Marseille	452,774	438,443	3.27%	503,325	-10.04%
7	(7)	Piraeus	410,512	354,398	15.83%	284,241	44.42%
8	(10)	Valletta	273,456	156,825	74.37%	140,512	94.61%
9	(8)	Bari / Brindisi	269,875	230,711	16.98%	106,213	154.09%
10	(12)	Naples / Salerno / Castellammare di Stabia	230,611	99,473	131.83%	126,672	82.05%
		Total (Major -10)	**7,971,584**	**7,161,217**	**11.32%**	**6,523,883**	**22.19%**

In a year with relevant higher traffic on the previous one, also the total Transit cruise passengers in the major MedCruise Ports registered has grown, showing a positive variation of 7.42% (Table 3.5). All the ports in this Top 10 contributed to generating the overall positive variation, particularly Marseille, Naples/Salerno/Castellammare di Stabia and Genoa/Savona.

Balearic Islands returned to the top of the list of the major cruise ports in terms of Transit passengers after one year, as recorded a growth of 6.53%. In 2019, the number of visiting cruise passengers in Balearic Islands was 1.68 million. Comparing to five years before (2015), Balearic Islands hosted +16.14% or around 130,113 more Transit passengers in 2019.

The 10 major Med ports in terms of Transit passengers hosted significantly more passenger movements (11,32 million) than those they had hosted five years earlier, back in 2015 (8,81 million). Genoa/Savona is the member that tops the list in terms of percentage growth within these five years (49.35%), followed by Marseille and Genova/Savona. In absolute values, around 0.9 of the 2.5 million passengers come from Balearic Islands, Marseille and Corfu.

TRANSIT

- 2018: for the third time five members hosted more than 1.000.000 Transit passenger movements (first time in 2013, second in 2015)
- 2007: The first time that a single Med port (Naples) hosted more than 1.000.000 million Transit passengers.
- 2000: Balearic Islands topped the list hosting 355.566 Transit cruise passengers. It would rank as 20th biggest port in the Med in 2016.

Table 3.5 Major MedCruise Port Members per Transit Pax, 2019

Genoa/Savona, Marseille and Corfu Had all Together 0.9 Million Transit Passengers More Than in 2015

Rank 2019	Rank 2018	Port	Transit Pax 2019	Transit Pax 2018	2019/2018	Transit Pax 2015	2019/2015
1	(1)	Balearic Islands	1,675,459	1,572,718	6.53%	1,442,605	16.14%
2	(2)	Civitavecchia / Fiumicino /Gaeta	1,540,861	1,484,979	3.76%	1,403,509	9.79%
3	(4)	Marseille	1,413,144	1,277,741	10.60%	947,734	49.11%
4	(3)	Barcelona	1,384,696	1,375,196	0.69%	1,176,548	17.69%
5	(5)	Naples / Salerno / Castellammare di Stabia	1,223,412	1,071,291	14.20%	1,142,899	7.04%
6	(8)	Genoa / Savona	922,105	781,484	17.99%	617,402	49.35%
7	(7)	Livorno / Piombino / Portoferraio	876,002	801,919	9.24%	731,260	19.79%
8	(6)	Tenerife Ports	857,190	853,347	0.45%	n/a	n/a
9	(9)	Dubrovnik / Korcula	731,771	669,293	9.33%	768,887	-4.83%
10	(10)	Corfu	699,318	653,573	7.00%	577,420	21.11%
		Total (Major -10)	**11,323,958**	**10,541,541**	**7.42%**	**8,808,264**	**28.56%**

3.3 Major Variations in MedCruise Ports

This chapter tables show the major variations when comparing cruise traffic, in terms of total cruise passenger movements (Table 3.6), cruise calls (Table 3.7), Home In/Out passengers (Table 3.8) and Transit passengers (Table 3.9). It's a way to shed light on ports that can't be included in rankings on absolute values. In order to better understand the trends, these tables provide both a short-term view by comparing data recorded in 2019 to 2018, as well as a medium-term perspective by comparing cruise passengers and cruise call statistics of 2019 with those of 2015.

Remarkable variations of the total passenger movements hosted by each port in the Med were observed within just one year. In 2019, the three ports that experimented the major variation to the previous year (2018) are Egyptian Ports, Taranto and Castellón (Table 3.6) while Taranto, Castellón and Taragona recorded the largest growth in 5 years.

Table 3.6 Total Cruise Passengers - Major Variations 2019/2018 and 2019/2015

Port	2019	2018	Var. 2019/2018	Port	2019	2018	Var. 2019/2018
Egyptian Ports	72,964	1,160	6190.0%	Taranto	9,205	314	2831.5%
Taranto	9,205	658	1298.9%	Castellón	5,452	366	1389.6%
Castellón	5,452	566	863.3%	Tarragona	128,089	11,600	1004.2%
Cabo Verde	49,860	6,320	688.9%	Ceuta	9,351	1,613	479.7%
Alanya	14,138	3,027	367.1%	Sète	111,837	20,555	444.1%

Table 3.7 Total Cruise Calls - Major Variations 2019/2018 and 2019/2015

Port	2019	2018	Var. 2019/2018	Port	2019	2015	Var. 2019/2015
Egyptian Ports	55	2	2650.0%	Tarragona	63	11	472.7%
Castellón	5	1	400.0%	Ancona, Ortona, Pesaro	93	24	287.5%
Cabo Verde	146	30	386.7%	Taranto	7	2	250.0%
Taranto	7	2	250.0%	Rijeka	24	7	242.9%
Cyprus Ports	94	40	135%	Canarian ports	3	1	200.0%

The major variation is recorded in the MedCruise member Cyprus Ports, that increased up to 25,518 in 2019. In a 5-year period, the Port of Tarragona added to the 11 Home In/Out passengers of 2015, more than 31,400 passengers.

Table 3.8 Total Home In/Out - Major Variations 2019/2018 and 2019/2015

Port	2019	2018	Var. 2019/2018	Port	2019	2015	Var. 2019/2015
Cyprus Ports	25,518	1,632	1463.6%	Tarragona	31,473	11	286018.2%
Naples, Salerno, Castellammare di Stabia	230,611	99,473	131.8%	Heraklion	46,720	3,344	1297.1%
Portimao	2,043	960	112.8%	Portimao	2,043	238	758.4%
Sardinian Ports	21,713	11,355	91.2%	Livorno /Piombino / Portoferraio	12,344	4,181	195.2%
Valletta	273,456	156,825	74.4%	Bari / Brindisi	269,875	106,213	154.1%

Transit passenger movements show different variations. Compared to the previous year, 2019 transit passengers in Egyptian Ports added almost 72,000 passengers to the 1,160 transit passengers of 2018. The Port of Taranto counted more than 9,000 transit passengers with an increase of 1300% compared with 2018. In 5 years, Port of Taranto, with more than 9,200 transit passengers, shows an increase of 2800% compared to 2015.

Table 3.9 Total Transit Passengers - Major Variations 2019/2018 and 2019/2015

Port	2019	2018	Var. 2019/2018	Port	2019	2015	Var. 2019/2015
Egyptian Ports	72,964	1,160	6190.0%	Taranto	9,205	314	2831.5%
Taranto	9,205	658	1298.9%	Castellón	5,452	366	1389.6%
Castellón	5,452	566	911.4%	Tarragona	96,616	11,589	733.7%
Cabo Verde	49,266	6,320	863.3%	Ceuta	9,351	1,613	479.7%
Alanya	14,138	3,027	367.1%	Sète	111,837	20,406	448.1%

3.4 **Passengers per Call**

The deployment of bigger vessels in the Mediterranean and the adjoining seas is evident by the continuous increase of the average number of cruise passengers that reach a destination per call. In 2019, the average number of hosted passengers per cruise call was 2,279.

The increase within the last two decades is even more impressive. In 2000 each cruise call in the Med was resulting in 813 passenger movements on average. Within 10 years, the average number of passengers per call moved up to 1,577 for each call, resulting in the new record of 2,279 in 2019 (Figure 3.1).

MEDCRUISE TRENDS

•2019: MedCruise Member ports averaged 2,279 passenger per call.

•2015: for the first time the (average) number of cruise passenger per call surpassed 2.000 pax.

• 2000: the value was only 813 per call.

Figure 3.1 Average Pax/Call in MedCruise Ports, 2000-2019

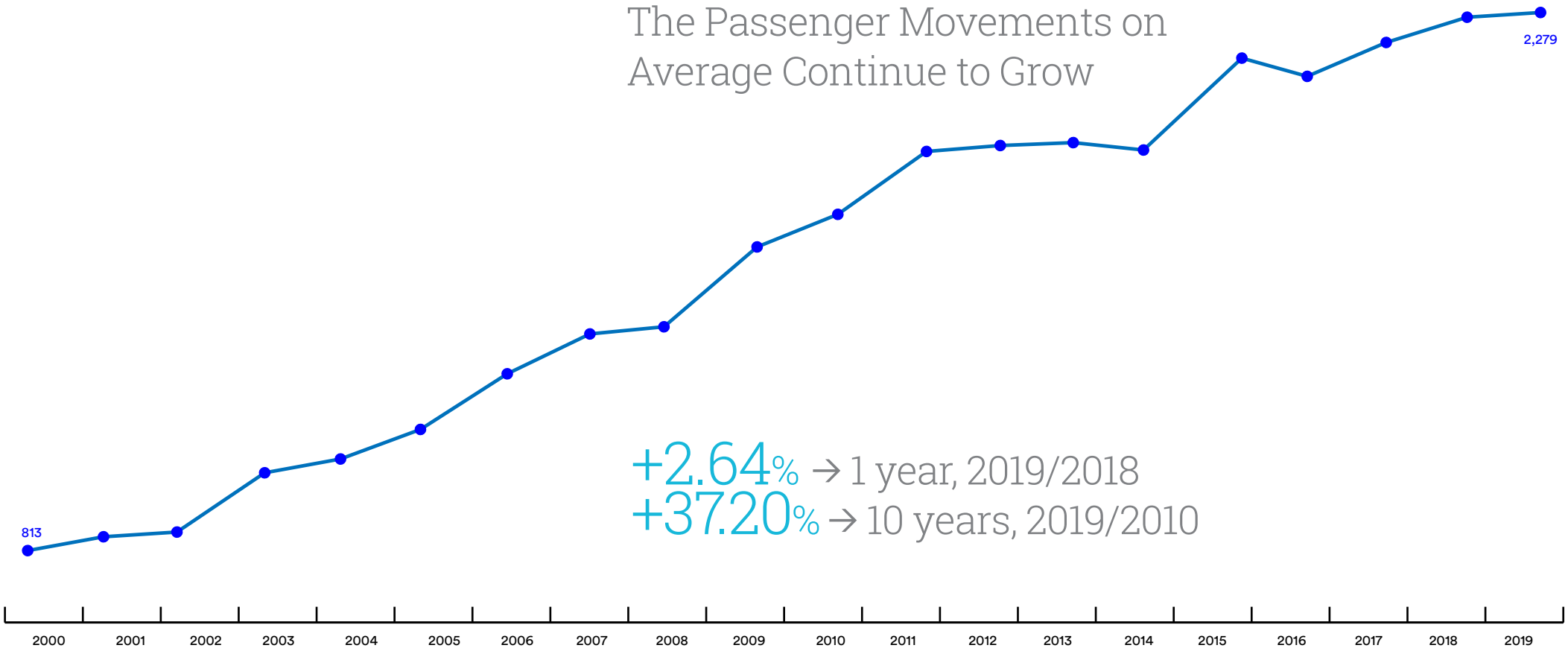
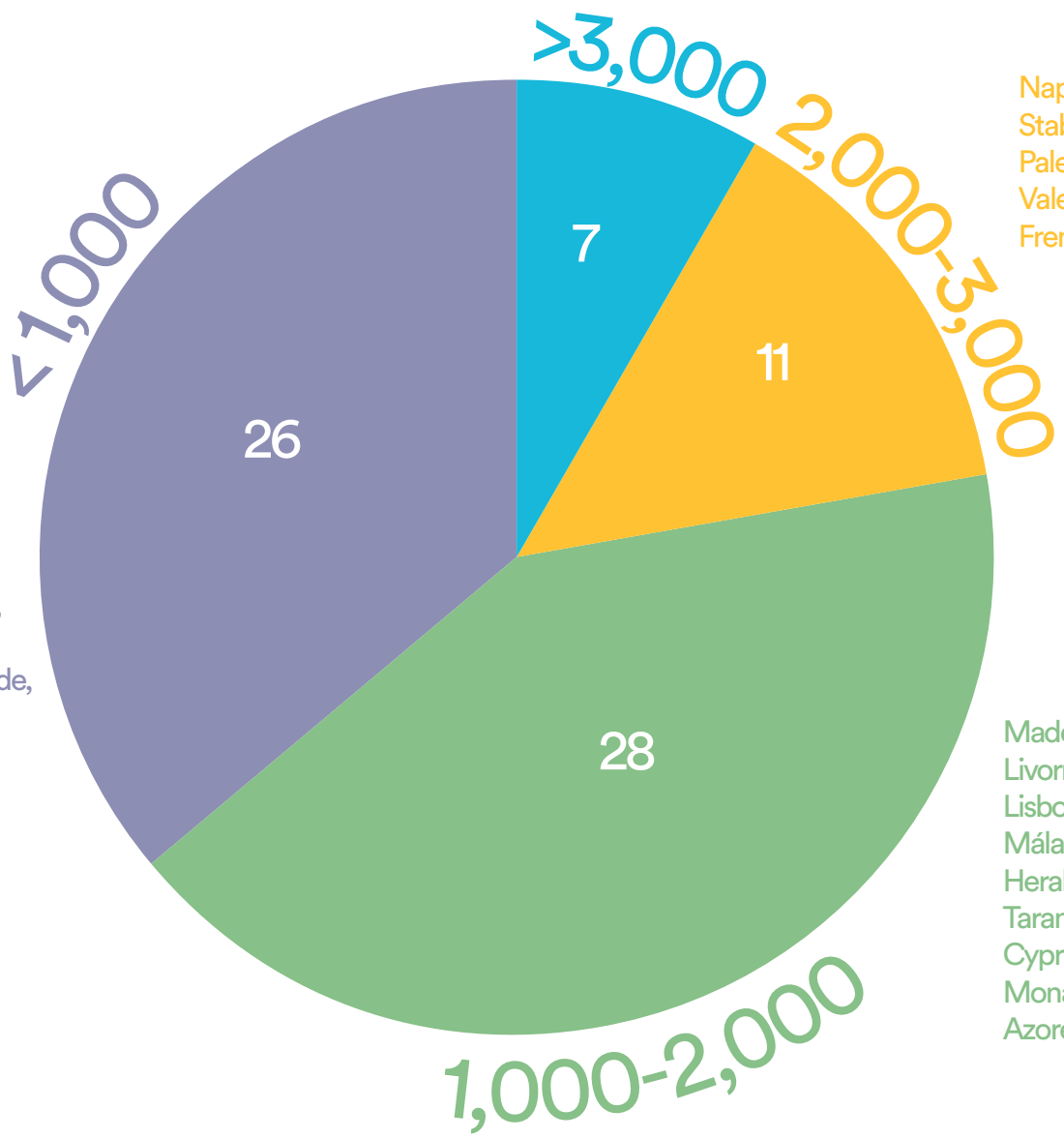


Table 3.10 MedCruise Port Overview per Cruise Pax/Call 2019



Genoa/Savona, Barcelona, La Spezia/Marina Di Carrara Marseille, Venice, Civitavecchia, Balearic Islands

Naples / Salerno / Castellammare di Stabia, Bari / Brindisi, Messina, Valletta, Palermo, Sardinian Ports, Valencia, Tenerife Ports, Tarragona, French Riviera, Souda/Chania

Antalya / Bodrum / Kusadasi, Leixoes, Ashdod, Thessaloniki, Tangier, Odessa, Portofino, Tunisian Ports, Canarian ports, Patras, Gioia Tauro, Volos, Alanya, Constantza, Portimao, Kavala, Cabo Verde, Bastia/North Corsica, Motril-Granada, Igoumenitsa, Huelva, Sibenik, Burgas, Istanbul, Trabzon, Varna

Madeira Ports, Toulon-Var Provence, Corfu, Livorno/Piombino/Portoferraio, Catania, Lisbon, Haifa, Piraeus, Rijeka, Gibraltar, Málaga, Sète, Koper, Ceuta, Cartagena, Heraklion, Zadar, Egyptian Ports, Kotor, Taranto, Dubrovnik/Korcula, Split, Cyprus Ports, Costa Brava Cruise Ports, Monaco, Ancona/ Ortona/Pesaro, Castellón, Azores

Table 3.11 Major MedCruise Pax/Cruise Call

7 Ports with More Than 3,000 Pax/Call, 18 Over 2,000 Pax/Call

No	Port	TP/TC 2019	TP/TC 2018	Variation 2019/2018	TP/TC 2015	Variation 2019/2015
1	Genoa, Savona	4,641	4,384	5.87%	4,267	8.77%
2	Barcelona	3,922	3,665	7.02%	3,392	15.65%
3	Marseille	3,754	3,398	10.47%	3,283	14.36%
4	La Spezia, Marina Di Carrara	3,492	2,695	29.59%	3,812	-8.38%
5	Civitavecchia	3,316	3,213	3.20%	2,861	15.89%
6	Balearic Islands	3,246	2,830	14.68%	2,534	28.10%
7	Venice	3,223	3,109	3.67%	3,037	6.10%
8	Naples/ Salerno /Castellammare di Stabia	2,764	2,558	8.05%	2,853	-3.11%
9	Bari / Brindisi	2,536	2,348	8.69%	2,501	2.05%
10	Messina	2,487	2,165	14.86%	2,048	21.41%
	Major -10	**35,826**	**32,573**	**9.98%**	**32,771**	**9.32%**
11	Valletta	2,426	2,208	9.86%	2,184	11.08%
12	Palermo	2,338	2,549	-8.31%	2,734	-14.51%
13	Sardinian Ports	2,242	2,325	-3.60%	2,039	9.95%
14	Valencia	2,146	2,115	1.44%	2,134	0.54%
15	Tenerife Ports	2,089	1,859	12.35%	1,844	13.27%
16	Tarragona	2,033	1,722	18.10%	1,055	92.80%
17	French Riviera Ports	2,015	1,794	12.30%	1,637	23.04%
18	Souda/Chania	2,015	1,848	7.65%	1,860	6.95%
19	Madeira Ports	1,989	1,741	12.41%	1,942	0.76%
20	Toulon-Var Provence	1,957	1,782	7.87%	1,591	20.83%
	Major -20 SUM	**56,418**	**52,083**	**8.32%**	**51,137**	**10.33%**

3.5 Cruise Traffic Concentration

Table 3.12 Major 20 MedCruise Ports - Cruise Pax. Concentration

Cruise Pax Concentration Increases

No	Port	Total Pax. 2019	2019	2018	2017	2016	2015
1	Barcelona	3,137,918	10.08%	10.05%	10.47%	9.93%	9.32%
2	Balearic Islands	2,658,156	8.54%	8.52%	8.14%	7.24%	7.32%
3	Civitavecchia	2,652,403	8.52%	8.50%	8.51%	8.66%	8.33%
4	Genoa / Savona	2,018,847	6.49%	6.47%	6.87%	7.13%	6.71%
5	Marseille	1,865,918	6.00%	5.98%	5.74%	5.91%	5.32%
	Major -5	**12,333,242**	**39.63%**	**39.52%**	**39.72%**	**38.87%**	**37.01%**
6	Venice	1,611,341	5.16%	5.58%	5.51%	5.94%	5.81%
7	Naples / Salerno / Castellammare di Stabia	1,454,023	4.66%	4.19%	3.58%	4.83%	4.66%
8	Piraeus	1,098,091	3.52%	3.44%	4.07%	4.05%	3.60%
9	Tenerife Ports	1,067,440	3.42%	3.63%	3.72%	3.27%	3.42%
10	Valletta	902,425	2.89%	2.54%	3.00%	2.53%	2.45%
	Major -10	**18,466,562**	**59.28%**	**58.88%**	**59.61%**	**59.49%**	**56.95%**
11	Livorno / Piombino / Portoferraio	888,346	2.85%	2.90%	2.81%	3.15%	2.70%
12	Corfu	807,197	2.59%	2.63%	2.62%	2.77%	2.37%
13	Dubrovnik / Korcula	804,881	2.58%	2.62%	2.89%	3.08%	3.05%
14	Bari, Brindisi, Manfredonia, Monopoli	763,195	2.45%	2.42%	1.95%	1.50%	1.91%
15	French Riviera Ports	697,361	2.23%	2.18%	2.68%	2.08%	2.00%
16	La Spezia, Marina Di Carrara	649,588	2.08%	1.69%	1.76%	1.88%	2.45%
17	Kotor	614,747	1.97%	1.76%	2.09%	1.99%	1.62%
18	Madeira Ports	596,818	1.91%	1.93%	2.09%	1.93%	2.13%
19	Lisbon	571,259	1.83%	2.06%	2.01%	1.93%	1.88%
20	Palermo	532,973	1.71%	2.16%	1.77%	1.89%	2.01%
	Major 20 - SUM	**25,392,927**	**81.47%**	**81.24%**	**82.27%**	**81.68%**	**79.06%**

Table 3.13 Major 20 MedCruise Ports - Cruise Calls Concentration

Cruise Calls Concentration Decreased Slightly

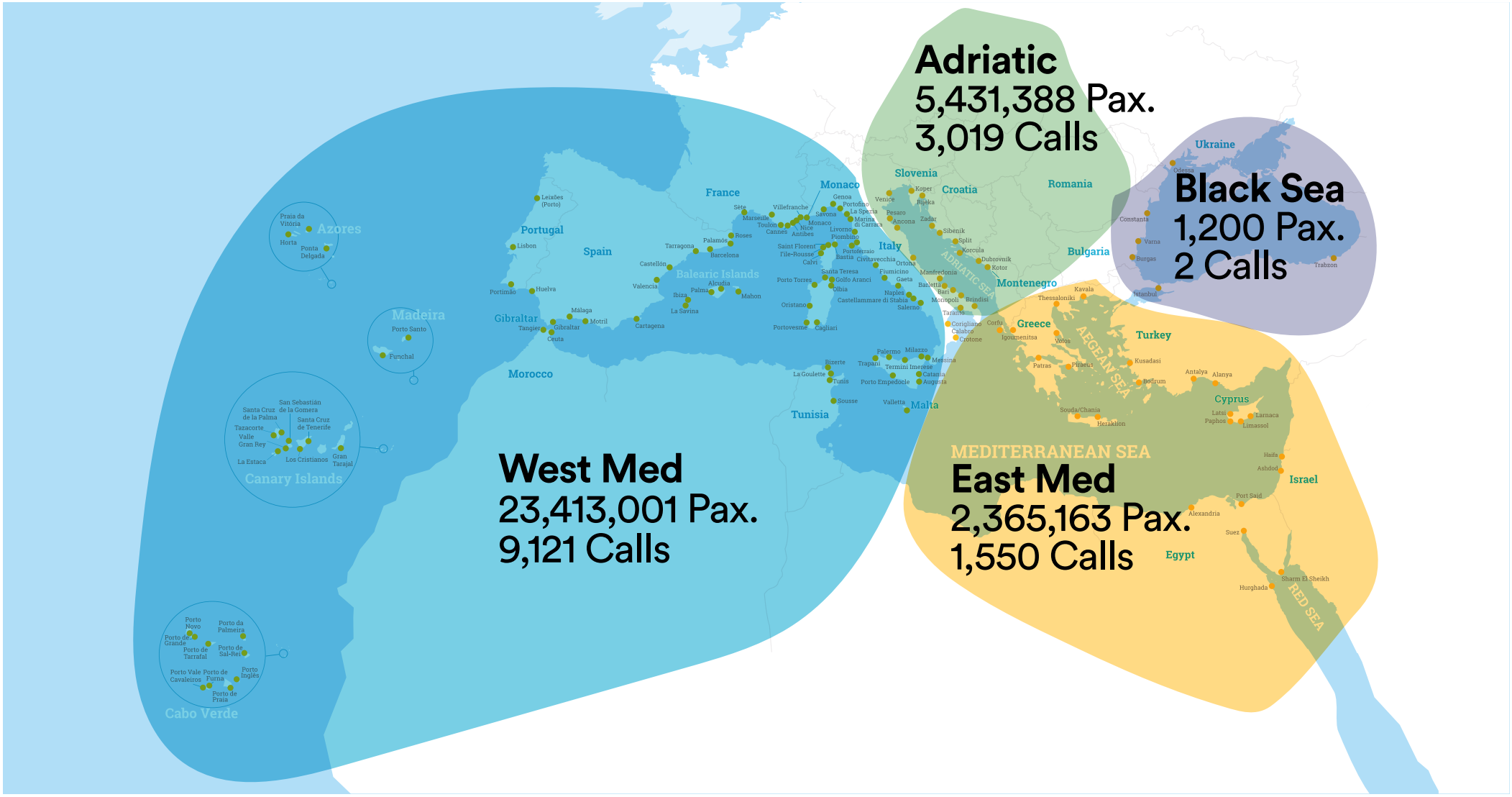
No	Port			2018	2017	2016	2015
1	Balearic Islands	819	5.98%	6.81%	6.75%	5.66%	6.00%
2	Barcelona	800	5.84%	6.58%	6.41%	5.79%	5.71%
3	Civitavecchia	800	5.84%	6.03%	6.01%	6.36%	6.05%
4	Dubrovnik / Korcula	622	4.54%	3.47%	4.44%	4.88%	3.62%
5	Piraeus	622	4.54%	4.15%	4.75%	4.77%	4.73%
	Major -5	**3,663**	**26.75%**	**27.04%**	**28.35%**	**27.46%**	**26.11%**
6	Naples / Salerno / Castellammare di Stabia	526	3.84%	3.63%	2.77%	3.76%	3.39%
7	Tenerife Ports	511	3.73%	4.33%	4.39%	4.00%	3.85%
8	Venice	500	3.65%	3.98%	3.84%	4.04%	3.97%
9	Marseille	497	3.63%	4.00%	3.66%	3.74%	3.37%
10	Livorno / Piombino / Portoferraio	477	3.48%	3.63%	3.73%	3.98%	3.66%
	Major -10	**6,174**	**45.09%**	**49.88%**	**50.28%**	**50.70%**	**47.48%**
11	Kotor	464	3.39%	3.26%	3.54%	3.72%	3.13%
12	Genoa / Savona	435	3.18%	3.35%	3.29%	3.52%	3.27%
13	Corfu	420	3.07%	3.27%	3.38%	3.67%	3.10%
14	Valletta	372	2.72%	2.55%	2.82%	2.42%	2.33%
15	French Riviera Ports	346	2.53%	2.76%	3.08%	2.48%	2.61%
16	Lisbon	310	2.26%	2.69%	2.72%	2.37%	2.33%
17	Bari, Brindisi, Manfredonia, Monopoli	301	2.20%	2.29%	1.53%	1.21%	1.58%
18	Madeira Ports	300	2.19%	2.32%	2.41%	2.27%	2.38%
19	Málaga	288	2.10%	2.36%	2.46%	1.93%	1.77%
20	Split	282	2.06%	2.06%	1.93%	2.18%	1.99%
	Major -20	**9,692**	**70.79%**	**72.66%**	**72.08%**	**71.61%**	**67.76%**

4 Analysis Per Medcruise Region

4.1 The MedCruise Regions

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

Map 4.1 Cruise Traffic by MedCruise Region in 2019



A total of 40 MedCruise members are located in the West Med region (Table 4.1). The cruise passenger movements that took place in these ports in 2019 reached 23.4 million, that equals to 9,121 total cruise calls. West Med is definitely the biggest region of the four in terms of the share of cruise activities; it hosted 75% of the total passenger movements and 66.6% of the cruise calls.

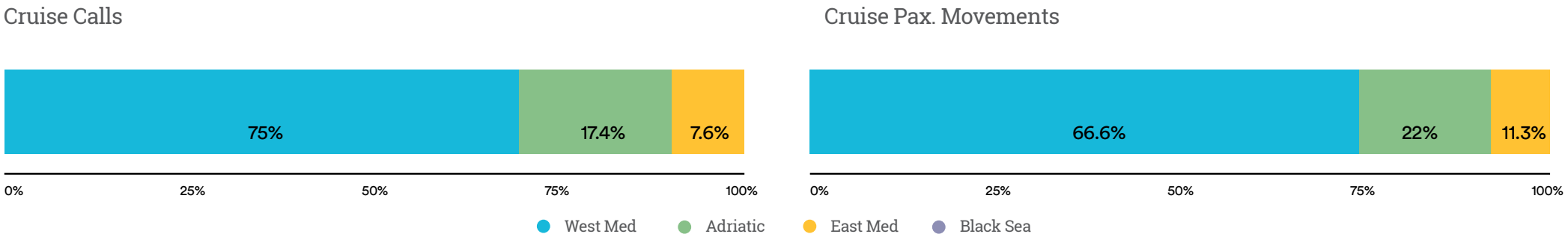
MedCruise has intensified its efforts to support the strategy of these ports to regain cruise activities among others by hosting international gathering of cruise stakeholders in its member ports located in the Black Sea.

Table 4.1 Total Cruise Traffic per Region, 2019

Region	No of Members	Total Pax Movements	Total Cruise Calls	Transit Pax Movements	Home In/Out Pax Movements
West Med	41	23,413,001	9,121	16,817,806	6,595,195
Adriatic	12	5,431,388	3,019	3,572,330	1,859,058
East Med	15	2,365,163	1,550	1,687,265	677,898
Black Sea	5	1,200	2	1,200	0
Total	**73**	**31,210,752**	**13,692**	**22,078,601**	**9,132,151**

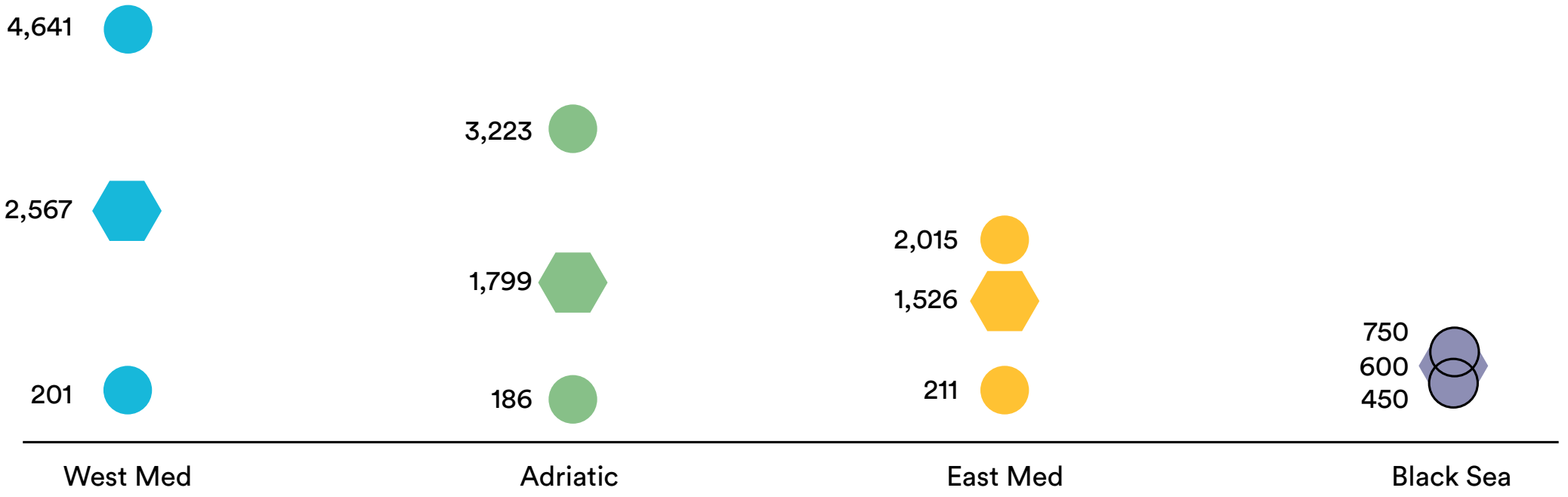
Figure 4.1 Cruise Passenger Traffic Shares per Region, 2019

3 Out of 4 Cruise Passengers Have Been Welcomed in West Med Ports



The four sub-regions have distinctive features as regards the type of cruise vessels that are deployed in each of them (Figure 4.2). Larger cruise ships are deployed in the West Med, where the average number of cruise passengers per call stands at 2,567. The Adriatic is the region where the second highest average of passengers/call is recorded (1,799), with the maximum observed at an Adriatic port being 3,223 passengers. Adriatic is the third in terms of MedCruise members (12) but the second biggest MedCruise region in terms of cruise activity. Cruise ships deployed in the East Med are even smaller, i.e. 1.523 passengers/call. The region where the smaller cruise ships of all are deployed is the Black Sea (average 600 passengers per call); Black Sea ports recorded just two (2) calls during 2019.

Figure 4.2 Average Cruise Passengers/Call per Region, 2019



4.2 Cruise Traffic Evolution per Region

Table 4.2 details the evolution and variation of cruise passenger movements, providing a picture of both short and mid-term trends. Adriatic stands as the most dynamic region with a 20.9% growth since 2015, and 11.10% growth comparing to 2018. The growth in West Med was 19% within five years term and 9.1% within one year term.

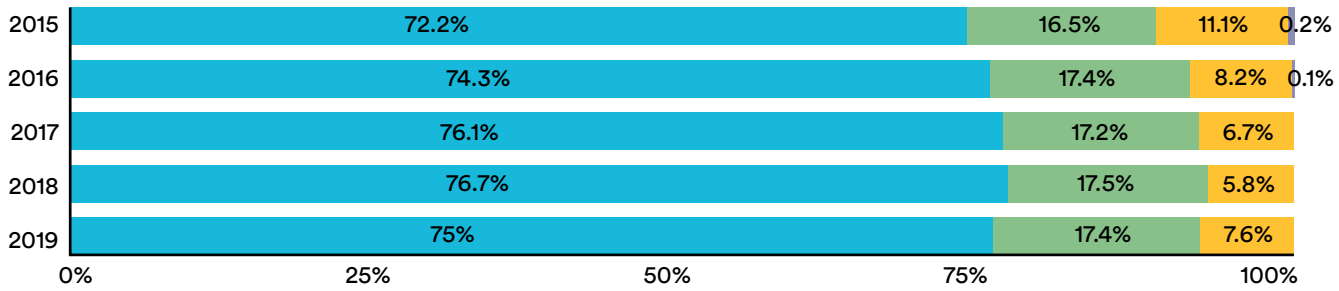
East Med and Black Sea are also shown positive numbers in 2019. Comparing to 2018, East Med dropped a quarter of its passenger movements the last five years but in 2019 registered 44.5% more passengers movements than 2018. Also Black Sea- the most dynamic region in 2015- dropped almost 100% of the traffic within the last five years. It seems today that the expectations for a durable stable external environment have confirmed and cruise activities are about to re-emerge. Black Sea registered 1,200 passengers movements in 2019. In 2018, Black Sea had zero passengers movements. The evolution of traffic concentration per region chart is particularly interesting (Figure 4.3), with West Med to remain dominant but steady and Adriatic gradually to increase its share.

Table 4.2 Total Cruise Passenger Movements Variations per Region

All Four Regions are Growing

Region	2019	2018	Variation 2019/2018	2015	Variation 2019/2018
West Med	23,413,001	21,463,157	9.1%	19,681,872	19.0%
Adriatic	5,431,388	4,889,351	11.1%	4,492,976	20.9%
East Med	2,365,163	1,636,689	44.5%	3,033,790	-22.0%
Black Sea	1,200	0	100.0%	51,433	-97.7%
Total	**31,210,752**	**27,989,197**	**11.51%**	**27,260,071**	**14.5%**

Figure 4.3 Cruise Passenger Movements Evolution per Region



East Med Shares are Increasing

West Med Adriatic East Med Black Sea

As regards the total number of cruise calls per region (table 4.3), the development of the four sub-regions were diverse. All the regions registered higher numbers of calls when comparing 2019 to the calls registered a year earlier. East Med (+46.6%) and Black Sea (100.00%) seem to recover gradually the traffic lost the last years. In Adriatic (+12.5%) and the West Med (+2.8%) remained almost stable. Looking at the 5-year trend, West Med and Adriatic ports have a single (+9.6%) and double-digit (+18.7%) increase accordingly. The decline was a significant one in the case of the East Med, where cruise calls declined by 29.4%, and even more significant in the Black Sea (-96.8%).

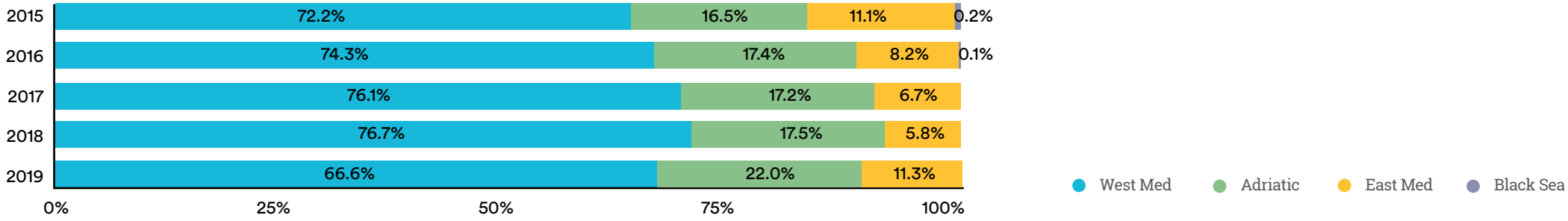
Following these developments, the share of cruise calls in West Med ports increased in the last five years from 63.4% of calls in the Med to 66.6%. The percentage of the Adriatic increased from 19.4% to 22.0%, while East Med and the Black Sea have seen their respective shares of the total cruise calls in the Med declining (figure 4.4)

Table 4.3 Total Cruise Calls Movements Variations per Region

West Med and Adriatic Ports Grew in the Past 5 Years

Region	2019	2018	Variation 2019/2018	2015	Variation 2019/2015
West Med	9,121	8,873	2.8%	8,323	9.6%
Adriatic	3,019	2,683	12.5%	2,544	18.7%
East Med	1,550	1,057	46.6%	2,197	-29.4%
Black Sea	2	0	100.0%	63	-96.8%
Total	**13,692**	**12,613**	**8.55%**	**13,127**	**4.30%**

Figure 4.4 Cruise Calls Evolution per Region



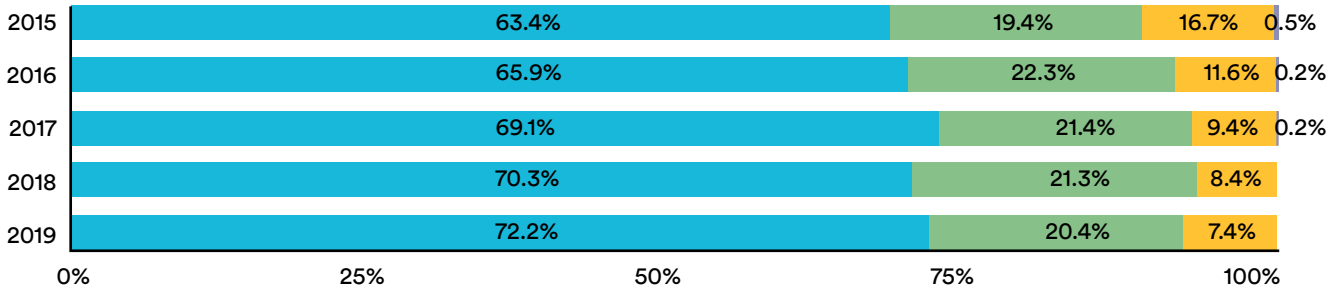
The West Med is the region where most home-porting activities are happening (Table 4.4). East Med homeporting activities show a remarkable annual increase of 64.3%, followed by Adriatic homeporting activities with 50.7%. The total amount recorded in 2019 was 37.12% more homeport passenger movements that 2018 and 30.05% than five years ago.

Figure 4.5 illustrates the shares of Home In/Out passengers per MedCruise region since 2015. Within this period, the share of the West Med and the Adriatic increased to reach 72.2% and 20.3% respectivetly, while the ones for the other 2 regions declined.

Table 4.4 Total Home In/Out Passenger Movements Variations per Region

Region	2019	2018	Variation 2019/2018	2015	Variation 2019/2015
West Med	6,595,195	5,013,541	31.5%	5,220,561	26.3%
Adriatic	1,859,058	1,233,543	50.7%	1,043,563	78.1%
East Med	677,898	412,712	64.3%	757,091	-10.5%
Black Sea	0	0	0.0%	689	-100.0%
Total	**9,132,151**	**6,659,796**	**37.12%**	**7,021,904**	**30.05%**

Figure 4.5 Cruise Home In/Out Passenger Movements Evolution per Region



Home In/Out Mov. Confirmed the Increasing Concentration of Med Traffic in the East Med and in the Adriatic

West Med Adriatic East Med Black Sea

In total, on an annual basis transit passengers in the Med and its adjoining seas increased in 2019 by 10.92% and equal to 22,078,601 passengers. This growth is the outcome of the increase of 2019 traffic of transit passengers in all four Med regions, West Med (+8.4%), Adriatic (+12.5%), East Med (+38.6%) and Black Sea (+100%).

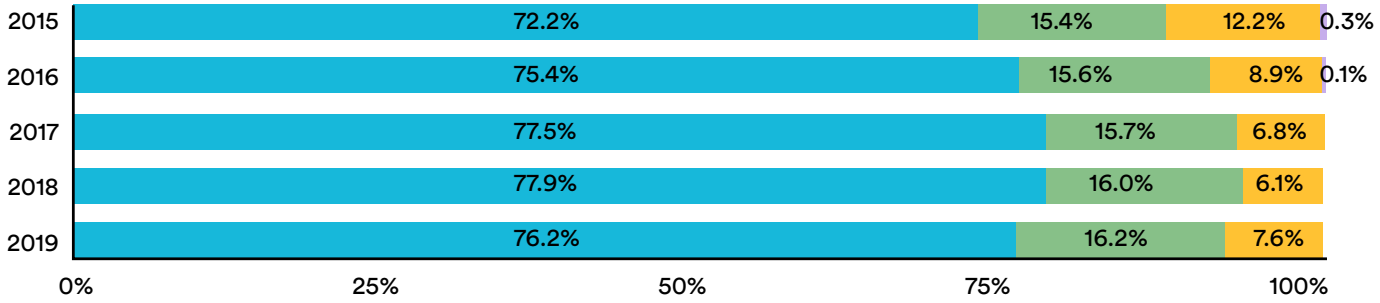
In terms of market share (Figure 4.6), West Med region handles almost five times more traffic than the second region in transit passenger movements market, the Adriatic.

Table 4.5 Total Transit Passengers Variations per Region

East Med Recorded the Highest Growth 2019/2018

Region	2019	2018	Variation 2019/2018	2015	Variation 2019/2015
West Med	16,817,806	15,510,686	8.4%	13,528,156	24.3%
Adriatic	3,572,330	3,176,174	12.5%	2,880,253	24.0%
East Med	1,687,265	1,217,458	38.6%	2,276,409	-25.9%
Black Sea	1,200	0	100.0%	50,744	-97.6%
Total	**22,078,601**	**19,904,318**	**10.92%**	**18,735,562**	**17.84%**

Figure 4.6 Cruise Transit Passengers Evolution per Region



The Concentration in Transit Pax Is Even Higher than the One in Home In/Out

West Med Adriatic East Med Black Sea

4.3 The MedCruise Growth Indexes (MEDGRI)

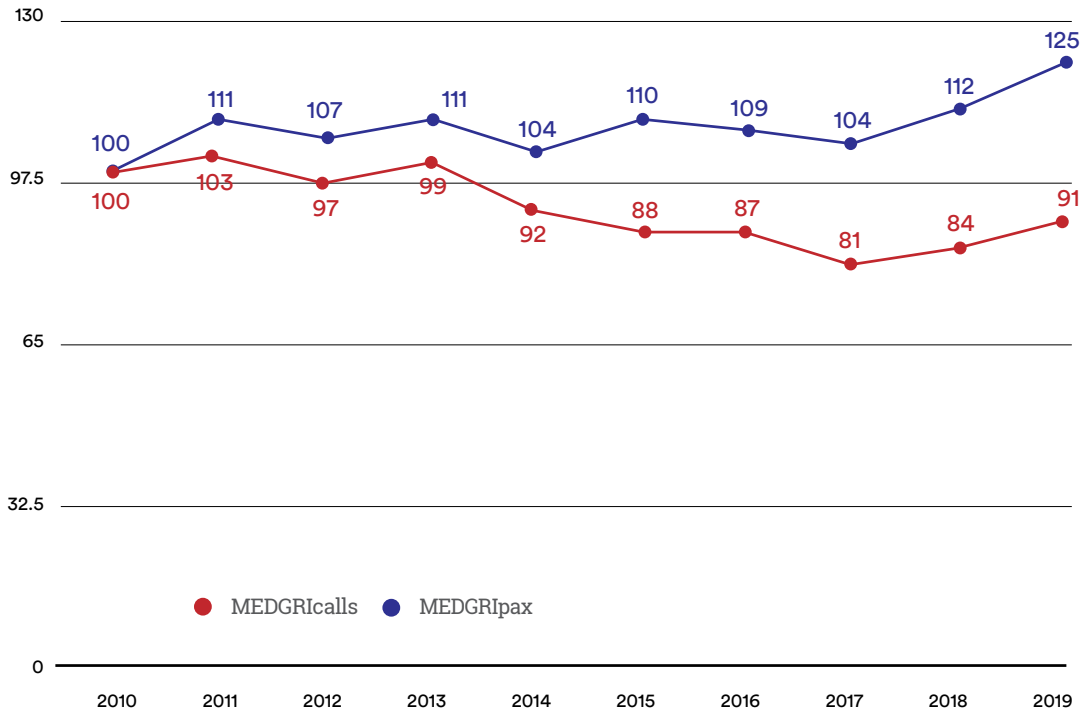
In order to facilitate the monitoring of cruise activity trends in the Mediterranean and its adjoining seas, MedCruise established two indexes aiming to give a clear picture of the evolution of cruise passenger movements and cruise calls respectively, in each of the four MedCruise regions, as well as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

MEDGRI$_{pax}$ (Figure 4.7) is the index that monitors the annual trend of cruise passenger movements in the Med and in each of the four regions in terms of passenger movements. The index has 2010 as the basis year (MEDGRIpax=100). The figure presents the evolution since the base year, easily showing a period marked by variations of opposite sign ending in 2019, with the highest index (MEDGRIpax = 125).

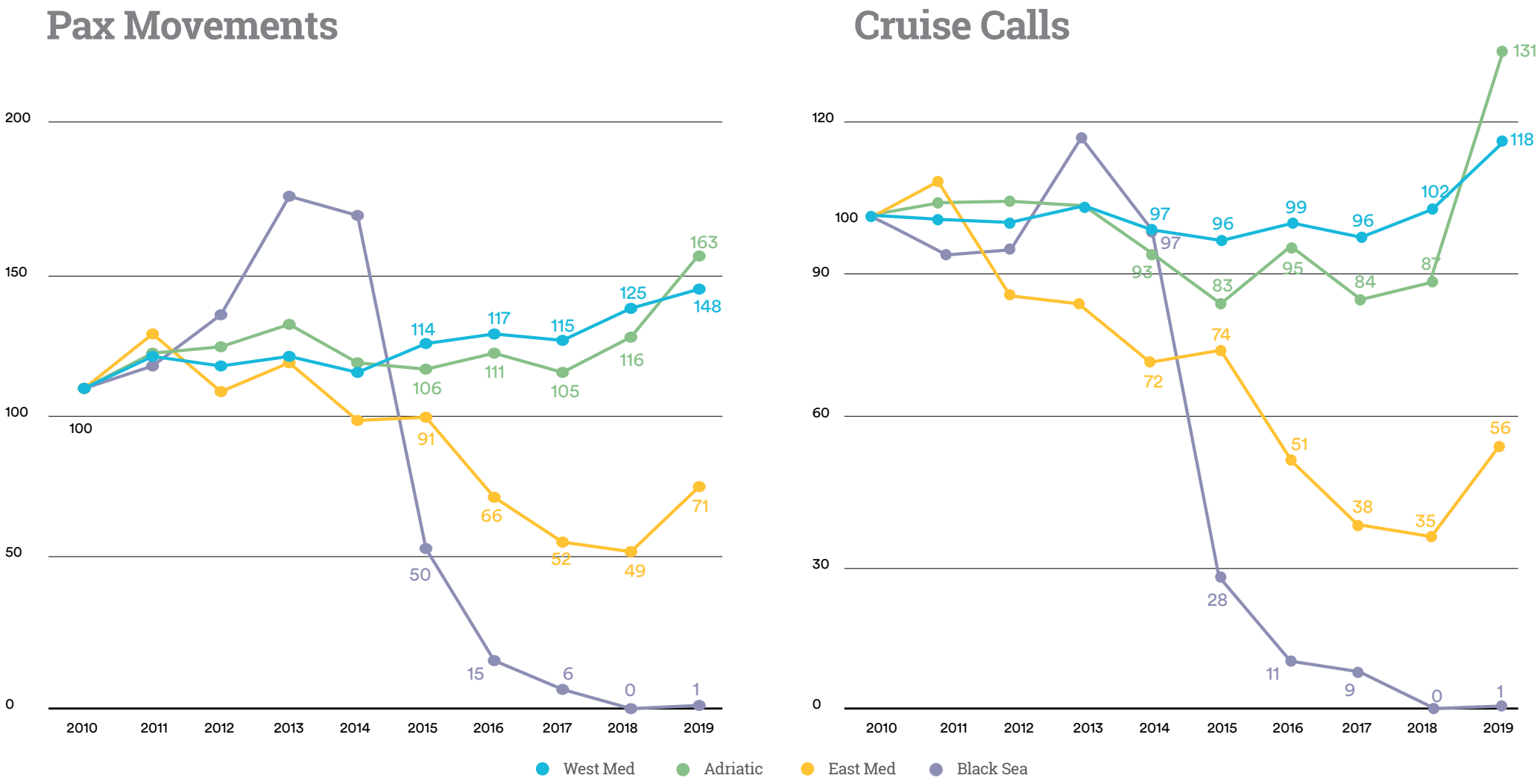
Looking at regional trends Black Sea ports that had experienced the most remarkable growth of all regions in 2013 and 2014, returned in 2015 to half the levels of 2010 (as the index in the particular case stands at 50), and to just 1 in 2019. The index is lower (71) in the case of East Med region as well, though one year before MEDGRIpax in the East Med was standing at 117, the highest level of all in the particular year. The two other regions continue to host more cruisers than those they were hosting in 2010, with the respective 2019 values of MEDGRIpax standing at 163 in the Adriatic and at 148 in the West Med case.

MEDGRI$_{calls}$ monitors the annual trend of cruise calls in the Med and in each of the four regions, having again 2010 as the basis year (MEDGRIcalls =100). The evolution of MEDGRIcalls is illustrated in the 4.9 figure. Cruise passenger numbers in the Med and its adjoining seas are more than in the past, but the number of vessels are almost the same than those of 2010. In the West Med region (MEDGRIcalls= 118) and in the Adriatic region (MEDGRIcalls= 131) the 2019 index is over 100. While a MEDGRIcalls= 1 had been recorded in the Black Sea, in the East Med the increase of the number of cruise calls (2019 MEDGRIcalls=56) is lower than the one of cruise passenger movements.

Figure 4.7 MEDGRI Trends: the MedCruise Growth Indexes (2010=100)

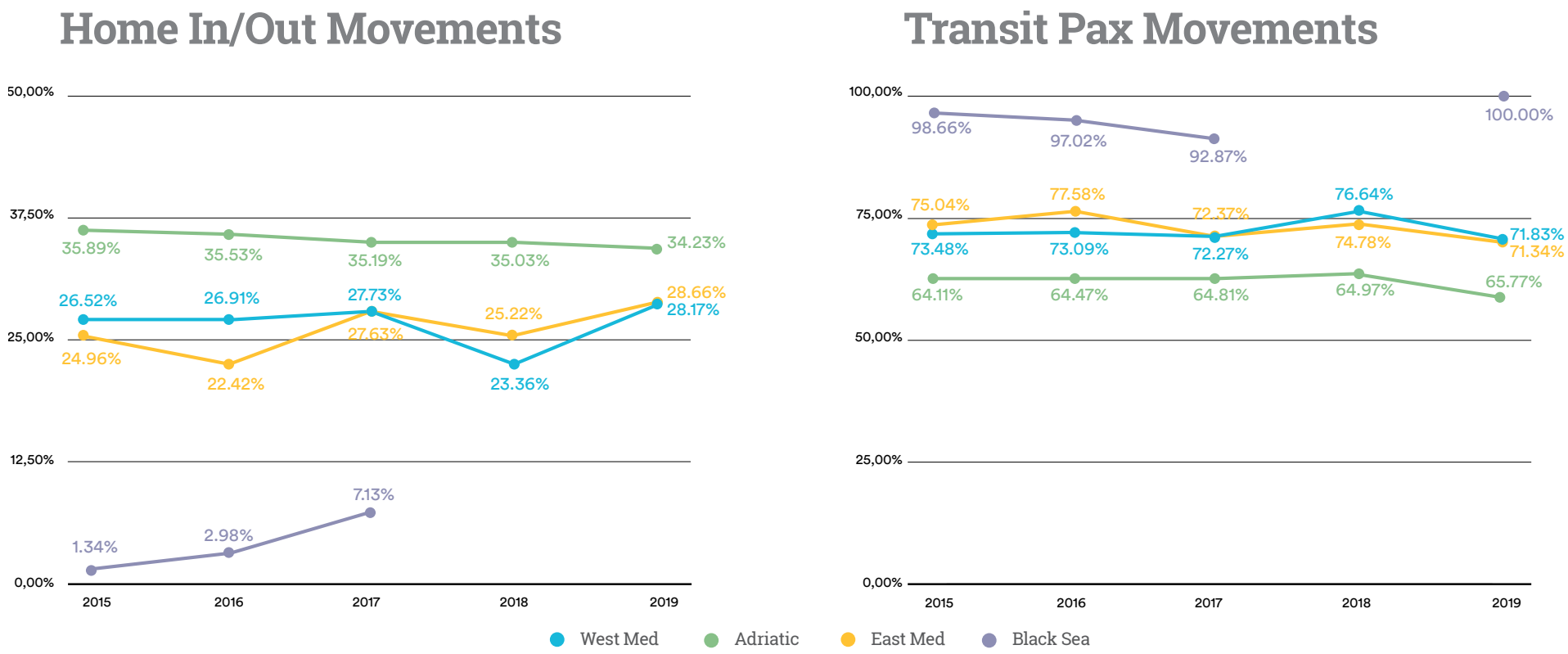


Figures 4.8 and 4.9 MEDGRI Trends: the MedCruise Growth Indexes (2010=100)



The following figures provide visualised information on the evolution of Home In/Out shares per region, as well as on those of the Transit passenger movements compared to the total of the cruise passengers recorded in each of the four MedCruise regions per year. In 5 years, the Home In/Out versus Transit passengers ratio didn't change significantly in the West and East Med.

Figures 4.10 and 4.11 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 2019 with those of 2018, as well as a similar comparison with the passenger movements and calls that had been recorded in 2015.

Table 4.6 Major Ports per Region: Total Cruise Passenger Movements

	No	Port	2019	2018	Variation 2019/2018	2015	Variaton 2019/2015
West Med	1	Barcelona	3,137,918	3,041,963	3.2%	2,540,302	23.5%
	2	Balearic Islands	2,658,156	2,431,153	9.3%	1,996,533	33.1%
	3	Civitavecchia	2,652,403	2,441,737	8.6%	2,271,652	16.8%
Adriatic	1	Venice	1,611,341	1,560,579	3.3%	1,582,481	1.8%
	2	Corfu	807,197	735,832	9.7%	647,346	24.7%
	3	Dubrovnik	804,881	732,431	9.9%	830,684	-3.1%
East Med	1	Piraeus	1,098,091	961,632	14.2%	980,149	12.0%
	2	Heraklion	307,043	297,929	3.1%	219,805	39.7%
	3	Souda/ Chania	265,956	139,944	90.0%	96,612	175.3%

Barcelona Overcomes 3 Million Threshold

Table 4.7 Major Ports per Region: Total Cruise Calls

	No	Port	2019	2018	Variation 2019/2018	2015	Variaton 2019/2015
West Med	1	Balearic Islands	819	859	-4.7%	788	3.9%
	2	Barcelona	800	830	-3.6%	749	6.8%
	3	Civitavecchia	800	760	5.3%	794	0.8%
Adriatic	1	Dubrovnik	622	438	42.0%	475	30.9%
	2	Venice	500	502	-0.4%	521	-4.0%
	3	Kotor	464	411	12.9%	411	12.9%
East Med	1	Piraeus	622	524	18.7%	621	0.2%
	2	Antalya, Bodrum, Kusadasi	212	159	33.3%	660	-67.9%
	3	Heraklion	204	187	9.1%	170	20.0%

Balearic Islands and Barcelona Recorded a Slight Annual Decline

Table 4.8 and Table 4.9 present information on the leading ports, in terms of size, in each region as regards Home In/Out passenger movements and Transit passenger movements, respectively.

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

	No	Port	2019	2018	Variation 2019/2018	2015	Variaton 2019/2015
West Med	1	Barcelona	1,753,222	1,666,767	5.2%	1,363,754	28.6%
	2	Civitavecchia	1,111,542	956,758	16.2%	868,143	28.0%
	3	Genoa, Savona	1,096,742	1,078,401	1.7%	1,213,051	-9.6%
Adriatic	1	Venice	1,390,153	841,657	65.2%	794,884	74.9
	2	Bari, Brindisi, Manfredonia, Monopoli	269,875	230,711	17.0%	106,213	154.1%
	3	Corfu	107,879	69,926	54.3%	69,926	54.3%
East Med	1	Piraeus	410,512	354,398	15.8%	284,241	44.4%
	2	Haifa	165,895	N/A		N/A	
	3	Heraklion	46,720	29,841	56.6%	3,344	1297.1%

Haifa Recorded Ranked Second After Piraeus in Homeport Traffic in East Med

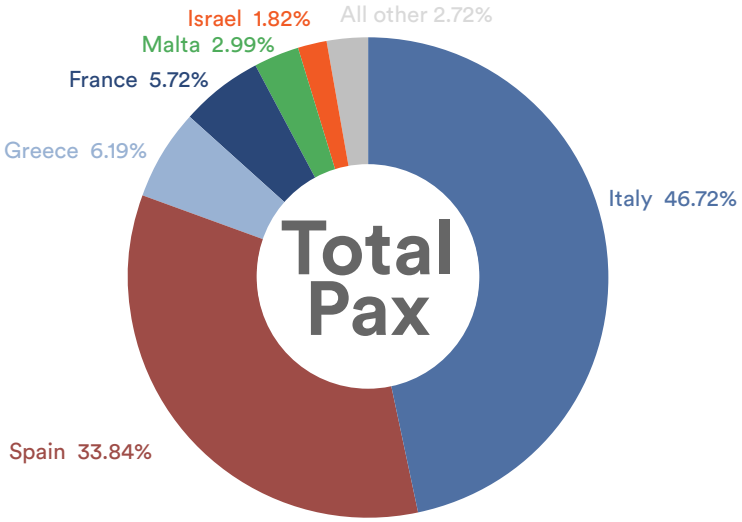
Table 4.9 Major Ports per Region: Total Transit Passengers

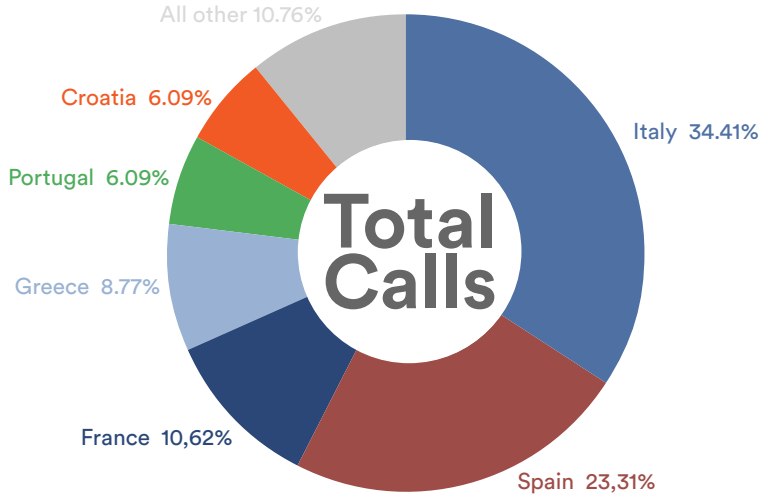
	No						
West Med	1	Balearic Islands	1,675,459	1,572,718	6.5%	1,442,605	16.1%
	2	Civitavecchia	1,540,861	1,484,979	3.8%	1,403,509	9.8%
	3	Marseille	1,413,144	1,277,741	10.6%	947,734	49.1%
Adriatic	1	Dubrovnik	731,771	669,293	9.3%	768,887	-4.8%
	2	Corfu	699,318	653,573	7.0%	577,420	21.1%
	3	Kotor	613,321	490,602	25.0%	439,108	39.7%
East Med	1	Piraeus	687,579	607,234	13.2%	695,908	-1.2%
	2	Souda/Chania	265,956	139,944	90.0%	96,612	175.3%
	3	Heraklion	260,323	268,088	-2.9%	216,461	20.3%

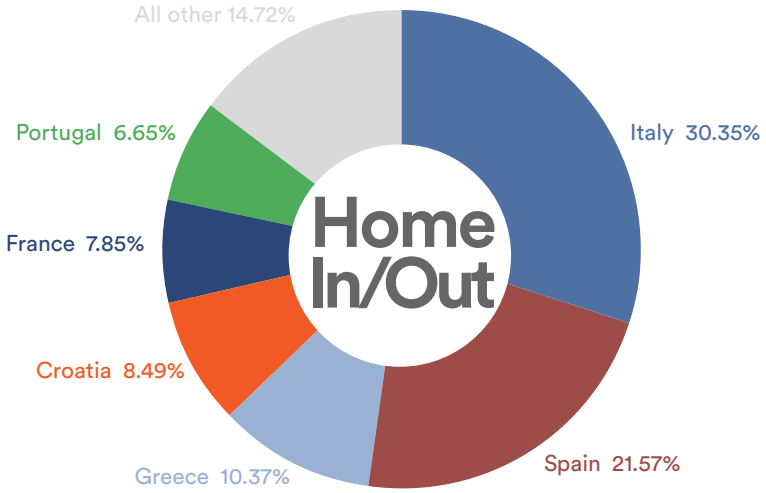
Dubrovnik Is Still the First Port in Adriatic for Transit Passengers

4.5 Cruise Traffic per Country

MedCruise members spread in 21 different countries in the Mediterranean and its adjoining seas. The fact that MedCruise members represent in most cases the vast majority of the total cruise activities per country allows meaningful conclusions on the trends observed. It is acknowledged though this is not in all cases the total traffic within the country, as the numbers of reporting might not always correspond to the total of cruise ports in the respective country. Figures below present the shares of cruise activities per major country.







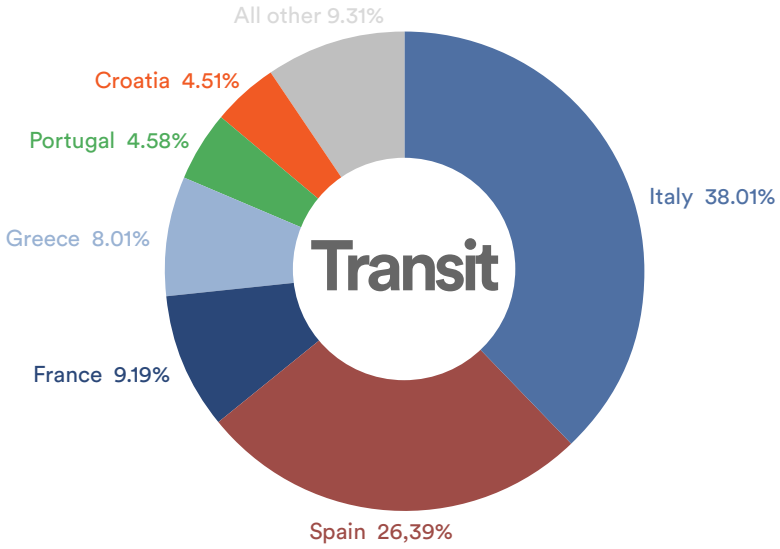


Table 4.10 lists the cruise passenger movements that were recorded in 2019 per country and the respective variations observed when comparing these data with those of previous years. Italy confirms its leading role and Egypt shows the annual highest growth.

Table 4.10 Cruise Passenger Movements per MedCruise Country

Egypt, Israel and Cabo Verde Recorded Remarkable Growth

Country	2019	% Share in 2019	2018	Variation 2019/2018	2015	Variation 2019/2015
Italy	11,864,469	38.01%	10,719,976	10.7%	10,337,491	14.8%
Spain	8,237,308	26.39%	7,820,445	5.3%	6,478,748	27.1%
France	2,866,876	9.19%	2,184,350	11.0%	2,054,327	24.0%
Greece	2,500,758	8.01%	1,252,740	14.5%	1,203,433	21.7%
Portugal	1,428,608	4.58%	2,583,538	8.2%	2,311,670	14.4%
Croatia	1,408,141	4.51%	1,319,930	12.4%	1,249,108	17.0%
Malta	902,425	2.89%	492,475	26.9%	442,029	35.0%
Montenegro	614,747	1.97%	711,018	24.8%	668,277	39.1%
Gibraltar	328,057	1.05%	135,289	-19.4%	1,422,361	-4.7%
Israel	264,717	0.85%	406,998	1183.0%	344,140	692.1%
Turkey	201,093	0.64%	20,633	48.6%	33,419	-85.9%
Monaco	183,468	0.59%	170,571	7.6%	259,325	-29.3%
Cyprus	132,828	0.43%	6,320	327.3%	n/a	-23.4%
Slovenia	115,581	0.37%	101,415	14.0%	57,893	99.6%
Egypt	72,964	0.23%	1,160	6190.0%	n/a	n/a
Cabo Verde	49,878	0.16%	31,250	689.2%	121,608	n/a
Morocco	36,986	0.12%	31,089	18.4%	173,309	-69.6%
Ukraine	750	0.00%	0	0.0%	6,563	-88.6%
Tunisia	648	0.00%	0	0.0%	53,780	-98.8%
Romania	450	0.00%	0	0.0%	31,856	-98.6%
Bulgaria	0	0.00%	0	0.0%	10,734	-100.0%
Total	**31,210,752**	**100.00%**	**27,989,197**		**27,260,071**	

Considering the annual variation of cruise calls per country (Table 4.11), Egypt and Cabo Verde are shown the highest, followed by Cyprus.

The medium-term trends of the number of cruise calls per country indicate that Israel, Slovenia and Croatia are the ones that within the period 2015-2019 experienced major increases in the number of calls.

Table 4.11 Cruise Calls per MedCruise Country

Country	2019	% Share in 2019	2018	Variation 2019/2018	2015	Variation 2019/2015
Italy	4,156	30.35%	3,903	6.5%	3,777	10.0%
Spain	2,953	21.57%	3,047	-3.1%	2,646	11.6%
Greece	1,420	10.37%	1,254	13.2%	1,380	2.9%
Croatia	1,162	8.49%	951	22.2%	922	26.0%
France	1,075	7.85%	1,102	-2.5%	1,030	4.4%
Portugal	910	6.65%	836	8.9%	803	13.3%
Montenegro	464	3.39%	411	12.9%	411	12.9%
Malta	372	2.72%	322	15.5%	306	21.6%
Turkey	238	1.74%	174	36.8%	1,035	-77.0%
Gibraltar	197	1.44%	243	-18.9%	204	-3.4%
Israel	163	1.19%	n/a	0.0%	32	409.4%
Monaco	163	1.19%	177	-7.9%	209	-22.0%
Cabo Verde	146	1.07%	30	386.7%	n/a	n/a
Cyprus	94	0.69%	75	135.0%	49	-43.7%
Slovenia	72	0.53%	2	-4.0%	n/a	46.9%
Egypt	55	0.40%	46	2650.0%	88	n/a
Morocco	49	0.36%	40	6.5%	167	-44.3%
Ukraine	1	0.01%	0	0.0%	13	-92.3%
Tunisia	1	0.01%	0	0.0%	15	-93.3%
Romania	1	0.01%	0	0.0%	25	-96.0%
Bulgaria	0	0.00%	0	0.0%	15	-100.0%
Total	**13,692**	**100.00%**	**12,613**		**13,127**	

5 Analysis Per Medcruise Port Size

5.1 Categories of MedCruise ports per Size

This section presents an analysis of cruise traffic developments based on the size of MedCruise port members. The 72 MedCruise port members are divided in two categories based on the total cruise passenger movements per year. Both category A and B contain 36 ports.
These are the two categories

140,000

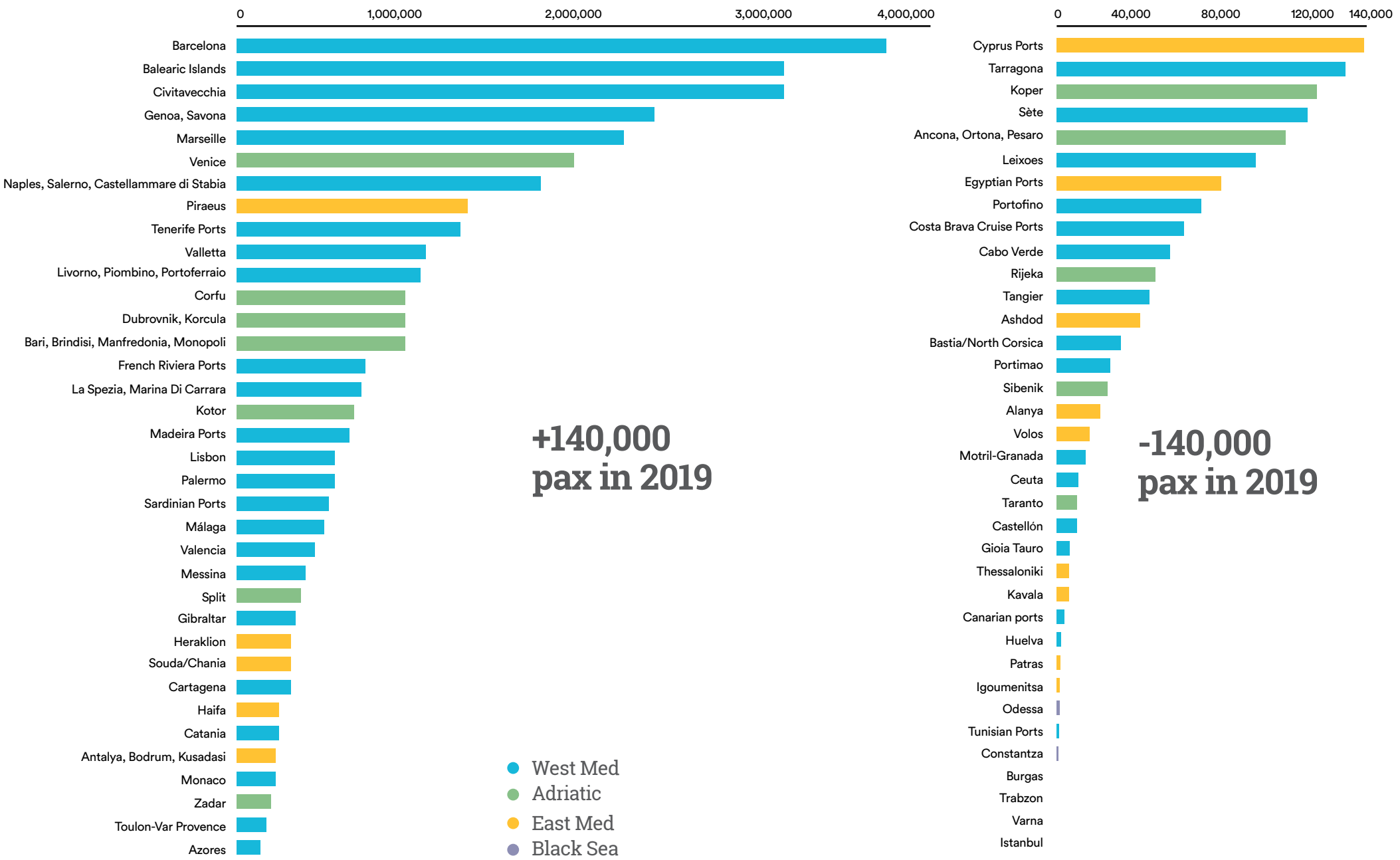
Category B 36 port members with less than 140,000 cruise passenger movements in 2019

Category A 36 port members with more than 140,000 cruise passenger movements in 2019

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.

Figures 5.1 and 5.2 detail the list of MedCruise port members included in Category A and B (see also the Appendix for the list of ports included in each of these categories). In total, 24 of the 36 ports of Category A are located in the West Med. In terms of passenger movements hosted per year, among the major 10 members only two are not ports of West Med. These are Venice in Italy and Piraeus in Greece. In category A, seven ports are located in the Adriatic and five ports in the East Med with Piraeus being the only among these 5 ports, that hosted more than 1 million passenger movements. None of the Black Sea ports are included in Category A group of ports as all ports in the region recorded less than 140,000 passenger movements in 2019. The geographical distribution of this group of ports in the four regions is more balanced for category B.

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



5.2 Cruise Traffic by Size

Table 5.1 presents the major variations as regards total passengers, cruise calls, home in/out and transit passengers in the case of each of the two size categories.

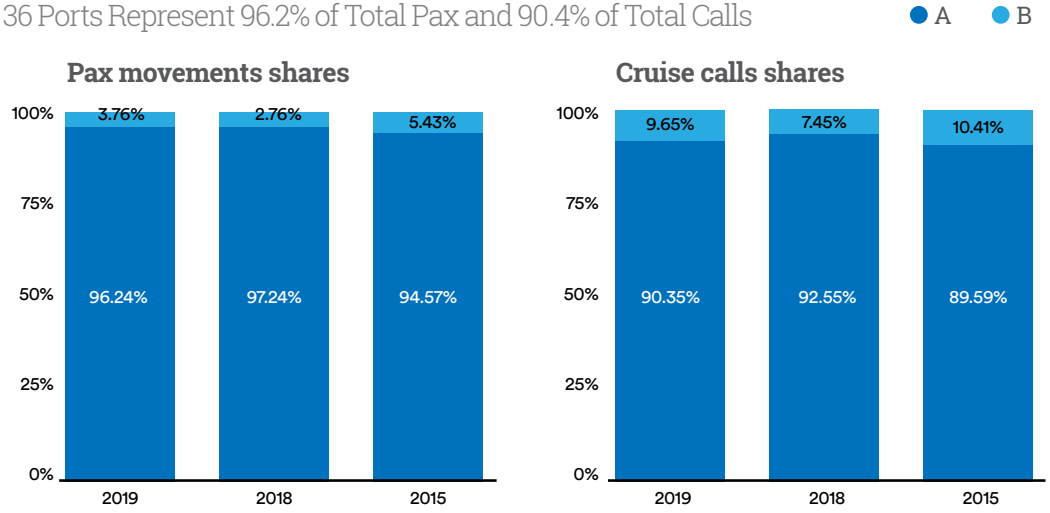
Table 5.1 Cruise Traffic Variations by Size Category

The Annual Growth Gets Even Stronger in Both Categories in All Type of Traffic

		2019	2018	Variation 2019/2018	2015	Variation 2019/2015
Total pax movements	A	30,036,542	27,217,250	10.36%	25,780,346	16.51%
	B	1,174,210	771,947	52.11%	1,479,725	-20.65%
Cruise calls	A	12,371	11,673	5.98%	11,761	5.19%
	B	1,321	940	40.53%	1,366	-3.29%
Home In/Out	A	9,055,705	8,058,333	12.38%	7,313,766	23.82%
	B	76,446	37,570	103.48%	277,298	-72.43%
Transit	A	20,980,837	19,169,941	9.45%	17,533,425	19.66%
	B	1,097,764	734,377	49.48%	1,202,137	-8.68%

Figure 5.3 Cruise Traffic Evolution by Size Category

36 Ports Represent 96.2% of Total Pax and 90.4% of Total Calls



The overall positive variations 2019 on 2018 can be found both on the categories A and B. The share of Category B ports remains a minor share of the total cruise passengers that visit the Mediterranean and its adjoining seas. It's evident how the variations attributed to group B are much more higher than the ones marked by group A, but this should be explained, together with the good performances, through the absolute values which, being enormously lower, are subject to much more pronounced jumps, when downward as well as upward. Figure 5.3 clearly shows how to evaluate the Med: the ports included in the first group (A) influence and characterize the performances of the region, but it is also evident that all the other ports with less traffic, whereas do not relevantly impinge on the overall dimensions are crucial for the choices of deployment made by the cruise companies.

5.3 Variations by Size Category per Region

Table 5.2 details the distribution of the total passenger movements hosted in 2019 by the ports of each size category per region, together with the variations on the previous year and in a 5-year horizon. In terms of annual variations (2019/2018), the Category A ports located in the East Med lead the ranking, but in absolute values the ones located in the West Med contributed to the growth of the group with more than 1,7 million passenger movements (out of around 3.2 million). The 5-year-variations showed a decrease in the traffic in the East Med area (-0.46%) while in the same period the Adriatic ports of Category A grew of 17.75% and the West Med ones of 18.08%.

Performances in 5 years had been quite different considering the Category B ports which belong to the single areas. The ones located in the West Med grow much more than the ones of Category A and the Adriatic ones registered in 2019 around 162,910 passenger movements more than in 2015. A dramatic collapse had characterized the ports located in the Black Sea, bringing the 51,433 pax. movements registered in 2015 to 1,200 in 2019.

Table 5.2 Variations by Size Category per Region: Total Passenger Movements

"A" and "B" Ports Grew

	Pax movements	% of total 2019 of each category	% of total 2019	2019	2018	Variation 2019/2018	2015	Variation 2019/2015
A	West Med	75.90%	73.04%	22,796,863	21,011,878	8.50%	19,306,486	18.08%
	Adriatic	17.13%	16.48%	5,144,350	4,673,605	10.07%	4,368,848	17.75%
	East Med	6.98%	6.71%	2,095,329	1,531,767	36.79%	2,105,012	-0.46%
B	West Med	52.47%	1.97%	616,138	451,279	36.53%	375,386	64.13%
	Adriatic	24.45%	0.92%	287,038	215,746	33.04%	124,128	131.24%
	East Med	22.98%	0.86%	269,834	104,922	157.18%	928,778	-70.95%
	Black Sea	0.10%	0.00%	1,200	0	100.00%	51,433	-97.67%
Total				**31,210,752**	**27,989,197**		**27,260,071**	

For Home In/Out (table 5.4), Group B East Med ports recorded an impressive increase: in 2018 recorded 1,638 home in/ out pax movements and in 2019 almost 30,000. Of course, this number is 90.48% lower than in 2015.

Last, for transit pax (Table 5.5), Adriatic ports show short and mid-term growth in both A and B categories. In Group A, East Med recorded 30% increase of the transit pax movements since last year.

Table 5.3 Variations by Size Category per Region: Total Cruise Calls

Cruise Calls are Returning in East Med Ports of Both Groups

	Cruise Calls	% of total 2019 of each category	% of total 2019	2019	2018	Variation 2019/2018	2015	Variation 2019/2015
A	West Med	0.67	0.61	8,350	8,279	0.86%	7,872	6.07%
	Adriatic	0.22	0.20	2,720	2,446	11.20%	2,379	14.33%
	East Med	0.11	0.10	1,301	948	37.24%	1,510	-13.84%
B	West Med	58.36%	5.63%	771	594	29.80%	451	70.95%
	Adriatic	22.63%	2.18%	299	237	26.16%	165	81.21%
	East Med	18.85%	1.82%	249	109	128.44%	687	-63.76%
	Black Sea	0.15%	0.01%	2	0	0.00%	63	-96.83%
Total				**13,692**	**12,613**		**13,127**	

Table 5.4 Variations by Size Category per Region: Home In/Out Pax

Group A East Med Ports Have Grown Significantly in Short and Mid-Term Period

	Home In/Out	% of total 2019 of each category	% of total 2019	2019	2018	Variation 2019/2018	2015	Variation 2019/2015
A	West Med	72.44%	71.83%	6,559,635	5,947,221	10.30%	5,220,016	25.66%
	Adriatic	20.36%	20.19%	1,843,812	1,700,038	8.46%	1,605,965	14.81%
	East Med	7.20%	7.14%	652,258	411,074	58.67%	487,785	33.72%
B	West Med	46.52%	0.39%	35,560	23,078	54.09%	545	6424.77%
	Adriatic	19.94%	0.17%	15,246	12,854	18.61%	6,758	125.60%
	East Med	33.54%	0.28%	25,640	1,638	1465.32%	269,306	-90.48%
	Black Sea	0.00%	0.00%	0	0	0.00%	689	-100.00%
Total				**9,132,151**	**8,095,903**		**7,591,064**	

Table 5.5 Variations by Size Category per Region: Total Transit Pax

Group B Adriatic Ports Transit Pax Has Doubled Since 2015

	Transit	% of total 2019 of each category	% of total 2019	2019	2018	Variation 2019/2018	2015	Variation 2019/2015
A	West Med	77.39%	73.54%	16,237,228	15,082,485	7.66%	13,153,315	23.45%
	Adriatic	15.73%	14.95%	3,300,538	2,973,282	11.01%	2,762,883	19.46%
	East Med	6.88%	6.54%	1,443,071	1,114,174	29.52%	1,617,227	-10.77%
B	West Med	52.89%	2.63%	580,578	428,201	35.59%	374,841	54.89%
	Adriatic	24.76%	1.23%	271,792	202,892	33.96%	117,370	131.57%
	East Med	22.24%	1.11%	244,194	103,284	136.43%	659,182	-62.95%
	Black Sea	0.11%	0.01%	1,200	0	0.00%	50,744	-97.64%
Total				**22,078,601**	**19,904,318**		**18,735,562**	

6 Seasonality Analysis

6.1 Seasonality in MedCruise Ports

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

Figure 6.1 illustrates the shares of passenger movements and cruise calls per month in 2019. The highest share of both cruise passenger movements and calls in 2019 were recorded in October (14.81% and 13.61%, respectively). Notably, the same happened in the years 2014-2018 as well, when October hosted around 14% of the cruise traffic in these years. From May to October the shares per month have never been lower than 10%, both per passenger movements and calls. The longer distance between the passenger movements share and call share is registered in July and August.

Figure 6.1 Cruise Traffic Shares per Month, 2019

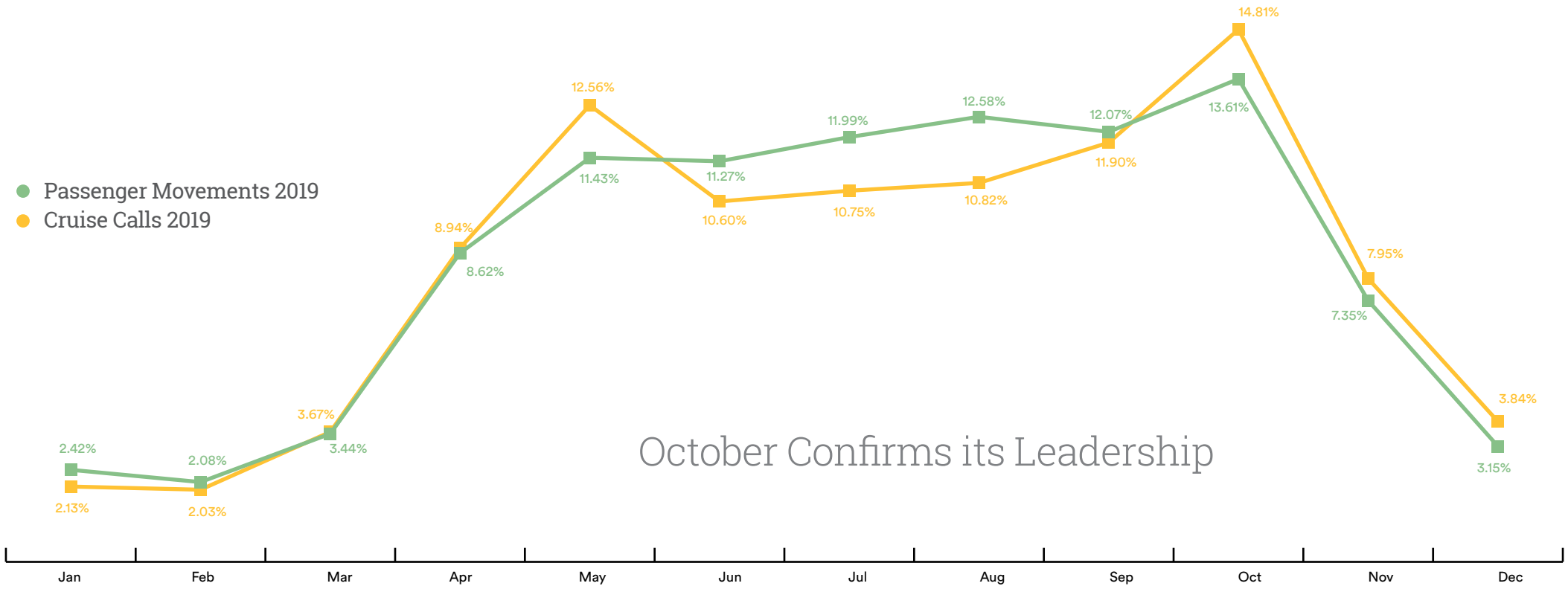
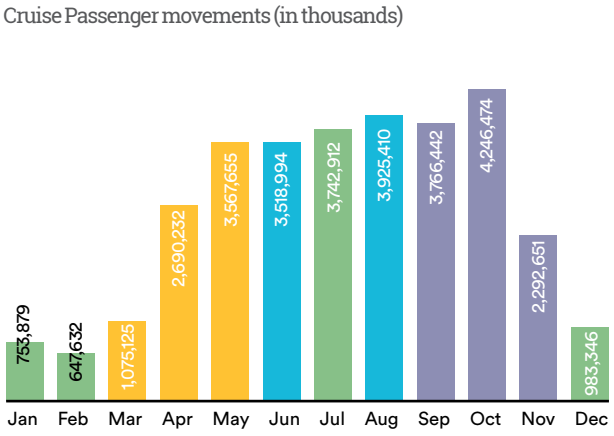


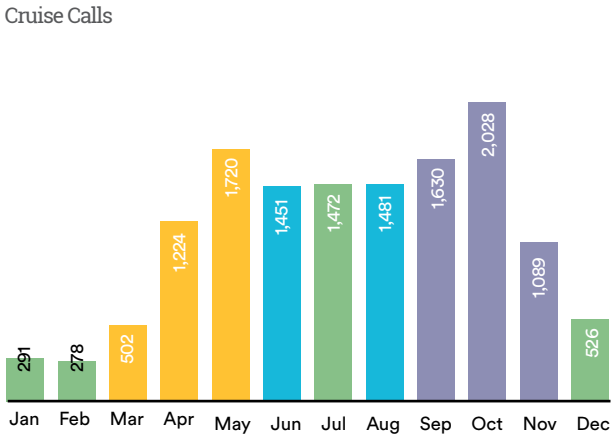
Table 6.1 Total Cruise Traffic per Month, 2019

Around 73% and 71% of Pax Movements and Calls Happen from May to October

Month	Total Cruise Pax	% of Total Pax	Total Cruise Calls	% of Total Cruise Calls	Pax/Call
January	753,879	2.42%	291	2.13%	2,591
February	647,632	2.08%	278	2.03%	2,330
March	1,075,125	3.44%	502	3.67%	2,142
April	2,690,232	8.62%	1224	8.94%	2,198
May	3,567,655	11.43%	1720	12.56%	2,074
June	3,518,994	11.27%	1451	10.60%	2,425
July	3,742,912	11.99%	1472	10.75%	2,543
August	3,925,410	12.58%	1481	10.82%	2,651
September	3,766,442	12.07%	1630	11.90%	2,311
October	4,246,474	13.61%	2028	14.81%	2,094
November	2,292,651	7.35%	1089	7.95%	2,105
December	983,346	3.15%	526	3.84%	1,869

Figures 6.2 and 6.3 Total Traffic per Month, 2019



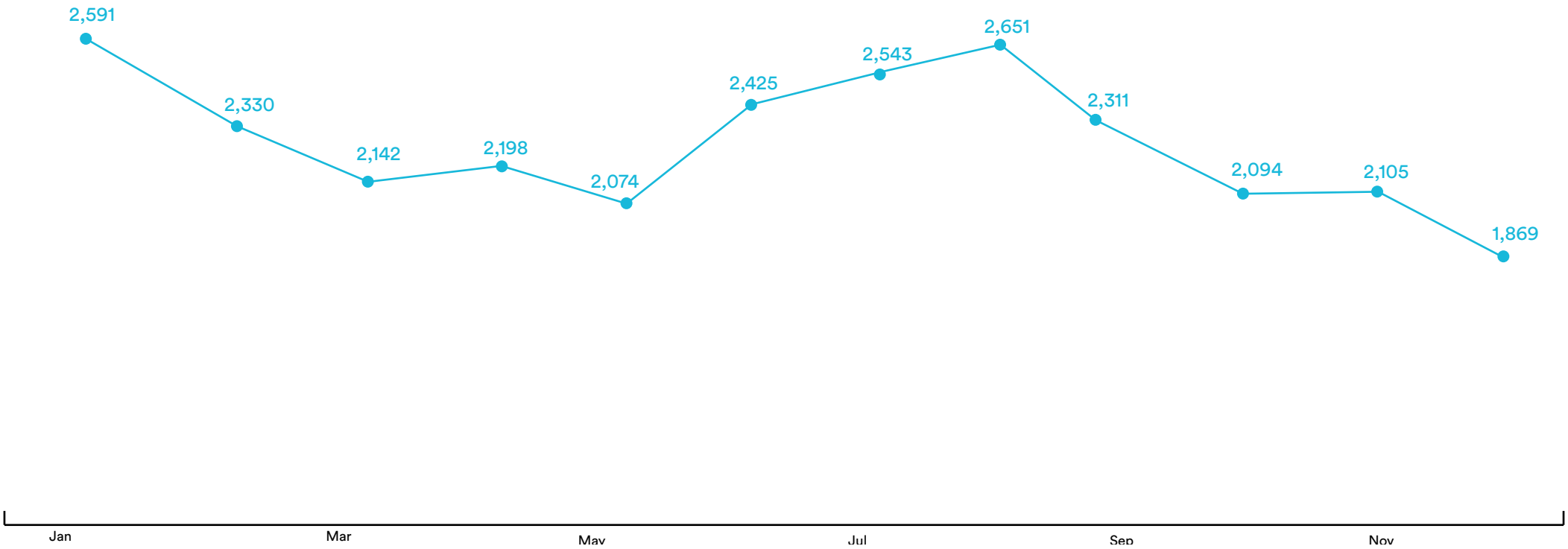


As usual, cruise traffic in Med is mostly centred around warmer months. In 2019, from May to October, there were 72.95% of the total passenger movements and 71.44% of calls in the ports of the Association. The month of February had less traffic, but overall, the winter months (January, February and December) contributed by generating 7.64% of the total passenger movements and 8% of the total calls.

Figure 6.4 presents the average number of passengers per cruise call during each month of the year. The variations per month, as expected, are significant and follow the ones of the total traffic except for the months of January and February. In August, the number of passengers per call appears to be 41.8% higher compared to the respective ratio of December. August is the month of 2019 with the highest rate of passengers per call (2,651), followed by January (2,591) and July (2,543). The lowest rates are registered in December (1,869) and May (2,074).

Figure 6.4 Average Pax/Call per Month, 2019

July and August Share the Leading Position



6.2 Seasonality by Region in 2019

The four distinctive regions in which MedCruise membership spreads (West Med, Adriatic, East Med, Black Sea) register different seasonality trends distributions (Table 6.2).

In West Med the cruise traffic is distributed in a more balanced way throughout the year. Cruise activities in West Med during the winter months correspond to a 9.36% share of the total cruise passenger movements in the region, while 33.87% takes place during the summer.

In the Adriatic and in the East Med, cruise traffic is concentrated mostly during the second and third trimester of the year, in particular the period commencing in June and ending in November. The passenger movements in the Adriatic and in the East Med during the winter months (Dec-Feb) correspond to a minimum of 1.36% and 5% of the total traffic taking place in the regions on an annual basis.

Table 6.2 Trimester Shares of Cruise Traffic within the MedCruise Regions

The Four Variables Show Similar Trimester Trends, Even If Home-Port Traffic in Medcruise Port Members Is Higher in Summer and Lower in Winter

Region	Home In/Out Passengers				Total Calls			
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	24.48%	33.87%	32.28%	9.36%	27.34%	28.74%	34.67%	9.25%
Adriatic	19.88%	44.50%	34.26%	1.36%	20.60%	41.24%	33.65%	4.50%
East Med	22.02%	35.51%	37.47%	5.00%	21.29%	34.71%	36.58%	7.42%
Black sea	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%	100.00%	0.00%
Total	23.50%	35.84%	33.02%	7.64%	25.17%	32.16%	34.67%	8.00%
Region								
	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
West Med	24.06%	33.97%	33.18%	8.79%	24.65%	33.83%	31.92%	9.59%
Adriatic	17.82%	47.21%	34.05%	0.92%	20.95%	43.08%	34.37%	1.60%
East Med	23.83%	39.40%	33.55%	3.23%	21.29%	33.94%	39.05%	5.72%
Black sea	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	0.00%
Total	22.77%	37.07%	33.38%	6.78%	23.79%	35.34%	32.87%	8.00%

6.3 Seasonality by Size in 2019

Table 6.3 details the shares of the total cruise traffic that corresponds to each trimester of 2019 within the two different port size categories of MedCruise.

Category A ports (ports hosting more than 140,000 passenger movements in 2019) recorded a higher share of the annual passenger movements hosted during the winter season (7.67%) compared to the respective share observed in Category B ports (6.87%), but not in terms of calls (7.70% vs 10.83%).

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

Table 6.3 Trimester Shares of Cruise Traffic within the Two Size Categories

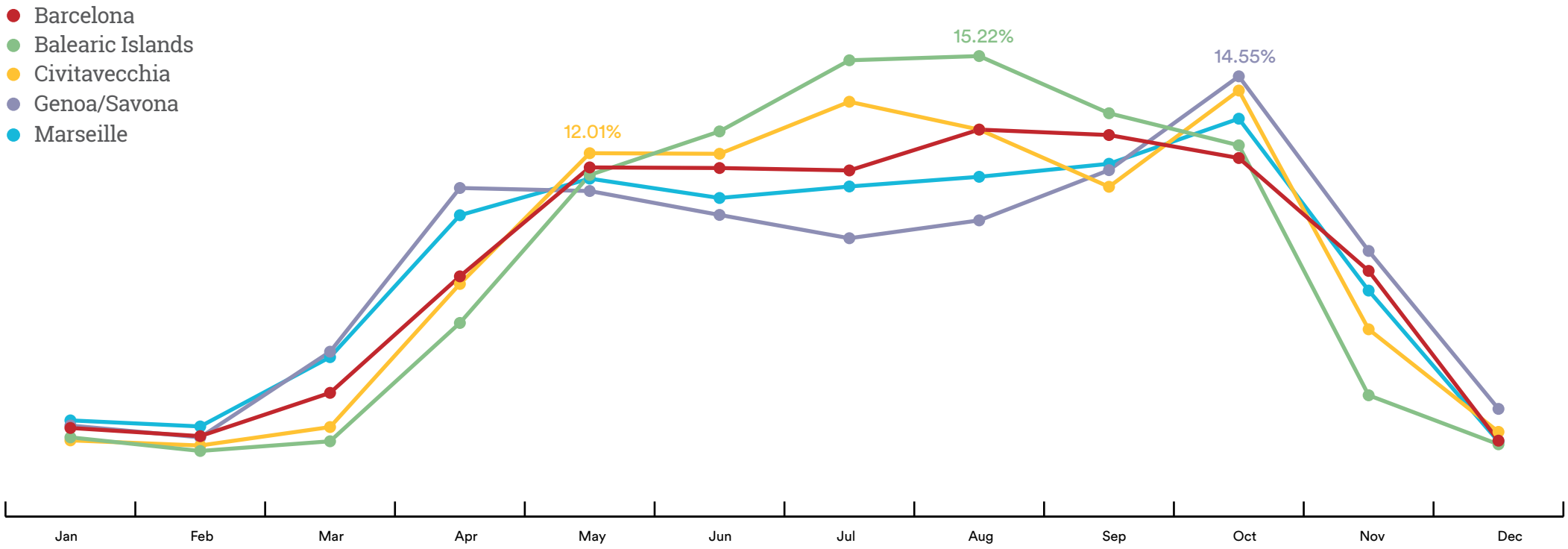
No Big Differences Between the Categories A and B in terms of Seasonality

	Size Category	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Cruise Pax Movements	A	23.54%	35.94%	32.85%	7.67%
	B	22.35%	33.31%	37.47%	6.87%
Cruise Calls	A	25.07%	32.68%	34.55%	7.70%
	B	26.04%	27.33%	35.81%	10.83%
Home In/Out	A	22.86%	37.09%	33.35%	6.69%
	B	11.96%	34.80%	36.85%	16.39%
Transit Pax	A	23.83%	35.45%	32.63%	8.09%
	B	23.08%	33.21%	37.51%	6.20%

6.4 Seasonality of Cruise Activity in MedCruise Ports

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

Figure 6.5 Major 5 MedCruise Ports Cruise Pax Seasonality, 2019



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

Table 6.4 Highest Concentration of Passenger Movements (March/April/May, 2019)

No.	Port	Region	Size	% share of the port's total traffic	% share of all MedCruise Ports trimester traffic	Total Pax Mar-May	Total Calls Mar-May
1	Azores	West Med	A	61.79%	1.26%	92,057	76
2	Leixoes	West Med	B	41.20%	0.50%	36,546	41
3	Bastia/North Corsica	West Med	B	39.65%	0.13%	9,300	28
4	Motril-Granada	West Med	B	39.64%	0.05%	3,731	12
5	Tangier	West Med	B	39.16%	0.20%	14,483	21
6	Canarian ports	West Med	B	38.39%	0.01%	741	1
7	Egyptian Ports	East Med	B	35.25%	0.35%	25,723	14
8	Lisbon	West Med	A	33.45%	2.62%	191,081	116
9	Málaga	West Med	A	32.76%	2.13%	155,862	102
10	Taranto	Adriatic	B	32.24%	0.04%	2,968	2
TOTAL					**7.26%**	**532,492**	**413**

Table 6.5 Highest Concentration of Passenger Movements (June/July/August, 2019)

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	Castellón	West Med	B	71.74%	0.03%	3,911	3
2	Thessaloniki	East Med	B	69.73%	0.03%	3,435	5
3	Ceuta	West Med	B	62.89%	0.05%	5,881	2
4	Tarragona	West Med	B	56.75%	0.65%	72,692	28
5	Gioia Tauro	West Med	B	55.24%	0.03%	2,900	4
6	Rijeka	Adriatic	B	52.88%	0.19%	21,754	12
7	Sardinian Ports	West Med	A	52.16%	2.25%	251,380	91
8	Koper	Adriatic	B	51.47%	0.53%	59,491	34
9	Ancona, Ortona, Pesaro	Adriatic	B	49.90%	0.45%	50,890	40
10	Monaco	West Med	A	48.54%	0.80%	89,054	68
TOTAL					**5.02%**	**561,388**	**287**

Table 6.6
Highest Concentration of Passenger Movements (September/October/November, 2019)

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	Constantza	Black Sea	B	100.00%	0.00%	450	1
2	Odessa	Black Sea	B	100.00%	0.01%	750	1
3	Tunisian Ports	West Med	B	100.00%	0.01%	648	1
4	Huelva	West Med	B	83.46%	0.01%	1,176	2
5	Igoumenitsa	East Med	B	70.09%	0.01%	738	3
6	Patras	East Med	B	66.37%	0.01%	809	1
7	Ashdod	East Med	B	58.84%	0.16%	16,141	16
8	Cabo Verde	West Med	B	54.93%	0.27%	27,396	66
9	Volos	East Med	B	52.79%	0.06%	6,638	13
10	Motril-Granada	West Med	B	46.91%	0.04%	4,416	14
TOTAL					**0.57%**	**59,162**	**118**

Table 6.7
Highest Concentration of Passenger Movements (December/January/February, 2019)

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	Alanya	East Med	B	43.75%	0.26%	6,185	5
2	Tenerife Ports	West Med	A	41.72%	18.67%	445,319	201
3	Madeira Ports	West Med	A	38.67%	9.68%	230,761	108
4	Cabo Verde	West Med	B	28.97%	0.61%	14,450	44
5	Canarian ports	West Med	B	28.65%	0.02%	553	1
6	Palermo	West Med	A	20.83%	4.65%	111,004	24
7	Egyptian Ports	East Med	B	19.90%	0.61%	14,519	24
8	Tangier	West Med	B	17.51%	0.27%	6,476	5
9	Cyprus Ports	East Med	B	17.07%	0.95%	22,672	19
10	Ashdod	East Med	B	15.78%	0.18%	4,330	6
TOTAL					**35.90%**	**856,269**	**437**

7 Cruise and Ferry Traffic In Medcruise Ports

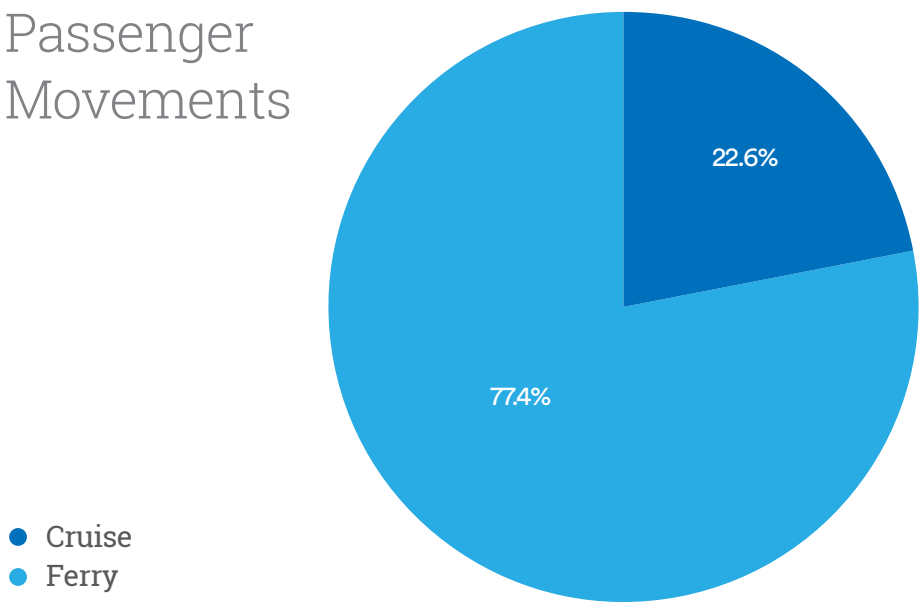
7.1 MedCruise Ports Hosting Cruise and Ferry Traffic

This section provides a new analysis of passenger movements in the MedCruise port members. It is interesting to notice how just the sum of the two kinds of traffic (cruise + ferry) generates new rankings highlighting different ports and areas.

The full list of ports included in this analysis, along with the raw material for ferry passenger movements and ferry calls for 2019, are available at the end of the section. It had been collected ferry traffic data from 61 members with 18 of them to declare no ferry traffic in 2019. The MedCruise members which provided both data on cruise and ferry (included the ones which declared to have had no ferry traffic) hosted more than 106 million ferry passengers in 2019 (106,656,770; with 389,865 ferry calls).

- MedCruise port members ports hosted more than 106 Million ferry passengers in 2019
- At least 390,000 ferry calls had been recorded
- Each day of the year around 1.000 ferries call a Med-Cruise member port

Figures 7.1 and 7.2 Passengers traffic in MedCruise Ports, cruise vs. ferry, 2019



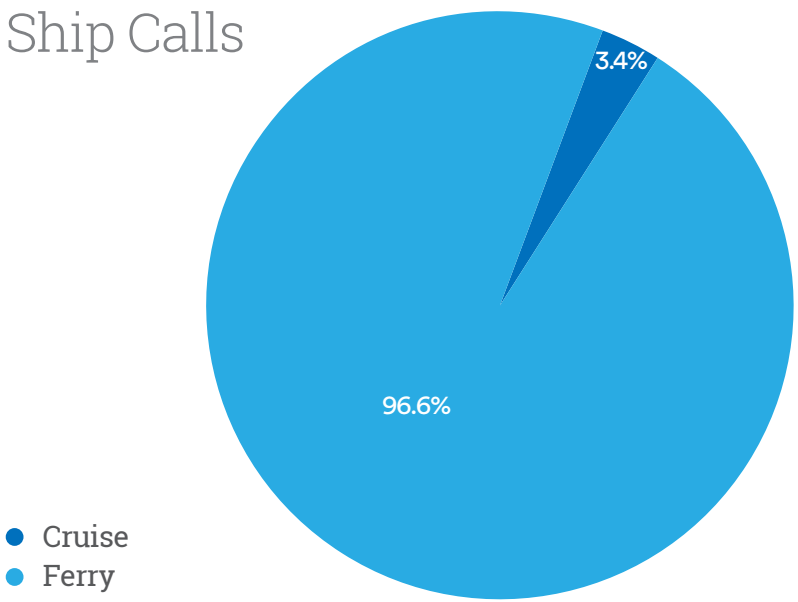


Table 7.1 shows the ranking of Top10 MedCruise port members for total passengers. Three members – Piraeus, Livorno/Piombino/Portoferraio and Messina -hosted in 2019 more than 10M ferry passengers and more than 11M adding the cruise passengers. Balearic Islands and Naples/Salerno/Castellammare di Stabia exceeded the 8M threshold. Barcelona, that leads the ranking for cruise traffic, is only at the tenth place of this ranking.

Table 7.1 Major MedCruise Port Members for Total Passenger Movements (cruise + ferry)

No.	Port	Country	Region	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Piraeus	Greece	East Med	1,098,091	622	16,551,054	5,284	17,649,145	5,906
2	Livorno, Piombino, Portoferraio	Italy	West Med	888,346	477	10,900,297	31,452	11,788,643	31,929
3	Messina	Italy	West Med	422,732	170	10,755,431	97,438	11,178,163	97,608
4	Balearic Islands	Spain	West Med	2,658,156	819	6,861,048	51,295	9,519,204	52,114
5	Naples, Salerno, Castellammare di Stabia	Italy	West Med	1,454,023	526	6,851,448	23,461	8,305,471	23,987
6	Sardinian Ports	Italy	West Med	481,924	215	5,761,759	n/a	6,243,683	n/a
7	Tenerife Ports	Spain	West Med	1,067,440	511	5,156,129	12,967	6,223,569	13,478
8	Split	Croatia	Adriatic	359,955	282	5,247,834	19,764	5,607,789	20,046
9	Canarian ports	Spain	West Med	1,930	3	5,015,666	55,744	5,017,596	55,747
10	Barcelona	Spain	West Med	3,137,918	800	1,490,644	3,260	4,628,562	4,060

Table 7.2 Major MedCruise Port Members for Total Passenger Traffic in the East Med

No.	Port	Country	Region	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Piraeus	Greece	East Med	1,098,091	622	16,551,054	5,284	17,649,145	5,906
2	Igoumenitsa	Greece	East Med	1,053	5	2,772,401	10,647	2,773,454	10,652
3	Heraklion	Greece	East Med	307,043	204	1,713,727	2,927	2,020,770	3,131

Table 7.3 Major MedCruise Port Members for Total Passenger Traffic in the West Med

No.	Port	Country	Region	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Livorno, Piombino, Portoferraio	Italy	West Med	888,346	477	10,900,297	31,452	11,788,643	31,929
2	Messina	Italy	West Med	422,732	170	10,755,431	97,438	11,178,163	97,608
3	Balearic Islands	Spain	West Med	2,658,156	819	6,861,048	51,295	9,519,204	52,114

Table 7.4 Major MedCruise Port Members for Total Passenger Traffic in the Adriatic

No.	Port	Country	Region	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Split	Croatia	Adriatic	359,955	282	5,247,834	19,764	5,607,789	20,046
2	Zadar	Croatia	Adriatic	183,034	131	2,419,474	18,000	2,602,508	18,131
3	Bari, Brindisi, Manfredonia, Monopoli	Italy	Adriatic	763,195	301	1,712,212	2,966	2,475,407	3,267

Table 7.5 shows the few ports that recorded a high average of ferry pax per call. The leading port (Piraeus) did not reach the 3,200 mark. It should be noted how the average ferry pax per call is 342, a value that is 7 times less than the value for cruise ships.

Table 7.5 Major MedCruise Port Members for Average of Ferry Pax/Call

No.	Port	Country	Region	Ferry Pax	Ferry Calls	AVG Ferry Pax/Call
1	Piraeus	Greece	East Med	16,551,054	5,284	3,132.3
2	Toulon-Var Provence	France	West Med	1,742,417	1,165	1,495.6
3	French Riviera Ports	France	West Med	415,537	302	1,376.0
4	Portimao	Portugal	West Med	14,087	12	1,173.9
5	Genoa, Savona	Italy	West Med	2,528,991	2,187	1,156.4
6	Civitavecchia	Italy	West Med	1,804,201	1.618	1,115.1
7	Sète	France	West Med	127,892	116	1,102.5
8	Madeira Ports	Portugal	West Med	370,757	353	1,050.3
9	Bastia/North Corsica	France	West Med	2,473,503	2,648	934.1
10	Souda/Chania	Greece	East Med	1,217,124	1,422	855.9

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

Elaborations have been done to explore the profile of a port limited to the passenger traffic in order to understand if and how one of the two components (cruise and ferry) can be predominant. Only ports which hosted in 2019 both kind of traffic had been considered. Easy to envisage, there are many ports in which the ferry traffic represents the large majority of their passenger traffic, exceeding the 95% (Table7.6).

Table 7.6 MedCruise Port Members with the Highest Ferry Pax Traffic Share on Overall Traffic

Many MedCruise Members with Reduced Cruise Traffic are Strong in Ferry Traffic

No.	Port	Country	Region	Cruise Pax	Ferry Pax	Ferry Share
1	Igoumenitsa	Greece	East Med	1,053	2,772,401	99.96%
2	Canarian ports	Spain	West Med	1,930	5,015,666	99.96%
3	Ceuta	Spain	West Med	9,351	2,101,173	99.56%
4	Kavala	Greece	East Med	2,699	479,719	99.44%
5	Bastia/North Corsica	France	West Med	23,454	2,473,503	99.06%
6	Tangier	Morocco	West Med	36,986	1,610,869	97.76%
7	Huelva	Spain	West Med	1,409	43,244	96.84%
8	Messina	Italy	West Med	422,732	10,755,431	96.22%
9	Motril-Granada	Spain	West Med	9,413	232,978	96.12%
10	Volos	Greece	East Med	12,574	300,457	95.98%

Table 7.7 MedCruise Port Members with the Highest Cruise Pax Traffic Share on Overall Traffic

No.	Port	Country	Region	Cruise Pax	Ferry Pax	Cruise Share
1	Gibraltar	Gibraltar	West Med	328,057	2,025	99.39%
2	Alanya	Turkey	East Med	14,138	4,134	77.38%
3	Cyprus Ports	Cyprus	East Med	43,192	15,744	73.29%
4	Catania	Italy	West Med	208,509	82,657	71.61%
5	Barcelona	Spain	West Med	3,137,918	1,490,644	67.79%
6	French Riviera Ports	France	West Med	697,361	415,537	62.66%
7	Portimao	Portugal	West Med	22,861	14,087	61.87%
8	Madeira Ports	Portugal	West Med	596,818	370,757	61.68%
9	Civitavecchia	Italy	West Med	2,652,403	1,804,201	59.52%
10	Marseille	France	West Med	1,865,918	1,271,437	59.47%

With the same purpose, elaborations on calls' number had been realized and the results are shown in Tables 7.8 and 7.9. As for the passengers and even with higher concentrations, there are many ports hosting both both traffic categories to deal with ferries much more than with cruises (the last port in this ranking presents a ratio of 98.43%). The 10 ports with the higher percentage of cruise calls on total calls show a different situation, considering that it's more frequent in this case to find ports with a more balanced ratio.

Table 7.8 MedCruise Port Members with the Highest Ferry Call Share on Overall Traffic

No.	Port	Country	Region	Cruise Calls	Ferry Calls	Ferry/Total Calls
1	Canarian ports	Spain	West Med	3	55,744	99.99%
2	Igoumenitsa	Greece	East Med	5	10,647	99.95%
3	Ceuta	Spain	West Med	6	7,350	99.92%
4	Messina	Italy	West Med	170	97,438	99.83%
5	Kavala	Greece	East Med	7	2,690	99.74%
6	Zadar	Croatia	Adriatic	131	18,000	99.28%
7	Tangier	Morocco	West Med	49	3,988	98.79%
8	Split	Croatia	Adriatic	282	19,764	98.59%
9	Livorno, Piombino, Portoferraio	Italy	West Med	477	31,452	98.51%
10	Balearic Islands	Spain	West Med	819	51,295	98.43%

For Many MedCruise Ports, Cruise Ships Represent Less Than 2% of Overall Calls

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

Table 7.9 MedCruise Port Members with the Highest Cruise Call Share on Overall Traffic

No.	Port	Country	Region	Cruise Calls	Ferry Calls	Cruise/Total Calls
1	Gibraltar	Gibraltar	West Med	197	40	83.12%
2	Portimao	Portugal	West Med	57	12	82.61%
3	Cyprus Ports	Cyprus	East Med	38	32	54.29%
4	French Riviera Ports	France	West Med	346	302	53.40%
5	Alanya	Turkey	East Med	26	23	53.06%
6	Madeira Ports	Portugal	West Med	300	353	45.94%
7	Sète	France	West Med	69	116	37.30%
8	Civitavecchia	Italy	West Med	800	1,618	33.09%
9	Málaga	Spain	West Med	288	690	29.45%
10	Marseille	France	West Med	497	1,655	23.09%

Few Ports Present a Balanced Call Distribution

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

To complete the analysis, table 7.10 details the data recorded for each MedCruise port member which provided numbers, as regards cruise and ferry traffic hosted in 2019 (cruise traffic data refer to overall cruise passenger movements: Home In/Out and Transit).

Table 7.10 MedCruise Cruise Ports and Ferry Traffic Data, 2019

No	Port	Country	Region	Cruise Pax	Cruise Calls	Ferry Pax	Ferry Calls	Total Pax	Total Calls
1	Alanya	Turkey	East Med	14,138	26	4,134	23	18,272	49
2	Ancona, Ortona, Pesaro	Italy	Adriatic	101,981	93	1,100,992	1,604	1,202,973	1,697
3	Antalya, Bodrum, Kusadasi	Turkey	East Med	186,955	212	192,495	1,130	379,450	1,342
4	Ashdod	Israel	East Med	27,433	32	0	0	27,433	32
5	Azores	Portugal	West Med	148,973	142	562,993	7,279	711,966	7,421
6	Balearic Islands	Spain	West Med	2,658,156	819	6,861,048	51,295	9,519,204	52,114
7	Barcelona	Spain	West Med	3,137,918	800	1,490,644	3,260	4,628,562	4,060
8	Bari, Brindisi, Manfredonia, Monopoli	Italy	Adriatic	763,195	301	1,712,212	2,966	2,475,407	3,267
9	Bastia/North Corsica	France	West Med	23,454	77	2,473,503	2,648	2,496,957	2,725
10	Burgas	Bulgaria	Black Sea	0	0	0	0	0	0
11	Cabo Verde	Cabo Verde	West Med	49,878	146	1,071,263	3,727	1,121,141	3,873
12	Canarian ports	Spain	West Med	1,930	3	5,015,666	55,744	5,017,596	55,747
13	Cartagena	Spain	West Med	250,058	166	0	0	250,058	166
14	Castellón	Spain	West Med	5,452	5	0	0	5,452	5
15	Catania	Italy	West Med	208,509	113	82,657	1,387	291,166	1,500
16	Ceuta	Spain	West Med	9,351	6	2,101,173	7,350	2,110,524	7,356
17	Civitavecchia	Italy	West Med	2,652,403	800	1,804,201	1,618	4,456,604	2,418
18	Constantza	Romania	Black Sea	450	1	0	0	450	1
19	Corfu	Greece	Adriatic	807,197	420	n/a	n/a	n/a	n/a
20	Costa Brava Cruise Ports	Spain	West Med	56,731	50	0	0	56,731	50
21	Cyprus Ports	Cyprus	East Med	132,828	94	15,744	32	58,936	70
22	Dubrovnik, Korcula	Croatia	Adriatic	804,881	622	613,519	2,795	1,418,400	3,417
23	Egyptian Ports	Egypt	East Med	72,964	55	n/a	n/a	n/a	n/a

24	French Riviera Ports	France	West Med	697,361	346	415,537	302	1,112,898	648
25	Genoa, Savona	Italy	West Med	2,018,847	435	2,528,991	2,187	4,547,838	2,622
26	Gibraltar	Gibraltar	West Med	328,057	197	2,025	40	330,082	237
27	Gioia Tauro	Italy	West Med	5,250	9	n/a	n/a	n/a	n/a
28	Haifa	Israel	East Med	237,284	131	0	0	237,284	131
29	Heraklion	Greece	East Med	307,043	204	1,713,727	2,927	2,020,770	3,131
30	Huelva	Spain	West Med	1,409	7	43,244	214	44,653	221
31	Igoumenitsa	Greece	East Med	1,053	5	2,772,401	10,647	2,773,454	10,652
32	Istanbul	Turkey	East Med	0	0	0	0	0	0
33	Kavala	Greece	East Med	2,699	7	479,719	2,690	482,418	2,697
34	Koper	Slovenia	Adriatic	115,581	72	0	0	115,581	72
35	Kotor	Montenegro	Adriatic	614,747	464	0	0	613,747	464
36	La Spezia, Marina Di Carrara	Italy	West Med	649,588	186	n/a	n/a	n/a	n/a
37	Leixoes	Portugal	West Med	88,697	101	0	0	88,696	101
38	Lisbon	Portugal	West Med	571,259	310	0	0	571,259	310
39	Livorno, Piombino, Portoferraio	Italy	West Med	888,346	477	10,900,297	31,452	11,788,643	31,929
40	Madeira Ports	Portugal	West Med	596,818	300	370,757	353	967,575	653
41	Málaga	Spain	West Med	475,745	288	410,314	690	886,059	978
42	Marseille	France	West Med	1,865,918	497	1,271,437	1,655	3,137,355	2,152
43	Messina	Italy	West Med	422,732	170	10,755,431	97,438	11,178,163	97,608
44	Monaco	Monaco	West Med	183,468	163	0	0	183,468	163
45	Motril-Granada	Spain	West Med	9,413	32	232,978	977	242,391	1,009
46	Naples, Salerno, Castellammare di Stabia	Italy	West Med	1,454,023	526	6,851,448	23,461	8,305,471	23,987
47	Odessa	Ukraine	Black Sea	750	1	n/a	n/a	n/a	n/a
48	Palermo	Italy	West Med	532,973	228	1,690,416	3,384	2,223,389	3,612
49	Patras	Greece	East Med	1,219	2	n/a	n/a	n/a	n/a
50	Piraeus	Greece	East Med	1,098,091	622	16,551,054	5,284	17,649,145	5,906
51	Portimao	Portugal	West Med	22,861	57	14,087	12	36,948	69
52	Portofino	Italy	West Med	64,152	96	n/a	n/a	n/a	n/a
53	Rijeka	Croatia	Adriatic	41,137	24	0	0	41,137	24
54	Sardinian Ports	Italy	West Med	481,924	215	5,761,759	n/a	6,243,683	n/a
55	Sète	France	West Med	111,837	69	127,892	116	239,729	185

56	Sibenik	Croatia	Adriatic	19,134	103	289,702	3,028	308,836	3,131
57	Souda/Chania	Greece	East Med	265,956	132	1,217,124	1,422	1,483,080	1,554
58	Split	Croatia	Adriatic	359,955	282	5,247,834	19,764	5,607,789	20,046
59	Tangier	Morocco	West Med	36,986	49	1,610,869	3,988	1,647,855	4,037
60	Taranto	Italy	Adriatic	9,205	7	n/a	n/a	n/a	n/a
61	Tarragona	Spain	West Med	128,089	63	0	0	128,089	63
62	Tenerife Ports	Spain	West Med	1,067,440	511	5,156,129	12,967	6,223,569	13,478
63	Thessaloniki	Greece	East Med	4,826	6	0	0	4,866	6
64	Toulon-Var Provence	France	West Med	168,306	86	1,742,417	1,165	1,910,723	1,251
65	Trabzon	Turkey	Black Sea	0	0	0	0	0	0
66	Tunisian Ports	Tunisia	West Med	648	1	n/a	n/a	n/a	n/a
67	Valencia	Spain	West Med	435,616	203	677,006	1,788	1,112,622	1,991
68	Valletta	Malta	West Med	902,425	372	n/a	n/a	n/a	n/a
69	Varna	Bulgaria	Black Sea	0	0	0	0	0	0
70	Venice	Italy	Adriatic	1,611,341	500	n/a	n/a	n/a	n/a
71	Volos	Greece	East Med	12,574	22	300,457	1,056	313,031	1,078
72	Zadar	Croatia	Adriatic	183,034	131	2,419,474	18,000	2,602,508	18,131

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Appendix I:
MedCruise Ports: Total Cruise Passenger Movements, 2015-2019

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
1	Alanya	14,138	3,027	367.06%	12,189	9,272	22,321	-36.66%
2	Ancona / Ortona / Pesaro	101,981	67,031	52.14%	52,086	54,901	39,277	159.65%
3	Antalya / Bodrum / Kusadasi	186,955	132,262	41.35%	189,319	453,898	808,446	-76.87%
4	Ashdod	27,433	20,633	32.96%	26,757	27,632	33,419	-17.91%
5	Azores	148,973	164,074	-9.20%	135,783	125,904	141,846	5.02%
6	Balearic Islands	2,658,156	2,431,153	9.34%	2,110,663	1,957,429	1,996,533	33.14%
7	Barcelona	3,137,918	3,041,963	3.15%	2,712,247	2,683,594	2,540,302	23.53%
8	Bari / Brindisi	763,195	678,621	12.46%	506,513	406,145	520,203	46.71%
9	Bastia/North Corsica	23,454	34,063	-31.15%	31,661	18,533	53,024	-55.77%
10	Burgas	0	0	0.00%	1,925	5,833	7,575	-100.00%
11	Cabo Verde	49,878	6,320	689.21%	n/a	n/a	n/a	n/a
12	Canarian ports	1,930	1,392	38.65%	4,346	5,853	1,421	35.82%
13	Cartagena	250,058	228,387	9.49%	236,412	187,843	151,195	65.39%
14	Castellón	5,452	566	863.25%	411	1,095	366	1389.62%
15	Catania	208,509	126,167	65.26%	n/a	n/a	n/a	n/a
16	Ceuta	9,351	15,790	-40.78%	17,003	19,251	1,613	479.73%
17	Civitavecchia	2,652,403	2,441,737	8.63%	2,204,336	2,339,676	2,271,652	16.76%
18	Constantza	450	0	100.00%	1,891	6,912	31,856	-98.59%
19	Corfu	807,197	735,832	9.70%	679,681	748,914	647,346	24.69%
20	Costa Brava Cruise Ports	56,731	51,042	11.15%	45,176	25,505	40,800	39.05%
21	Cyprus Ports	132,828	31,089	327.25%	123,397	141,358	173,309	-23.36%
22	Dubrovnik / Korcula	804,881	732,431	9.89%	748,918	831,730	830,684	-3.11%
23	Egyptian Ports	72,964	1,160	6190.00%	9,835	n/a	n/a	n/a

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
24	French Riviera Ports	697,361	610,919	14.15%	693,351	562,929	546,199	27.68%
25	Genoa / Savona	2,018,847	1,854,273	8.88%	1,779,631	1,927,612	1,830,453	10.29%
26	Gibraltar	328,057	406,998	-19.40%	404,995	404,005	344,140	-4.67%
27	Gioia Tauro	5,250	8,463	-37.97%	4,141	13,758	13,868	-62.14%
28	Haifa	237,284	n/a	n/a	n/a	n/a	n/a	n/a
29	Heraklion	307,043	297,929	3.06%	181,693	238,780	219,805	39.69%
30	Huelva	1,409	11,691	-87.95%	6,571	20,071	4,788	-70.57%
31	Igoumenitsa	1,053	12,650	-91.68%	9,088	7,623	3,090	-65.92%
32	Istanbul	0	0	0.00%	0	36,708	589,314	-100.00%
33	Kavala	2,699	2,031	32.89%	3,226	6,042	12,783	-78.89%
34	Koper	115,581	101,415	13.97%	72,175	78,923	57,893	99.65%
35	Kotor	614,747	492,475	24.83%	541,017	536,644	442,029	39.07%
36	La Spezia / Marina Di Carrara	649,588	471,652	37.73%	454,954	507,531	667,446	-2.68%
37	Leixoes	88,697	n/a	n/a	n/a	n/a	n/a	n/a
38	Lisbon	571,259	577,603	-1.10%	521,042	522,497	512,128	11.55%
39	Livorno / Piombino / Portoferraio	888,346	812,551	9.33%	728,243	850,687	735,441	20.79%
40	Madeira Ports	596,818	541,467	10.22%	540,593	522,483	580,348	2.84%
41	Málaga	475,745	507,360	-6.23%	510,607	442,931	419,121	13.51%
42	Marseille	1,865,918	1,716,184	8.72%	1,487,313	1,597,213	1,451,059	28.59%
43	Messina	422,732	372,365	13.53%	390,196	373,199	327,702	29.00%
44	Monaco	183,468	170,571	7.56%	168,017	185,392	259,325	-29.25%
45	Motril-Granada	9,413	5,313	77.17%	4,111	4,570	6,481	45.24%
46	Naples / Salerno / Castellammare di Stabia	1,454,023	1,171,764	24.09%	927,458	1,306,151	1,269,571	14.53%
47	Odessa	750	0	100.00%	1,636	1,242	6,563	-88.57%
48	Palermo	532,973	604,193	-11.79%	459,229	510,078	546,884	-2.54%
49	Patras	1,219	1,647	-25.99%	952	743	1,090	11.83%
50	Piraeus	1,098,091	961,632	14.19%	1,055,559	1,094,135	980,149	12.03%
51	Portimao	22,861	36,786	-37.85%	29,859	19,520	14,786	54.61%
52	Portofino	64,152	36,048	77.96%	35,203	19,894	30,696	108.99%
53	Rijeka	41,137	10,913	276.95%	12,656	13,874	9,082	352.95%
54	Sardinian Ports	481,924	513,874	-6.22%	557,340	466,259	501,503	-3.90%

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
55	Sète	111,837	114,429	-2.27%	47,377	23,791	20,555	444.09%
56	Sibenik	19,134	35,729	-46.45%	27,718	12,276	17,562	8.95%
57	Souda/Chania	265,956	139,944	90.04%	128,067	147,915	96,612	175.28%
58	Split	359,955	307,139	17.20%	232,244	275,651	271,445	32.61%
59	Tangier	36,986	31,250	18.36%	23,550	97,311	121,608	-69.59%
60	Taranto	9,205	658	1298.94%	8,546	0	314	2831.53%
61	Tarragona	128,089	98,126	30.54%	51,393	14,013	11,600	1004.22%
62	Tenerife Ports	1,067,440	1,015,150	5.15%	964,337	884,173	933,154	14.39%
63	Thessaloniki	4,926	1,348	265.43%	2,424	18,876	26,356	-81.31%
64	Toulon-Var Provence	168,306	107,943	55.92%	239,023	362,479	240,833	-30.12%
65	Trabzon	0	0	0.00%	206	452	2,280	-100.00%
66	Tunisian Ports	648	0	100.00%	5,317	757	53,780	-98.80%
67	Valencia	435,616	412,512	5.60%	411,317	404,783	371,374	17.30%
68	Valletta	902,425	711,018	26.92%	778,596	682,970	668,277	35.04%
69	Varna	0	0	0.00%	791	1,109	3,159	-100.00%
70	Venice	1,611,341	1,560,579	3.25%	1,427,812	1,605,660	1,582,481	1.82%
71	Volos	12,574	31,337	-59.87%	7,618	37,445	67,096	-81.26%
72	Zadar	183,034	166,528	9.91%	137,667	136,462	74,660	145.16%

Appendix II
MedCruise Ports: Total Cruise Calls, 2015-2019

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
1	Alanya	26	15	73.33%	22	13	34	-23.53%
2	Ancona / Ortona / Pesaro	93	40	132.50%	28	34	24	287.50%
3	Antalya / Bodrum / Kusadasi	212	159	33.33%	165	338	660	-67.88%
4	Ashdod	32	n/a	100.00%	21	22	32	0.00%
5	Azores	142	138	2.90%	152	121	138	2.90%
6	Balearic Islands	819	859	-4.66%	819	742	788	3.93%
7	Barcelona	800	830	-3.61%	778	758	749	6.81%
8	Bari / Brindisi	301	289	4.15%	186	159	208	44.71%
9	Bastia/North Corsica	77	115	-33.04%	73	23	90	-14.44%
10	Burgas	0	0	0.00%	2	4	5	-100.00%
11	Cabo Verde	146	30	386.67%	n/a	n/a	n/a	n/a
12	Canarian ports	3	5	-40.00%	3	4	1	200.00%
13	Cartagena	166	148	12.16%	151	120	108	53.70%
14	Castellón	5	1	400.00%	1	2	2	150.00%
15	Catania	113	72	56.94%	n/a	n/a	n/a	n/a
16	Ceuta	6	10	-40.00%	10	13	4	50.00%
17	Civitavecchia	800	760	5.26%	729	833	794	0.76%
18	Constantza	1	0	100.00%	3	8	25	-96.00%
19	Corfu	420	413	1.69%	410	481	407	3.19%
20	Costa Brava Cruise Ports	50	54	-7.41%	46	37	37	35.14%
21	Cyprus Ports	94	40	135.00%	113	135	167	-43.71%
22	Dubrovnik / Korcula	622	438	42.01%	539	639	475	30.95%
23	Egyptian Ports	55	2	2650.00%	7	n/a	n/a	n/a

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
24	French Riviera Ports	346	348	-0.57%	374	325	343	0.87%
25	Genoa / Savona	435	423	2.84%	399	461	429	1.40%
26	Gibraltar	197	243	-18.93%	235	224	204	-3.43%
27	Gioia Tauro	9	12	-25.00%	6	13	12	-25.00%
28	Haifa	131	n/a	n/a	n/a	n/a	n/a	n/a
29	Heraklion	204	187	9.09%	131	165	170	20.00%
30	Huelva	7	16	-56.25%	6	17	6	16.67%
31	Igoumenitsa	5	14	-64.29%	8	7	6	-16.67%
32	Istanbul	0	0	0.00%	0	42	331	-100.00%
33	Kavala	7	5	40.00%	6	18	22	-68.18%
34	Koper	72	75	-4.00%	68	69	49	46.94%
35	Kotor	464	411	12.90%	430	487	411	12.90%
36	La Spezia / Marina Di Carrara	186	175	6.29%	215	211	175	6.29%
37	Leixoes	101	n/a	n/a	n/a	n/a	n/a	n/a
38	Lisbon	310	339	-8.55%	330	311	306	1.31%
39	Livorno / Piombino / Portoferraio	477	458	4.15%	453	521	481	-0.83%
40	Madeira Ports	300	293	2.39%	293	297	312	-3.85%
41	Málaga	288	298	-3.36%	299	253	233	23.61%
42	Marseille	497	505	-1.58%	444	490	442	12.44%
43	Messina	170	172	-1.16%	172	223	160	6.25%
44	Monaco	163	177	-7.91%	166	181	209	-22.01%
45	Motril-Granada	32	28	14.29%	31	21	27	18.52%
46	Naples / Salerno / Castellammare di Stabia	526	458	14.85%	336	493	445	18.20%
47	Odessa	1	0	100.00%	12	5	13	-92.31%
48	Palermo	228	237	-3.80%	154	174	200	14.00%
49	Patras	2	2	0.00%	2	2	3	-33.33%
50	Piraeus	622	524	18.70%	576	625	621	0.16%
51	Portimao	57	66	-13.64%	71	43	47	21.28%
52	Portofino	96	82	17.07%	79	57	80	20.00%
53	Rijeka	24	11	118.18%	15	15	7	242.86%
54	Sardinian Ports	215	221	-2.71%	259	240	246	-12.60%

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
55	Sète	69	72	-4.17%	44	36	31	122.58%
56	Sibenik	103	109	-5.50%	109	106	83	24.10%
57	Souda/Chania	132	78	69.23%	84	86	59	123.73%
58	Split	282	260	8.46%	234	286	261	8.05%
59	Tangier	49	46	6.52%	27	66	88	-44.32%
60	Taranto	7	2	250.00%	7	0	2	250.00%
61	Tarragona	63	57	10.53%	37	22	11	472.73%
62	Tenerife Ports	511	546	-6.41%	533	524	506	0.99%
63	Thessaloniki	6	4	50.00%	4	23	35	-82.86%
64	Toulon-Var Provence	86	62	38.71%	107	278	124	-30.65%
65	Trabzon	0	0	0.00%	1	3	10	-100.00%
66	Tunisian Ports	1	0	100.00%	6	2	15	-93.33%
67	Valencia	203	195	4.10%	203	181	174	16.67%
68	Valletta	372	322	15.53%	342	317	306	21.57%
69	Varna	0	0	0.00%	1	4	10	-100.00%
70	Venice	500	502	-0.40%	466	529	521	-4.03%
71	Volos	22	27	-18.52%	9	46	57	-61.40%
72	Zadar	131	133	-1.50%	104	114	96	36.46%

Appendix III
MedCruise Ports: Total Home In/Out Passengers, 2015-2019

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
1	Alanya	0	0	0.00%	0	0	0	0.00%
2	Ancona / Ortona / Pesaro	15,246	12,854	18.61%	11,118	10,896	6,676	128.37%
3	Antalya / Bodrum / Kusadasi	29,131	26,835	8.56%	56,913	62,594	200,200	-85.45%
4	Ashdod	0	0	0.00%	376	n/a	0	0.00%
5	Azores	2,042	1,374	48.62%	1,556	1,182	1,787	14.27%
6	Balearic Islands	982,697	858,435	14.48%	737,810	600,181	553,928	77.41%
7	Barcelona	1,753,222	1,666,767	5.19%	1,440,383	1,555,819	1,363,754	28.56%
8	Bari / Brindisi	269,875	230,711	16.98%	187,002	109,144	106,213	154.09%
9	Bastia/North Corsica	0	0	0.00%	0	0	0	0.00%
10	Burgas	0	0	0.00%	0	0	2	-100.00%
11	Cabo Verde	612	0	0.00%	n/a	n/a	n/a	n/a
12	Canarian ports	0	0	0.00%	0	n/a	0	0.00%
13	Cartagena	0	0	0.00%	133	186	0	0.00%
14	Castellón	0	0	0.00%	0	0	0	0.00%
15	Catania	12,357	14,471	-14.61%			0	100.00%
16	Ceuta	0	0	0.00%	0	0	0	0.00%
17	Civitavecchia	1,111,542	956,858	16.17%	849,993	847,009	868,143	28.04%
18	Constantza	0	0	0.00%	0	0	667	-100.00%
19	Corfu	107,879	82,259	31.15%	69,915	70,864	69,926	54.28%
20	Costa Brava Cruise Ports	0	0	0.00%	0	0	0	0.00%
21	Cyprus Ports	25,518	1,632	1463.60%	71,342	58,163	66,120	-61.41%
22	Dubrovnik / Korcula	73,110	63,138	15.79%	68,105	68,169	61,797	18.31%
23	Egyptian Ports	0	0	0.00%	n/a	n/a	0	0.00%
24	French Riviera Ports	57,969	49,206	17.81%	47,920	41,967	55,302	4.82%

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
25	Genoa / Savona	1,096,742	1,078,401	1.70%	1,059,442	1,183,423	1,213,051	-9.59%
26	Gibraltar	0	0	0.00%	0	90	583	-100.00%
27	Gioia Tauro	0	0	0.00%	0	21	147	-100.00%
28	Haifa	165,895	n/a	n/a	n/a	n/a	n/a	n/a
29	Heraklion	46,720	29,841	56.56%	18,874	7,302	3,344	1297.13%
30	Huelva	0	0	0.00%	0	0	0	0.00%
31	Igoumenitsa	0	0	0.00%	0	0	0	0.00%
32	Istanbul	0	0	0.00%	0	16,252	203,135	-100.00%
33	Kavala	0	0	0.00%	0	0	0	0.00%
34	Koper	0	0	0.00%	0	51	82	-100.00%
35	Kotor	1,426	1,873	-23.87%	1,364	1,412	2,921	-51.18%
36	La Spezia / Marina Di Carrara	3,842	5,467	-29.72%	8,824	7,402	96,881	-96.03%
37	Leixoes	1,432	n/a	n/a	n/a	n/a	n/a	n/a
38	Lisbon	72,830	62,089	17.30%	58,915	47,632	42,536	71.22%
39	Livorno / Piombino / Portoferraio	12,344	10,580	16.67%	9,711	9,274	4,181	195.24%
40	Madeira Ports	6,052	4,593	31.77%	3,058	2,775	3,721	62.64%
41	Málaga	43,189	107,887	-59.97%	138,053	92,246	32,492	32.92%
42	Marseille	452,774	438,443	3.27%	414,880	486,964	503,325	-10.04%
43	Messina	19,517	17,755	9.92%	20,532	18,027	17,068	14.35%
44	Monaco	32,935	28,631	15.03%	23,758	26,225	29,563	11.41%
45	Motril-Granada	0	0	0.00%	0	0	0	0.00%
46	Naples / Salerno / Castellammare di Stabia	230,611	99,473	131.83%	113,255	142,137	126,672	82.05%
47	Odessa	0	0	0.00%	253	9	15	-100.00%
48	Palermo	82,900	77,141	7.47%	75,176	72,034	65,582	26.41%
49	Patras	0	0	0.00%	0	0	0	0.00%
50	Piraeus	410,512	354,398	15.83%	332,611	352,663	284,241	44.42%
51	Portimao	2,043	960	112.81%	514	44	238	758.40%
52	Portofino	0	0	0.00%	0	0	0	0.00%
53	Rijeka	0	0	0.00%	0	0	0	0.00%
54	Sardinian Ports	21,713	11,355	91.22%	20,338	8,456	16,536	31.31%
55	Sète	0	0	0.00%	63	28	149	-100.00%

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
56	Sibenik	0	0	0.00%	0	0	0	0.00%
57	Souda/Chania	0	0	0.00%	782	0	0	0.00%
58	Split	0	0	0.00%	0	879	0	0.00%
59	Tangier	0	0	0.00%	0		0	0.00%
60	Taranto	0	0	0.00%	0	0	0	0.00%
61	Tarragona	31,473	22,118	42.30%	14,238	1,842	11	286018.18%
62	Tenerife Ports	210,250	161,803	29.94%	138,076	74,124	0	100.00%
63	Thessaloniki	122	0	100.00%	3	774	51	139.22%
64	Toulon-Var Provence	11,519	107,875	-89.32%	3,407	12,186	21,257	-45.81%
65	Trabzon	0	0	0.00%	206	452	0	0.00%
66	Tunisian Ports	0	0	0.00%	0	0	0	0.00%
67	Valencia	69,132	81,098	-14.75%	72,195	60,963	63,142	9.49%
68	Valletta	273,456	156,825	74.37%	216,029	114,731	140,512	94.61%
69	Varna	0	0	0.00%	1	2	5	-100.00%
70	Venice	1,390,153	1,321,006	5.23%	1,226,471	1,408,066	1,364,044	1.91%
71	Volos	0	6	-100.00%	0	0	0	0.00%
72	Zadar	1,369	1,051	30.26%	736	877	1,064	28.67%

Appendix IV
MedCruise Ports: Total Transit Passengers, 2015-2019

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
1	Alanya	14,138	3,027	367.06%	12,189	9,272	22,321	-36.66%
2	Ancona / Ortona / Pesaro	86,735	54,177	60.10%	40,968	44,005	32,601	166.05%
3	Antalya / Bodrum / Kusadasi	157,824	98,908	59.57%	132,406	391,304	608,246	-74.05%
4	Ashdod	27,433	20,633	32.96%	26,381	27,262	33,129	-17.19%
5	Azores	146,931	162,700	-9.69%	134,227	124,722	140,059	4.91%
6	Balearic Islands	1,675,459	1,572,718	6.53%	1,372,853	1,357,248	1,442,605	16.14%
7	Barcelona	1,384,696	1,375,196	0.69%	1,271,864	1,127,775	1,176,548	17.69%
8	Bari / Brindisi	493,320	447,625	10.21%	319,511	297,001	413,990	19.16%
9	Bastia/North Corsica	23,454	34,063	-31.15%	31,661	18,533	53,024	-55.77%
10	Burgas	0	0	0.00%	1,925	5,833	7,573	-100.00%
11	Cabo Verde	49,266	6,320	679.53%	n/a	n/a	n/a	n/a
12	Canarian ports	1,930	1,392	38.65%	4,346	5,853	1,421	35.82%
13	Cartagena	250,058	228,387	9.49%	236,279	187,657	151,195	65.39%
14	Castellón	5,452	566	863.25%	411	1,095	366	1389.62%
15	Catania	196,152	118,870	65.01%	n/a	n/a	n/a	n/a
16	Ceuta	9,351	15,790	-40.78%	17,003	19,251	1,613	479.73%
17	Civitavecchia	1,540,861	1,484,979	3.76%	1,354,343	1,492,667	1,403,509	9.79%
18	Constantza	450	0	100.00%	1,891	6,912	31,189	-98.56%
19	Corfu	699,318	653,573	7.00%	609,766	678,050	577,420	21.11%
20	Costa Brava Cruise Ports	56,731	51,042	11.15%	45,176	25,505	40,800	39.05%
21	Cyprus Ports	107,310	29,457	264.29%	52,055	83,195	107,189	0.11%
22	Dubrovnik / Korcula	731,771	669,293	9.33%	680,813	763,561	768,887	-4.83%
23	Egyptian Ports	72,964	1,160	6190.00%	n/a	n/a	n/a	n/a

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
24	French Riviera Ports	639,392	561,713	13.83%	645,430	520,962	490,897	30.25%
25	Genoa / Savona	922,105	781,484	17.99%	720,189	708,810	617,402	49.35%
26	Gibraltar	328,057	406,998	-19.40%	404,995	403,915	343,557	-4.51%
27	Gioia Tauro	5,250	8,463	-37.97%	4,141	13,737	13,721	-61.74%
28	Haifa	71,389	n/a	n/a	n/a	n/a	n/a	n/a
29	Heraklion	260,323	268,088	-2.90%	162,819	231,478	216,461	20.26%
30	Huelva	1,409	11,691	-87.95%	6,571	20,071	4,788	-70.57%
31	Igoumenitsa	1,053	12,650	-91.68%	9,088	7,623	3,090	-65.92%
32	Istanbul	0	0	0.00%	0	20,456	386,179	-100.00%
33	Kavala	2,699	2,031	32.89%	3,226	6,042	12,783	-78.89%
34	Koper	115,581	101,415	13.97%	72,175	78,872	57,811	99.93%
35	Kotor	613,321	490,602	25.01%	539,653	535,232	439,108	39.67%
36	La Spezia / Marina Di Carrara	645,746	466,185	38.52%	446,130	500,129	570,565	13.18%
37	Leixoes	87,265	n/a	n/a	n/a	n/a	n/a	n/a
38	Lisbon	498,429	515,514	-3.31%	462,127	474,865	469,592	6.14%
39	Livorno / Piombino / Portoferraio	876,002	801,919	9.24%	718,532	841,413	731,260	19.79%
40	Madeira Ports	590,766	536,874	10.04%	537,535	519,708	576,627	2.45%
41	Málaga	432,556	399,473	8.28%	372,554	350,685	386,629	11.88%
42	Marseille	1,413,144	1,277,741	10.60%	1,072,433	1,110,249	947,734	49.11%
43	Messina	403,215	354,610	13.71%	369,664	337,512	310,634	29.80%
44	Monaco	150,533	141,940	6.05%	144,259	159,167	229,761	-34.48%
45	Motril-Granada	9,413	5,313	77.17%	4,111	4,570	6,481	45.24%
46	Naples / Salerno / Castellammare di Stabia	1,223,412	1,071,291	14.20%	814,133	1,164,041	1,142,899	7.04%
47	Odessa	750	0	100.00%	1,383	1,233	6,548	-88.55%
48	Palermo	450,073	474,626	-5.17%	384,053	438,044	481,302	-6.49%
49	Patras	1,219	1,647	-25.99%	952	743	1,090	11.83%
50	Piraeus	687,579	607,234	13.23%	722,948	741,472	695,908	-1.20%
51	Portimao	20,818	35,826	-41.89%	29,345	19,476	14,548	43.10%
52	Portofino	64,152	36,048	77.96%	35,203	19,894	30,696	108.99%
53	Rijeka	41,137	10,913	276.95%	12,656	13,874	9,082	352.95%
54	Sardinian Ports	460,211	502,519	-8.42%	537,002	457,803	484,967	-5.10%

No	Port	2019	2018	Var. 2019/2018	2017	2016	2015	Var. 2019/2015
55	Sète	111,837	114,429	-2.27%	47,314	23,763	20,406	448.06%
56	Sibenik	19,134	35,729	-46.45%	27,718	12,276	17,562	8.95%
57	Souda/Chania	265,956	139,944	90.04%	127,285	147,915	96,612	175.28%
58	Split	359,955	307,139	17.20%	232,244	274,772	271,445	32.61%
59	Tangier	36,986	31,250	18.36%	23,550	97,311	121,608	-69.59%
60	Taranto	9,205	658	1298.94%	8,546	0	314	2831.53%
61	Tarragona	96,616	76,008	27.11%	37,155	12,171	11,589	733.69%
62	Tenerife Ports	857,190	853,347	0.45%	826,261	810,049	n/a	n/a
63	Thessaloniki	4,804	1,348	256.38%	2,421	18,102	26,305	-81.74%
64	Toulon-Var Provence	156,787	107,794	45.45%	235,616	350,293	219,576	-28.60%
65	Trabzon	0	0	0.00%	0	0	2,280	-100.00%
66	Tunisian Ports	648	0	100.00%	5,317	757	53,780	-98.80%
67	Valencia	366,484	331,414	10.58%	339,122	343,820	308,232	18.90%
68	Valletta	628,969	554,193	13.49%	562,610	568,239	527,765	19.18%
69	Varna	0	0	0.00%	790	1,107	3,154	-100.00%
70	Venice	221,188	239,573	-7.67%	201,341	197,594	218,437	1.26%
71	Volos	12,574	31,331	-59.87%	7,618	37,445	67,096	-81.26%
72	Zadar	181,665	165,477	9.78%	136,931	135,584	73,596	146.84%

Note (*): All tables include only ports that provided seasonality data for 2019

Appendix V
Seasonality of Cruise Activities in MedCruise Ports*
Cruise Pax Shares of MedCruise Ports per region – Shares per Trimester in 2019

West Med Ports	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Azores	61.79%	4.20%	21.22%	12.79%
Balearic Islands	20.18%	43.04%	29.61%	7.17%
Barcelona	23.58%	35.75%	32.57%	8.10%
Bastia/North Corsica	39.65%	36.24%	24.11%	0.00%
Cabo Verde	16.10%	0.00%	54.93%	28.97%
Canarian ports	38.39%	0.00%	32.95%	28.65%
Cartagena	25.47%	28.99%	34.93%	10.61%
Castellón	0.95%	71.74%	27.31%	0.00%
Catania	28.03%	29.36%	41.30%	1.30%
Ceuta	26.47%	62.89%	6.77%	3.87%
Civitavecchia	22.66%	38.49%	31.16%	7.68%
Costa Brava Cruise Ports	22.84%	37.97%	39.19%	0.00%
French Riviera Ports	21.91%	46.99%	30.72%	0.38%
Genoa, Savona	27.06%	28.97%	34.78%	9.19%
Gibraltar	22.77%	31.54%	36.68%	9.01%
Gioia Tauro	0.00%	55.24%	44.76%	0.00%
Huelva	7.10%	9.44%	83.46%	0.00%
La Spezia, Marina Di Carrara	20.84%	47.37%	30.87%	0.92%
Leixoes	41.20%	12.89%	39.21%	6.69%
Lisbon	33.45%	12.17%	44.26%	10.12%
Livorno, Piombino, Portoferraio	19.21%	41.63%	33.86%	5.30%
Madeira Ports	30.40%	2.50%	28.44%	38.67%
Málaga	32.76%	12.20%	46.37%	8.67%
Marseille	26.40%	32.67%	32.29%	8.64%

West Med Ports	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Messina	25.02%	39.49%	32.46%	3.03%
Monaco	19.85%	48.54%	28.89%	2.72%
Motril-Granada	39.64%	13.45%	46.91%	0.00%
Naples, Salerno, Castellammare di Stabia	20.36%	44.95%	33.42%	1.27%
Palermo	26.36%	26.87%	25.94%	20.83%
Portimao	31.04%	36.67%	31.13%	1.17%
Portofino	15.97%	44.79%	39.24%	0.00%
Sardinian Ports	19.45%	52.16%	28.09%	0.29%
Sète	26.51%	44.64%	25.71%	3.14%
Tangier	39.16%	2.81%	40.52%	17.51%
Tarragona	11.65%	56.75%	31.60%	0.00%
Tenerife Ports	30.05%	2.31%	25.92%	41.72%
Toulon-Var Provence	13.95%	41.55%	38.53%	5.97%
Tunisian Ports	0.00%	0.00%	100.00%	0.00%
Valencia	29.20%	28.49%	35.48%	6.84%
Valletta	27.24%	35.36%	29.79%	7.60%

Adriatic Port	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Ancona, Ortona, Pesaro	12.26%	49.90%	37.84%	0.00%
Bari, Brindisi, Manfredonia, Monopoli	19.10%	46.58%	32.48%	1.85%
Corfu	17.99%	40.53%	40.01%	1.46%
Dubrovnik, Korcula	21.36%	43.40%	33.62%	1.62%
Koper	17.90%	51.47%	30.38%	0.25%
Kotor	20.91%	40.96%	35.94%	2.18%
Rijeka	12.98%	52.88%	34.13%	0.00%
Sibenik	26.85%	42.77%	24.78%	5.60%
Split	23.06%	42.80%	33.11%	1.03%
Taranto	32.24%	46.83%	20.92%	0.00%
Venice	19.24%	47.10%	32.70%	0.96%
Zadar	26.45%	41.19%	31.73%	0.63%

East Med Ports	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Alanya	1.07%	19.45%	35.73%	43.75%
Antalya, Bodrum, Kusadasi	19.83%	43.68%	30.99%	5.50%
Ashdod	20.72%	4.66%	58.84%	15.78%
Cyprus Ports	23.36%	13.19%	46.39%	17.07%
Egyptian Ports	35.25%	0.00%	44.85%	19.90%
Haifa	20.36%	31.49%	40.84%	7.31%
Heraklion	28.37%	26.25%	42.13%	3.25%
Igoumenitsa	0.00%	29.91%	70.09%	0.00%
Kavala	24.75%	31.23%	44.02%	0.00%
Patras	0.00%	33.63%	66.37%	0.00%
Piraeus	21.07%	41.17%	35.00%	2.76%
Souda/Chania	19.34%	45.33%	34.33%	1.00%
Thessaloniki	0.00%	69.73%	30.27%	0.00%
Volos	18.02%	29.19%	52.79%	0.00%

Black Sea	Mar-May	Jun-Aug	Sept-Nov	Dec-Feb
Constanta	0.00%	0.00%	100.00%	0.00%
Odessa	0.00%	0.00%	100.00%	0.00%

Appendix VI
MedCruise Ports per Size Category

CATEGORY A (> 140,000 PAX.)

No	Port	2019
1	Antalya / Bodrum / Kusadasi	186,955
2	Azores	148,973
3	Balearic Islands	2,658,156
4	Barcelona	3,137,918
5	Bari / Brindisi	763,195
6	Cartagena	250,058
7	Catania	208,509
8	Civitavecchia	2,652,403
9	Corfu	807,197
10	Dubrovnik / Korcula	804,881
11	French Riviera Ports	697,361
12	Genoa / Savona	2,018,847
13	Gibraltar	328,057
14	Haifa	237,284
15	Heraklion	307,043
16	Kotor	614,747
17	La Spezia / Marina Di Carrara	649,588
18	Lisbon	571,259
19	Livorno / Piombino / Portoferraio	888,346
20	Madeira Ports	596,818
21	Málaga	475,745
22	Marseille	1,865,918
23	Messina	422,732
24	Monaco	183,468

CATEGORY B (> 140,000 PAX.)

No	Port	2019
1	Alanya	14,138
2	Ancona / Ortona / Pesaro	101,981
3	Ashdod	27,433
4	Bastia/North Corsica	23,454
5	Burgas	0
6	Cabo Verde	49,878
7	Canarian ports	1,930
8	Castellón	5,452
9	Ceuta	9,351
10	Constantza	450
11	Costa Brava Cruise Ports	56,731
12	Cyprus Ports	132,828
13	Egyptian Ports	72,964
14	Gioia Tauro	5,250
15	Huelva	1,409
16	Igoumenitsa	1,053
17	Istanbul	0
18	Kavala	2,699
19	Koper	115,581
20	Leixoes	88,697
21	Motril-Granada	9,413
22	Odessa	750
23	Patras	1,219
24	Portimao	22,861

No	Port	2019	No	Port	2019
25	Naples / Salerno / Castellammare di Stabia	1,454,023	25	Portofino	64,152
26	Palermo	532,973	26	Rijeka	41,137
27	Piraeus	1,098,091	27	Sète	111,837
28	Sardinian Ports	481,924	28	Sibenik	19,134
29	Souda/Chania	265,956	29	Tangier	36,986
30	Split	359,955	30	Taranto	9,205
31	Tenerife Ports	1,067,440	31	Tarragona	128,089
32	Toulon-Var Provence	168,306	32	Thessaloniki	4,926
33	Valencia	435,616	33	Trabzon	0
34	Valletta	902,425	34	Tunisian Ports	648
35	Venice	1,611,341	35	Varna	0
36	Zadar	183,034	36	Volos	12,574

MEDCRUISE
The Association of Mediterranean Cruise Ports

2019

Statistics

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