Cruise Market Trends

- Worldwide cruise market main drivers: more cruisers/higher capacity
- 100 ships in order
- 30 million global cruisers in 2019
- Cruise appeal: More people want to travel
- Worldwide passenger primary sourcing: Approx. 50% North America and 50% Europe, Asia/Pacific and Latin America.

- **Average new vessels size is approx. 3,500 pax. 80% of new vessels are 2,000 pax or more.**
- Cruise Lines are building bigger ships
- Bigger Ships increase requirements on port infrastructure and terminal operations
XPEDITION

26 SHIPS
5 SHIPS ON ORDER

Celebrity Cruises®

12 SHIPS
4 SHIPS ON ORDER

AZAMARA CLUB CRUISES®

3 SHIPS

Royal Caribbean International

6 SHIPS

Pullmantur Cruises

4 SHIPS

Silversea

9 SHIPS
5 SHIPS ON ORDER

RCL BRANDS: 14 ships on order
Terminal A Design Guidelines

- Curb to gangway in less than 10 minutes
- Enhance guess experience by improving sense of arrival
- Improve security considerations
- Leverage technology to simplify embarkation and debarkation flow
- Seamless transition from terminal to the ship
- >1,000 parking spaces
Improve Sense of Arrival and Seamless transition to the Ship
PortMiami New Homeport Terminals

NCL Terminal - Under Design
- Terminal SQF: 166,500 sqf
- Terminal Height: 139 ft
- Terminal Width: 700 ft

RCL Terminal - Under Construction
- Terminal SQF: 209,000 sqf
- Parking Garage height: 117 ft*
- Terminal Width: 500 ft
- Terminal Bldg Height: 104 ft
Port Infrastructure Development Takeaways

- Port Development investment must be part of a cruise strategy.
- Market growth will eventually bring bigger and more ships to every major cruise market.
- Infrastructure upgrades must be part of a short/long term master planning strategy.
- Cruise strategy must consider consumer awareness and destination development as well as the economic impact of direct and indirect spending of cruise guests.
- Lots of port improvement activity around the world.
- Infrastructure upgrades may enable ports to receive the newer ships which are the most eco-friendly vessels.
- Good roads and adequate transportation as well as rich and diverse tours and experiences are key to promote a successful cruise guests experience.
Port Investments around the world

Baoshan Port – Shanghai
4 berths – 3 Terminals
550,000 sq ft
Opened July 2018
$150M investment

Roma Cruise Terminal
Capable of handling 4,500 pax
100,000 sq ft
Opened June 2018
$25M investment
THANK YOU