

AAPA 2019 Cruise Seminar
Miguel Reyna, Associate Vice President, Commercial Development



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

RCL BRANDS: 14 ships on order



26 SHIPS
5 SHIPS ON ORDER



Celebrity **X**® Cruises®

12 SHIPS
4 SHIPS ON ORDER



3 SHIPS



6 SHIPS



 pullmantur
CRUISES

4 SHIPS



SILVERSEA

9 SHIPS
5 SHIPS ON ORDER



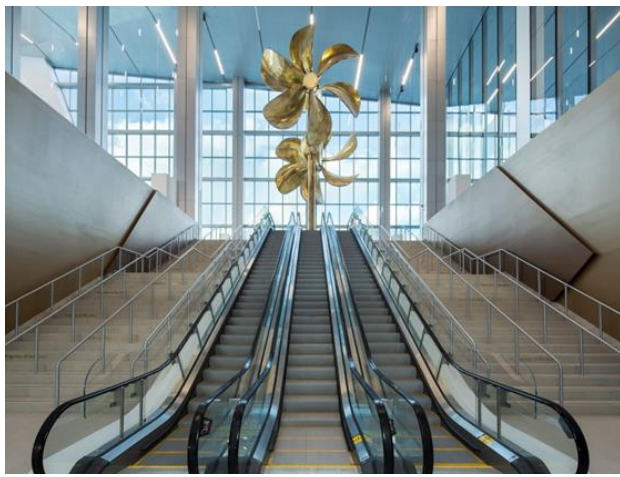
Terminal A Design Guidelines

- Curb to gangway in less than 10 minutes
- Enhance guest 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

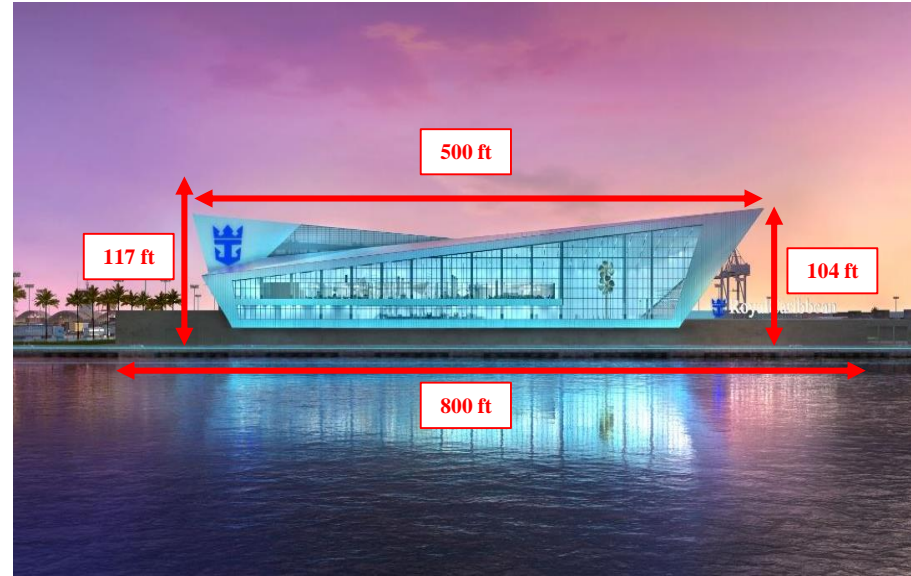


PortMiami New Homeport Terminals



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



COME SEEK

THE *Royal* CARIBBEAN

THANK YOU

