

THE WORLD CRUISE SHIPPING INDUSTRY to 2020

The world cruise shipping industry faces a challenging time ahead as a number of problems continue to restrict industry growth, mainly :-

- ◆ the continuing public perception of a terrorist threat;
- ◆ reluctance by some market sectors to go on fly/cruises;
- ◆ the image of cruises;
- ◆ the availability of suitable itineraries;
- ◆ opposition from environmentalist groups in certain areas;
- ◆ limited specialist port facilities;
- ◆ the continued low level of market penetration by cruises in Asia.

At the same time however, there are a number of factors that suggest future industry health – these include:-

- continued year-on-year passenger volume growth;
- an increasing range of cruise types and itineraries;
- the increased affordability of cruises in many key markets;
- the introduction of ever-larger cruise ships with more passenger facilities;
- continued propensity for global leisure travel;
- the changing image of cruises;
- increasing economic wealth in populous Asian economies;

This in-depth publication of over 230 pages examines the prospects for the industry in the period to 2020, including full examination of likely trends in the cruise ship fleet, cruise lines, ports, vessel design and cruise itineraries.

This Report is the 10th in-depth passenger shipping industry analysis published by OSC since 1992. The detail and range of the analysis and forecasts in the new Report are even greater than those in previous publications, and represent the most up to date and comprehensive set of analysis and forecasts available on international cruise shipping. It is essential reading for all parties with an interest in this sector.

CONTENTS

SECTION 1 INTRODUCTION & EXECUTIVE SUMMARY

Includes an overview of the Report's aims, as well as a summary of the methodology underlying the analyses.

This Section also includes a summary of the most significant points and conclusions drawn from the main body of the Report. They are presented in the order of the corresponding Sections for ease of reference.

SECTION 2 WORLD CRUISE SHIP FLEET

Analysis of the current fleet and recent developments.

Includes full detailed analysis of the fleet in terms of:-

- age structure;
- berth capacity;
- size structure;
- flag profile.

SECTION 3 CRUISE SHIP OPERATORS

Whilst the sector remains characterised by a large number of individual cruise brands, the international cruise shipping industry has become increasingly consolidated in recent years into a small number of leading groups.

This Section includes full discussion and analysis of each player in the industry, in terms of their vessels, areas of operation, and subsidiary cruise brands. Through full consideration of vessel newbuilding orders recently placed and expected, the Section includes full analysis of relative market shares for the leading lines.

The analyses and discussions also cover the recently failed cruise lines, as well as those likely to emerge as significant industry market players.

SECTION 4 WORLD CRUISE SHIPPING PATTERNS

The profile of individual areas of cruise vessel deployment has changed significantly in recent years, as new markets have emerged, new cruise areas developed, and a change in consumer preference with regard to the location of home-ports has helped shape cruise itineraries.

This Section draws on an extensive database of cruise ship sailing patterns and cruise itineraries to offer a detailed assessment of individual cruise regions, and offers a profile of cruise activity in each.

SECTION 5 WORLD CRUISE PORTS

Includes analysis and discussion of the world's leading cruise ports in terms of :-

- passenger throughput volumes;
- cruise facilities;
- home-ported vessels;
- cruise lines served;
- planned developments.

SECTION 6 ECONOMIC IMPACT OF CRUISE ACTIVITY

There is considerable debate in the industry over the full impact of cruise activity at a port – on the local, regional and national economy.

This Section includes an explanation of the measurement of such economic impact, and reviews the figures reported in recent years for ports around the world.

This represents the **first time** that such assessments of the economic impact of cruise activity in specific ports have been presented together in a publication.

SECTION 7 CRUISE SHIP PRICES & SHIPYARDS

Includes in-depth examination of the leading yards throughout the world for cruise ship construction, as well as the trend in cruise ship prices in recent years. Exchange rate developments have been critical in shaping the relative attractiveness of European yards for cruise ship construction in recent years, and this factor is examined in detail.

The profile of cruise ship repair and conversion is also examined here, in terms of the leading yards for such activity, and the recent projects undertaken.

SECTION 8 WORLD CRUISE DEMAND TO 2020

Includes detailed evaluation and discussion of regional and global demand for cruise shipping in the next 15 years. This includes full individual country-by-country analysis of passenger volumes in the forward period, and the implications for regional cruise activity.

This Section represents a comprehensive set of cruise shipping passenger forecasts throughout the period to 2020.

SECTION 9 CRUISE SHIP FLEET & DEMAND TO 2020

Examines the likely future development of the fleet in terms of :-

- newbuilding deliveries from the current orderbook;
- likely cruise ship scrapping or withdrawal from service;
- trends in vessel size;
- trends in vessel design & facilities.

In conjunction with the demand forecasts of the preceding Section, this Section includes full analysis of the **number of extra cruise ships required** over the period to 2020.

The overall report provides the most up to date and comprehensive assessment available of the prospects for international cruise shipping. In over 230 pages, it offers a realistic in-depth appraisal of market prospects in an industry where high quality independent analysis is often prohibitively expensive.

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Detailed discussion & analysis on :-

- cruise ship fleet
- cruise lines
- cruise ports
- cruise passenger volumes
- cruise itineraries
- cruise vessel design
- cruise ship construction & repair yards

"THE WORLD CRUISE SHIPPING INDUSTRY to 2020" is one of a large number of detailed analytical reports researched and published by **Ocean Shipping Consultants Ltd.**

Other recent publications include:- *Tick for details*

"Product Tankers : Market Prospects to 2015"

"Shipping Profitability to 2015"

"Ferries: World Fleet & Market Prospects to 2012"

"Marketing of Container Terminals"

"The World Ship Repair Market to 2015"

"World Shipbuilding:
Prospects for Prices & Demand to 2015"

"World LNG to 2020:
Prospects for Trade & Shipping"

OSC also undertakes confidential consultancy projects for individual clients worldwide. Further details are available on request.

THE WORLD CRUISE SHIPPING INDUSTRY to 2020

- a detailed appraisal of prospects

Includes analysis of the economic impact of cruise activity

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