

DREAM

Autumn 2009

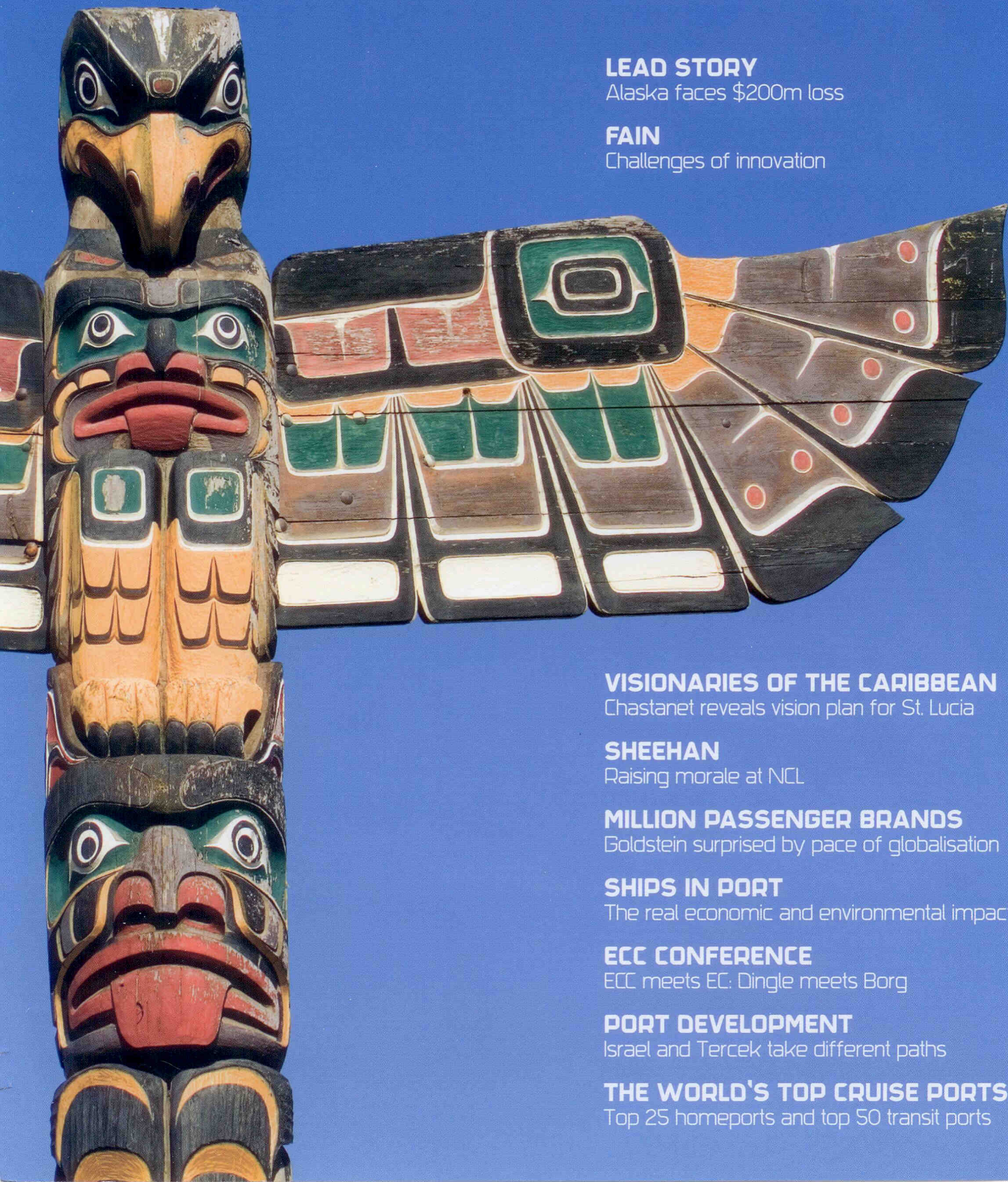
WORLD CRUISE DESTINATIONS

LEAD STORY

Alaska faces \$200m loss

FAIN

Challenges of innovation



VISIONARIES OF THE CARIBBEAN

Chastanet reveals vision plan for St. Lucia

SHEEHAN

Raising morale at NCL

MILLION PASSENGER BRANDS

Goldstein surprised by pace of globalisation

SHIPS IN PORT

The real economic and environmental impact

ECC CONFERENCE

ECC meets EC: Dingle meets Borg

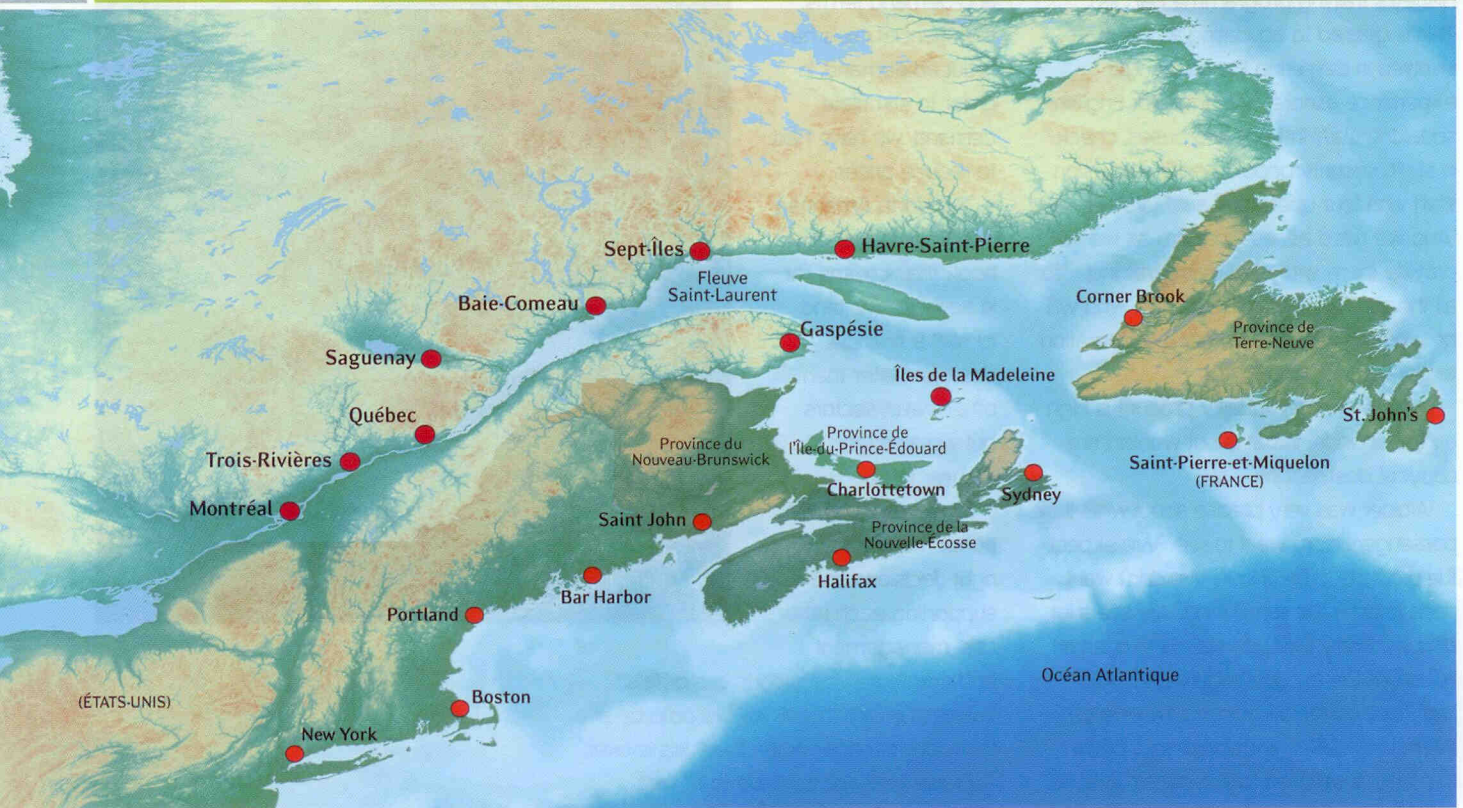
PORT DEVELOPMENT

Israel and Tercek take different paths

THE WORLD'S TOP CRUISE PORTS

Top 25 homeports and top 50 transit ports

Canada New England Cruise Symposium



Canada New England ports largely unaware of 'New Emission Control Area'. Susan Parker reports

Robert Sharak, executive vice president marketing and distribution Cruise Lines International Association, told delegates at the Canada New England 2009 symposium in Saguenay in June: "In this [financial] environment we will need to operate where it is affordable," highlighting that taxes and regulations can be a hindrance to growth and commercial viability.

Hot on the agenda at the moment is an example of a possible regulation that could have a major impact on the cost of cruise lines operating in this burgeoning region. In July the International Maritime Organization's Environmental Protection Committee approved a North American Emissions Control Area (ECA) which, if finally approved, will come into effect in 2012.

An ECA places controls on emissions of

NOx, SOx and particulate matter, which is likely to result in ships having to use more expensive low sulphur distillate fuel. Whether there is sufficient fuel of this type to meet the requirement of all ships operating within 200 nautical miles of the US/Canada coastline (the ECA) is not known.

With ports throughout Canada New England making investments in significant numbers, it is vital that they are aware of the possible consequences of this development yet at the symposium only two delegates knew of the ECA proposal.

Growth in the region is demonstrated by Cruise the Saint Lawrence, which shows passenger numbers increasing from 153,950 in 2007 to 258,944 this year.

Montreal is well placed for calls but is restricted to ships with an air draught of less than 49m. This year it has 31 calls, most of which are turnaround. As part of

a major port development, Vision 2020, there are discussions taking place over the future of the Iberville Terminal and whether it will be upgraded or replaced. Tony Boemi, vp cruise and development Port of Montreal, said: "We really want to develop the cruise industry much more aggressively. We want to do something that gives Montreal some sort of landmark." It is possible for four ships to dock at the height of fall although not all can be within minutes of downtown.

In June 2002, Pointe-a-Carcy cruise terminal was opened at Quebec City. Three piers are dedicated to cruise ships. There is an automatic tide-sensitive gangway for passengers linked to the terminal at Pier 22. The turnaround operation has doubled this year over last to eight calls and 35,000 passengers. Transit calls number 76 accounting for 93,000 passengers and 37,000 crew. Both Carnival Cruise Lines and MSC Cruises are calling in 2010 for the first time, while

Costa Cruises makes its debut on the St Lawrence river this year.

Trois-Rivieres has 10 calls next year compared to four this, due to the inaugural season of Pearl Sea Cruises' *Pearl Mist*. A major development of the entire waterfront is under way that will include the transformation of the dock.

Investment is not only in port facilities but attractions, and in Baie-Comeau the Glacier Exploration Centre was opened in a converted church in June. A total of C\$26m has been invested in the attraction, the pier and surrounding area which goes from two calls this year to five next with the arrival of *Carnival Glory*.

A wharf is being built at Sept-Iles so that ships can dock downtown and passengers board the train to visit the Innu summer camp on the Moisie River. Havre-St-Pierre is well ahead with its development, as it was originally due to receive Carnival Cruise Lines this year but now has until next to perfect its offering. For a community which will double its size with the arrival of *Carnival Glory*, it is rising to the challenge.

The first phase of development for Iles de la Madeleine will take two years, and an investment of C\$435,500 is being put into developing pontoons and marine facilities. This is a small ship paradise and Les Iles are keen to keep it that way.

Cruise Atlantic Canada, which numbers five major ports and five smaller ones, recorded a 35% growth in passenger and crew numbers to 814,000 for 2008 with direct spending increasing 33% to over C\$40m.

The waterfront at Corner Brook, Newfoundland & Labrador is under major renovation and shore excursions are being upgraded. There are 10 calls booked this year including those from Canadian Sailing Expeditions, which is homeporting for its second year in 2009.

Sydney saw an increase of 80% in 2008 over 2007 and there are ongoing efforts to implement a port master plan. Meanwhile Halifax has a five to 10-year vision for waterfront urbanisation which will include two new pavilions. This year calls will number 117 and passengers 215,000. Charlottetown will receive six inaugural calls this year and has a new tender dock.

CruiseMaine is expecting 282 calls and 231,033 passengers to 11 of its ports this year. In 2007 direct spending into the economy was put at US\$24m. Total investment into ports in Maine is about US\$20m.


Bar Harbor does not have a formal facility but has three deepwater anchorages. In 2009 93 calls and 143,984 passengers are forecast. With 2.5 million tourists per annum to this island of only 5,000 year-round residents, it has taken steps to ensure that it does not spoil the passenger experience with numbers. Following a study by Bermello Ajamil & Partners it has come up with an optimum passenger capacity.

Rockland will receive its first vessel this year while Portland's US\$14m Ocean Gateway Terminal with a pier length of 600ft at Portland was opened in May 2008. Plans are in place to extend this to a 1,000ft deepwater berth. Also available is the 1000ft Maine State Pier and Ocean Terminal. Calls numbered in 35 in 2008, 46 (65,500 passengers) in 2009 and 68 (75,438 passengers) in 2010.

About 60% of business at Boston is transit and virtually all of this is on Canada New England itineraries out of New York. In 2008 there were 113 ship calls, up 12% on 2007, and passengers number 270,000, an increase of 15%. In 2009, 62 out of 103 calls are transit. Passenger numbers are estimated at 250,000. New this year to the port is Costa Cruises and next year MSC Cruises calls. About US\$3m is due to be invested before next season to enhance

Christopher Allen, director deployment and itinerary planning Royal Caribbean International:
"I am very excited for 2009 and more excited for 2010 [about the Cruise New England region]. In 2010 our lower berths [RCI and Celebrity] will increase 35% ... it is crucial we continue to drive demand for the region."

Cruiseport Boston's Black Falcon Cruise Terminal and its surrounds.

New York City (NYC) has invested more than US\$250m in the Manhattan Cruise Terminal (MCT) and Brooklyn Cruise Terminals (BCT) with the latter opened in 2006 and the upgrades and renovations to the MCT completed in January 2009. Calls to MCT numbered 135 and 626,750 passengers this year with 194 calls forecast and 750,000 passengers for next year. While at BCT there are 42 calls and 226,219 passengers this year and 45 calls and 236,100 passengers forecast for 2010. 



Atherly: "Quebec City is the single highest rated port in the world."

Those associations/ports involved in the Canada New England symposium are:

- **Cruise St Lawrence:** Montreal, Trois Rivieres, Quebec City, Saguenay, Baie-Comeau, Sept-Iles, Havre-Saint-Pierre, Gaspesie and Iles de la Madeleine
- **Cruise Maine:** Kennebunkport; Portland; Freeport; Bath; Boothbay Harbor; Rockland; Camden; Belfast; Bucksport; Bangor; Bar Harbor; Searsport and Eastport
- **Cruise Atlantic Canada:** Charlottetown, Corner Brook, Halifax, Sydney, Saint John, Baddeck, Pictou, Miramichi, St Andrews-by-the-Sea and Summerside
- **New York:** Manhattan and Brooklyn
- **Boston**