

Workshop B:
Sustainable Cruise Ship Tourism

The Cruise Industry's Commitment to People & Environment

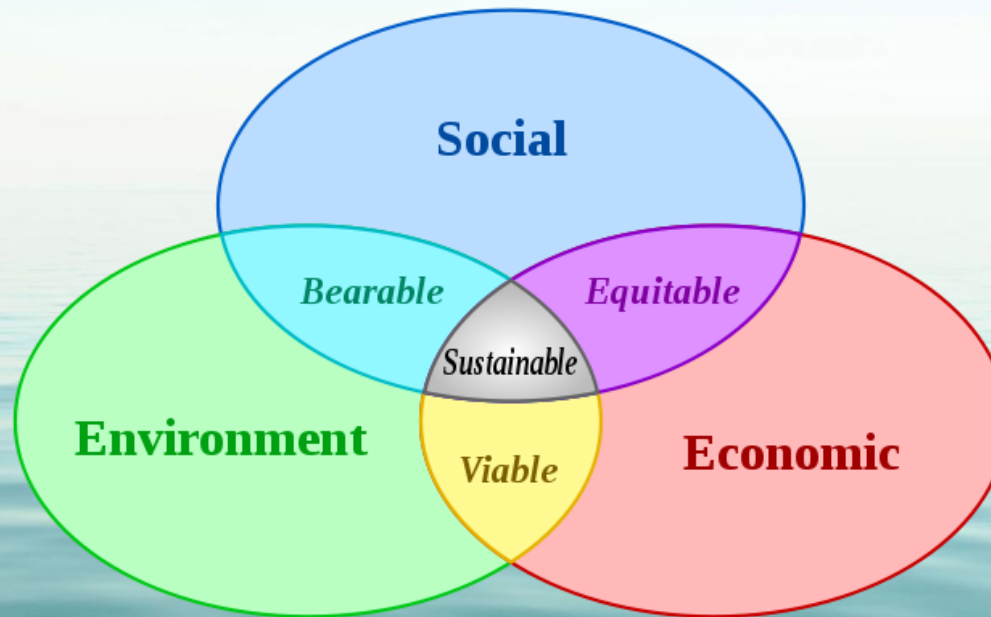
Presented by
Helge H. Grammerstorf
Managing Director,
SeaConsult HAM GmbH, Hamburg

03.05.2012

Definition of Sustainability

“Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs.”

Brundtland Commission of the United Nations on March 20, 1987



[Sustainable development] requires the reconciliation of environmental, social equity and economic demands - the "three pillars" of sustainability

United Nations - 2005 World Summit

Definition of a Cruise

- Commercial use of vessel
- Transportation of more than 12 passengers
- Minimum of three ports per cruise
- Dominant attribute: **accommodation of passengers in cabins**



A cruise ship is a passenger ship, which in contrast to ferries...

...does not carry cargo.

(Exception: Hurtigruten)

...takes various routes (worldwide itineraries).

(Exception : cycle cruises)

...includes various services.

(Accommodation, Meals, Entertainment, etc.)

THE CRUISE MARKET

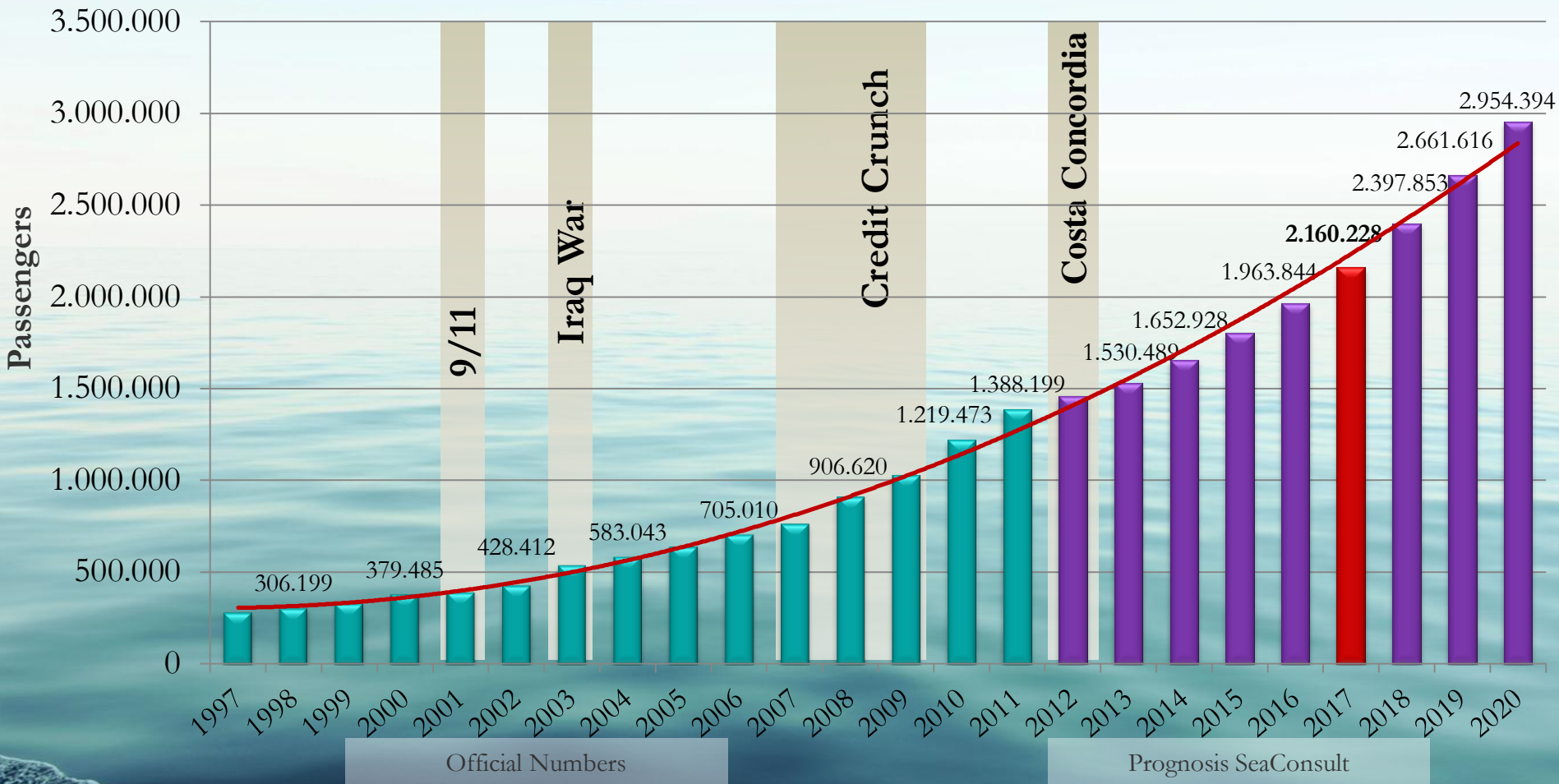
Developments of Vacation Trips and Cruises in Germany

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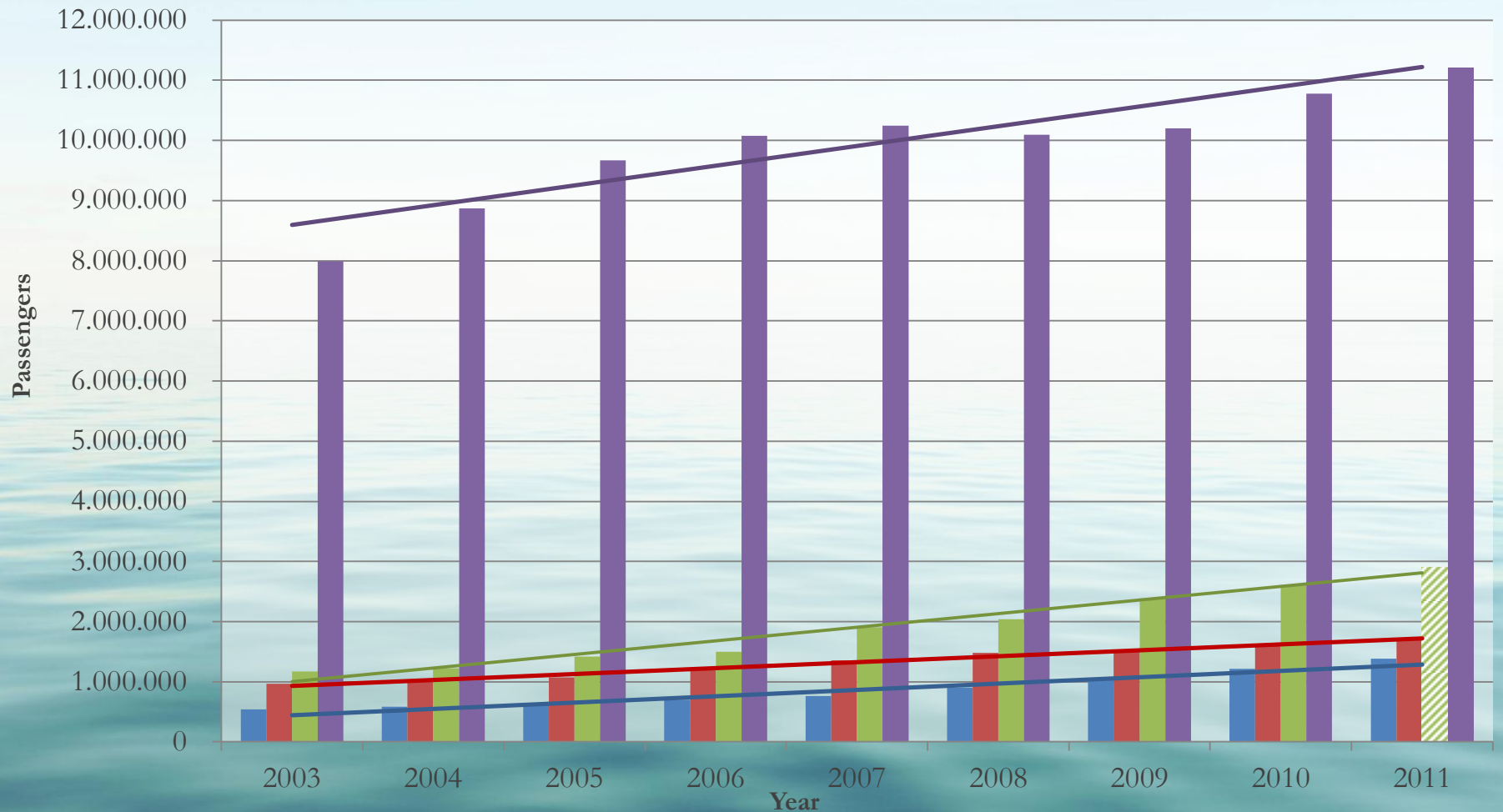


Development and Prognosis of German Passenger Numbers

(Ocean Going Cruises)

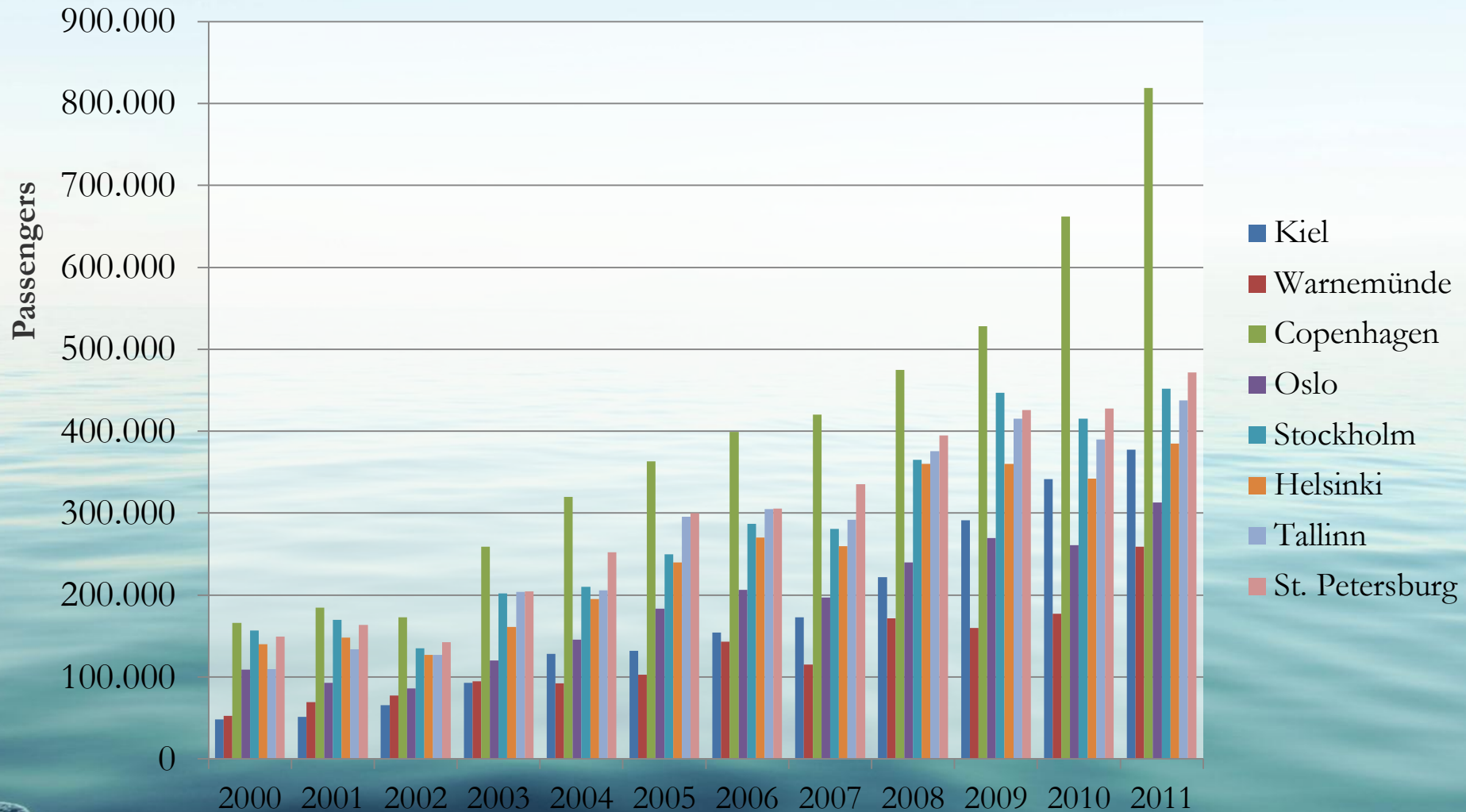


Development of Passenger Numbers (Ocean Going Cruises)

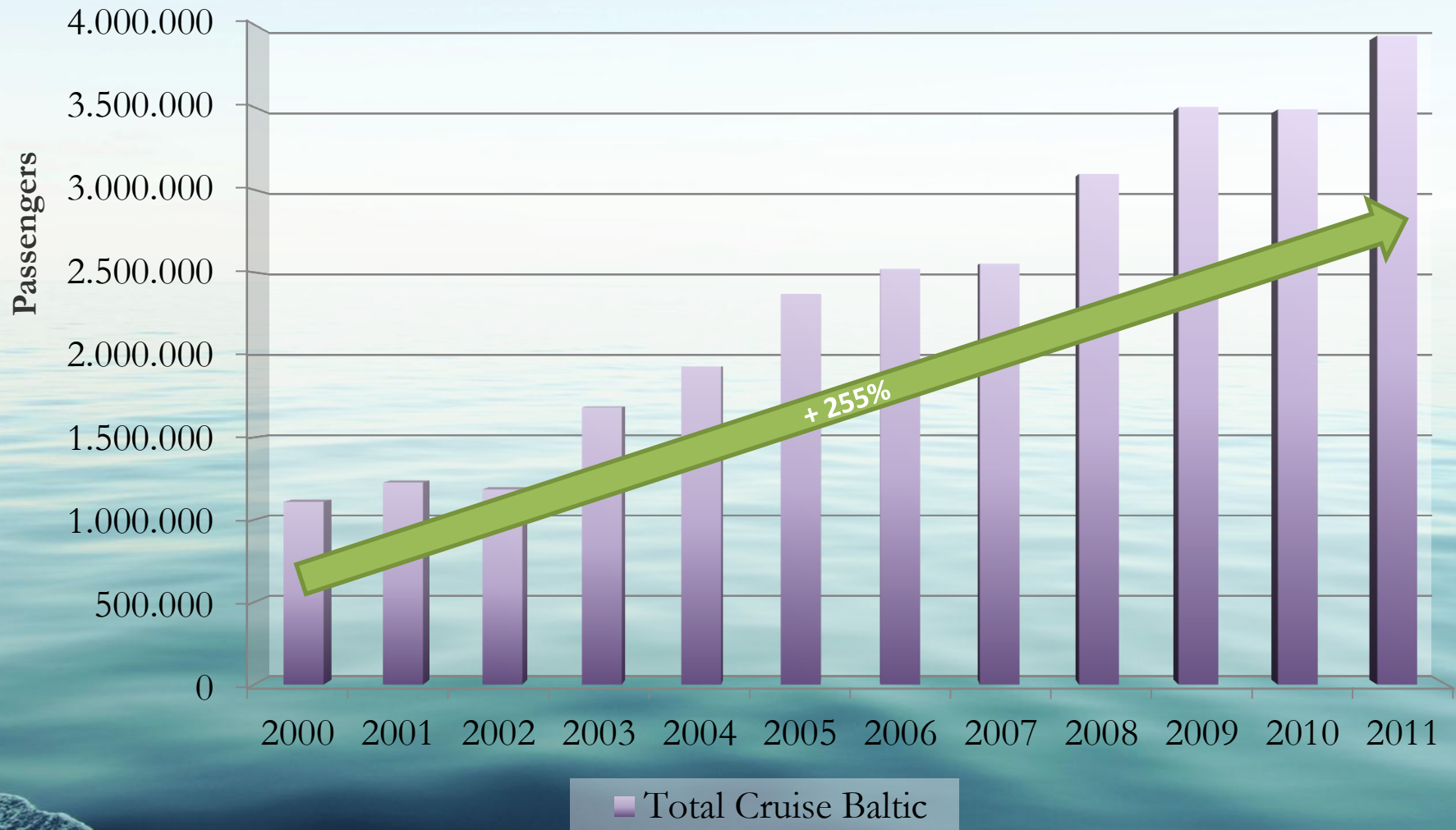


GER UK Rest EU North America Linear (GER) Linear (UK) Linear (Rest EU) Linear (North America)

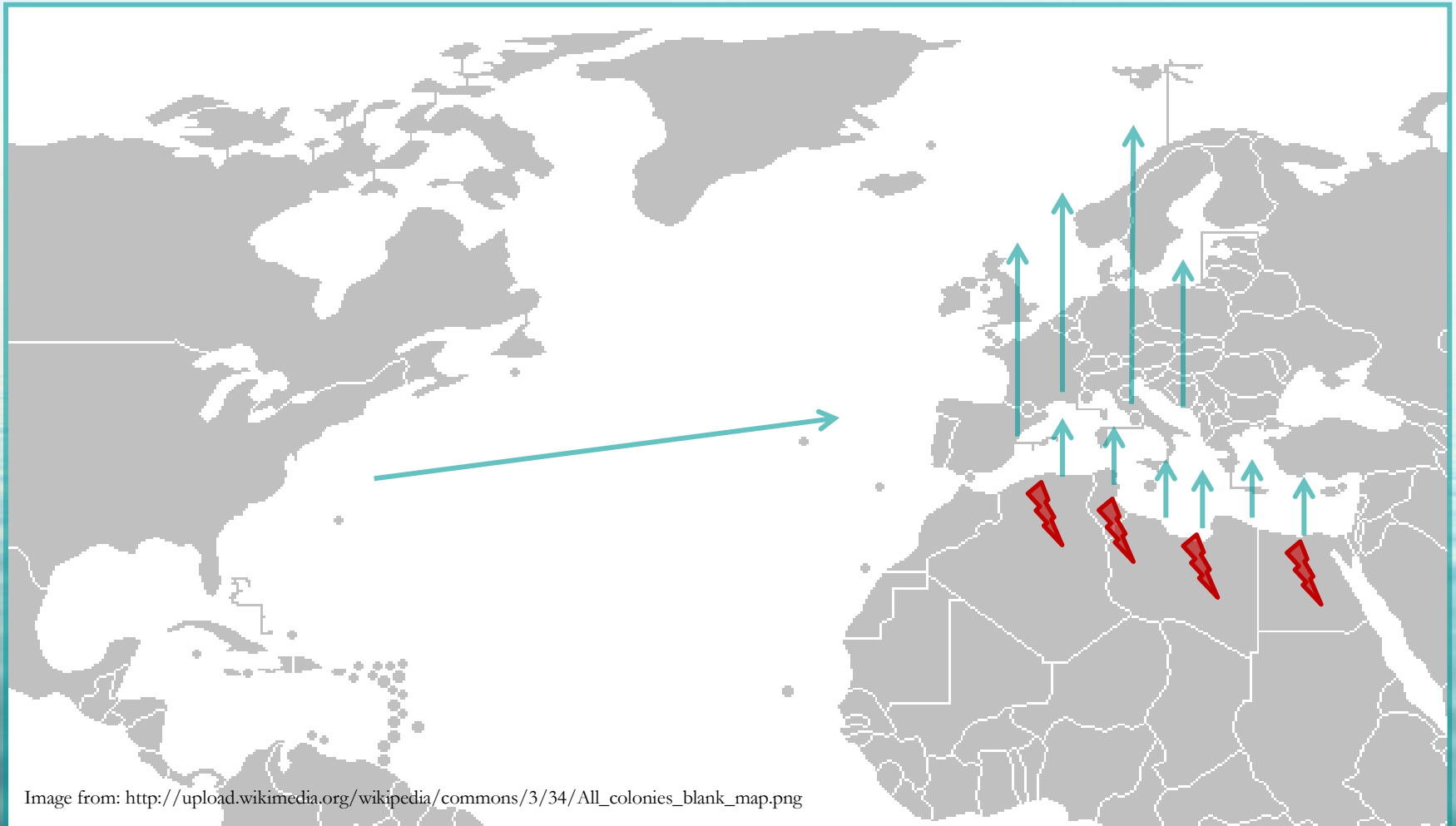
Development of Passenger Numbers in Baltic Ports (sample of largest cruise ports)



Development of Passenger Numbers in Ports of Cruise Baltic Association



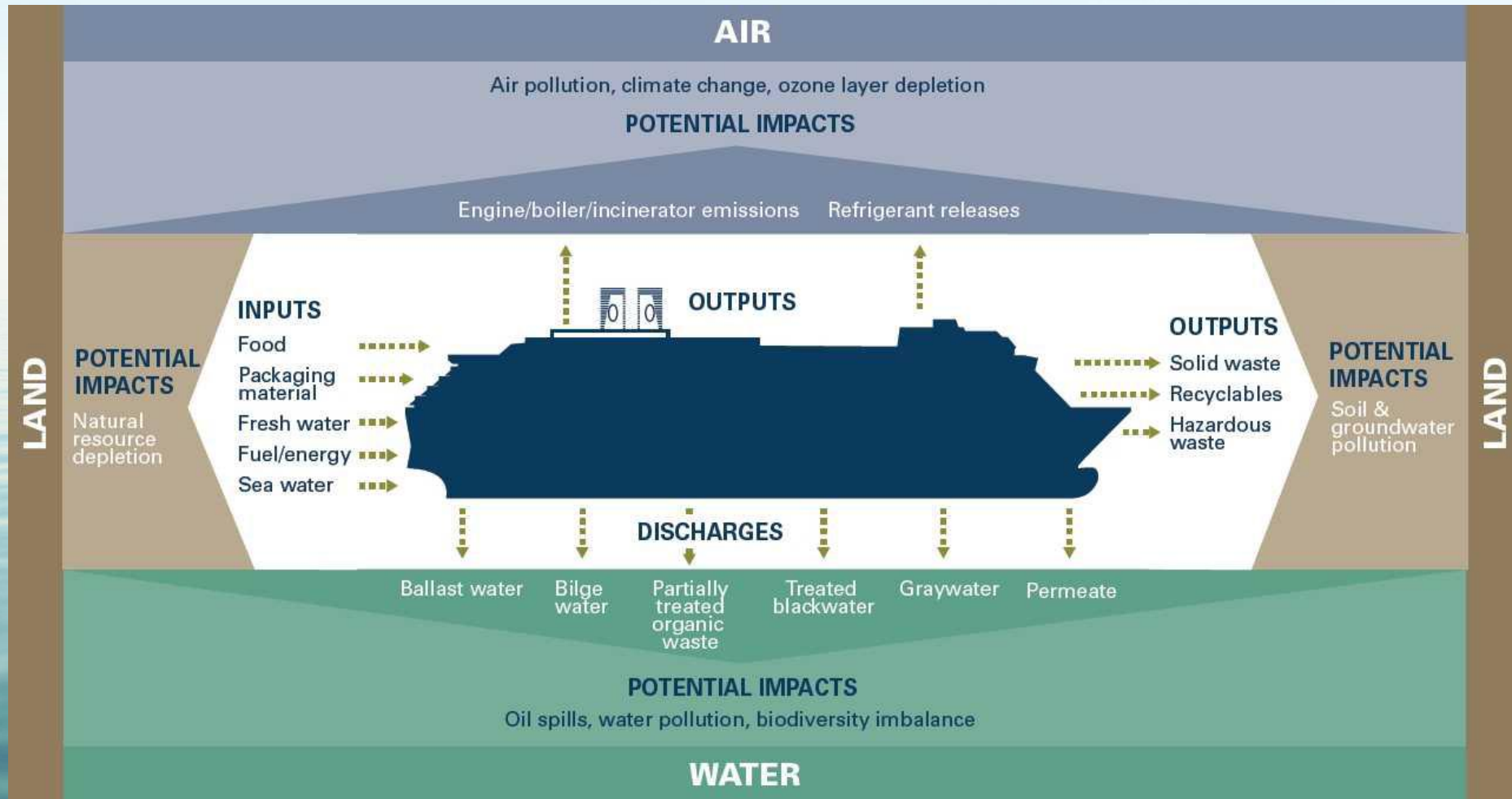
Deployment Developments in Europe



CRUISE AND SUSTAINABILITY

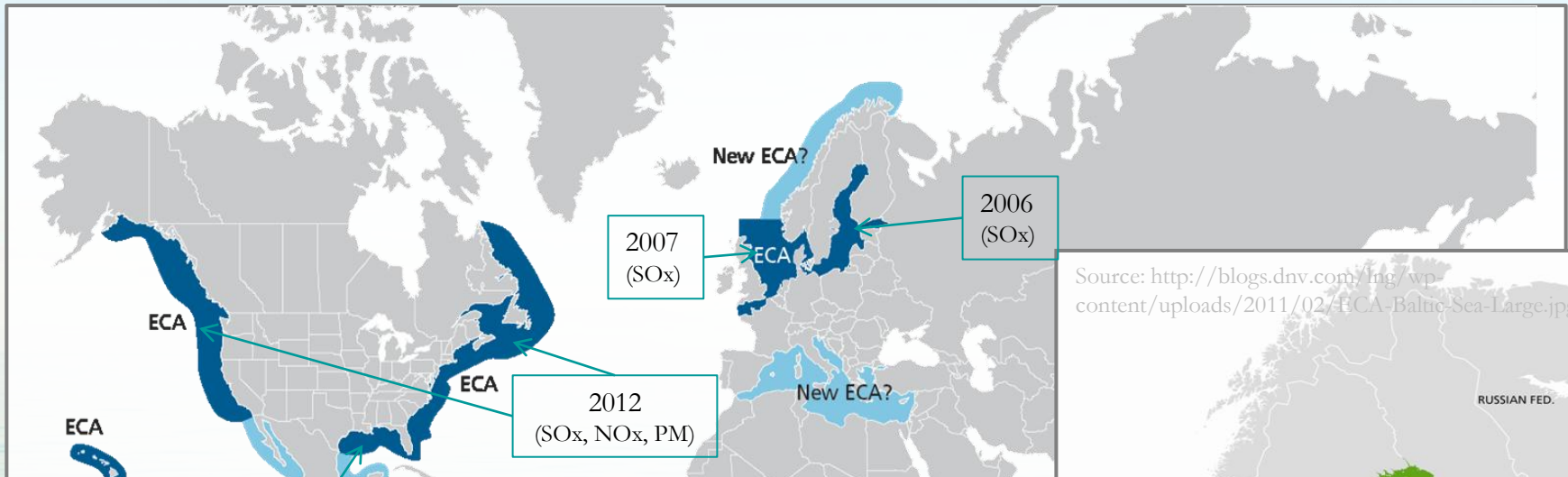
- Importance of the Baltic as a cruising area is increasing
- Economically and ecologically relevant
- International Maritime Organization (IMO) setting the course
- What do cruise lines contribute?

Impact of Cruise Vessels



Source: Carnival Corporation & plc - Sustainability Report - Fiscal Year 2010

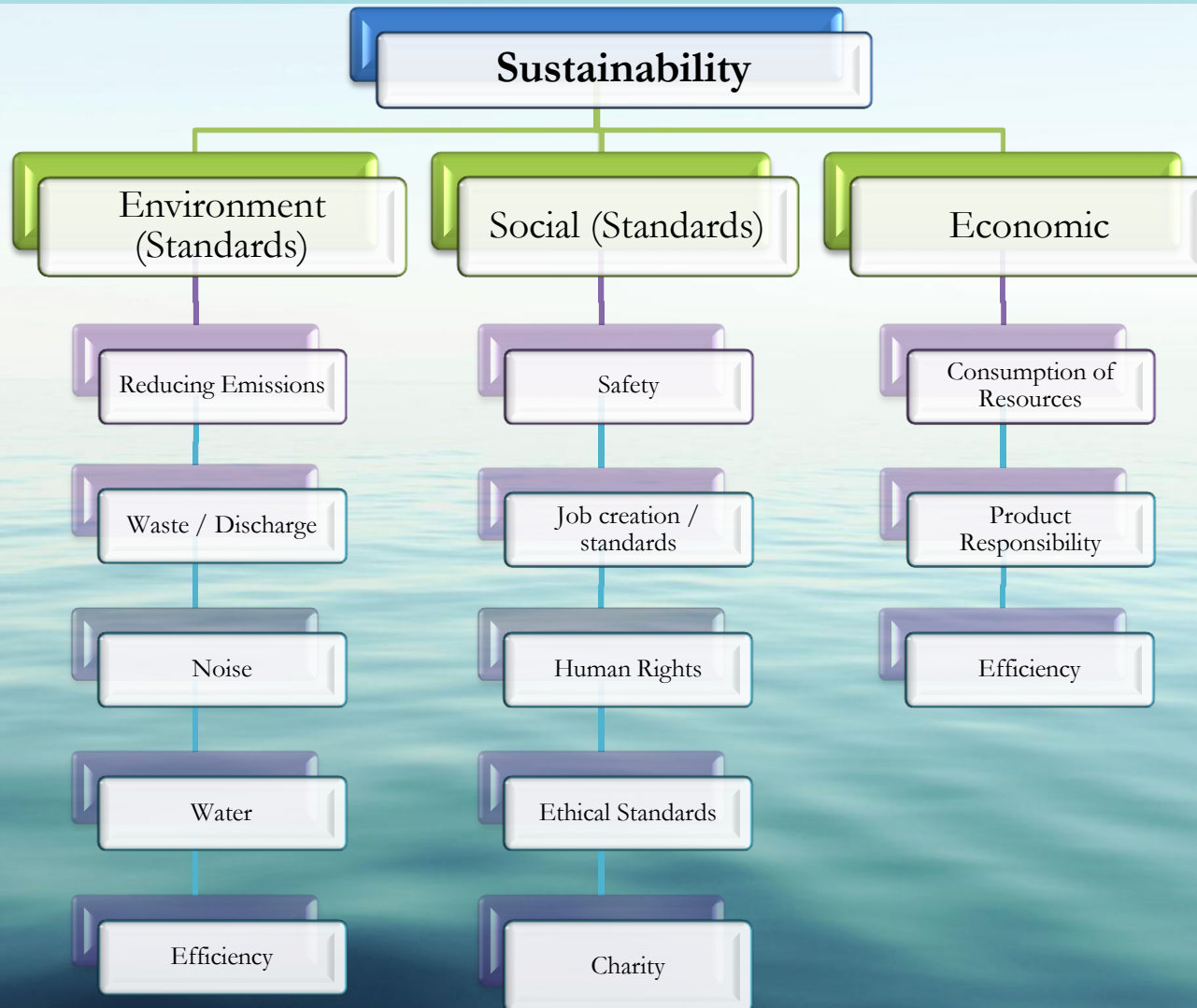
IMO Regulations – Emission Control Areas (ECA)



Outside an ECA established to limit SO _x and particulate matter emissions	<u>Inside an ECA</u> established to limit SO _x and particulate matter emissions
4.50% m/m prior to 1 January 2012	1.50% m/m prior to 1 July 2010
3.50% m/m on and after 1 January 2012	1.00% m/m on and after 1 July 2010
0.50% m/m on and after 1 January 2020*	0.10% m/m on and after 1 January 2015



Excerpt of Topics Concerning Cruise Lines and Sustainability

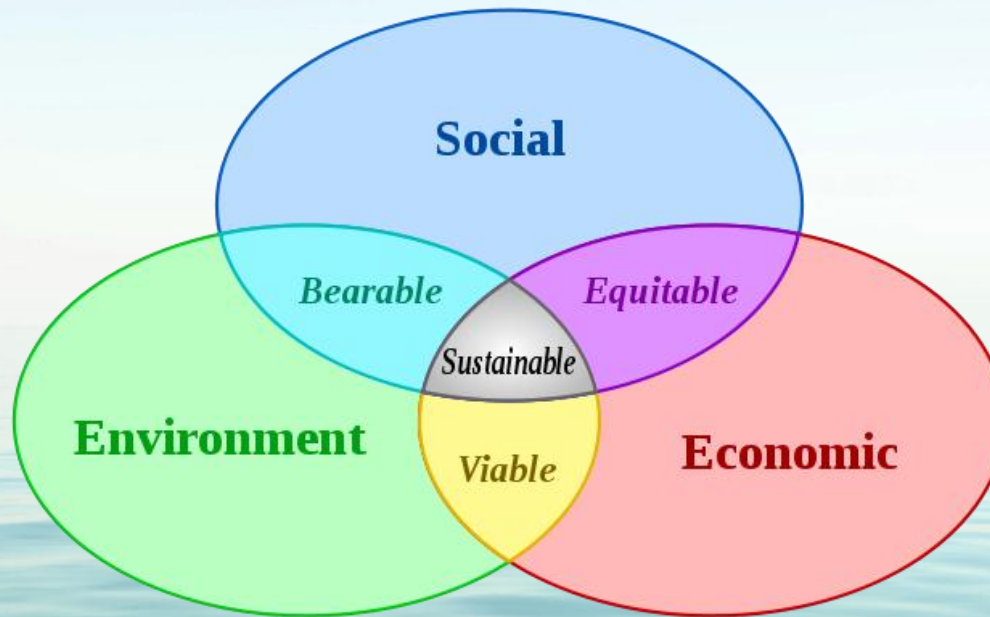


Cruise Lines and their Sustainable Approaches

(Note: only examples, hence list not complete)

Cruise lines	Annual Sustainability Reports	Awards	Cooperation / partnership
Royal Caribbean Cruises Ltd. (RCI, Azamara, CDF, Celebrity, Pullmantur)	Stewardship Reports	<ul style="list-style-type: none"> - Condé Nast Traveler World Savers Award - Travel Weekly, Magellan Silver Award for (Overall) Eco-Friendly “Green” Cruise Ship - City of San Diego, Director’s Recycling Award - ... 	<ul style="list-style-type: none"> - G.I.V.E. Program - Pan-American Development Foundation partnership
Carnival Corporation (Costa, Aida, Iberocruceros, Carnival, Seabourn, Cunard, HAL, P&O, Princess)	Sustainability Report	<ul style="list-style-type: none"> - Each cruise line - diverse awards 	
Costa S.P.A. (Costa, AIDA, Iberocruceros)	Since 2005	<ul style="list-style-type: none"> - B.E.S.T. 4 (Business Excellence Sustainable Task) by RINA (Italian shipping register) - Green Star - Venice Blue Flag - U Green Award - Lloyd’s List Italian Shipping Awards 2010 	<ul style="list-style-type: none"> - WWF - Social Projects
AIDA	AIDA cares		<ul style="list-style-type: none"> - Futouris
MSC		<ul style="list-style-type: none"> - Clean-Sea2 and Clean-Air - Green Planet Award - CIAL Award «Comuni Ricicloni 2008» - Venice Blue Flag 	<ul style="list-style-type: none"> - Six Golden Pearls programme (BV)
TUI Cruises	Yes		<ul style="list-style-type: none"> - Futouris - ...
Hapag Lloyd Cruises			<ul style="list-style-type: none"> - Futouris - CO² Footprint Calculator - atmosfair

Cruising and the Three Pillars of Sustainability



**Cruise tourism takes a responsible role
in sustainable development of its products and services**



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SeaConsult HAM GmbH, Bergstedter Chaussee 104, 22395 Hamburg,
Tel: 040-374 123 4, Fax: 040-374 123 66, Homepage: www.seaconsult.de,
eMail: contact@seaconsult.de