

On the occasion of its statutory meetings, the Marseille Provence Cruise Club reiterates its commitments and reports on its actions to foster environmental and social acceptance of the cruise industry, a creator of values for the region.

At the board and annual general assembly held last Wednesday 9th March 2022, the Marseille Provence Cruise Club unanimously re-elected President Jean-François Suhas, at the association's helm since 2015, as well as the Board and Committee.

It was an opportunity to once again evoke the pillars of action of an association created in 1996 and which brings together 62 private and public sector members, all stakeholders in the region's cruise ecosystem.

OVERVIEW

KEY FIGURES:

In 2021, despite a late restart of the cruise sector:

Maritime cruises

- Restarted on 4th July 2021
- **160 port calls** in total
- More than **350,000 cruise guests**, of which 130,000 turnaround and 220,000 transit
- Marseille hosted **18 cruise companies** and **35 different ships**
- **Sanitary measures** maintained
- **Flows regulations** at most popular sites
- Port calls by latest generation cruise ships
- **7 additional signatories** to the Blue Charter => **13 companies** and **97% of the passengers** passing through in 2021

River cruises

- Restarted on 30th June 2021
- Around **15,000 to 20,000** river cruise guests
- **280 cruises** on the River Rhône, of which nearly **80** from Provence ports

- **20** ships out of 25 in service, or 80% of the fleet

For 2022,

Maritime cruises

- **Return to pre-crisis levels** (1.8 million passengers in 2019), **11 maiden port calls** and **38 port calls at the J4 Dock**
- **5 new ships** expected: Costa Toscana, Azamara Onward (ex. Pacific Princess), Valiant Lady, Evrima, Celebrity Beyond
- **Return of the American guests**

River cruises

- Between **110,000** and **120,000** river cruise passengers expected
- **25** ships
- **820** port calls

1. 25 years to make Marseille Provence a cruise capital

The Marseille Provence Cruise Club – the legacy of a visionary, Jacques Truau, and the endurance of its actions

The Marseille Provence Cruise Club was created in **1996** by the then vice-president of the Marseille-Provence Chamber of Commerce and Industry, Jacques TRUAU, who wanted to bring together shipping and economic stakeholders around a unifying single counter in order to develop the cruise business in Marseille.

With huge **determination**, he worked towards **structuring** an independent body that would serve the industry's **general interest**.

Among the flagship projects of Jacques TRUAU's 20-year presidency, which would see Marseille establish itself as a **key cruise stronghold**, heralded internationally for its **tailored offering in terms of facilities and infrastructure**, were the **converting of the former fruit wharves into a cruise terminal** the **re-launch of the Chantier Naval de Marseille shipyard** which, since 2017, has been operating Dry Dock 10, the Mediterranean's largest, and the **widening of the port's northern channel**, allowing access to ships regardless of size and in all weathers.

Marseille today is the **no.1 cruise port in France, no.5 in Europe and no. 12 worldwide**, with cruise companies reaffirming their confidence in the port with year-round calls.

A structured source of expertise on cruise issues for the local and national ecosystems

The non-profit organisation has a team of **5 permanent staff members** with very complementary backgrounds, available to assist the ecosystem (local and national institutions, retailers etc.).

The team's work not only involves orchestrating the sea and river cruise sectors' actions in conjunction with the ecosystem on a daily basis, but also carrying forward the major projects concerning transition, communication and innovation.

- ***The Club's role with regard to local and national institutions***

The Club is in the front line of negotiations and wields considerable influence, especially in times of crisis. During the 2020-2021 health crisis for example, the Club worked tirelessly to bring the importance of the French cruise industry, its ports and destinations to the attention of the relevant ministries, in particular through its leading role in the CruiseLab, which brings together all mainland and overseas French ports. The constant collective action led to the issues being faced by the industry being taken into account at the highest levels.

- **A plural and loyal membership structuring the local cruise industry**

The Club has 62 private and public-sector members, all Marseille Provence cruise industry stakeholders.

The ties between members are close, creating a constant flow of information regarding cruise sector issues, in the interest of all.

Members as of 9th March 2022

A local network of more than 60 members

Marseille Provence Cruise Club

Institutions

- Marseille Fos
- LE VAX MARSEILLE PROVENCE
- REGION SUD
- BOUCHES DU RHONE
- MAIRIE MARSEILLE PROVENCE

Port stakeholders

- MPCT
- BOLUDA
- ACN
- GPB
- INTERCRUISES
- UMF
- Medov
- Latitude
- PONANT
- elengy
- POLE MSA
- Costa
- MSC

Cultural and touristic stakeholders

- PROVENCE TOURISME
- REGION SUD
- COMITE REGIONAL DE TOURISME
- Marseille
- Mairie de Marseille
- CASSIS
- PORT SAINT LOUIS
- Azur Tourism
- COLOR BUS
- C.MATHEZ
- POSQUEP
- INTERCONTINENTAL
- ARLES
- FERRIMOND
- CRUISELINE
- Union Guide Sédouan
- Prévost GUIDE INTERPRETE
- LES GUIDES CONFEDERES SUD-PROVENCE
- MOBILE
- culturespaces
- Mucem
- PERFORMANCE TRAVEL
- Le Bateau Provencien

Economic stakeholders and professional federations

- BOURSE
- Pernod Ricard
- aéroport marseille provence
- Cap Au Nord
- CCIFA
- Galerie Lafayette
- MarseilleShopping
- upe13
- fntv
- LES ENTREPRISES DU VOYAGE
- LES DOCKS

The Marseille Provence Cruise Club is a member of many local, national and international associations

Working with many local and national associations and federations



Cruise sector



Blue economy - Maritime industry



Entrepreneurship



Touristic development



Environment



Trade

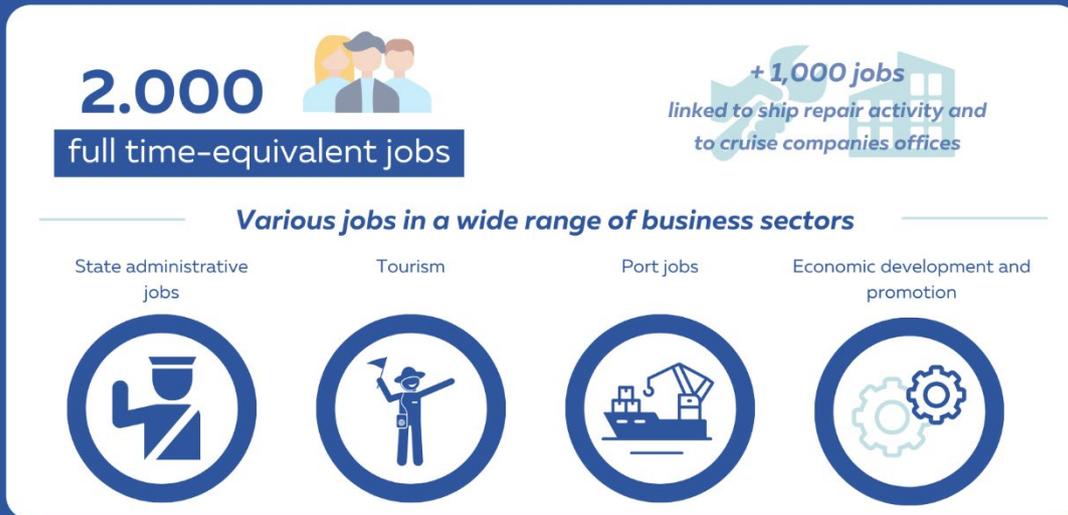


2. An inclusive cruise sector

The cruise business as a creator of local jobs

The cruise business alone creates **more than 2000 full time equivalent jobs** in the Marseille Provence area, including port jobs (shore travel agents, ship repairs, pilots, dockers, cruise companies etc.) and tourism-related jobs (guides, hotel and restaurant workers, taxi and bus drivers, retail workers etc.).

The cruise business – a driver of local employment



A supportive cruise sector

- **Donations by cruise ships during the Covid-19 pandemic**

During the health crisis in 2020, the Marseille Provence Cruise Club organised **10 food and furniture donation operations**, in conjunction with the port authority and health department. In total, **22 tonnes of food, equivalent to 48,000 meals, and 150m3 of furniture** were collected on board the ships in lay off and redistributed to charities for the needy.

- **Marseille – a port of refuge**

At the height of the health crisis, the Port de Marseille Fos took in **23 cruise ships**, when other Mediterranean ports had shut their doors.

At the start of the pandemic, passengers still cruising were taken off the ships and repatriated, thanks to an unprecedented collaborative effort by the authorities, airport and cruise operators, all carried out safely using special sanitary corridors.

- **Collaboration with local associations for the protection of the environment and biodiversity**

The Marseille Provence Cruise Club works with local associations facing common challenges to pool resources, exchange, inform and bring about solutions for protecting the environment.

For example, as part of the UICN's World Conservation Congress in September 2021, and in conjunction with the Coastal Conservation Agency and "Plan Bleu", the Club organised an event entitled ICO Solutions. The idea behind this word first was to bring together the foundations of three cruise companies, Costa Cruises, MSC Cruises and Ponant, and local associations for whom biodiversity is the very essence of their work, to exchange and jointly construct concrete solutions to shared problems.

An accessible cruise sector

The Club has increased its visibility among different audiences (members, general public, professionals, institutions) through **online and offline communication campaigns**.

The Association regularly publishes simplified themed educational messages on social networks (Twitter, LinkedIn, Facebook and Instagram), in addition to a monthly newsletter, to highlight its actions, inform the general public and sector professionals, provide briefings and counter disinformation. The Club also responds to requests from different press and media outlets for interviews.

In addition, if requested by a school, the Club provides classes for students interested in the cruise business.

3. The green path

In all its work, the Marseille Provence Cruise Club considers the **environmental impact of the cruise industry**, whether at the port or inland, to be its utmost priority.

This is why, since he first became President in 2015, Jean-François Suhas has brought the entire ecosystem together around an **environmental and social pledge**.

Signing of the cruise industry Blue Charter

At the Marseille Provence Cruise Club's instigation, the Marseille port community implemented a **unique and proactive approach** to reducing the impact of port calls and improving quality of life for local residents, by directly appealing to the cruise companies calling at Marseille.

The Marseille Provence Blue Charter was signed at the Blue Maritime Summit event in October 2019 by **six leading cruise companies**, Costa Group (Costa Cruises, AIDA Cruises), MSC Cruises, Royal Caribbean Group (Royal Caribbean International and Celebrity Cruises) and Ponant, as well as by the Grand Port Maritime de Marseille, the Ministry for Ecological Transition, the Sud Regional Council and the Aix-Marseille-Provence Metropolitan Authority, an initiative that has received widespread support.

The Marseille Provence Blue Charter



A 4-point commitment in favour of eco-energy transition and local residents' living environment

1



Using shore-to-ship power

2



Providing facilities for LNG vessel port calls
and a local supply chain

3



Burning 0.1% low-sulphur marine
gasoil

4



Reducing speed to 10 knots

Compliance with the Blue Charter is overseen by the pilot service and the Port of Marseille Fos harbour master's office. Any non-compliance is reported directly to the Maritime Affairs Directorate.

In 2021, **seven more cruise companies** signed up to the Blue Charter: Hapag Lloyd, Norwegian Cruise Line Holdings (Norwegian Cruise Line, Oceania and Regent Seven Seas), TUI, Silversea Cruises and Sea Cloud.

If **13 shipping companies** are Blue Charter signatories today, representing **97% of all cruise guests passing through the port in 2021**, all the cruise companies calling at Marseille Fos are expected to sign in the future.

The signatories

Cruise companies

Groups



Independents



Institutions



Progress of scheme to provide shore-to-ship power at the Port of Marseille Fos

The Port of Marseille Fos has undertaken an ambitious programme to equip its passenger berths with shore-to-ship power outlets.

With support from the state and local authorities, the Port of Marseille Fos has invested more than €50M in a plan to provide shore power to berthed ships, within an economic framework set out in partnership with its cruise sector clients.

Today, the Corsica terminal berths are already supplied with high tension and 50Hz supplies. These berths each week handle calls by two to four vessels of the La Méridionale and Corsica Linea companies, representing 1200 “plugged-in” port calls per year. The Port of Marseille is the only

Mediterranean port, and one of only 14 worldwide, to offer shipping companies high tension shore-to-ship power on a regular basis and industrial scale.

Thus, the Port de Marseille Fos is now considered a reference in terms of shore-to-ship power connection, thanks to its proven expertise since 2017.

The Port of Marseille Fos is pursuing its aim to extend this service to all passenger berths.

Work to equip the ferry berths at the new Cap Janet terminal, which serves the Maghreb countries, began in January 2022, with delivery expected sometime between this summer and spring 2023.

At the same time, the Port has commenced work on increasing the capacity of its internal electricity distribution network from 30.5MW to 68MW. The upgrade, due to be completed by the end of 2022, will allow power to be supplied to Cap Janet and provide for loops in anticipation of power point installation at the cruise terminal berths.

The Port is also building a new sub-station to convert electricity from 50Hz to 60Hz for the cruise ship connections and installing solar panels on the roofs of six of the port's sheds, with a total power output of 9MW.

Consequently, in less than six years, the Port will have increased its internal electricity supply's capacity **four-fold**, from 18MW to 77MW, thus achieving its aim of providing shore-to-ship power to all passenger ships (passenger-cargo vessels, Corsica and Maghreb ferries and cruise ships), representing more than 2000 port calls every year.

Handling the latest-generation ships at Marseille – Liquefied natural gas bunkering and dedicated local supply chain

Since 2019, and from the moment they left the shipyard, Marseille has handled port calls by the world's first cruise ships to be powered by liquefied natural gas, the AIDAnova and Costa Smeralda.

In 2021, Costa Cruises boosted its presence in Marseille with port calls by the Costa Smeralda every Sunday from July to November.

The Port has handled **21 port calls** by the Costa Smeralda. This means that **13% of port calls** and **20% of passenger numbers** at Marseille have complied with the Blue Charter.

In 2022, it is the turn of the two latest LNG-powered ships, the Costa Toscana on 6th March and the AIDAcosma, due on 28th April, to make their maiden port calls at Marseille.

In 2023, beginning in the spring, the Port of Marseille Fos will also receive regular port calls by MSC Cruises' first LNG vessel the MSC World Europa. For these calls, MSC Cruises has signed a partnership agreement with Total to supply fuel for the ship, with the first bunkering operation due to take place directly at the cruise terminal in November 2022 using a barge.

LNG is currently the most **neutral** fuel available on the market, providing reductions of more than **99% of sulphur oxide** emissions, more than **85% of nitrogen oxide** and **fine particle** emissions and around **25% of CO₂** emissions

These port calls underline the cruise companies' attachment to Marseille and the innovative positioning of its port.

Solar panel and charging point installation at the terminals

Extensive work is being undertaken to install solar panels at the cruise terminals.

Likewise, the terminals' staff and passenger parking areas will be fitted with charging points. Charging points for coaches are also being considered.

Port community unity on the challenge of eco-energy transition

The Marseille-Fos port community is working in total synergy and on a daily basis to further eco-energy transition in the shipping and port sectors, whatever the type of business.

Membership of the AtmoSud air quality association and collaboration

The Marseille Provence Cruise Club is a member of the AtmoSud association and an active member of the working group monitoring cruise ship emissions, in cooperation with the Port of Marseille Fos, Sud Regional Council and shipping companies operating in Marseille and regional ports.

The task of the working group is to provide AtmoSud with real-time data on each ship calling at the region's ports, a world first in this field.

This in turn will provide a reliable record of ships' emissions when manoeuvring and at berth, thus allowing an objective impact assessment to be made in comparison with all other sources of pollution.

The study, the timeline of which will be extended back to 2015, will highlight the changes to date and map out the path towards zero carbon over the coming decade.

4. Prospects for the Marseille Provence Cruise Club and the cruise industry

Traffic forecast

For 2022, the Club anticipates a gradual return to pre-crisis levels, that is to say **more than 1.8 million maritime cruise guests** through Marseille and **120,000 river cruise guests** through Southern Rhône ports.

"Bubble" excursions are no longer compulsory since 2nd March last. The company making the port call can choose whether or not to apply the waiver, depending on the regulations in force in the vessel's flag country.

Future actions

- *Tourism offer and reception*

> Improving cruise passenger traffic management in the city centre: since the cruise business restarted in July 2021, visitor numbers at Notre-Dame de la Garde have been restricted, further to a measure instigated in October 2020 by the Marseille Provence Cruise Club and the Basilica, in consultation with shore travel agencies.

Access to the site is now limited to **four coaches per company per half day**, in order to **smooth traffic flow** and **avoid disturbing** local residents. The new measure has been well received and adhered to by cruise operators calling at Marseille and provides for a **less stressful visitor experience**, one that ensures **respect for all**, whether tourists, operators or residents.

This restriction measure also shortens the transit time of coaches bringing tourists from the city centre, thus reducing emissions and congestion.

New regulations are due to come into force during 2022 at other popular sites such as the Panier.

> Showcasing the region's tourism offer:

- Reorganising a regional cruise workshop for the autumn
- Identifying new products, new places throughout the year.

> Following up the project to improve river landing stages in the Bouches-du-Rhône: Presenting the new services, facilities and infrastructure to operators, with a visit to Arles at the end of the year.

> Survey of turnaround and transit passenger spending and economic benefits and continuation of the follow-up on nationalities

- ***Market development and network coordination***

> CruiseLab coordination: lobbying government agencies to promote the industry's recovery and support cruise sector issues in mainland France and overseas territories.

> Coordinating the regional "Tourisme de croisière" industry contract: pooling B2B promotional campaigns at the international level, providing information to local tourism stakeholders and institutions, organising trade events, training, statistical studies.

> Return to attending international shows and events:

- Danube Tourism & Shipping Conference, Regensburg: 4-6 April 2022
- Seatrade Cruise Global, Miami : 25-28 April 2022
- 60th Medcruise General Assembly, Palamos: 24-27 May 2022
- Seatrade Med, Malaga: 14-15 September 2022
- International Cruise Summit, Madrid: 15-16 November 2022
- River Cruise Europe Convention, Mainz: 28-30 November 2022
- 2022 CLIA Summit at Sea – Dates to be confirmed

> Continuation of conferences, workshops and B2B meetings online: CLIA, Medcruise, River Cruise Europe and Atout France mainly

> Eductour for French-speaking Canadian tour operators: present turnaround offer and pre/post-cruise stays in Provence (in partnership with the Marseille tourist office and the airport) – Early May or October

> Resuscitate the "Direct USA <> Marseille air link" subject with the Airport: follow-up to be done on the visit to cruise companies in Los Angeles at the beginning of 2020 to obtain support for a direct air link

> Incorporation of the River Cruise Europe association's office: drawing up an action plan for the association, which becomes a separate structure in 2022

> Eductour for river cruise company nautical and excursion managers: presentation of the new destination and new infrastructure as part of the Rencontres Nationales du Tourisme Fluvial in Arles

> Participation in the launch and organising of the Rhône-Saône Cruise Club: initiative overseen by the CNR and VNF for the entire catchment area

> Consolidation of the river cruise knowledge base: creation of information sheets on the vessels (operators, schedules...)

Upcoming Club dates

- ***Club's 25th anniversary, at the cruise terminals***

The Club celebrated its 25th birthday in November 2021. The sanitary measures in place at the time prevented the organising of an event. Therefore, before this summer, the association intends organising an enjoyable journey back in time to retrace its history, in the company of members of its association and ecosystem.

- ***2nd edition of the Blue Maritime Summit – Thursday 20th October at the Cosquer Cave***

Local and world blue economy stakeholders will be coming together once more to bolster their actions on the issue of maritime sector eco-energy transition in the Marseille-Fos region.

For this event, a **new Blue Charter - covering the entire Mediterranean and even stricter than the 2019 version**, particularly regarding decarbonation- is being drafted jointly by the government, local authorities, Marseille Provence Cruise Club and private operators. It will be released with a target **signature date of November 2022 for implementation on 1st January 2023**.

This universal charter and its many provisions represent a significant and totally new limitation of the impact operating ships in the Mediterranean has on the environment, both in terms of air pollution and biodiversity.

- ***6th edition of the Rencontres Nationales du Tourisme Fluvial in Arles, 8th and 9th November 2022***

The upcoming Rencontres Nationales du Tourisme Fluvial (RNTF) are being held in Arles in November 2022.

This city and three others in the Bouches-du-Rhône have initiated a campaign to develop river tourism, in conjunction with the Departmental Council and with support from the Regional Council.

The Marseille Provence Cruise Club has been working closely with the Bouches-du-Rhône Departmental Council in preparing the candidacy application and all the stakeholders are delighted to be organising this leading river cruise and river tourism event.

- ***2030 and 2050 objectives***

- **Support for Marseille's candidacy for the "100 climate-neutral and intelligent cities by 2030" call for interest**

The Marseille Provence Cruise Club is firmly behind Marseille's candidacy for this European project. A dossier has been put together describing the Club's various actions and a letter of support drafted.

- Objectives set out by the **International Maritime Organisation for decarbonizing the maritime sector**

In 2018, the International Maritime Organization set out two target dates for gradually eliminating greenhouse gases in shipping: **2030**: a 40% reduction in CO₂ emissions and **2050**: a 50% reduction in CO₂ emissions.

The Marseille Provence Cruise Club and the whole of the local port and maritime communities are committed to intensifying their decarbonizing efforts with the aim of reaching a zero-emission shipping sector.

The Marseille Provence Cruise Club

The local partner of ocean & river cruise stakeholders since 1996!

- A club that brings together and speaks for the local cruise ecosystem

The Club is at the heart of the river and ocean cruise business in Marseille and Provence, with a network of 50 private and institutional members, all key stakeholders of the local economic environment. Its strength? The combination of expertise in the port and tourism sectors of the cruise industry. Its priorities? To promote the industry's eco-energy transition and enhance the economic benefits for the region.

- Achieving cross-sector missions to meet challenges in the region

The Club undertakes concrete actions to:

- **Encourage and coordinate** all the marketplace stakeholders in the ongoing eco-energy (efficiency) transition phase
- **Promote** Marseille Provence as an all-in-one cruise destination, with ocean and river ports* that consolidate its unique position in the Mediterranean
- **Inform and coordinate** the key players handling incoming passengers to optimize tourist flows and experience
- **Analyse** developments and outlook in the cruise market and passenger profiles
- **Represent** cruise sector professionals at the local and national levels and act as their spokesperson
- **Provide input** to members regarding market knowledge and serve as an intermediary for new partnerships

These actions contribute to make the cruise industry a sector of excellence in the regional tourism economy.

- A close-knit and enthusiastic team working in the general interest

The Club is a non-profit organization with five employees and a volunteer chairman. The strengths of the team? Expertise, adaptability and versatility.

It is backed by the Sud Region, the Bouches-du-Rhône Department, the Aix Marseille Metropolitan Authority, the Port of Marseille Fos Authority and the Aix-Marseille-Provence Chamber of Commerce and Industry.

**Marseille, Cassis, La Ciotat, Martigues, Port-Saint-Louis-du-Rhône, Arles, Tarascon, Avignon and Châteauneuf-du-Pape/Orange*