



Overview of the Supply Operation Requirements in the Cruise Industry

Andreas Papachristophorou

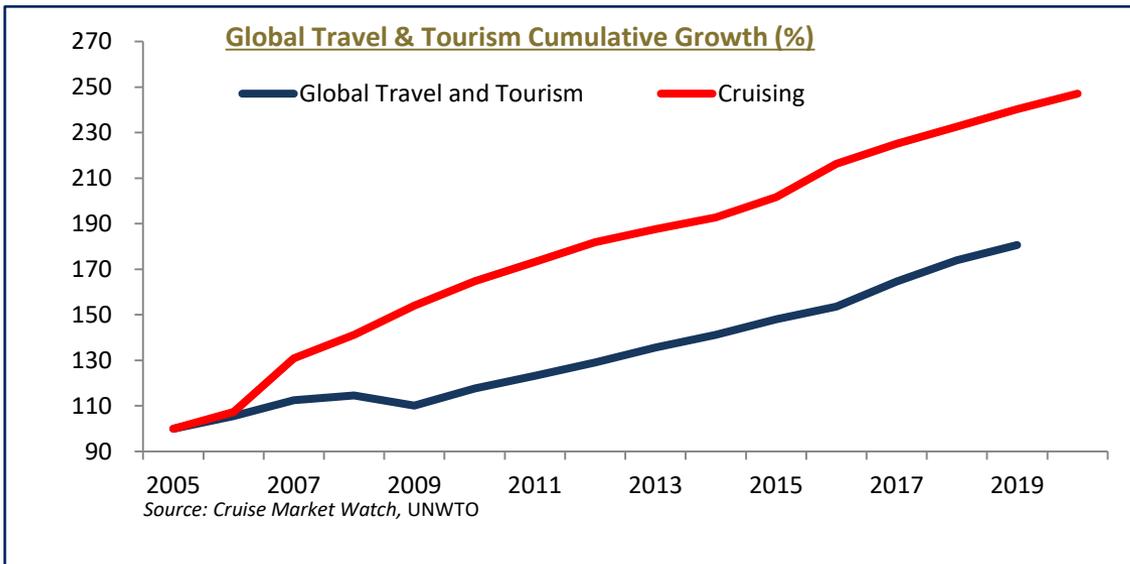
TWO-DAY CONFERENCE OF “NAYS” PROJECT

**“Digitization in the Maritime Sector: The creation of a supply chain platform for the
cruise industry”**

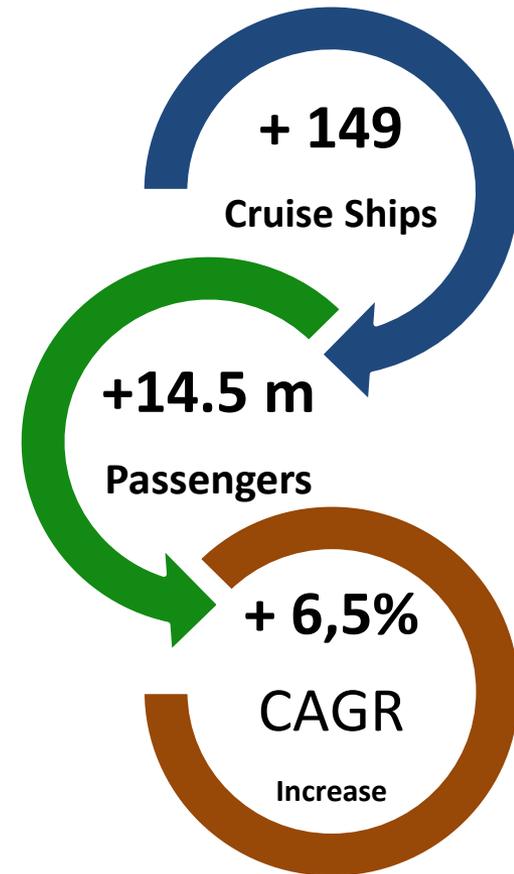
Ajax Hotel, Limassol, Thursday, 27th February 2020



2019



Since 2005

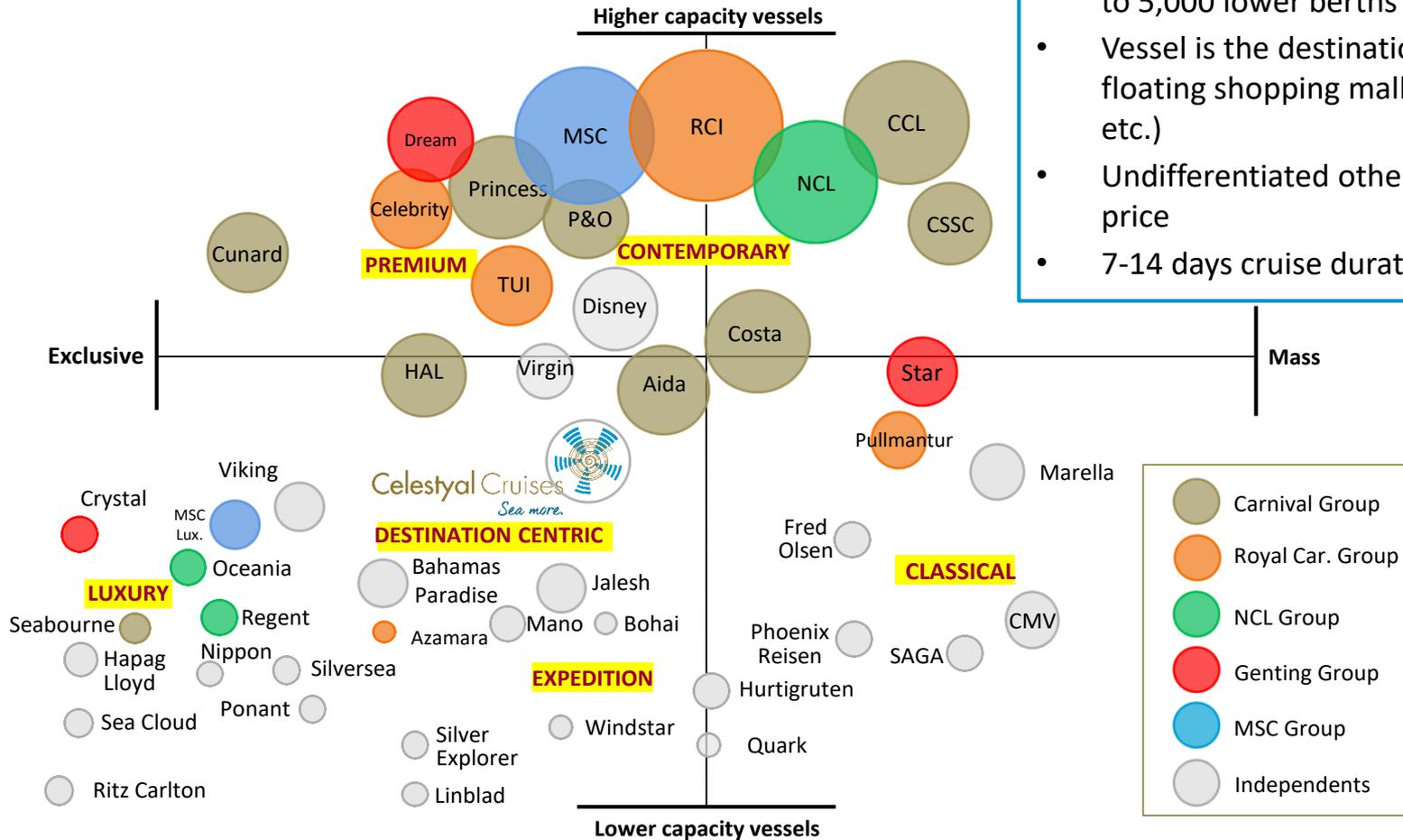


Source: Cruise Industry News



Typical Industry Product Offering

- Ever-increasing size of vessels, up to 5,000 lower berths
- Vessel is the destination (i.e. floating shopping malls, casinos, etc.)
- Undifferentiated other than by price
- 7-14 days cruise duration

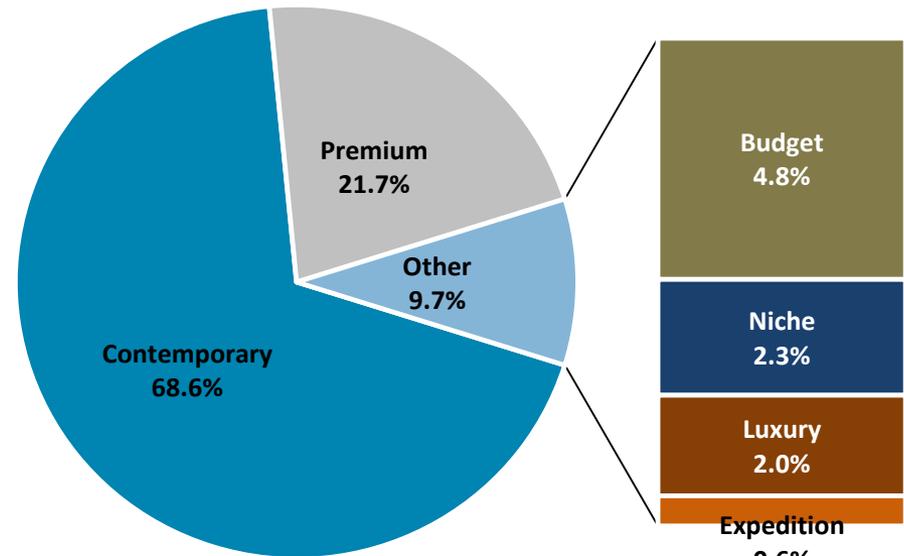
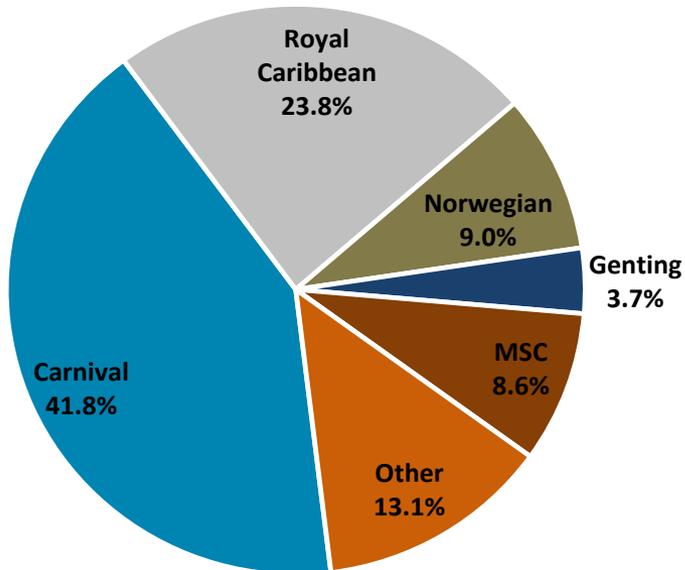


A Highly Concentrated Industry with Significant Barriers to Entry

Medium Priced Products by far the Largest Segment of the Cruise Industry

Market Dominated by Big-5 (2019)

Market Segmentation (2019)



100% = 27.8 million passengers capacity

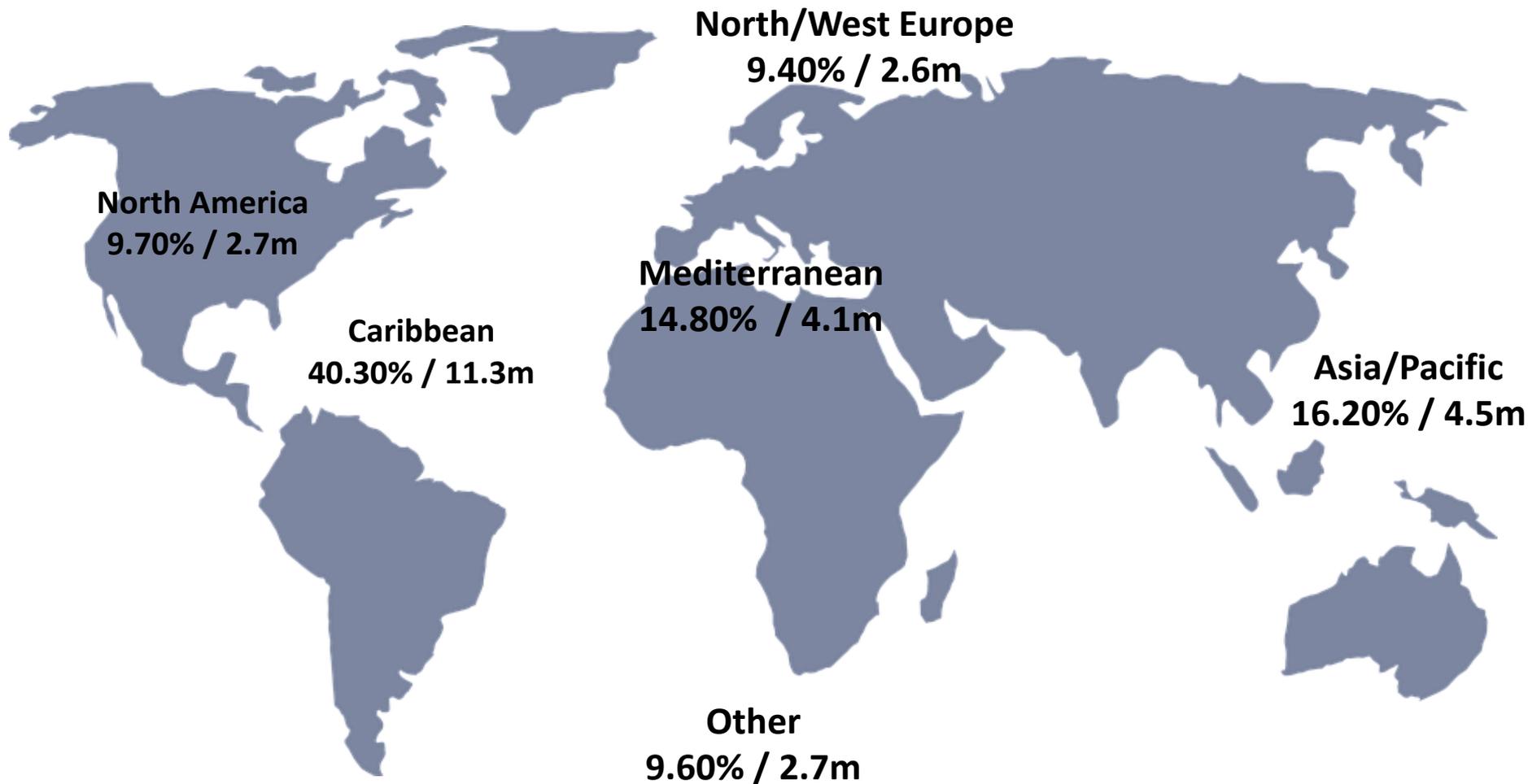
Source: Cruise Industry News 2019
Royal Caribbean includes TUI

Source: Cruise Industry News 2019



Demand and Capacity Deployment Dominated by North America with Europe in Second Place

Cruise Industry Capacity Deployment 2019



Cruise Passengers Mediterranean Movements 2018



Source: Cruise Activities in MedCruise Ports STATISTICS REPORT 2018

Typical Cruises in Eastern Mediterranean

3 Day Cruises "ICONIC AEGEAN"



4 Day Cruises "ICONIC AEGEAN"



Typical Cruises in Eastern Mediterranean

7 days Eclectic



Typical Cruises in Eastern Mediterranean

7 days "3 Continents"





Hotel Operations Supplies

- Food and Beverage
- Linen
- Cutlery and tableware
- Cleaning Materials
- Medical Supplies
- Sundries
- Furniture and fixtures
- Sound and Vision Equipment
- Kitchen Equipment
- Concessioners Supplies
- Uniforms
- Decoration items



Deck and Engine Supplies

- Fuels / Bunkers (HFO/MGO/LNG etc)
- Lubricants
- Water
- Machinery Spare Parts
- Miscellaneous (Charts, Navigation etc)
- Electricity



People

- Passengers
- Crew
- Concessioners' Staff
- Luggage
- Shore Staff
- Visitors
- Authorities
- Surveyors
- Agents
- Tour Operators
- Technicians
- Local representatives

Outflows

Sludge / Sewage / Garbage / F&B wastage / wrong orders / Damaged or old machinery and equipment



Coordination in order to achieve smooth operation and timely departure.

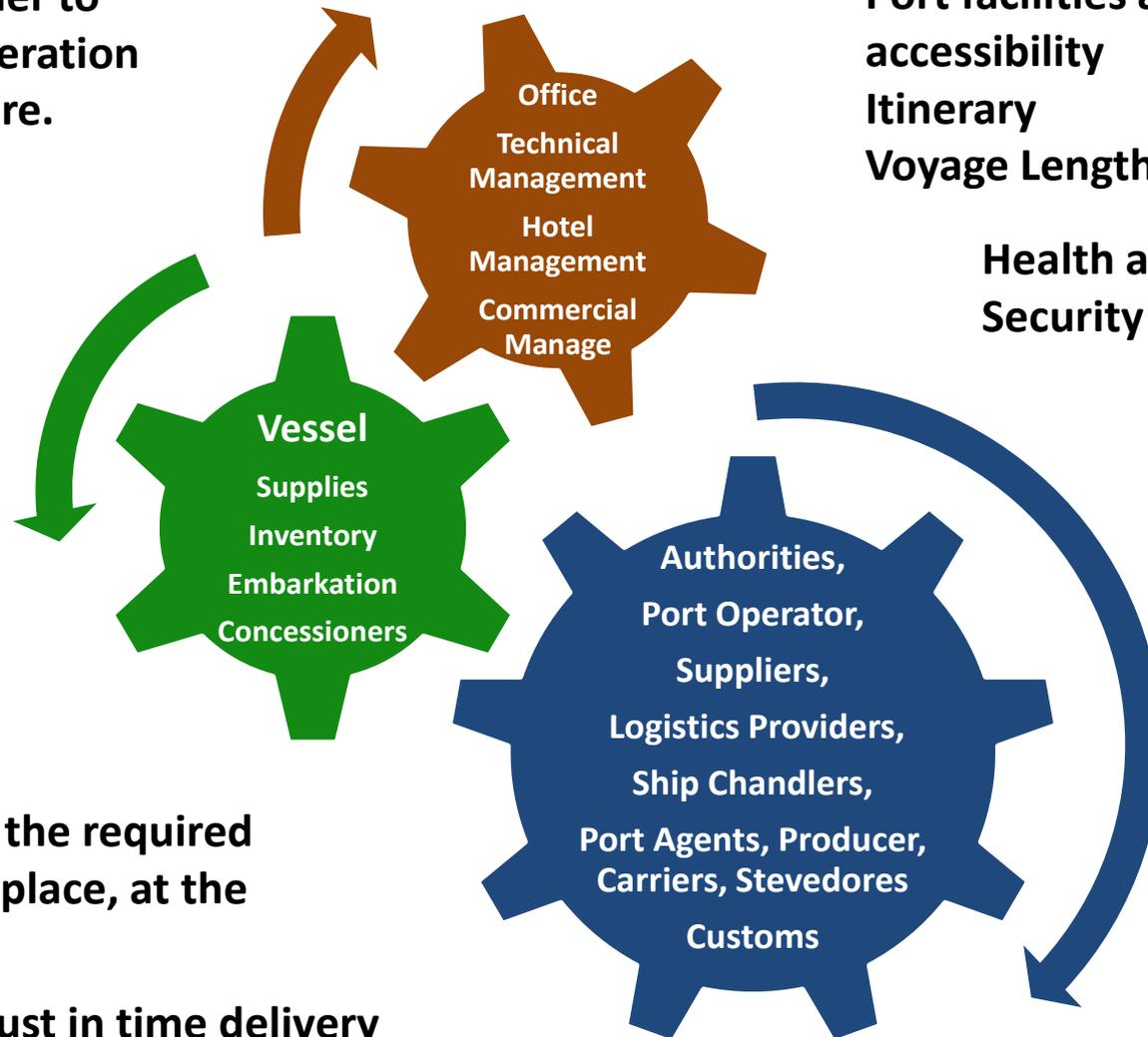
Reliability

Quality of goods
Certification
ISO/HCAP

Storage Capacity
Onboard and at the Port

Correct quantity in the required quality, at the right place, at the agreed time.

Just in time delivery



Port facilities and accessibility
Itinerary
Voyage Length

Health and Safety
Security

Customs
Procedure

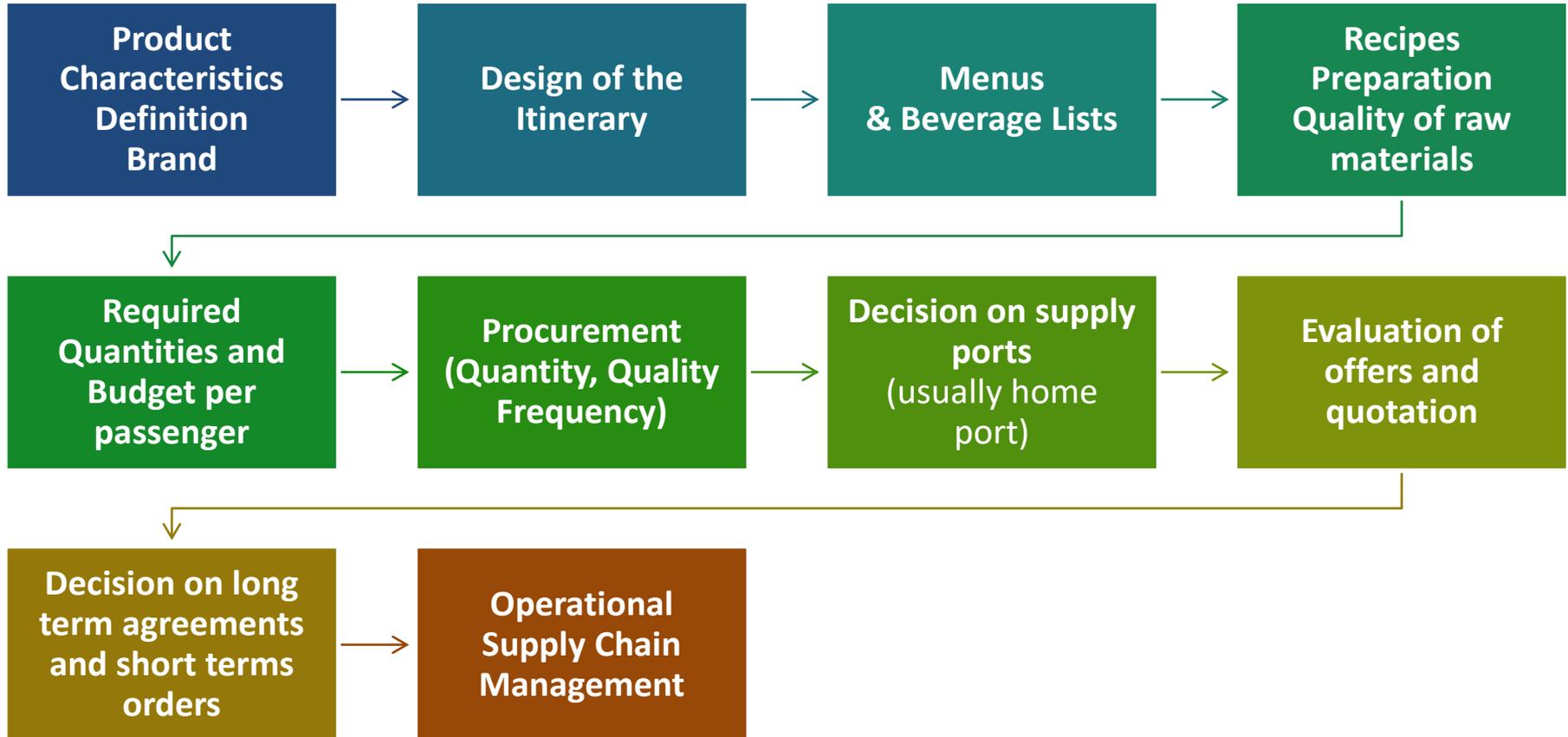
Paperwork
in order

Invoicing

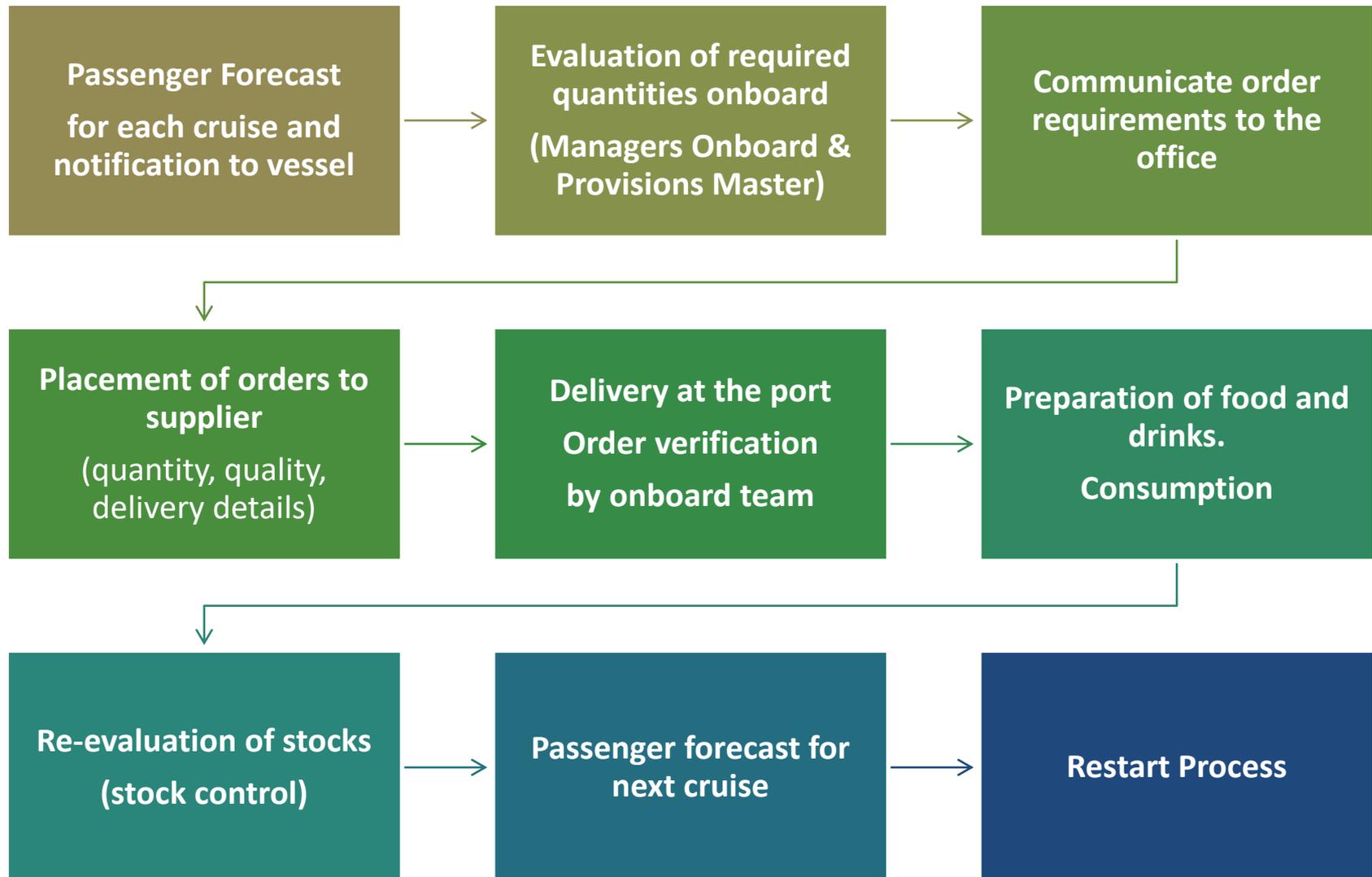
Payments



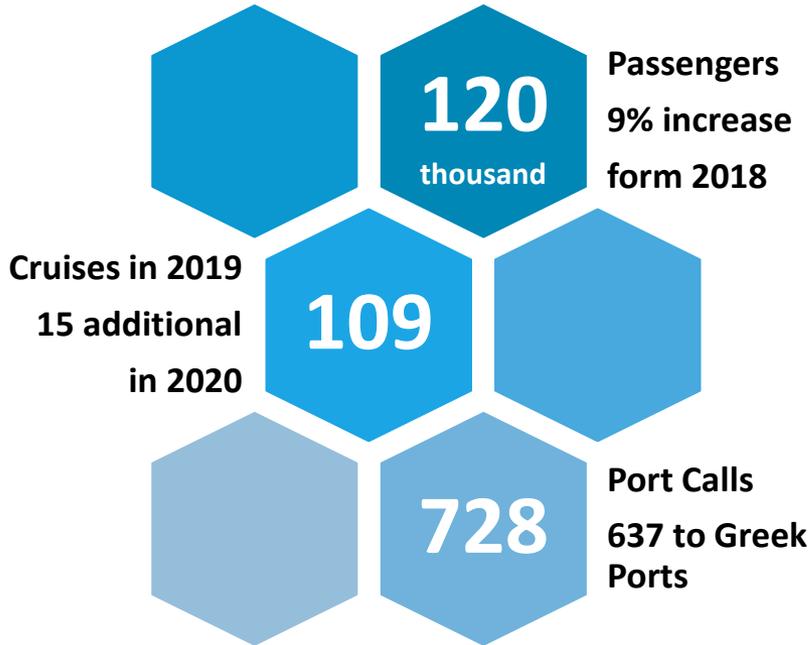
Supply Chain Process for Food and Beverage Materials



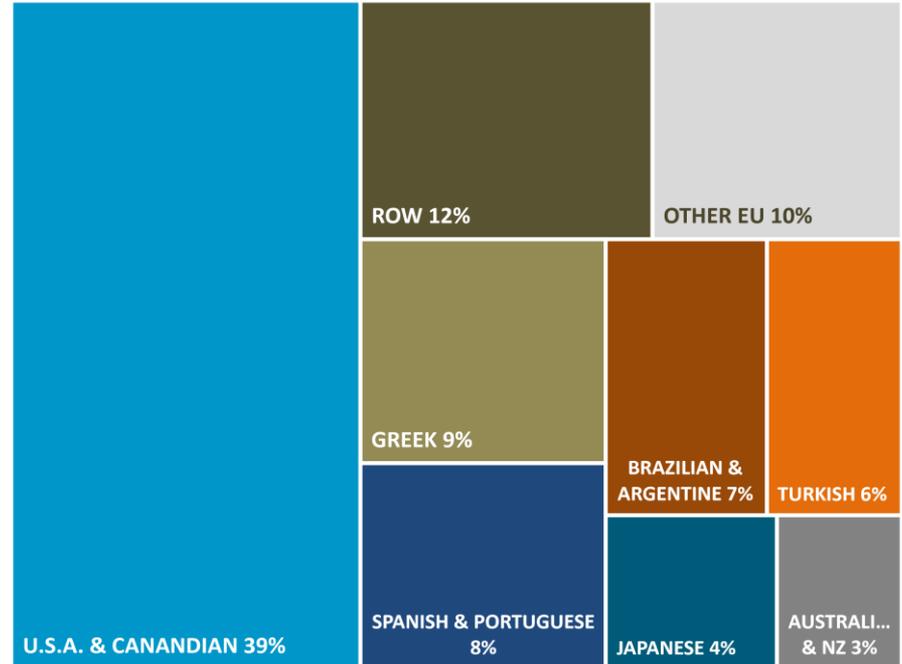
Supply Chain Process for Food and Beverage Materials



About Celestyal 2019 Passengers



Nationality of Passenger



Origin of Passengers



About Celestyal

Contribution To The Greek Economy

In 2019

133.7
€ mil

Annual contribution to the Greek economy

37
€mil

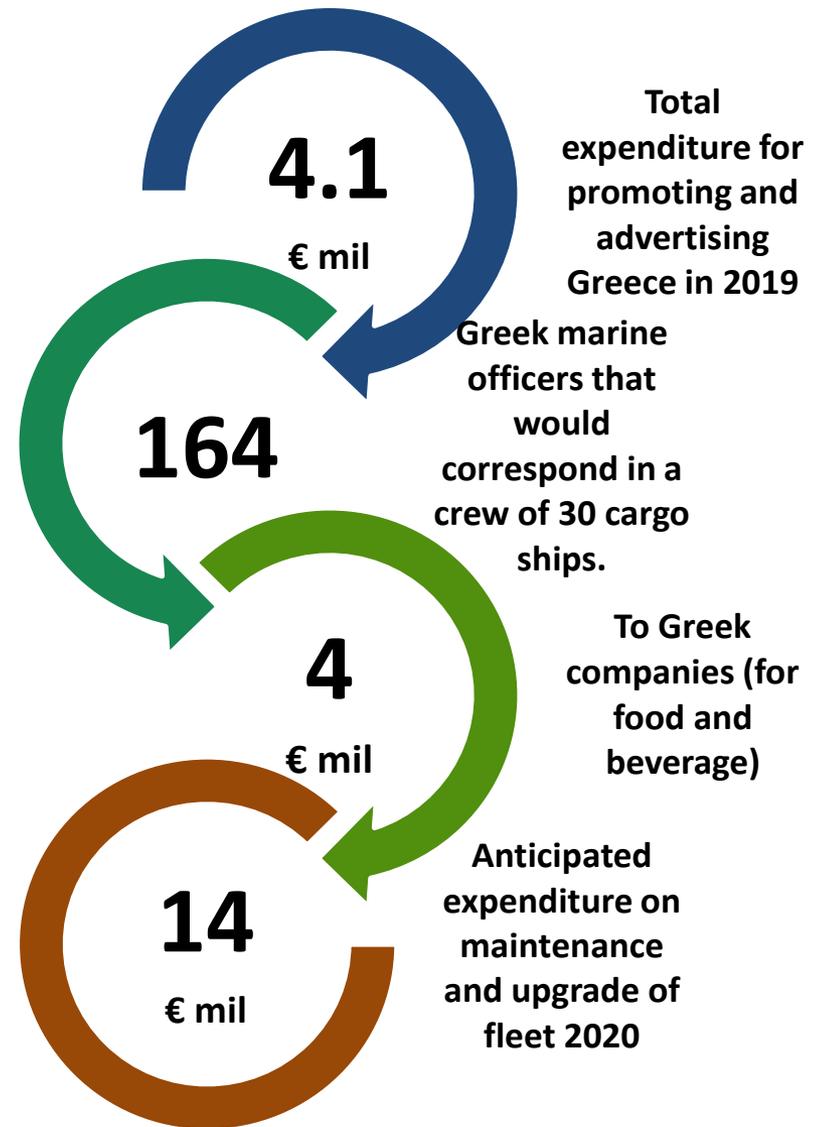
Direct annual operating expenditure

54.7
€ mil

601.000 visits X 91 € per passenger
(average CLIA 2019)

+ 42
€ mil

105.000 passengers homeporting in Greece X 400€ expenses per passenger



Thank you

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