



臺灣港務股份有限公司

Taiwan International Ports Corporation, Ltd



Overview Taiwan Cruise Industry

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**Cruising
with me?**



**Let's learn about
Cruising!**

- Introduction of TIPC
- Global and Asia Cruise Market
- Taiwan Cruise Market
- Cruise ports in Taiwan
- Ports Upgrade & Future plans

Introduction of TIPC



Reform on Port Authorities

MOTC

Ministry of Transportation
and Communications

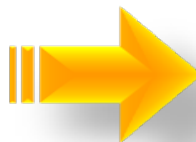
Keelung
Harbor Bureau

Taichung
Harbor Bureau

Kaohsiung
Harbor Bureau

Hualien
Harbor Bureau

1st of March
2012



MOTC

Ministry of Transportation
and Communications



交通部航港局
Maritime and Port Bureau, MOTC

✧ Maritime & Port-related
Public Administration



TIPC
臺灣港務股份有限公司
TAIWAN INTERNATIONAL PORTS CORP., LTD

✧ Port Operations &
Developments

Ports Operated by TIPC

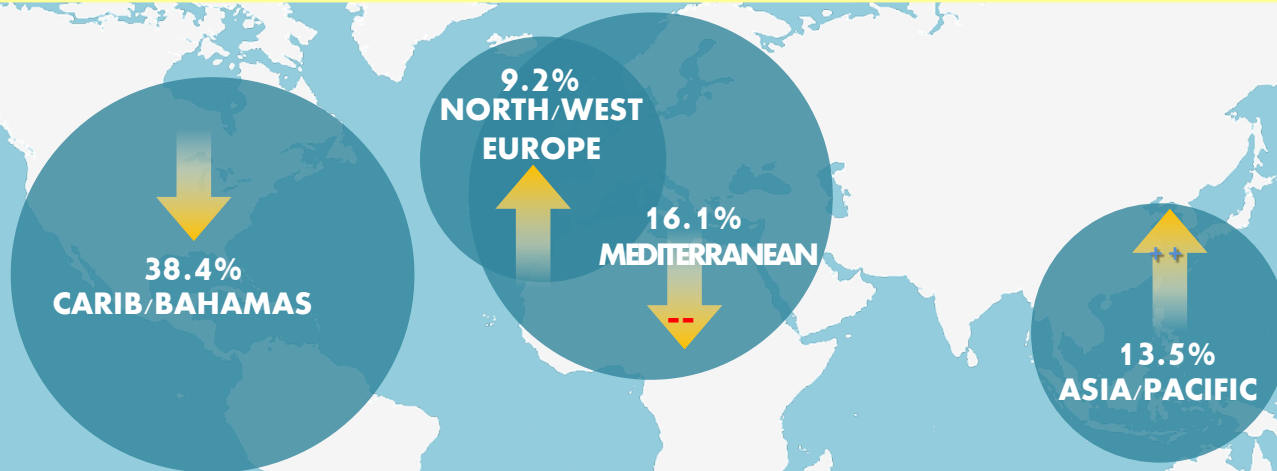


Each Port has magnificent scenic spots nearby

Global and Asia Cruise Market

Global cruise market

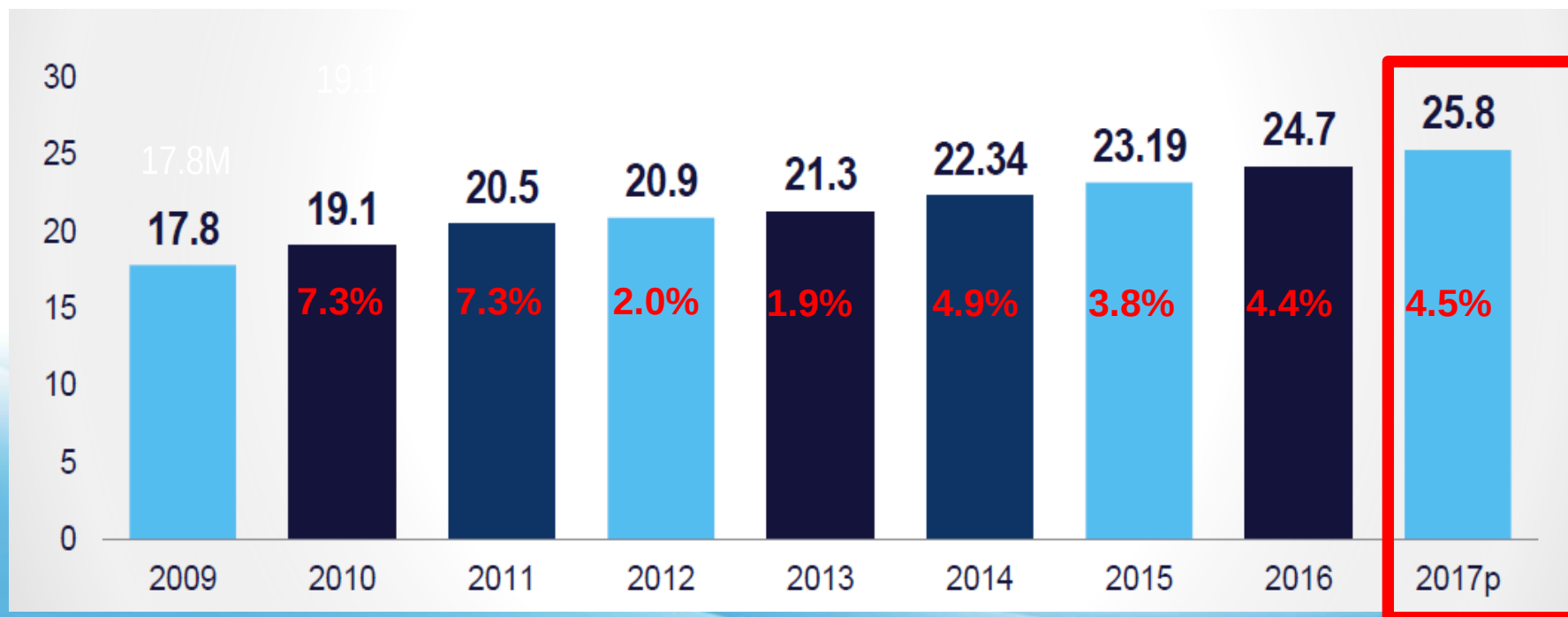
- Caribbean, Mediterranean and Asia are 3 major cruising regions.
- Asia cruise market represents about 13.5% share in 2016



Region	2016	2015	2014	2013	2012
Caribbean/Bahamas	38.4%	39.9%	42.2%	39.5%	39.3%
Mediterranean	16.1%	17.9%	17.7%	19.6%	20.9%
Asia/Pacific	13.5%	10.4%	9.1%	8.0%	6.0%
North/West Europe	9.2%	8.5%	9.0%	9.4%	8.2%

Global cruise passengers number

- CLIA projects cruise passengers will reach 25.8 million in 2017.
- In Asia market, growth rate of cruising increase to 30% in 2017. The figure is much higher compared to global market with 4.5% growth this year.



TOP3 Global Cruise Fleet

1



CARNIVAL
CORPORATION & PLC

101 ships
market share : 44.3%

2



Royal Caribbean
INTERNATIONAL

48 ships
market share : 24.5%

3



NCL
NORWEGIAN
CRUISE LINE®

24 ships
market share : 9.1%



Top 5 Asia Cruise Brands



Asia to Asia Cruises by Top 5 Brands

Unit : ship calls

<u>Brand</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>
 Star 	420	365	352
 Costa 	116	169	211
 Royal Caribbean International 	106	120	166
 Princess	5	86	73
 NYK Asuka II	47	42	46

Home Port v.s. Transit Port

1

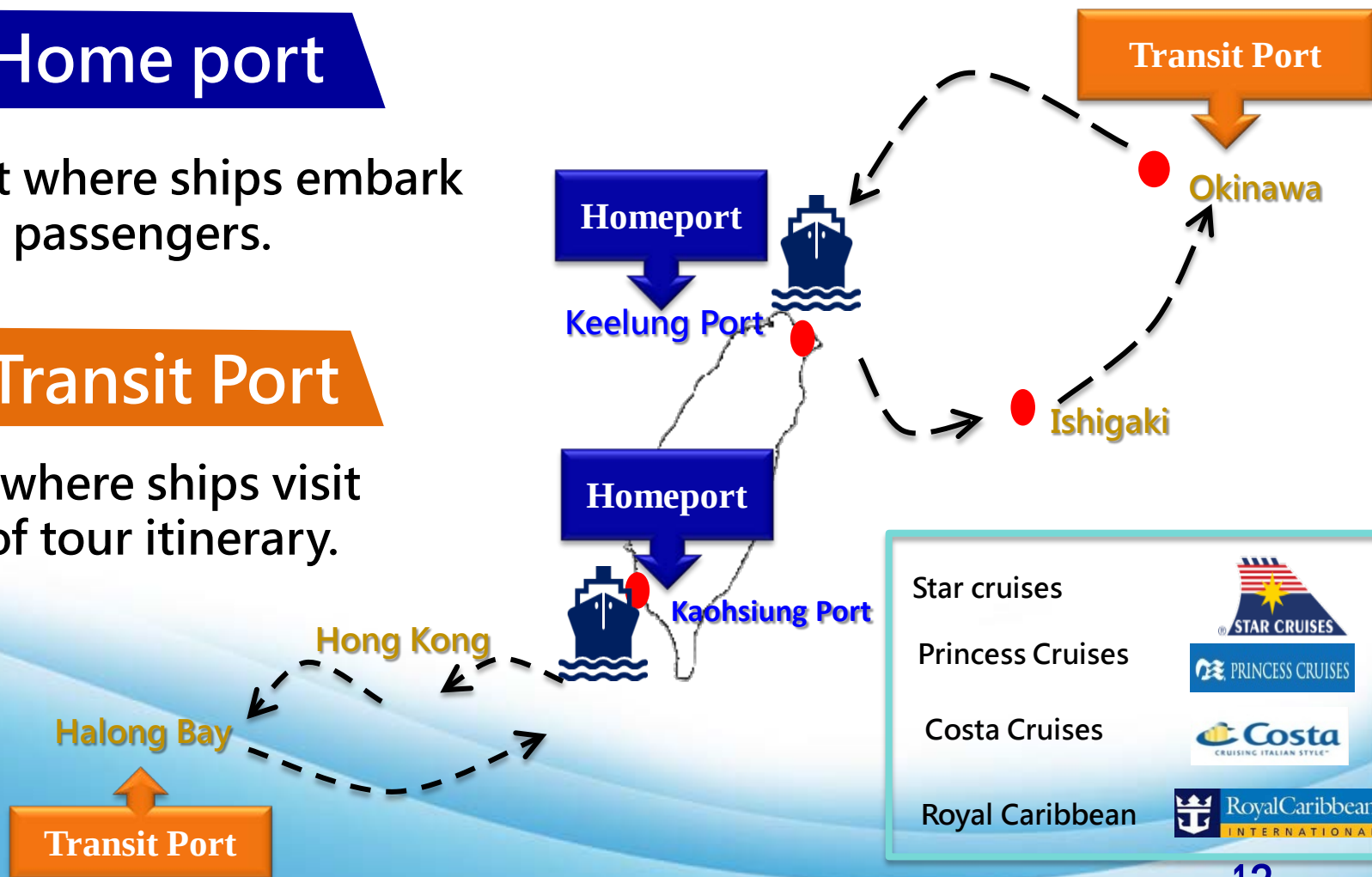
Home port

The port where ships embark passengers.

2

Transit Port

The port where ships visit as part of tour itinerary.



Star cruises



Princess Cruises



Costa Cruises



Royal Caribbean



Asia Cruise Market

Top 10 Cruise Ports in Asia

Top 10 Ports by Total Calls, 2016 picture



#5

Asia Source Market

Passenger Volume by Source Market 2015



Taiwan is second largest source market in Asia, followed by Singapore, Japan and Hong Kong.



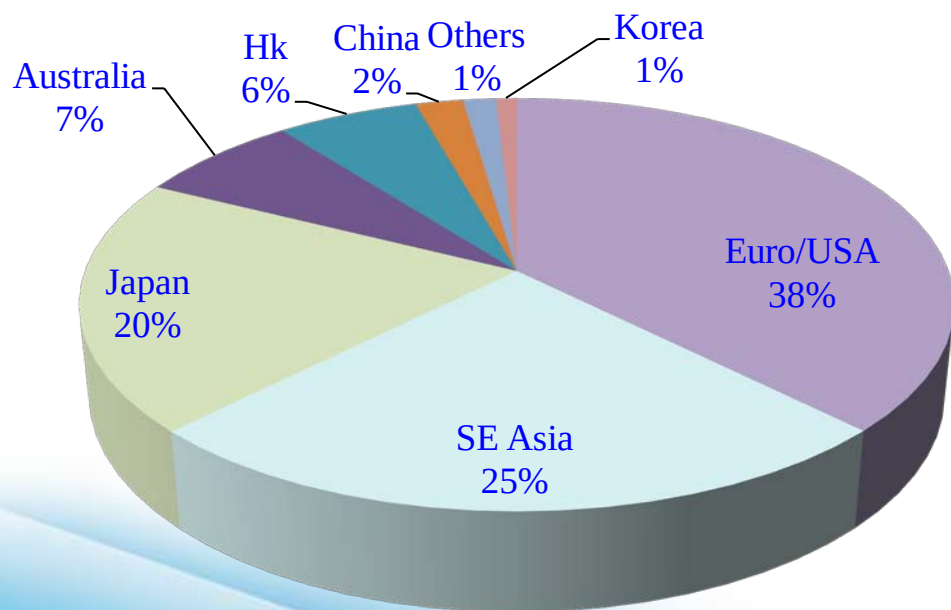
Taiwan Cruise Market

Taiwan Cruise Statistics(1)

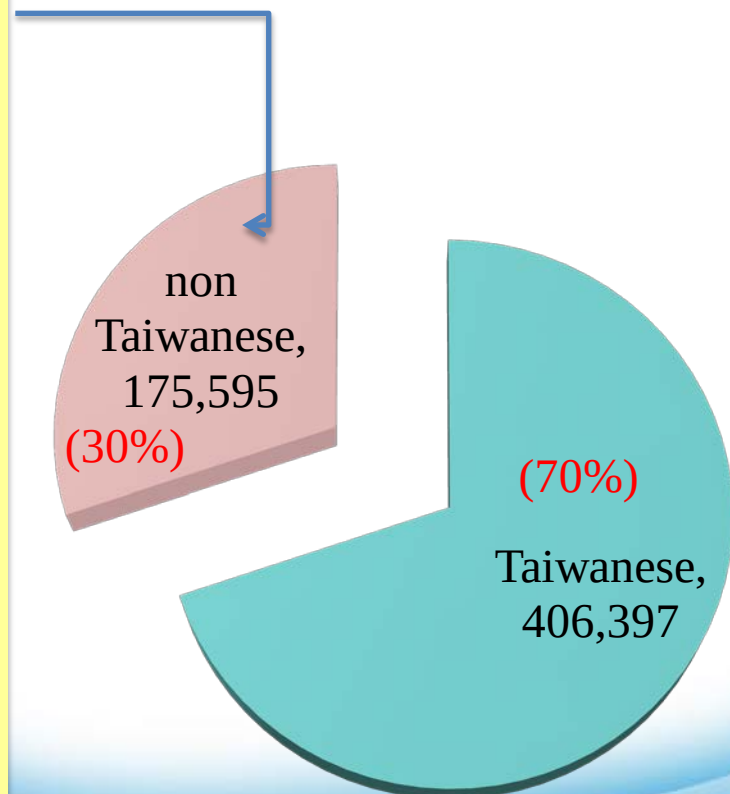


Analysis of Cruise Passenger

Nationality breakdown of In/outbound passenger (Jan-July 2017)



Euro/USA SE Asia Japan Australia
 Hk China Others Korea



Cruise Economic contribution

Port & Service

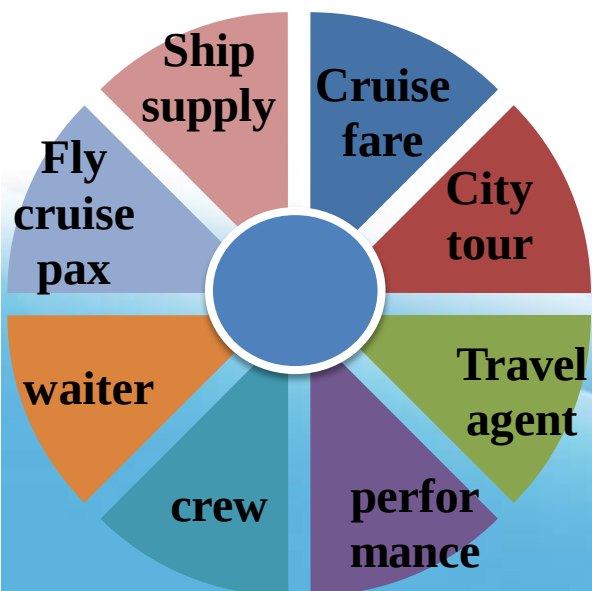
wharfage, towage,
pilotage &
port service

Shipping Industry

ship agents supply,
ship repair, crew
employment

Local Economy

Tourism related
business &
consumption



contribute to local
economies and boost job
opportunities.

Cruise Ports in Taiwan

Taiwan Cruise Ports



Taiwan Cruise Ports Facility

Depth : -9~-10m

Capacity : 1,200pax/hr (homeport)
2,000pax/hr (transit port)



Keelung
基隆港



Taichung
臺中港

Hualien
花蓮港

Depth : -14m

Capacity : 2000pax/hr
(transit port)



Kaohsiung
高雄港

Depth : -9~-10.5m

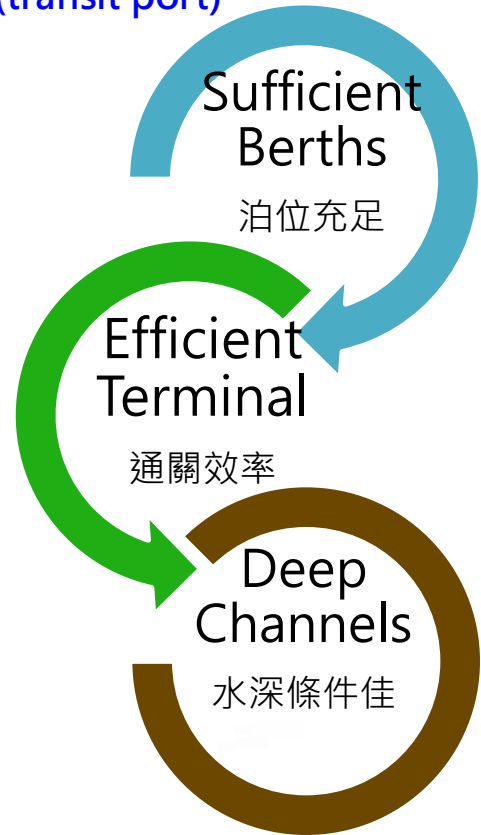
Capacity : 1,200pax/hr (homeport)
2,000pax/hr (transit port)



Sufficient
Berths
泊位充足

Efficient
Terminal
通關效率

Deep
Channels
水深條件佳



All ports are well equipped and able to accommodate 160,000 tons ships to call

Port of Keelung 基隆港

Skyscraper Taipei 101 臺北101大樓



Queen's Head in Yeliu Geopark

野柳女王頭



National Palace Museum 故宮博物館



Sky Lantern in Pingxi 平溪天燈



Port of Taichung 臺中港

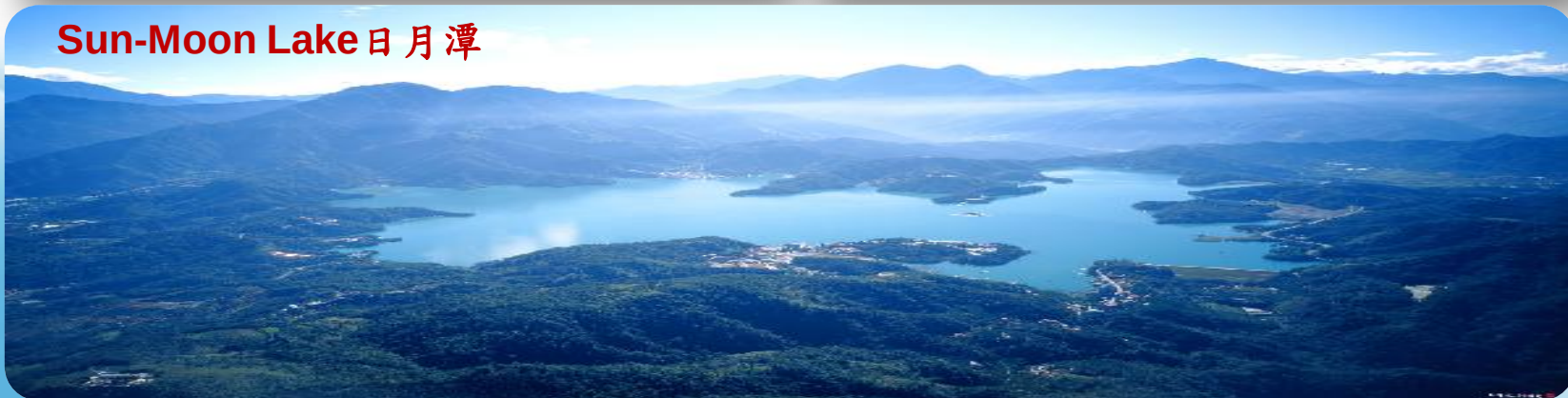
Lukang Historic Street 鹿港老街



Chung Tai Monastery 中台禪寺



Sun-Moon Lake 日月潭



Port of Kaohsiung 高雄港

Mainung Folk Village 美濃



Siziwan 西子灣



The Pier 2 Art Center
駁二藝術特區



Fo Guang Shan 佛光山



Port of Hualien 花蓮港

Taroko Gorge 太魯閣



Whales Watching 海上賞鯨



River Rafting 溯溪

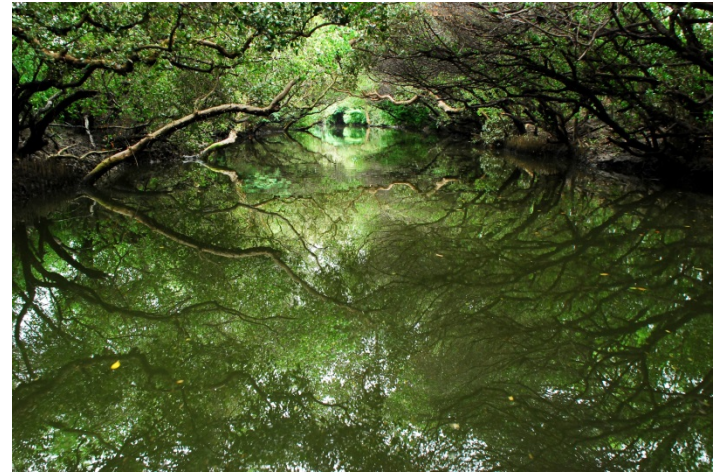


Port of Anping 安平港

Hayashi Department Store 林百貨



Sicao Green Tunnel 四草綠色隧道



Confucius Temple 孔廟



Port of Penghu 澎湖港

Ma-Kong Old Street 中央老街



Jibei Island 吉貝



Twin Hearts Stone Weir 雙心石滬



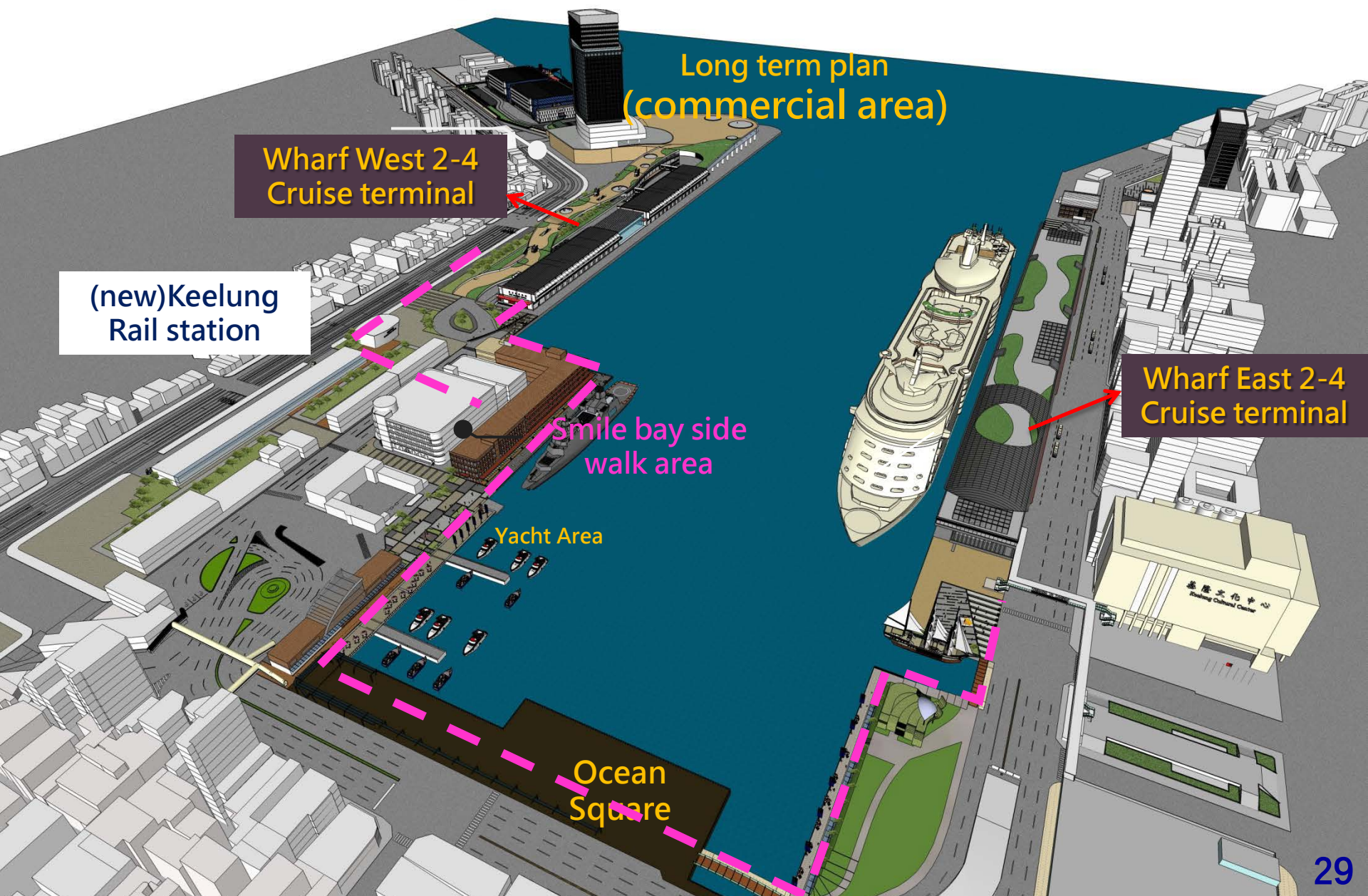
Skin Diving 浮潛



Ports upgrade & Future Plan



Future plan-Keelung Port





Upgrade port facility- East bank of Keelung Port

The new build platform will be located at East wharf 3-4 to provide passenger comfortable space during embarkation and disembarkation.





Upgrade port facility- West bank of Keelung Port

Wharf West 2-4 Cruise Terminal renovation



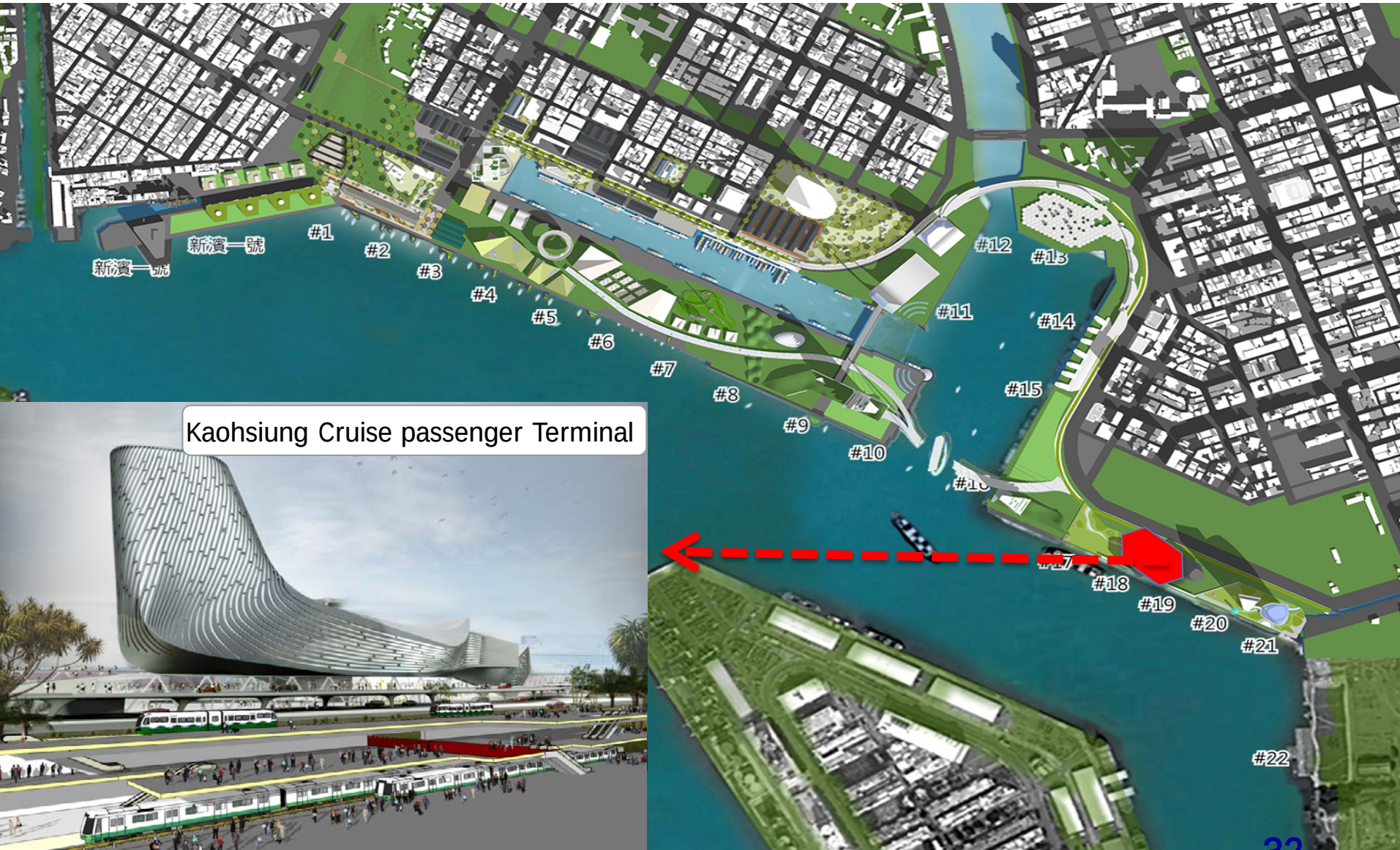
West 2

West 3

West 4



Kaohsiung Cruise Passenger Terminal



Kaohsiung Cruise passenger Terminal



Kaohsiung Cruise passenger Terminal



Redevelop old port area(1)

- Co work with Kaohsiung city government to develop waterfront from wharf#1-10



Redevelop old port area(2)



Sail of Asia Resort

Harbor View Park

North Pier Plaza

Ocean Culture & Popular Music Center

Kaohsiung Cruise Passenger Terminal

Kaohsiung Exhibition Center

Thanks for your attention

