

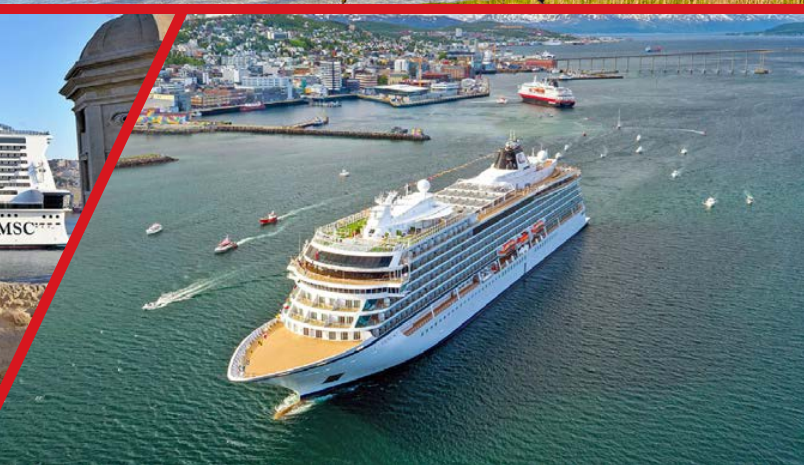
Cruise Industry News



CRUISE

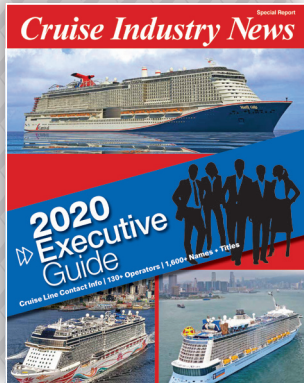
Ship

ORDERBOOK

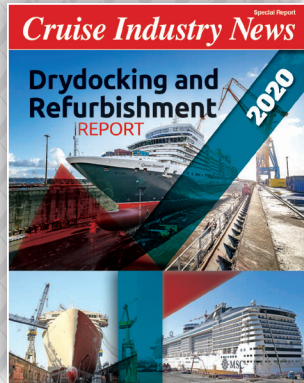


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Current Orderbook



Zero Emissions



Brazil Market



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Financial Tracking











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Ocean Ships On Order: 106
Average Size: 85,849 Tons
Average Capacity: 2,172 Passengers
Average Cost \$600,000,000

Orderbook Value: \$62.4 Billion
Total Berths: 225,888
Average Price/Berth: \$276,039

November 4 2020

2020:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
☑  Hurtigruten	Fridtjof Nansen	\$220	20,000	530	Kleven	World	Q1
☑ Regent	Splendor	\$478	54,000	750	Fincantieri	World	January
☑ Virgin	Scarlet Lady	\$710	110,000	2,770	Fincantieri	Carib	February
☑  Ponant	Le Bellot	\$110	10,000	180	VARD	World	March
☑ Celebrity	Apex	\$900	129,500	2,900	Chantiers	Eur/Carib	April
☑  Lindblad	NG Endurance	\$135	12,000	126	Ulstein	World	April
☑  Silversea	Silver Origin	\$75	5,739	100	De Hoop	Galapagos	June
☑  Ponant	Le Jacques Cartier	\$110	10,000	180	VARD	World	July
☑ Princess	Enchanted Princess	\$760	141,000	3,660	Fincantieri	Eur/Carib	September
☑ Saga	S/Adventure	\$350	58,250	1,000	Meyer	Europe	September
☑  P&O Cruises	Iona	\$950	183,900	5,200	Meyer	Europe	Q3
☑ Silversea	Silver Moon	\$370	40,700	596	Fincantieri	World	October
☑  Mystic/Nicko	World Voyager	\$80	9,300	200	West Sea	World	Q3
Sea Cloud	Spirit	\$100	6,000	136	Metalships	World	Q3
MSC Cruises	Virtuosa	\$900	177,100	4,888	Chantiers	Europe	October
 Costa Cruises	Firenze	\$780	135,500	4,232	Fincantieri	China	October
 Coral Expeditions	Geographer	\$75	5,500	120	VARD	Australia	December
 Quark Expeditions	Ultramarine	\$150	13,000	200	Brodosplit	World	Q4

Note: For a full accounting of cruise ship orderbook trends dating back to 1988, please see the [Cruise Ship Orderbook Report](#)

EXPEDITION

2020 MARKET REPORT

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Cruise Industry News Special Report

Expedition Market Report 2020

Market Capacity

Days	Capacity	Empty	MC Share
10	9,903	92,000	9.9%
12	2,462	63,832	14.7%
15	972	26,438	4.3%
2	490	59,880	8.2%
4	748	29,102	4.8%
2	714	19,710	4.9%
3	833	16,931	3.7%
4	854	15,440	3.6%
5	410	14,940	3.6%
8	552	14,088	3.2%
4	540	13,568	2.9%
3	178	10,434	2.4%
2	600	10,200	2.2%
2	200	10,000	2.0%
1	212	6,000	2.7%
2	284	8,298	1.9%
1	298	6,284	1.5%
1	1,000	6,000	1.4%
1	278	6,000	1.3%
6	245	4,416	1.0%
3	202	3,888	0.9%
1	188	3,700	0.9%
1	148	2,880	0.7%
1	114	3,400	0.8%
2	242	3,338	0.8%
2	200	3,100	0.7%
1	134	3,080	0.7%
1	200	2,000	0.7%
1	199	2,080	0.7%
1	148	2,080	0.7%
1	189	2,388	0.6%
1	188	2,398	0.6%
3	284	2,134	0.5%
1	188	1,781	0.4%
1	90	1,080	0.2%
1	34	1,080	0.2%
2	100	850	0.2%
1	83	680	0.2%
Total	104	17,816	434,106
Change	+18.6%	+30.3%	+3.8%

Market Share 2021

Market Capacity
434,106

Ships
104

PDF

40 Cruise Industry News 2020 Expedition Market Report

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COMPANIES:

- Adventure Canada
- Alaskan Dream
- Albatros Expeditions
- Antarctica21
- Antarpply Expeditions
- Atlas Ocean Voyages
- Aurora Expeditions
- Australis
- Celebrity
- Coral Expeditions
- Crystal
- G Adventures
- Hapag-Lloyd
- Heritage Expeditions
- Hurtigruten
- Iceland Pro
- Lindblad
- Metropolitan Touring
- Nicko Cruises
- Oceanwide
- Overseas Adventure
- Travel
- Paul Gauguin
- Peregrine
- Polar Latitudes
- Polar Quest
- Ponant
- Poseidon Expeditions
- Quark
- Scenic
- Seabourn
- Silversea
- True North
- UnCruise
- Vantage Cruises
- Victory Cruise Lines
- Viking Ocean
- VIVA Expeditions
- Vodohod
- Windstar



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2021:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
 Carnival	Mardi Gras	\$950	183,900	5,200	Meyer Turku	Carib	January
 SunStone ²	Ocean Explorer	\$65	8,000	140	CMIH	World	January
Viking Ocean	Viking Venus	\$400	47,000	930	Fincantieri	World	Q1
 SunStone ³	Ocean Victory	\$65	8,000	186	CMIH	World	March
Tradewind Voyages	Flying Clipper	\$100	8,770	300	Brodosplit	World	March
 AIDA Cruises	AIDAcosma	\$950	183,900	5,400	Meyer	Europe	Spring
Royal Caribbean	Odyssey	\$950	167,000	4,200	Meyer	Caribbean	April
 Crystal	Endeavor	\$390	19,800	200	MV Werften	World	April
 Ponant	Commandant Charcot	\$324	30,000	270	VARD	World	May
Holland America	Rotterdam	\$520	99,000	2,660	Fincantieri	Eur/Carib	June
Ritz-Carlton	Evrima	\$225	25,000	298	Barreras	World	Spring
 Hapag-Lloyd	H/Spirit	\$155	16,100	230	VARD	World	Q2
 Hurtigruten	Unnamed	\$220	20,000	530	Kleven	World	Q2
 Mystic/Atlas	World Navigator	\$80	9,300	200	West Sea	World	Q2
Virgin	Valiant Lady	\$710	110,000	2,770	Fincantieri	Eur/Carib	Q2
Emerald	Azzurra	\$100	10,000	100	Halong	World	Q2
MSC Cruises	Seashore	\$1,100	169,380	4,560	Fincantieri	Europe	Summer
 SunStone ⁴	Sylvia Earle	\$65	8,000	130	CMIH	World	September
Princess	Discovery Princess	\$760	141,000	3,660	Fincantieri	Eur/Carib	October
 Oceanwide	Janssonius	\$85	6,300	174	Brodosplit	World	October
 Seabourn	Venture	\$225	23,000	264	Mariotti Damen	World	Q3
 Lindblad	NG Resolution	\$150	12,000	126	Ulstein	World	Q3
 Swan Hellenic	Minerva	\$150	10,000	152	Helsinki	World	November
Silversea	Silver Dawn	\$380	40,700	596	Fincantieri	World	Q4
 Viking Ocean	Viking Octantis	\$275	30,000	378	VARD	World	Q4
 Costa Cruises	Toscana	\$950	183,900	5,224	Meyer Turku	South Am	Q4
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA

2. On charter to Vantage Travel.

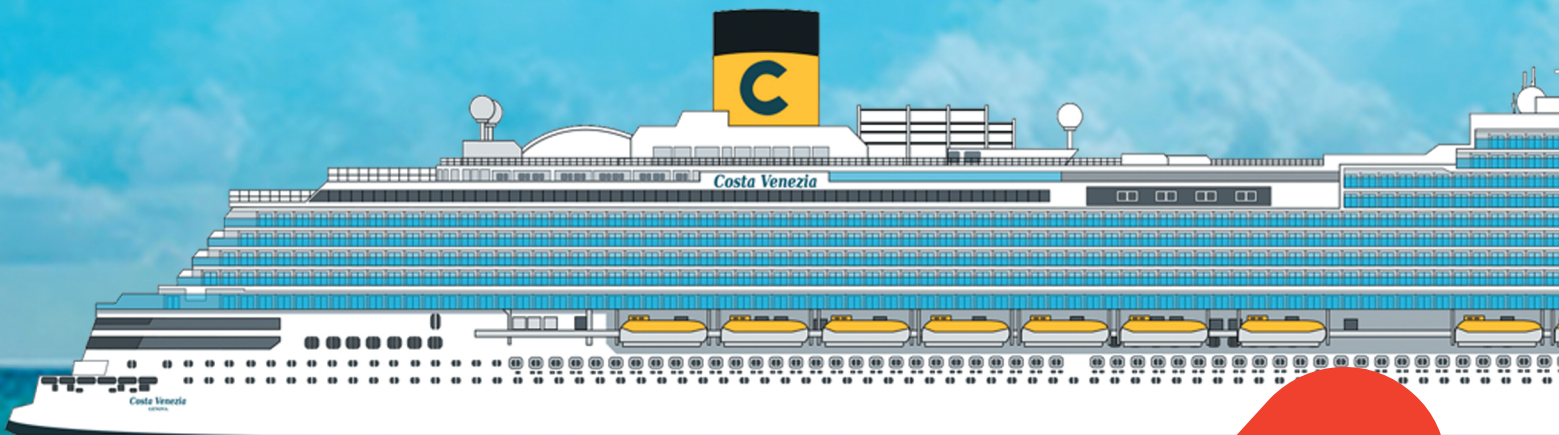
3. On charter to Victory Cruise Lines and Albatros Expeditions.

4. On charter to Aurora Expeditions.

CHINA 2021

MARKET REPORT

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- Local Players



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2022:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
SunStone ⁵	Ocean Odyssey	\$65	8,000	140	CMIH	World	February
Mystic/Atlas	World Traveller	\$80	9,300	20	West Sea	World	Q1
Ritz-Carlton	Unnamed	\$225	25,000	298	Barreras	World	Q1
Dream Cruises	Global Dream	\$1,800	208,000	5,000	MV Werften	China	Q1
Royal Caribbean	Wonder	\$1,300	227,625	5,448	Chantiers	China	Spring
Swan Hellenic	Unnamed	\$150	10,000	152	Helsinki	World	April
Seabourn	Unnamed	\$225	23,000	264	Mariotti Damen	World	May
MSC Cruises	Europa	\$1,200	205,700	5,400	Chantiers	TBA	May
Royal Caribbean	Unnamed	\$1,100	200,000	5,000	Meyer Turku	TBA	Q2
Viking Ocean	Viking Polaris	\$275	30,000	378	VARD	World	Q2
Aranui	AraMana	\$150	10,000	280	Huanghai	Asia	Q2
Disney	Disney Wish	\$900	140,000	2,500	Meyer	TBA	Q2
SunStone ⁶	Ocean Albatros	\$65	8,000	186	CMIH	World	October
Celebrity	Unnamed	\$900	129,500	2,900	Chantiers	TBA	Fall
Virgin	Unnamed	\$710	110,000	2,770	Fincantieri	TBA	Q3
Mystic/Atlas	World Seeker	\$80	9,300	200	West Sea	World	Q4
Swan Hellenic	Unnamed	\$170	12,500	192	Helsinki	World	Q4
Carnival	Celebration	\$950	183,900	5,200	Meyer Turku	TBA	TBA
Norwegian	Unnamed	\$850	140,000	3,300	Fincantieri	TBA	TBA
Viking Ocean	Viking Mars	\$400	47,000	930	Fincantieri	World	TBA
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA
Disney	Unnamed	\$900	140,000	2,500	Meyer	TBA	TBA
Cunard Line	Unnamed	\$600	113,000	3,000	Fincantieri	World	TBA
P&O Cruises	Unnamed	\$950	183,900	5,200	Meyer	TBA	TBA
Silversea	Unnamed	TBA	TBA	TBA	Meyer Werft	World	TBA
Oceania	Unnamed	\$660	67,000	1,200	Fincantieri	TBA	TBA
Paul Gauguin	Unnamed	\$165	11,000	230	VARD	Asia-Pacific	TBA
Paul Gauguin	Unnamed	\$165	11,000	230	VARD	Asia-Pacific	TBA
Scenic	Eclipse II	\$185	16,500	228	Rijeka	World	TBA
Celebrity	Beyond	\$900	129,500	2,900	Chantiers	TBA	TBA
Crystal	Unnamed	\$390	19,800	200	MV Werften	World	TBA

5. On charter to Vantage Travel.

6. On charter to Albatros Expeditions.

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2023:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
■ Dream Cruises	Unnamed	\$1,800	208,000	5,000	MV Werften	China	Q1
Ritz-Carlton	Unnamed	\$225	25,000	298	Barreras	World	Q1
Crystal	Unnamed	\$900	70,000	800	MV Werften	World	Q1
■ SunStone ⁷	Ocean Discoverer	\$65	8,000	186	CMIH	World	March
TUI Cruises	Mein Schiff 7	\$625	110,000	2,900	Meyer Turku	Europe	Spring
■ AIDA Cruises	Unnamed	\$950	183,900	5,400	Meyer	TBA	Spring
MSC Cruises	Unnamed	\$600	64,000	1,000	Fincantieri	World	Spring
Royal Caribbean	Unnamed	\$1,300	231,000	5,714	Chantiers	TBA	Fall
■ Princess	Unnamed	\$1,000	175,000	4,300	Fincantieri	TBA	Q4
Virgin	Unnamed	\$795	110,000	2,770	Fincantieri	TBA	Q4
Regent	Unnamed	\$545	54,000	750	Fincantieri	World	Q4
■ Disney	Unnamed	\$900	140,000	2,500	Meyer	TBA	TBA
Norwegian	Unnamed	\$850	140,000	3,300	Fincantieri	TBA	TBA
■ Carnival China	Unnamed	\$750	135,000	5,000	CSSC	China	TBA
MSC Cruises	Unnamed	\$1,100	169,380	4,560	Fincantieri	TBA	TBA
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA
■ MSC Cruises	Unnamed	\$1,000	177,000	4,888	Chantiers	TBA	TBA
Silversea	Unnamed	TBA	TBA	TBA	Meyer Werft	World	TBA
■ Mystic/Atlas	World Adventurer	\$80	9,300	200	West Sea	World	TBA
■ Mystic/Atlas	World Discoverer	\$80	9,300	200	West Sea	World	TBA
■ Crystal	Unnamed	\$390	19,800	200	MV Werften	World	TBA

7. On charter to Victory Cruise Lines and Aurora Expeditions.

2021 Fleet Deployment

- All Major Brands | 2021 Data
- Capacity Breakdown by Cruise Line/Region
- Key Luxury + Expedition Brands
- Updated 2020 Pre and Post COVID Data

Special Report

Cruise Industry News

2021 Fleet Deployment

Ship	Change
41.1%	+35.3%
26.6%	+47.3%
13.7%	+13.3%
5.9%	-79.3%
3.2%	-5.3%
2.5%	-3.8%
0.9%	-8.3%
1.1%	0%
10.3%	0%
100%	0%

COVID-19	Change
33.9%	-3.7%
29.6%	+12.9%
14.8%	-2.7%
8.2%	+20.3%
6.1%	-19.3%
2.9%	+42.3%
2.3%	+6.3%
1.3%	-14.8%
0.7%	-38.3%
0.7%	0%
0.1%	0%
100%	0%

2020 REALIZED	Change
Canada	0%
Med	0%
Ind/Pac/Sea	0%
Carib/Pa	0%
Africa	0%
NW Europe	0%
Asia/Pacific	0%
Overall	0%

2018	Change
35.8%	+3.3%
35.5%	+35.3%
15.5%	+19.3%
7.8%	+35.3%
6.9%	+39.3%
2.6%	+62.3%
2.1%	+95.4%
1.6%	+6.7%
1.3%	-36.3%
0.6%	+33.3%
0.3%	0%
100%	0%

2021	Change
Bermuda	2
World	11
Overall	13
Change	+9.1%

2018	Change
37.3%	+11.3%
29.2%	+3.8%
15.9%	+2.1%
8.3%	-3.2%
7.3%	-3.0%
2.3%	+25.0%
1.5%	0%
0.9%	0%
0%	0%
100%	0%

2018	Change
NW Europe	10
Med	100
Caribbean	8
Carib/Pa	41
Ind/Pac/Sea	51
Canada	21
Transatlantic	5
Asia/Pacific	2
Africa	2
Bermuda	1
World	13
Overall	13
Change	+8.3%

PROJECTED 2021	Change
CAPACITY	1,389,170
SHIPS	15



Fleet

2020 REALIZED	Change
Canada	0%
Med	0%
Ind/Pac/Sea	0%
Carib/Pa	0%
Africa	0%
NW Europe	0%
Asia/Pacific	0%
Overall	0%

2018	Change
NW Europe	10
Med	100
Caribbean	8
Carib/Pa	41
Ind/Pac/Sea	51
Canada	21
Transatlantic	5
Asia/Pacific	2
Africa	2
Bermuda	1
World	13
Overall	13
Change	+8.3%

PROJECTED 2021	Change
CAPACITY	1,389,170
SHIPS	15



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2024:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
■ Royal Caribbean	Unnamed	\$1,100	200,000	5,000	Meyer Turku	TBA	Q2
MSC Cruises	Unnamed	\$600	64,000	1,000	Fincantieri	World	Spring
Celebrity	Unnamed	\$900	129,500	2,900	Chantiers	TBA	Fall
■ MSC Cruises	Unnamed	\$1,200	205,700	5,400	Chantiers	TBA	TBA
Norwegian	Unnamed	\$850	140,000	3,300	Fincantieri	TBA	TBA
■ Carnival China	Unnamed	\$750	135,000	5,000	CSSC	China	TBA
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA
■ TUI Cruises	Unnamed	\$850	161,000	4,000	Fincantieri	TBA	TBA
Ocean Residences	Njord	\$650	80,000	300	DIV	World	TBA

2025:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
■ Princess	Unnamed	\$1,000	175,000	4,300	Fincantieri	TBA	Spring
MSC Cruises	Unnamed	\$600	64,000	1,000	Fincantieri	World	Spring
■ Royal Caribbean	Unnamed	\$1,100	200,000	5,000	Meyer Turku	TBA	Spring
■ MSC Cruises	Unnamed	\$1,200	205,700	5,400	Chantiers	TBA	TBA
Norwegian	Unnamed	\$850	140,000	3,300	Fincantieri	TBA	TBA
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA
Oceania	Unnamed	\$660	67,000	1,200	Fincantieri	TBA	TBA

2026:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
MSC Cruises	Unnamed	\$600	64,000	1,000	Fincantieri	World	Spring
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA
Norwegian	Unnamed	\$850	140,000	3,300	Fincantieri	TBA	TBA
■ TUI Cruises	Unnamed	\$850	161,000	4,000	Fincantieri	TBA	TBA

2027:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
Viking Ocean	Unnamed	\$400	47,000	930	Fincantieri	World	TBA
Norwegian	Unnamed	\$850	140,000	3,300	Fincantieri	TBA	TBA
■ MSC Cruises	Unnamed	\$1,200	205,700	5,400	Chantiers	TBA	TBA

Note: For a full accounting of cruise ship orderbook trends dating back to 1988, please see the [Cruise Ship Orderbook Report](#)

2020

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Coastal Ships:

Cruise Line	Ship	Cost ¹	Tonnage	Capacity	Yard	Sailing	Delivery
☑ American	Jazz	\$80	5,148	195	Chesapeake	U.S.	2020
■ Havila	Capella	\$200	15,812	468	Tersan	Norway	2021
■ Havila	Castor	\$200	15,812	468	Tersan	Norway	2021
American	Melody	\$80	5,148	195	Chesapeake	U.S.	2021
American	Unnamed	\$80	5,148	195	Chesapeake	U.S.	2021
■ Havila	Polaris	\$200	15,812	468	Tersan	Norway	Q4 2021
■ Havila	Pollux	\$200	15,812	468	Tersan	Norway	Q4 2021
Viking	Mississippi	\$150	10,000	386	Edison Chouest	U.S.	2022

Note: For a full accounting of cruise ship orderbook trends dating back to 1988, please see the [Cruise Ship Orderbook Report](#)

(1) In Millions (USD) | Costs May Be Estimated

■ : LNG Powered

■ : Expedition Vessel

■ : China/Asia Market Dedicated Vessel

☑ : Delivered

TBA: To Be Announced

Last Updated: November 3, 2020

2020

LUXURY MARKET REPORT

CRUISE INDUSTRY NEWS

Luxury Cruise Capacity

Presented by Cruise Industry News



Luxury Market

Atlas Ocean Voyages Carving Out Luxe



Luxury Market 2020: Market Overview



Company	Ships	Berths	Capacity	Market Share
Viking Ocean	6	5,580	151,590	23.2%
Silversea	10	3,492	93,548	14.3%
Regent	5	3,410	92,700	14.1%
Seabourn	5	2,558	60,660	12.3%
Crystal	4	2,092	58,360	8.9%
Ponant	11	2,192	56,292	8.6%
Windstar	6	1,436	47,332	7.2%
Hapag-Lloyd	5	1,548	38,846	5.9%
Ritz-Carlton	1	298	10,132	1.5%
Paul Gauguin	1	320	9,920	1.5%
SeaDream	2	220	9,570	1.5%
Scenic	1	228	6,384	1.0%
Total:	57	23,374	655,334	100%
Change:	+11.8%	+11.4%	+6.6%	

30 Cruise Industry News: 2020 Luxury Market Report



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