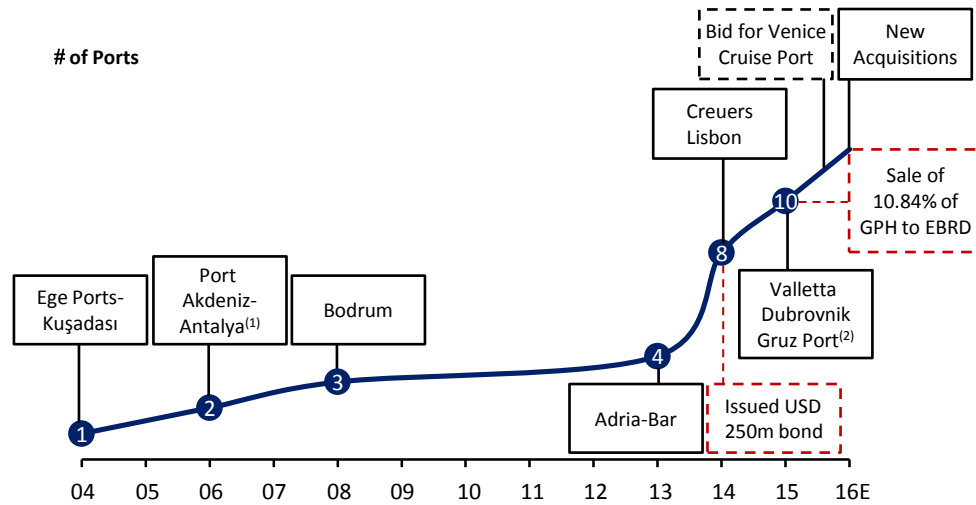




Creating a Friendly Environment for the Cruise Industry

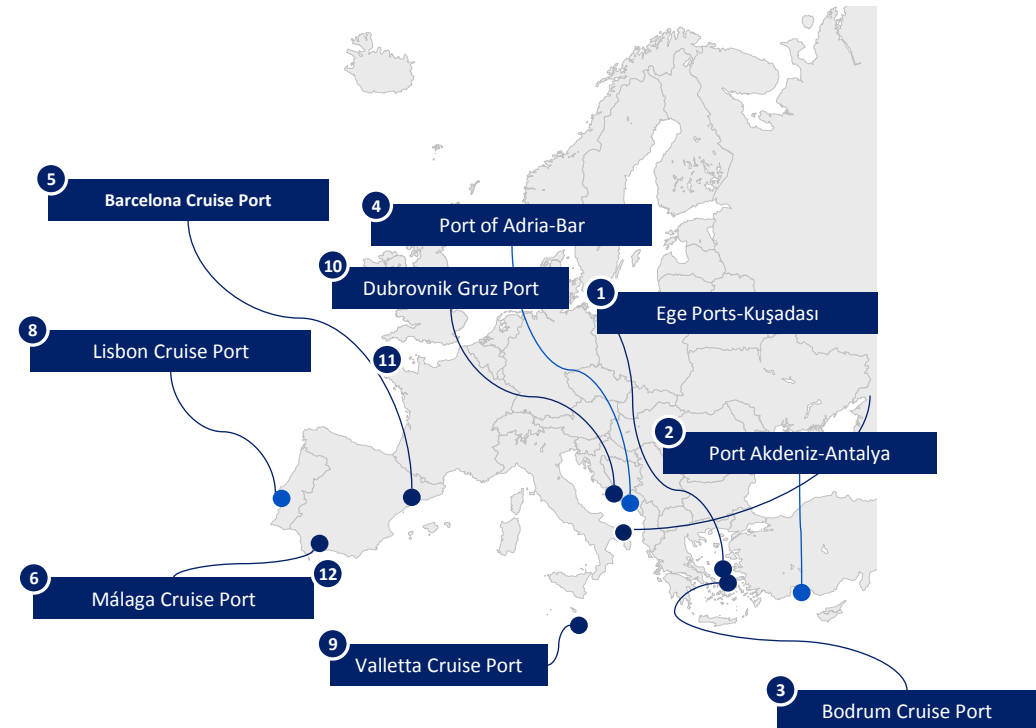
Global Ports Holding – World's largest Cruise Port Operator

GPH Port Growth



Diversified Asset Portfolio

Mediterranean & Atlantic



Singapore



- GPH is the largest cruise port operator in the world and will serve about 8m passengers by the end of 2016
- Established in 2004 with Ege Ports, Kusadası.
- Operated 2 commercial ports and 1 multipurpose port in Turkey until 2013
- International expansion started in December 2013 with Port of Adria, Bar
- From 3 ports to 10 at 7 countries within 2 years time.
- By the end of 2016, GPH is expected to reach 16 ports, across 9 countries, hosting c.8mn pax annually, capturing c.28% Mediterranean market share

Key Issues to Become a Successful Cruise Port



- Destination
- Port
- Relationship Between Port and City
- Relationship with Other Ports of the Region





Destination

Offering Itinerary



It should be attractive enough to be included in the cruise itinerary

Differentiation



Differentiation from the other Ports in the itinerary



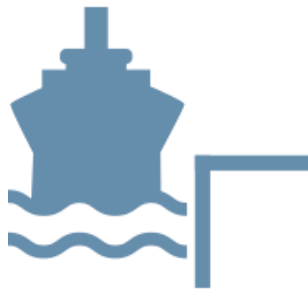
Infrastructure



Entrance
Channel



Draught



Piers



Fenders /
Billboards



Port

Cruise Facilities

Location



Operations



Transport Links



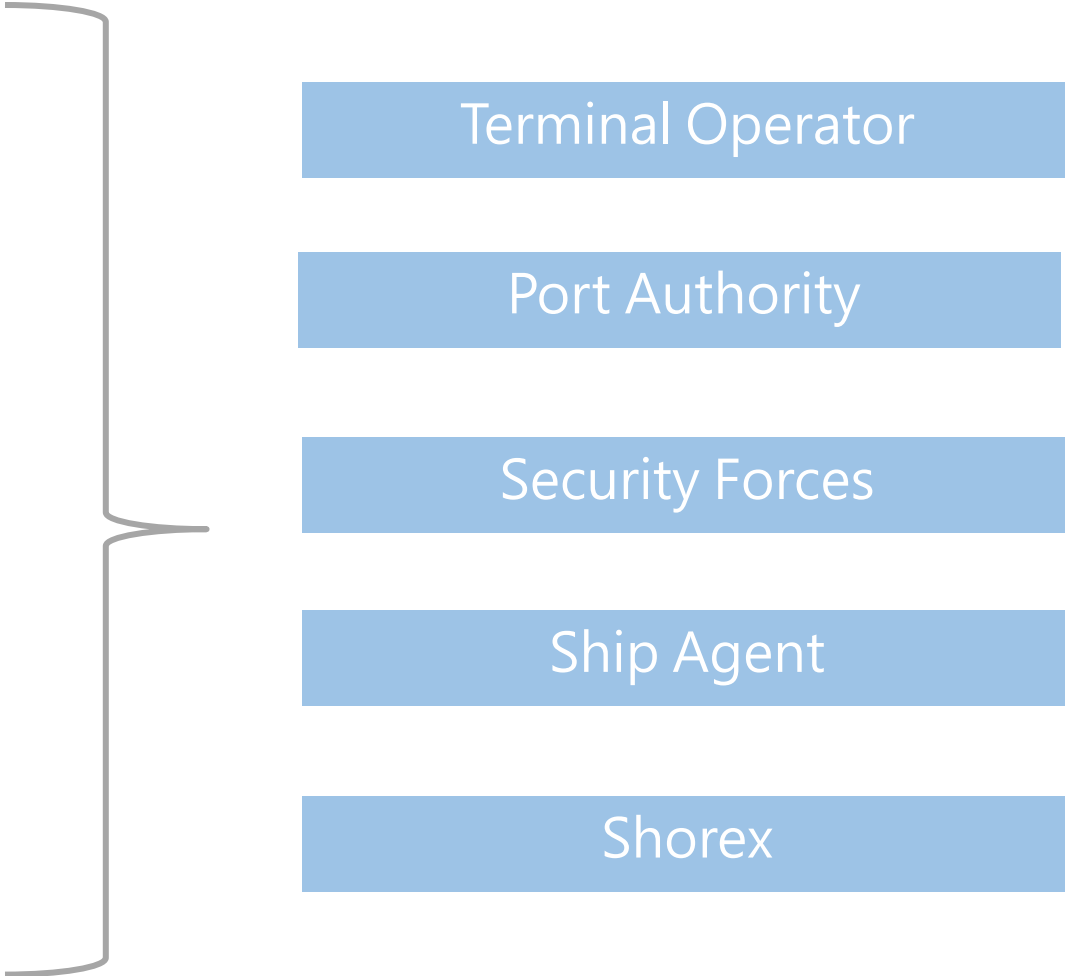
- Away from cargo traffic
- Next to the city

- Seamless operations
- Functional facilities (no huge buildings)
- Trained and experienced personnel
- High security level

- Easy access to city and destinations
- Proximity to the airport



COORDINATION BETWEEN THE PORT COMPANIES





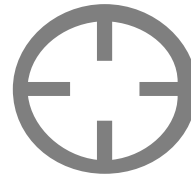
Relationship Between Port and City

City



- Promote the destination
- Build marketing strategies

Port



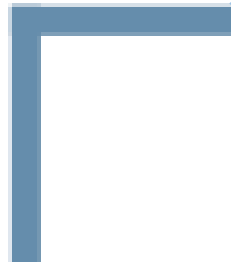
- Offer adequate services to cruise lines and passengers

Airport



- Proximity to airport to encourage turnaround

Relationship with Neighbor Ports

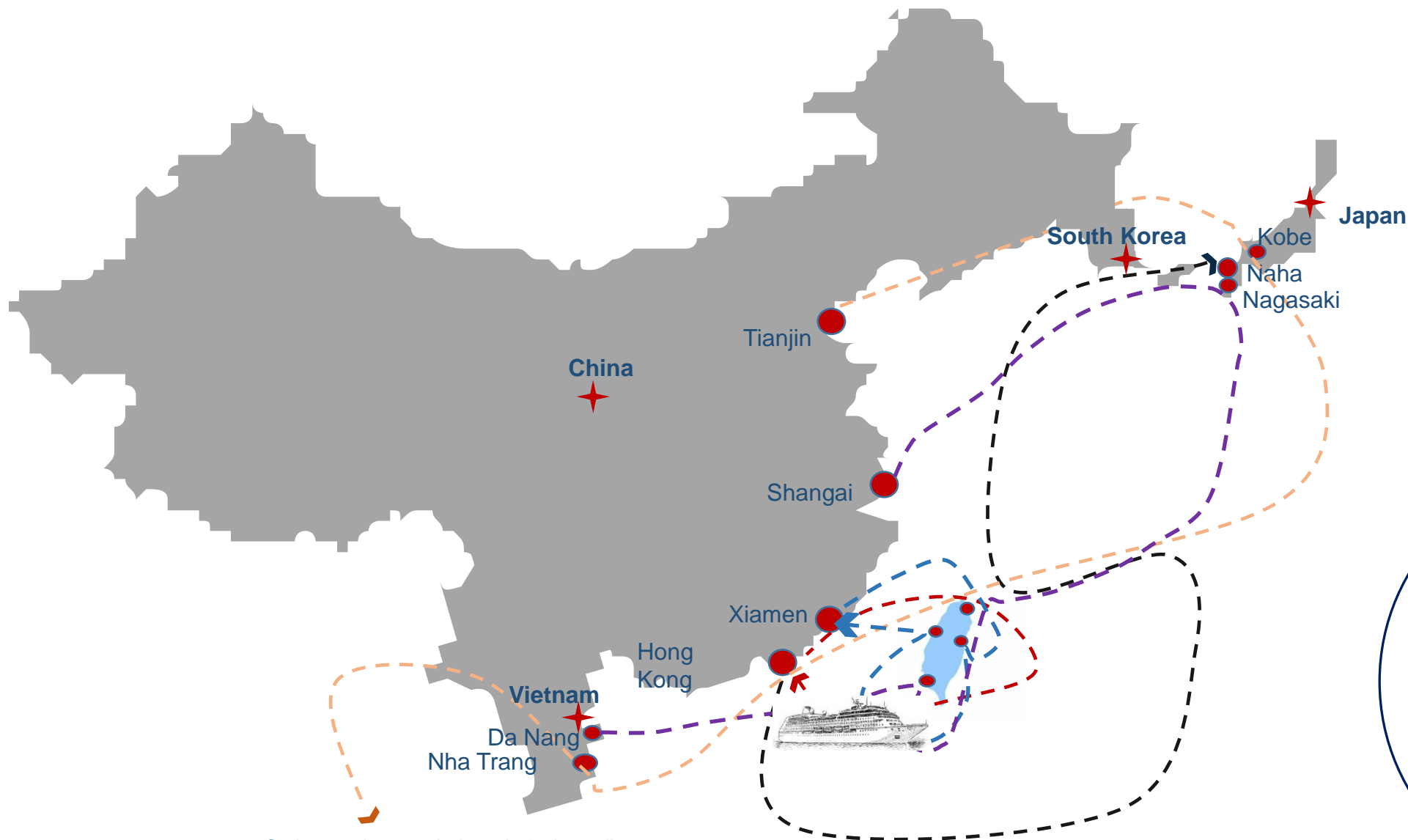


The cruise itinerary needs to include several and different destinations



The cruise itinerary is a chain of Ports/destinations → If one of them fails, all the itinerary fails

East Asia Itineraries



Cruise continues to Indonesia & Australia





THANK YOU