

Good morning



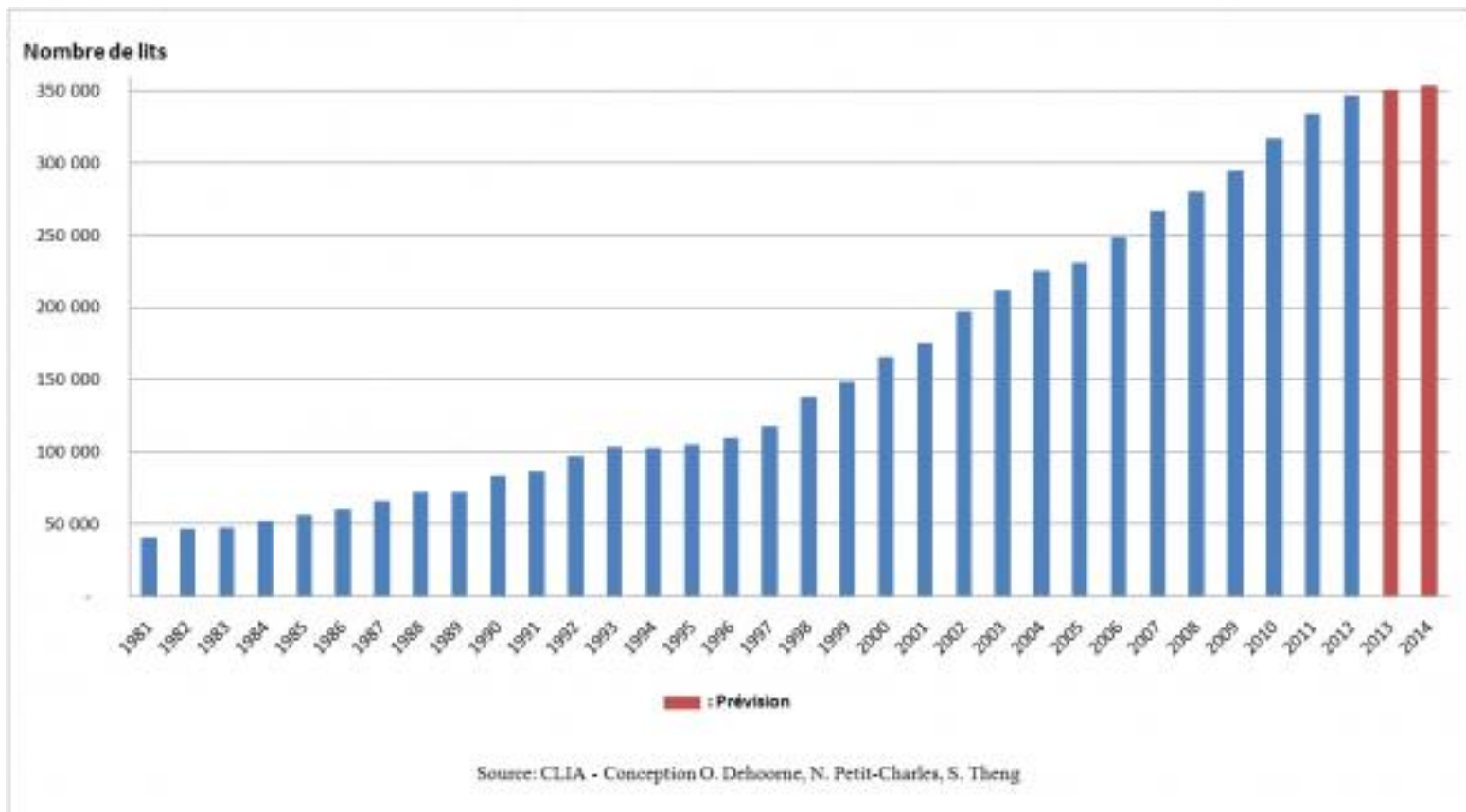
Needs for a cruise strategy



Setting up a short and long term strategy for the cruise industry development in New Caledonia, to be shared between actors of the Territory and the cruise lines, is a way to reach a sustainable development of cruise activities in New-Caledonia

On board beds number

Evolution of cruise companies on board accomodation (1981-2014)

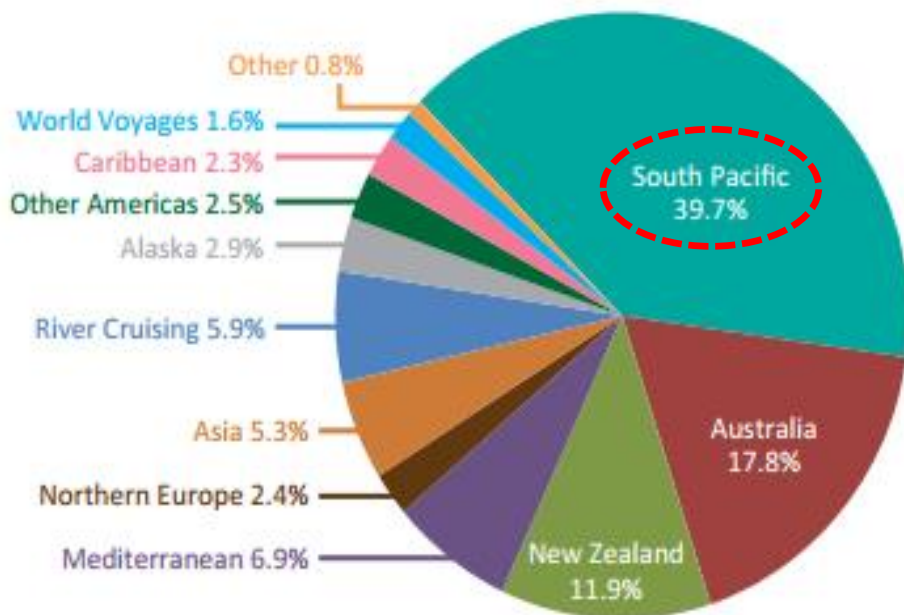


- Strong competition context in the South Pacific
- Strong expectations from cruise lines for destination diversification
- Transversal challenges
- Investment in port infrastructures
- Potential environment and social impacts
- Environment policies that are still in evolution
- An economic income for the country of great importance
- The benefits from cruise activity must be quantified
- A «stable level» to find

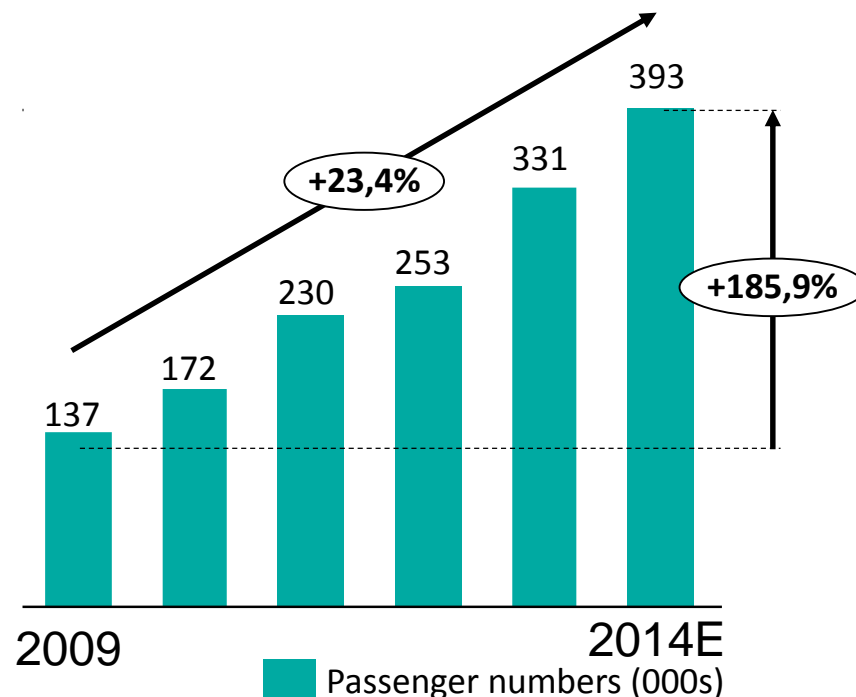
A view from Australia : P&O Cruises

The South Pacific has been the main recipient for P&O Cruise Australia as the N°1 cruise destination

DESTINATION SHARE*

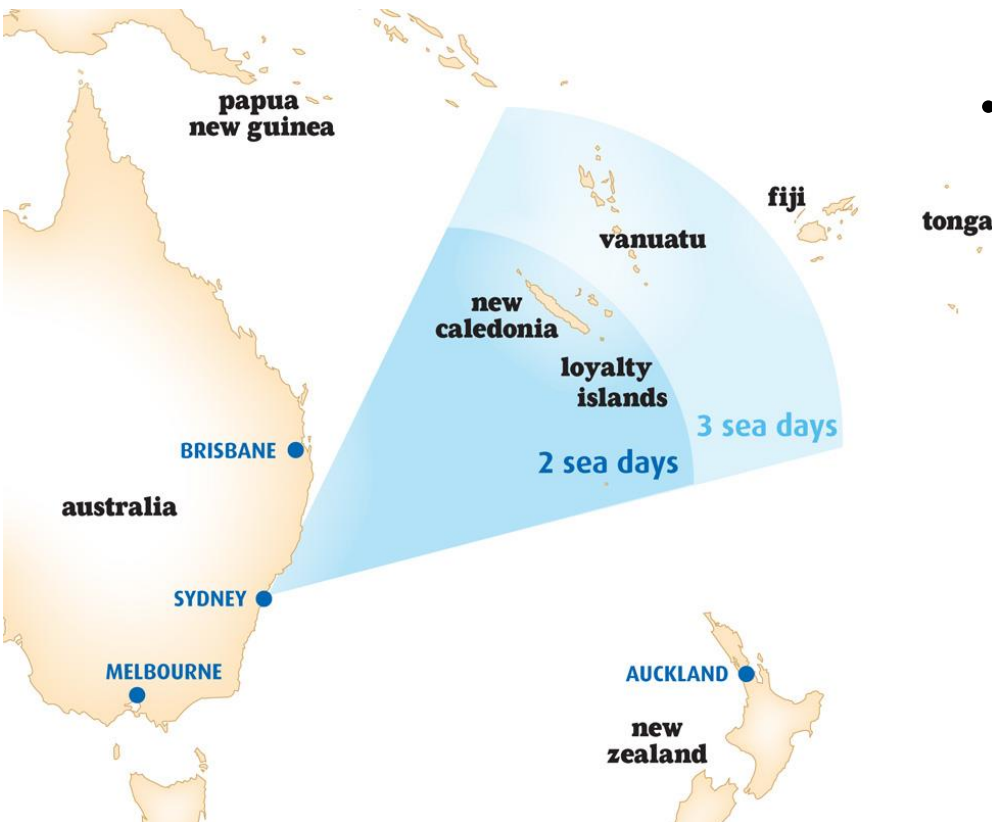


DESTINATION GROWTH



A view from Australia

NEW CALEDONIA IS A GATEWAY TO THE SOUTH PACIFIC



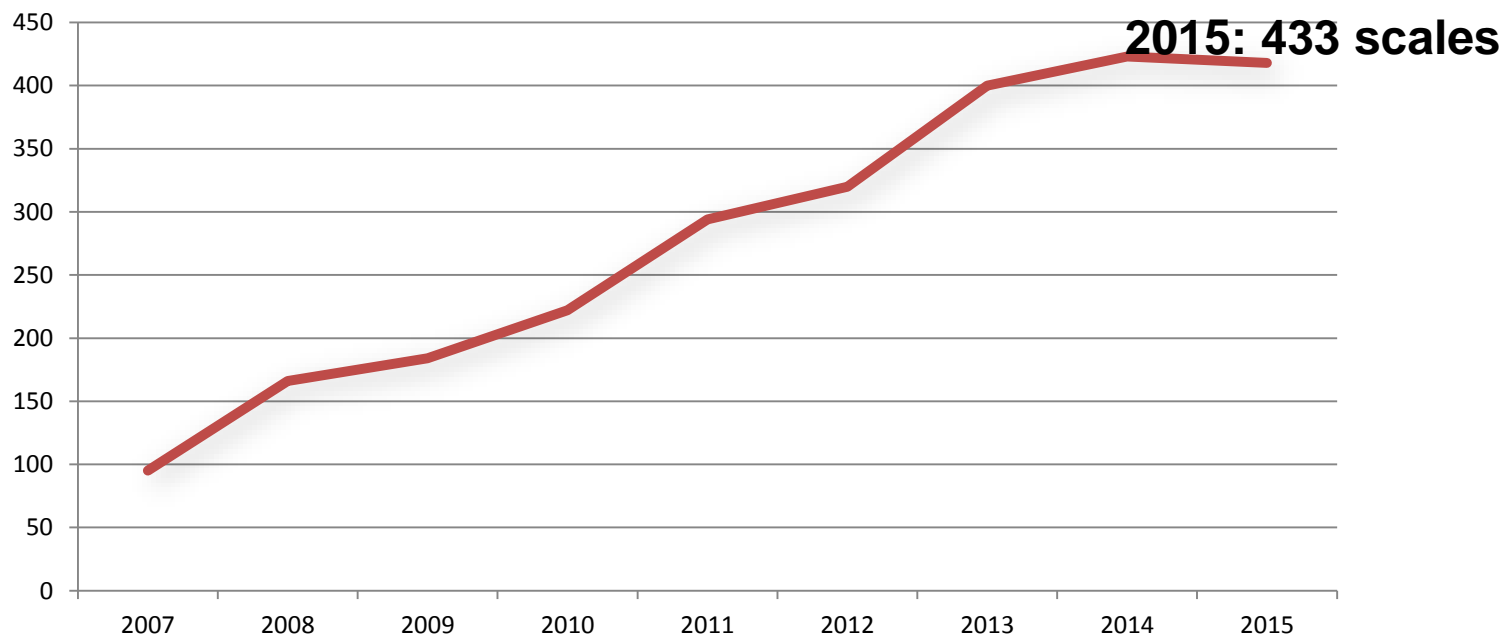
- New Caledonia is only:
 - 2 sea-days away from the Australian Eastern Seaboard and/or Auckland
 - New Caledonia is a year-round destination for guests
 - A logical stop for itineraries to the rest of the South Pacific
 - Noumea is one of few destinations in the region where ships can berth alongside

Total cruise ships calls in New Caledonia destinations

Number of Cruise ships calls in New Caledonia destination

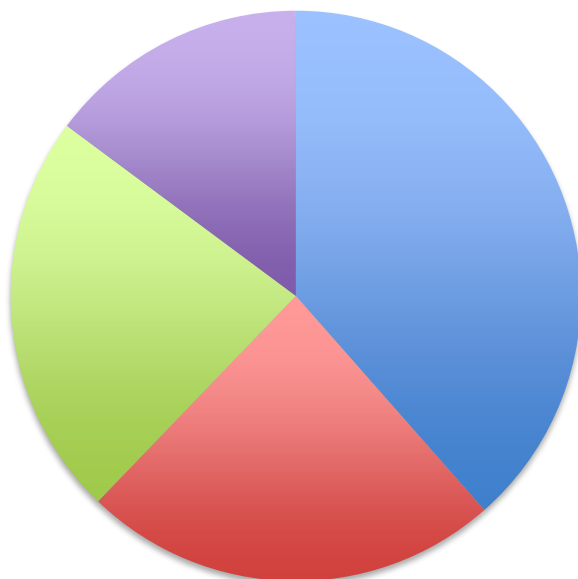
2007 = 95 calls

2017 = 560 calls already booked!



New Caledonia Cruise Destinations

	2011	2012	2013	2014	2015	2016
Nouméa	104	118	144	164	161	200
Ile des Pins	66	84	109	106	99	111
Lifou	70	88	96	98	96	129
Maré	0	16	29	56	62	90



 **Nouméa**

 **Ile des Pins**

 **Lifou**

 **Maré**

Cruise ships evolution

	Name of Ship	Cruise Line	LOA	Capacity
2006	<i>Pacific Star</i>	<i>P&O Australia</i>	220	1350
2008	<i>Pacific Dawn</i>	<i>P&O Australia</i>	245	2000
2010	<i>Rhapsody of the Seas</i>	<i>RCCL</i>	263	2400
2012	<i>Carnival Spirit</i>	<i>CCL</i>	292	2500
2014	<i>Voyager of the Seas</i>	<i>RCCL</i>	311	3100

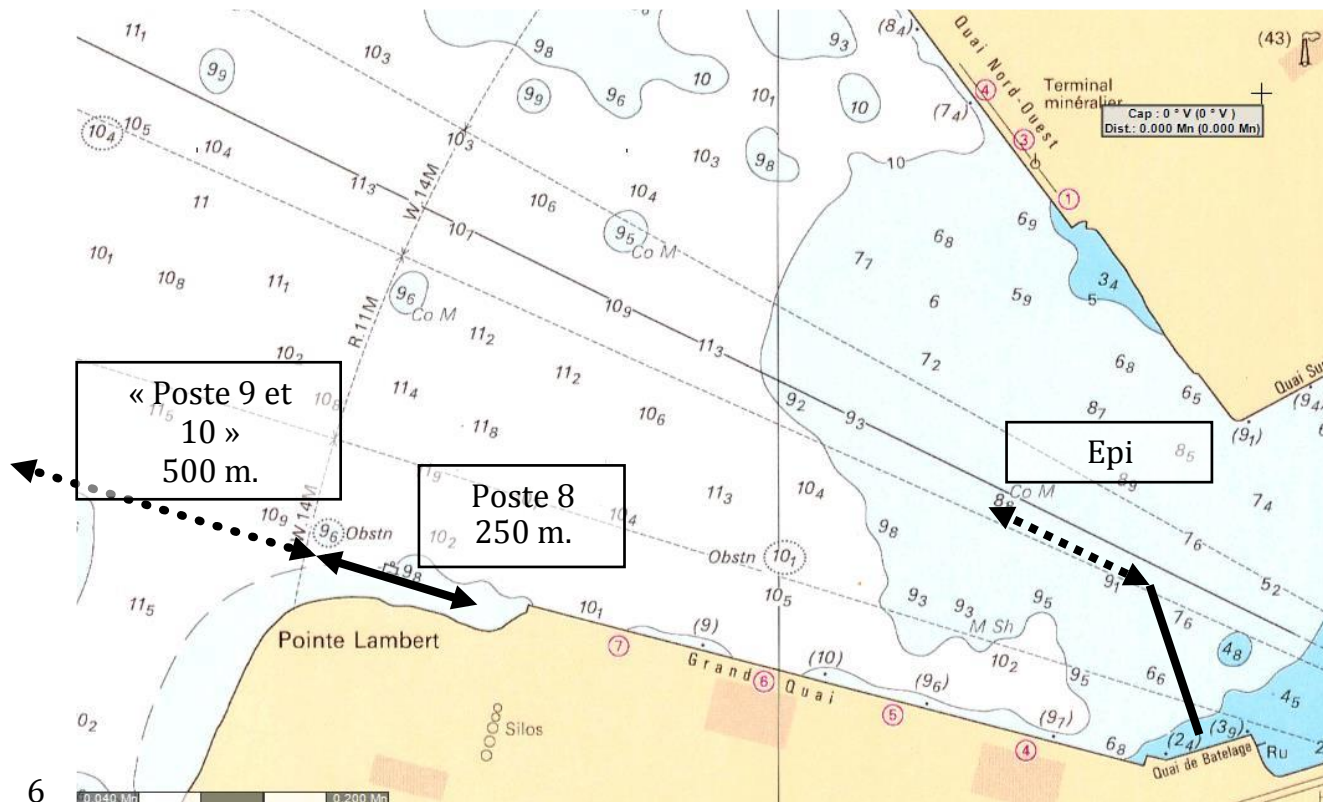
Noumea as a turnaround / home based port destination

Ideally located as a gateway to the South Pacific, Noumea has a great potential to be developped as a home based port of call for cruise lines, pending a number of services are developped :

- **Port Infrastructures** (new berth and cruise ship terminal to be built)
- **Fuel Supply** (two projects under study by Total and SSP)
- **Provisionnement / Supply chain** (building up a logistic platform)
- **Waste Management** (treated locally or re-exported)*
- **Airline** (cost and capacity incurred currently is detrimental to the project)
- **Hotels and tourism development** (combination of pre-cruise and post-cruise offers in New Caledonia)

Future developments

Projects are under studies at Noumea container wharf : an extension of pier project (poste 8 and 9) or a construction of a finger pier berth as to receive 2 to 3 cruise ships at once.



Future developments

New Caledonia Island's destinations (Isle of Pines, Lifou, Mare) are saturated in 2018, **new destinations** must be opened in the next 2 years to face the cruise lines demands.



Future developments



New Caledonia having no cruise strategy yet in place at a territorial level, urgently requires the set up of a **Cruise Club** regrouping local private and public actors from all destinations, so to work at maintaining and enhancing the current potential brought by the cruise ships visits.

Conclusion



A dedicated Cruise Club shall be set up to activate a development plan, to growth the value of the cruise visitor economy, improve the visitors experiences and secure the current and future market brought by cruise lines.

Conclusion



The cruise industry has two dimensions, tourism and maritime

But do not forget that vessels shipowners decide their destination based on the maritime facilities and opportunities.

Thank you very much

