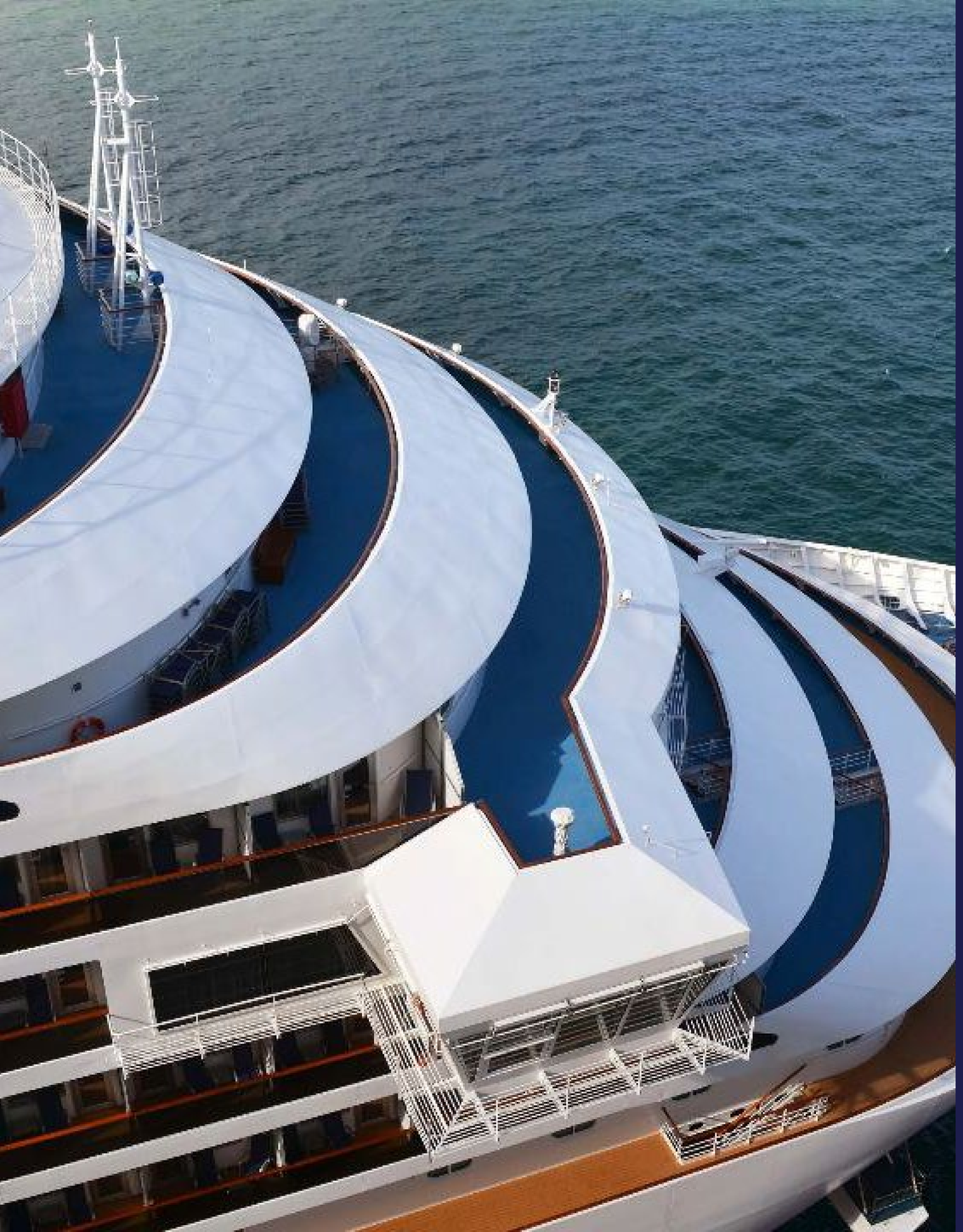


Spreading the Benefits of Cruise Tourism

Baltic Sea Tourism Forum
3 Nov 2026

Hans Chen Braas
Regional Director, Nordic & Baltics

CLIA CRUISE LINES INTERNATIONAL ASSOCIATION



About Cruise Lines International Association

Cruise Lines International Association (CLIA) provides a unified voice for the industry as the leading authority of the global cruise community. Together with its members and partners, CLIA supports:

- Policies and practices that foster a safe, healthy and sustainable cruise operations;
- Tourism strategies that maximise the socio-economic benefits of cruise travel; and
- Technologies and innovations to support the pursuit of pathways to net-zero by 2050.



CLIA membership as of September 2026

46 ocean-going cruise lines

12 river cruise marketing affiliates

358 executive partners

- Ports and destinations
- Shipbuilders
- Engineers
- Maritime product & service providers

77,000 travel trade members

- 11,000 travel agencies
- 66,000 travel agents & advisors

CLIA-member cruise lines represent >90% of global ocean-going capacity, and the travel trade members comprise the largest network of travel advisors who specialize in cruise travel

Source: CLIA member data as of September 2026



CRUISE LINES INTERNATIONAL ASSOCIATION

About the industry

Plenty of room for growth
Cruise currently represents less than 3% of travel and tourism.

A mainstream global industry
Cruise is now a mainstream global travel choice, offering a seamless vacation experience with strong and growing demand.

Strong and resilient
With consistent growth over decades, the cruise industry continues to demonstrate resilience through economic cycles, geopolitical events, and global disruption.

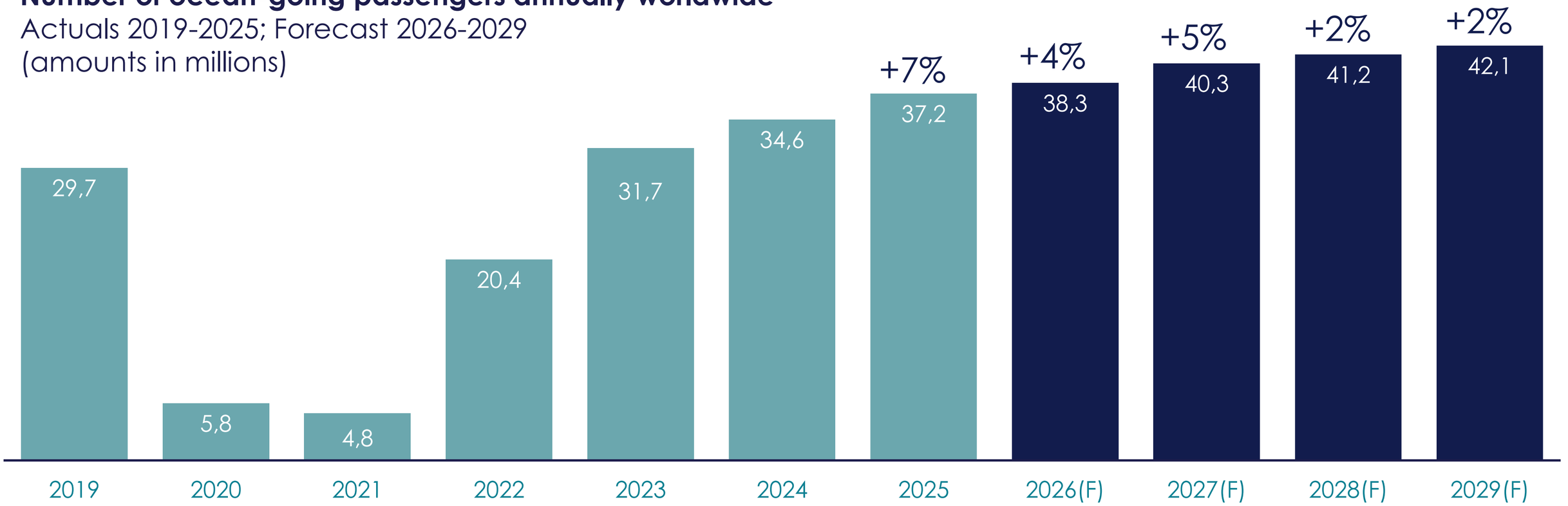
Responsible and sustainable
Cruise lines are pursuing net-zero emissions by 2050 through innovation, collaboration, and investment—while continuing to offer one of the safest and most responsible ways to travel.

37.2 million

ocean-going cruisers globally
in **2025**

FORECAST IS STRONG: ~42m Passengers in 2029

Number of ocean-going passengers annually worldwide
Actuals 2019-2025; Forecast 2026-2029
(amounts in millions)



Very strong short-term forecast with a return to more traditional single-digit year-over-year growth as seen in most prior years in the past

Forecast slows as current understanding of additions to global fleet capacity show tapering off in the future

Source: 2019-2025 CLIA One reSource Passenger Database, April 2026; Forecast Information via Tourism Economics Cruise Intelligence Platform

2024 Global Economic Impact



35M
CRUISE PASSENGERS IN 2024
+9%



$198.8B
GLOBAL ECONOMIC IMPACT IN 2024
+18%



1.8M
JOBS WORLDWIDE
+12%



$60B
WAGES WORLDWIDE
+5%

Source: CLIA 2024 global economic impact study results as of November 2025

Cruise in Europe



- **Cruise is an important part of Europe's maritime ecosystem**
  Combining maritime transport, advanced manufacturing, and tourism.

- **Total economic impact of € 64,1 billion and Contributes € 28.3 billion to Europe's GDP**
  Supporting 445,000 in jobs & €16.4 billion in wages.

- **Cruise is committed to Europe**
  98% of ships currently on order will be built in Europe.

Source: 2024 Europe Cruise Economic Impact Study, January 2026

About the fleet

>70%

of ships in the global fleet are small- and mid-size ships



>70% of cruise ships sailing today and scheduled to sail in 2036 are small- and mid-size ships



< 30% of cruise ships sailing today and scheduled to sail in 2036 are large ships

OPERATIONAL EFFICIENCY & EMISSIONS REDUCTION STRATEGIES



CRUISE LINES INTERNATIONAL ASSOCIATION



Cruise lines are pursuing net-zero emissions by 2050

- Reducing emissions at berth and at sea
- Pursuing fuel flexibility, conducting multiple trials
- Making substantial and concrete investments in environmental technologies and practices to increase operational efficiency

Cruise lines are following a path to decarbonisation with advancements in technology, infrastructure, and operations

TECHNOLOGY



INFRASTRUCTURE



OPERATIONS



It comes down to three key elements

The Fuels

The Fuels

The Fuels



- The development of future fuels
- The supply of safe, competitively priced future fuels at scale
- The industry's readiness for adoption

ENVIRONMENTAL TECHNOLOGIES & PRACTICES REPORT

Onshore Power Supply



The number of ships that can plug in at port has tripled since 2018

28%
of capacity
55 ships
2018

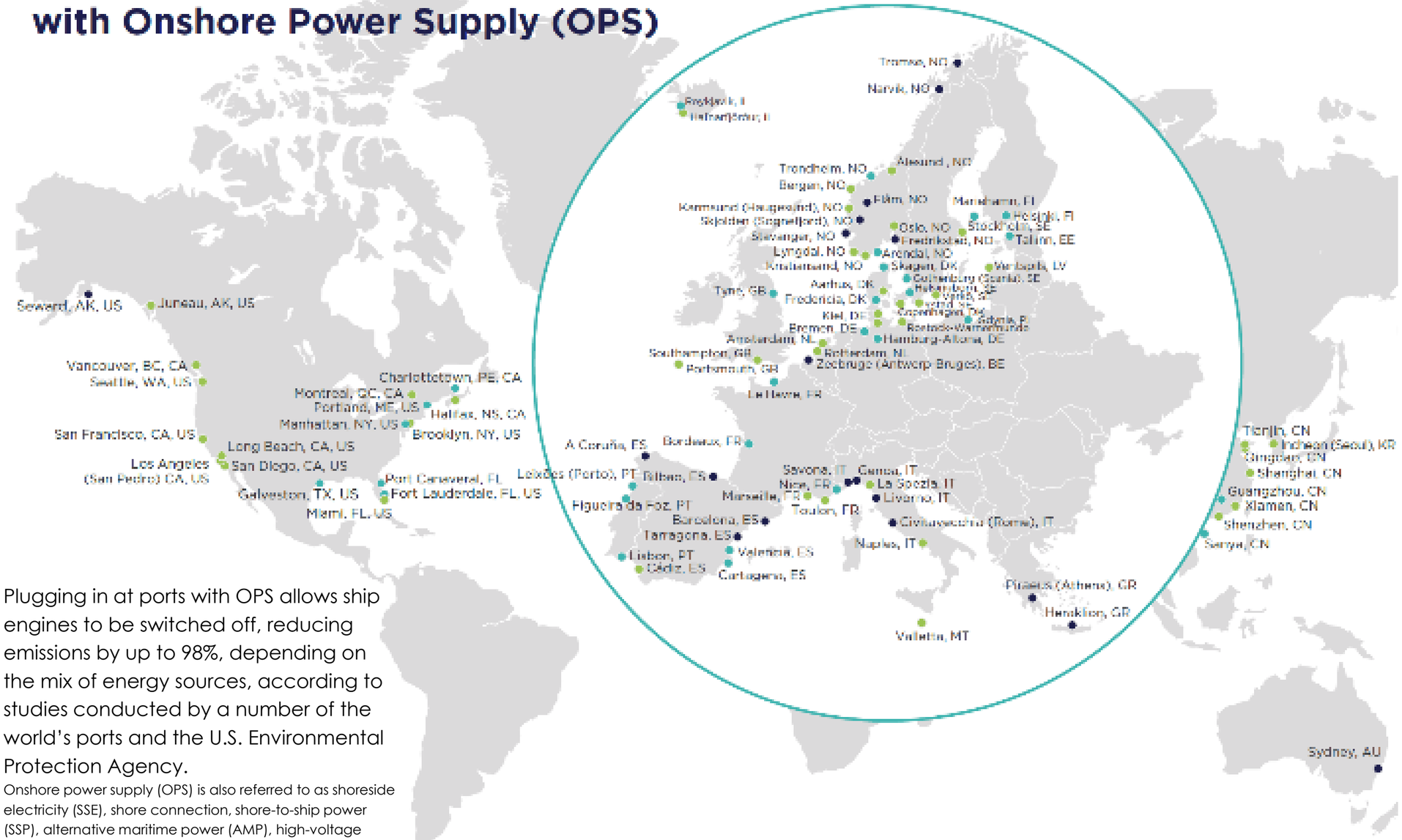
73%
of capacity
193 ships
2026

82%
of capacity
279 ships
2039

Source: CLIA Onshore Power Supply at Cruise Ports Tracking (September 2026)

ENVIRONMENTAL TECHNOLOGIES AND PRACTICES REPORT

Ports with at least one cruise berth with Onshore Power Supply (OPS)



Plugging in at ports with OPS allows ship engines to be switched off, reducing emissions by up to 98%, depending on the mix of energy sources, according to studies conducted by a number of the world's ports and the U.S. Environmental Protection Agency.

Onshore power supply (OPS) is also referred to as shoreside electricity (SSE), shore connection, shore-to-ship power (SSP), alternative maritime power (AMP), high-voltage shore connection (HVSC), or cold ironing.

40	20	31
Active Ports	Funded Ports	Planned Ports

Onshore Power Supply provides emissions reductions of up to 98% depending on the mix of energy sources.

< 3% of cruise ports have at least one cruise berth with onshore power supply

Source: CLIA Port Data (June2025)

Spreading the Benefits of Cruise Tourism



How to succeed? (I)



Strategy

- 5-year plan (at least)
- Include whole destination and region
- Realistic expectations
- Consistency

National and regional networks

- Join networks and participate actively
- Liaise with Port Agents and Tour Operators

Customers

- Meet cruise lines at trade shows and do your homework:
  - Arrange meetings in advance
  - Join social events

How to succeed? (II)



Local network

- Involve all relevant local stakeholders
  - Attractions, shops, culture, shopping associations etc.
  - Develop local cruise network

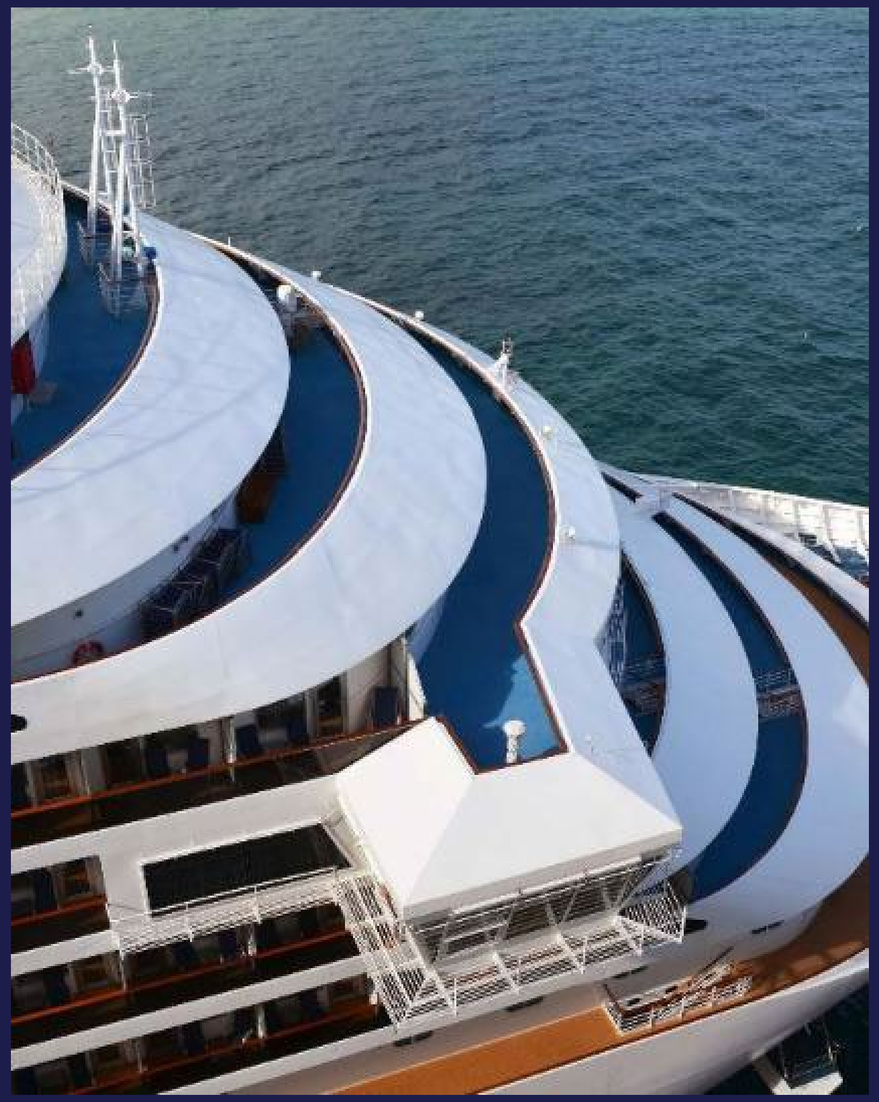
Political support

- Make sure you have political support to pursue added cruise tourism activities

Internal assessment

- Which ships fit in the port?
- Which segments of guests suit the destination?

How to succeed? (III)



The “Champions”

- Appoint dedicated persons from port and destination to drive the development project and represent the joint destination, both towards customers and locally.

Port focus

- All Maritime and Technical aspects, infrastructure, access roads etc.

Destination focus

- Close collaboration with shore excursion providers, attractions, hotels etc.

How policies can affect the market



Cruise visitor fees and taxes in the North
In the recent years, cruise passenger taxes has been introduced and suggested in several countries.

Greenland: EUR 6,70 per pax per call – introduced in 2024. reduction of calls from bigger ships.

Iceland: EUR 18,40 per pax per 24 hours in Iceandic waters – introduced in 2025 and reduced to EUR 11,77 in 2026 after a nationwide decline of 27% in bookings.

Norway: EUR 9,70 per pax per 24 hours in port – implementation from 2027. Amount is still not confirmed.

Denmark: EUR 26,75 per pax per call – implementation from 2028. Still merely a suggestion and not an official legislative proposal.

The short implementation time causes lack of predictability for cruise lines and their guests, causing notable disruptions in the market.


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