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Ocean Hull Workshop

Chairman
Peter Christmas

Ocean Hull Committee Workshop

“The changing scene of passenger travel by sea - new risks, new challenges , new solutions”

Peter Christmas

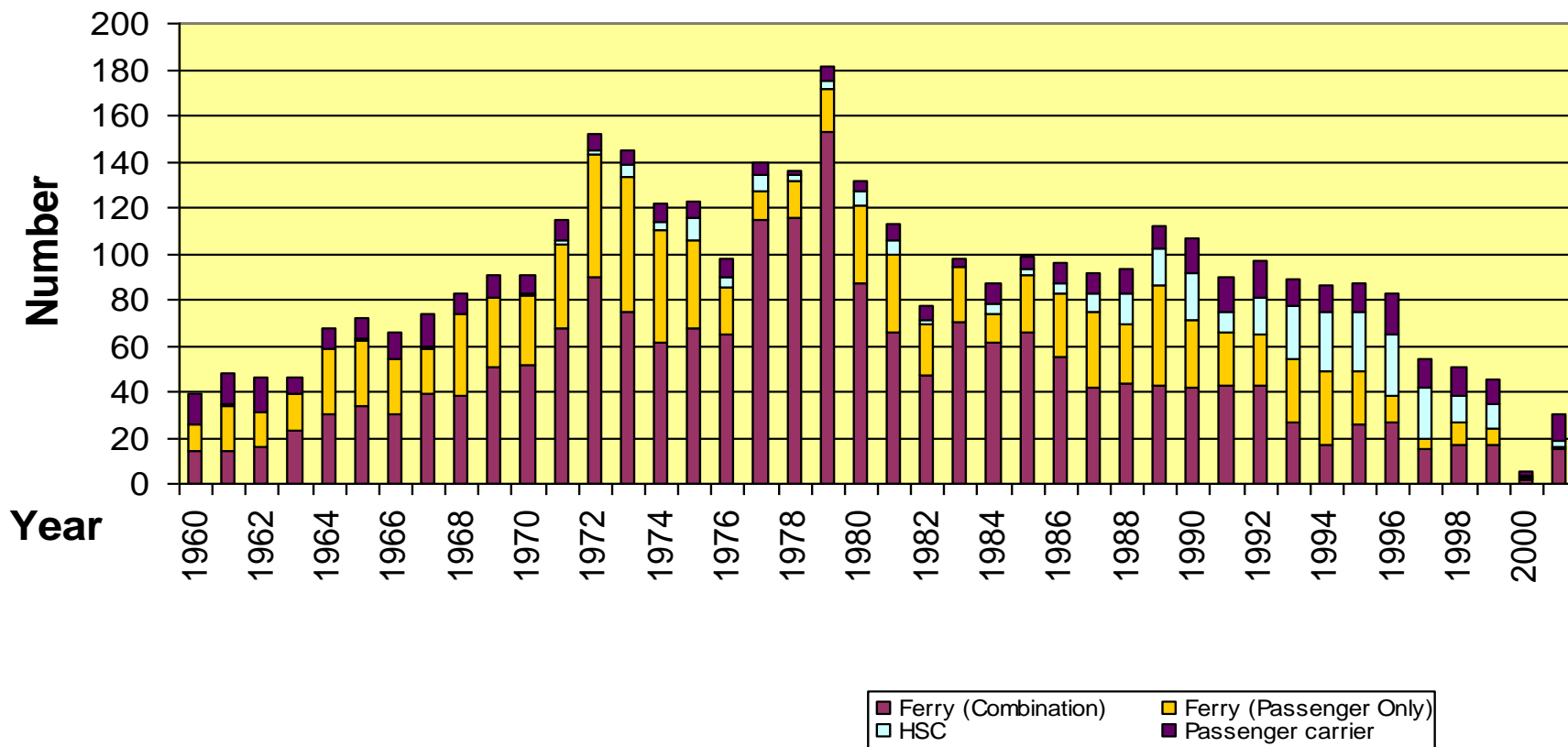


“Millennium”



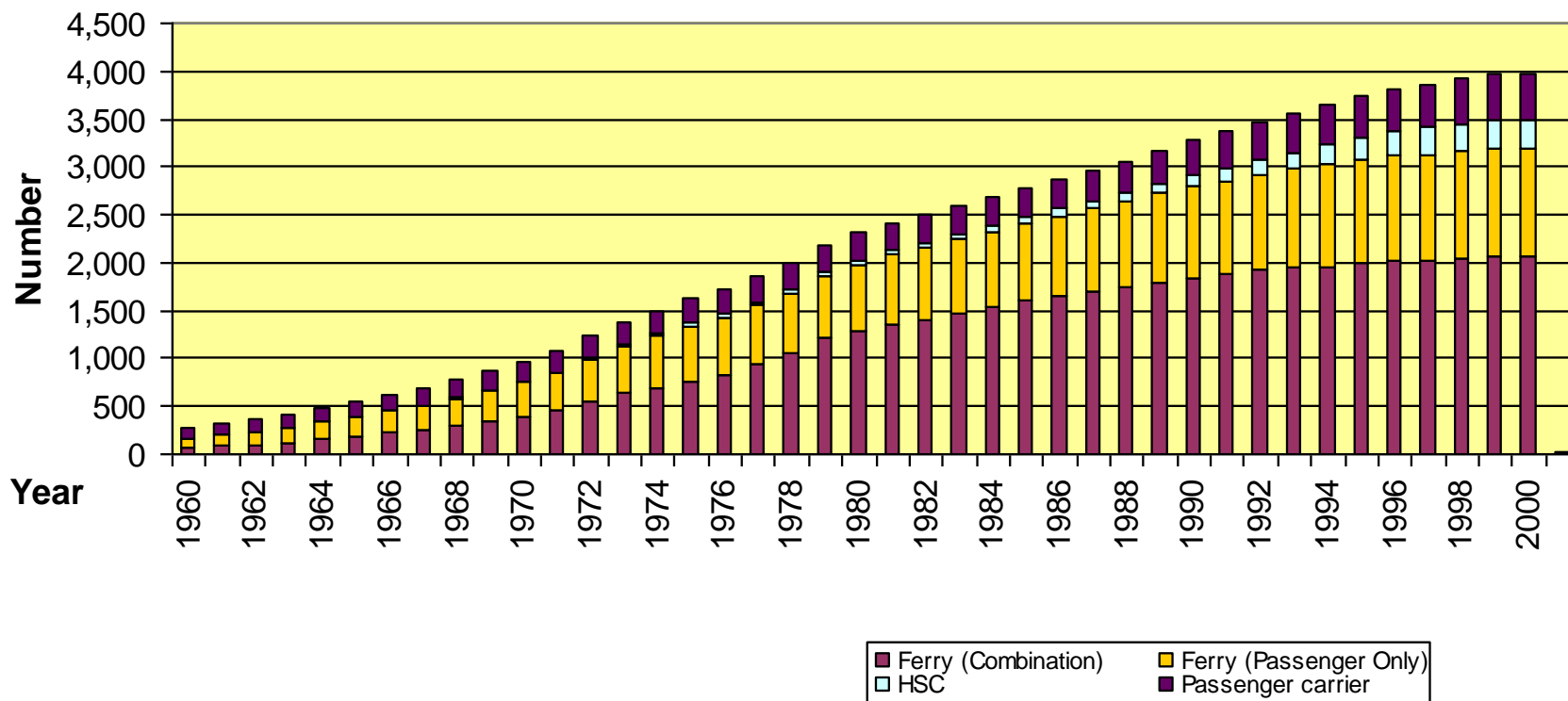
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Passenger Carrying Vessels





Passenger Carrying Vessels (Cumulative)



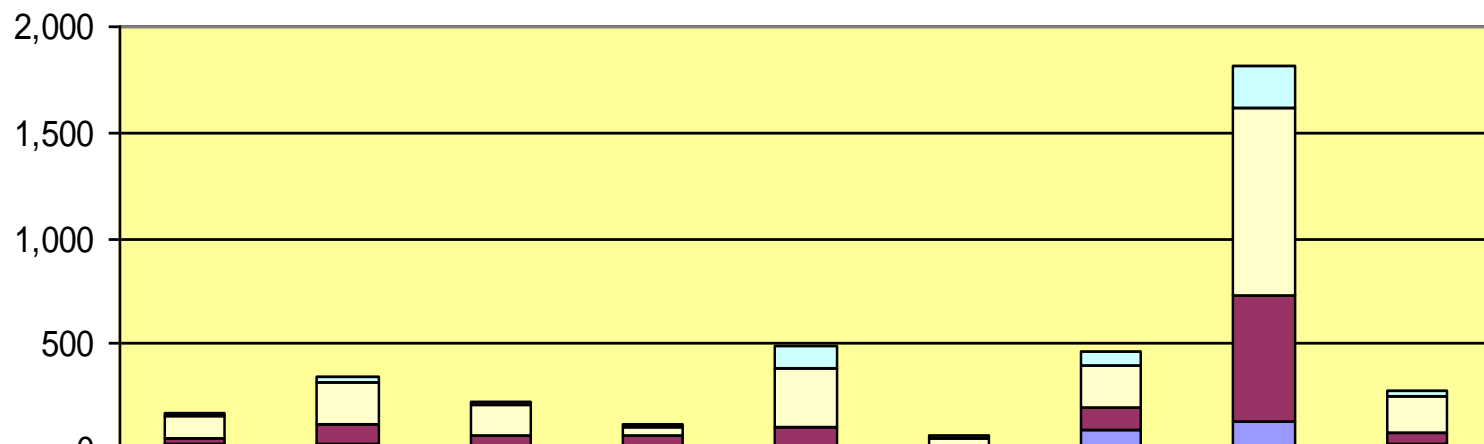


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Passenger Vsl by Class

- Passenger carrier
- Ferry (Combination)
- Ferry (Passenger Only)
- HSC

No.



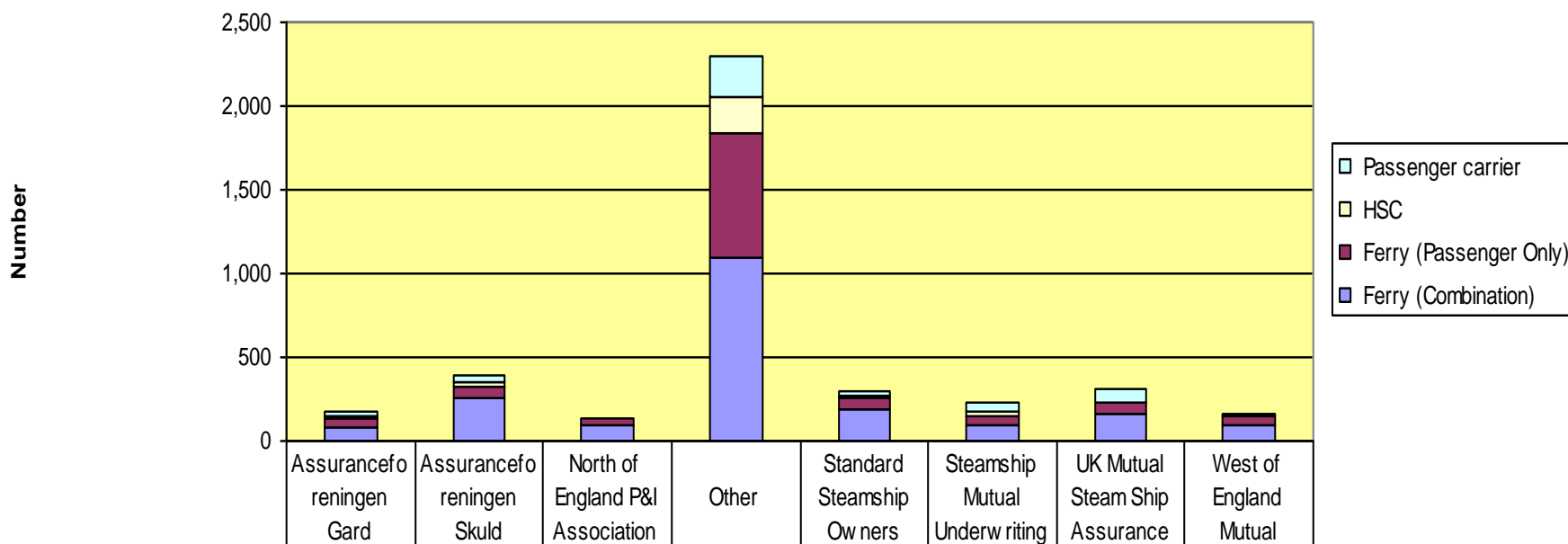
	American Bureau	Bureau Veritas	Germanischer Lloyd	Hellenic Register	Lloyd's Register	Nippon Kaiji Kyokai	Norske Veritas	Other	Registro Italiano
■ Passenger carrier	20	35	16	11	107	7	70	196	31
■ Ferry (Combination)	99	194	144	41	277	53	199	888	166
■ Ferry (Passenger Only)	31	98	55	68	107	4	99	598	61
■ HSC	23	22	10		2	1	96	129	20

Class



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Passenger Carriers by P+I Club



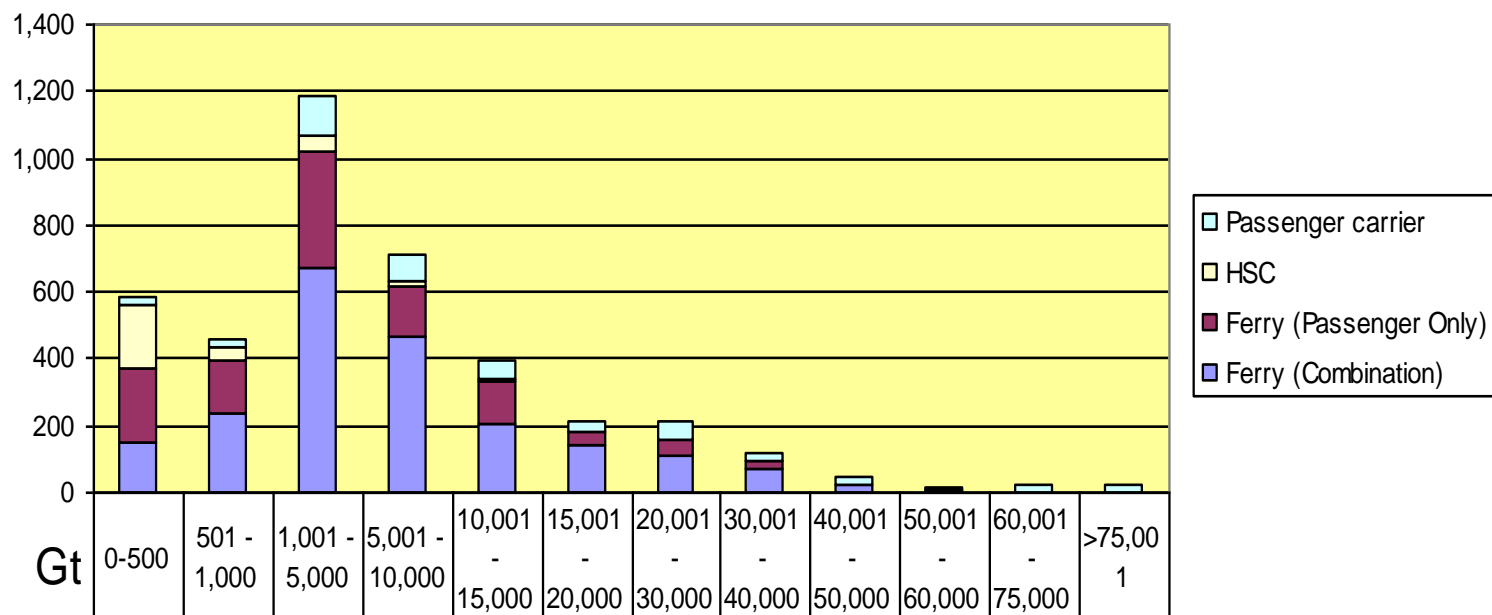
	Assurancefo reningen Gard	Assurancefo reningen Skuld	North of England P&I Association	Other	Standard Steamship Ow ners	Steamship Mutual Underw riting	UK Mutual Steam Ship Assurance	West of England Mutual
Passenger carrier	33	39	10	250	29	48	72	12
HSC	12	23	2	207	15	24	12	8
Ferry (Passenger Only)	46	65	38	750	58	61	56	47
Ferry (Combination)	85	262	91	1094	193	93	167	97

Club



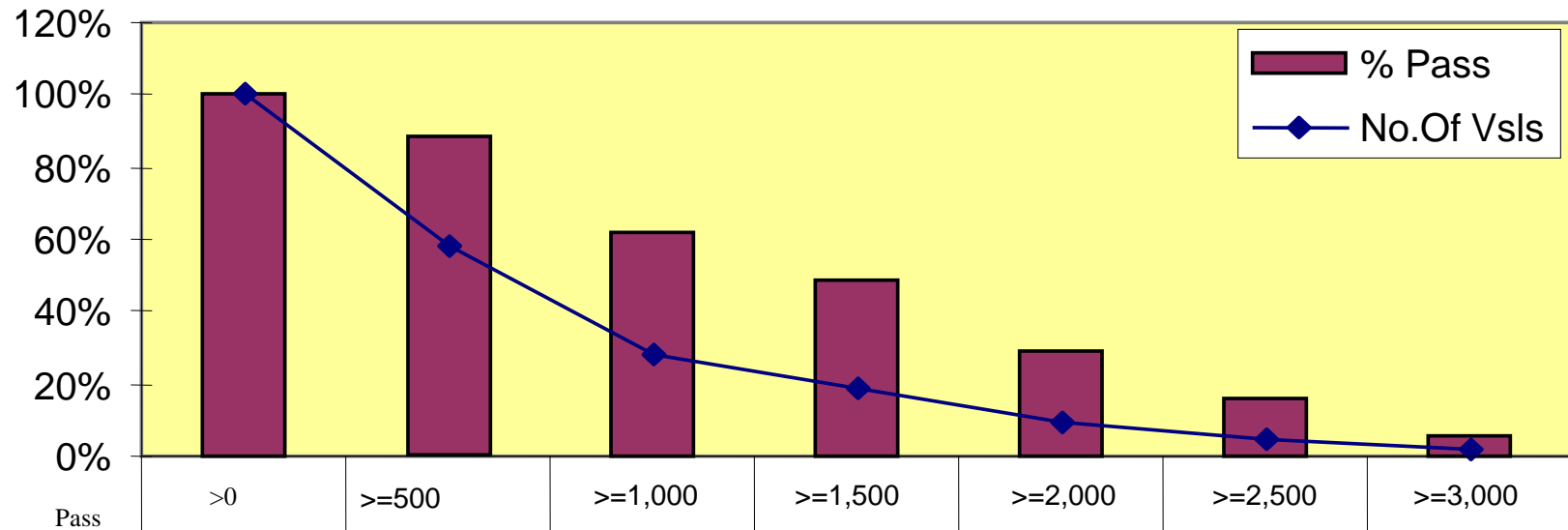
Passenger carrying vessels split by Gt

Number



Gt	0-500	501 - 1,000	1,001 - 5,000	5,001 - 10,000	10,001 - 15,000	15,001 - 20,000	20,001 - 30,000	30,001 - 40,000	40,001 - 50,000	50,001 - 60,000	60,001 - 75,000	>75,000 1
Passenger carrier	28	18	120	83	58	33	56	22	18	11	21	24
HSC	186	46	44	15	3	2		1	5			
Ferry (Passenger Only)	223	155	348	151	134	37	41	28	1	3		
Ferry (Combination)	152	237	676	463	202	145	114	68	21	2	1	

Cumulative Comparisons (Cruise VsIs)



% Pass	100%	88%	62%	49%	29%	16%	6%
No.Of VsIs	100%	58%	28%	19%	9%	5%	1%

This shows that 19% of passenger vessels which are greater than 1,500 passengers account for 49% of the world cruise capacity. Hence concentration of risk into fewer units

International Passenger Comparison of Cruise Vessel Passengers

Domicile of Pass	1994	1995	1996	1997	1994-97 % increase
France	135,000	136,000	153,000	164,000	121%
Italy	120,000	151,000	167,000	200,000	167%
Spain	20,000	24,000	27,000	35,000	175%
Germany	260,000	308,000	357,000	400,000	154%
UK	269,000	339,000	416,000	521,000	194%
Other Europe	100,000	100,000	112,000	118,000	118%
Total Europe	904,000	1,058,000	1,232,000	1,438,000	159%
North America	4,448,000	4,378,000	4,656,000	5,051,000	114%
Sub Total	5,352,000	5,436,000	5,888,000	6,489,000	121%
RoW	300,000	350,000	380,000	400,000	133%
Total	5,652,000	5,786,000	6,268,000	6,889,000	122%

Maritime Cruise Market Capacity 2000 by Principal Regions

Region	No of vessels	Lower Berths	Cruises	PPT	Pax-nights	Season
Caribbean/ S America	142	147,982	4,004	4,817,312	30,317,439	All-year
Mediterranean	108	76,238	2,329	1,527,811	9,881,293	Mar-Nov
Asia/ Oceania	54	33,075	1,854	957,930	4,492,455	All-year
Alaska	29	23,943	624	615,339	4,460,193	May-Sept
Northern Europe	61	39,545	496	292,526	3,181,946	May-Sept
East Coast N Am	32	27,516	451	437,316	2,766,706	Jul-Oct
West Mexico	20	14,806	427	525,402	2,655,772	All-year
Atlantic	77	63,474	258	233,967	2,122,743	March-Nov
Round World (est.)	9	7,900	9	7,900	700,000	Dec-Apr
Total #	292	231,105	10,452	9,415,503	60,578,547	
TOTAL CAPACITY+	292	231,105	+14,600	+11,555,250	*80,886,750	

Source: G. P. Wild (International) Ltd

International Ferry Capacity - 2000

Region	Ships	Passengers	Cars	Lane Metres
Irish Sea	40	24,131	6,968	42,315
English Channel	47	52,136	14,439	44,032
North Sea	67	18,786	12,582	119,904
Western Scandinavia	74	63,851	15,526	54,825
Baltic	123	66,199	21,321	151,891
Western Mediterranean	166	155,980	45,145	139,109
Eastern Mediterranean	98	84,338	30,242	103,114
Other regions*	136	105980	17565	n.a
TOTAL	751	571,401	163,788	655,190

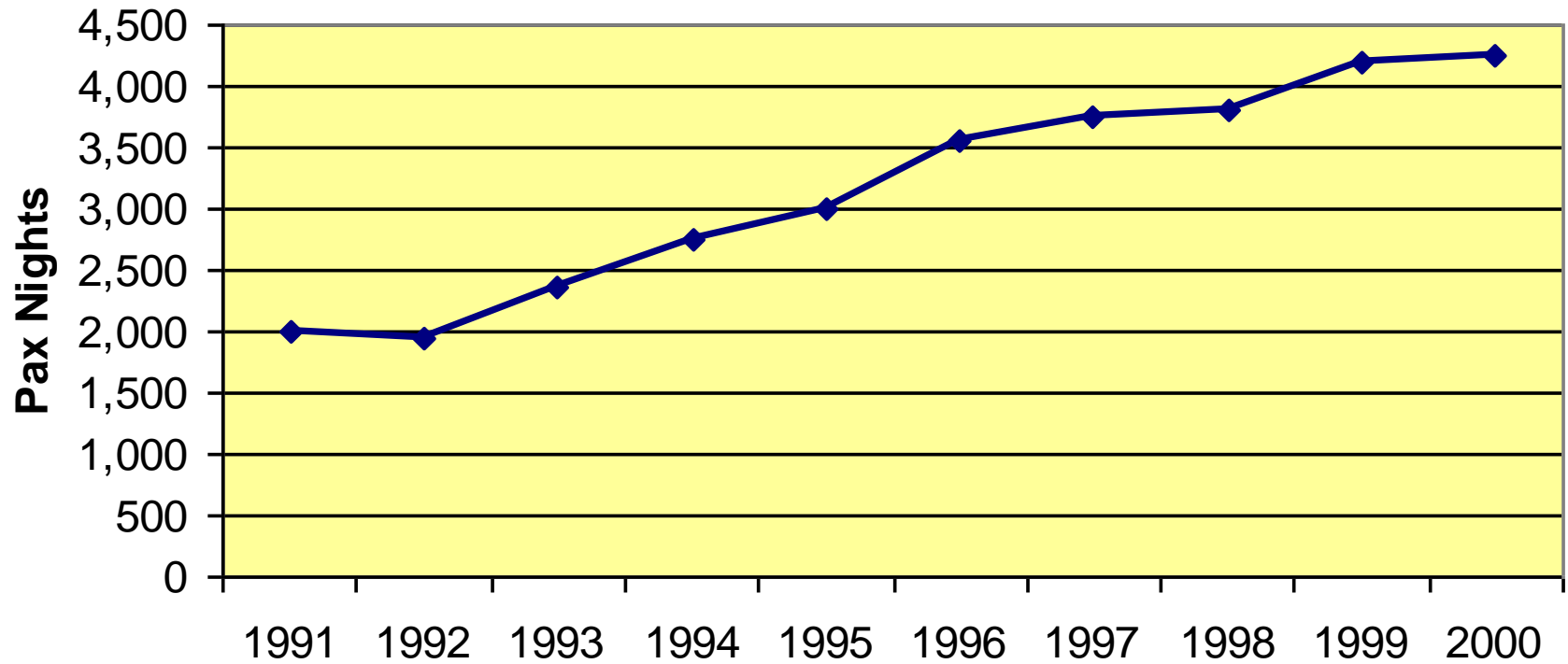
*Principally North America and USA

Source G P Wild (International) Limited from various sources



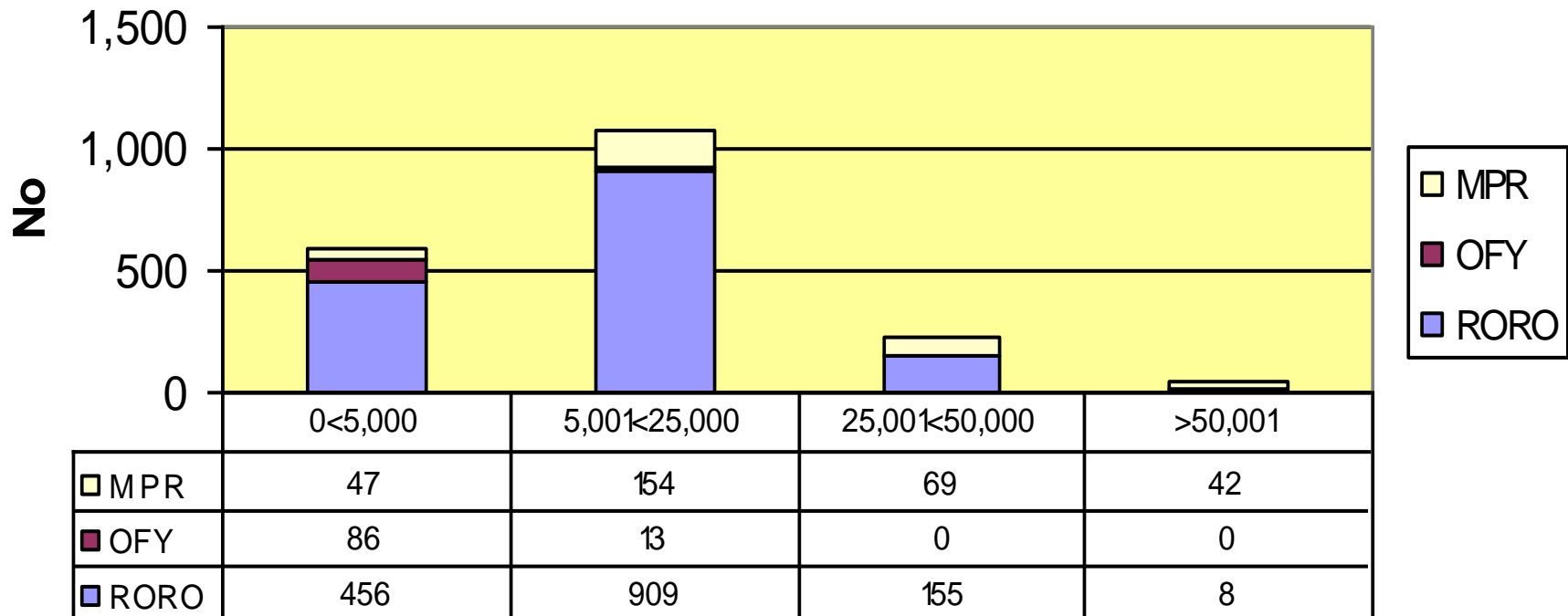
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Growth in Alaska



Source: G. P. Wild (International) Ltd

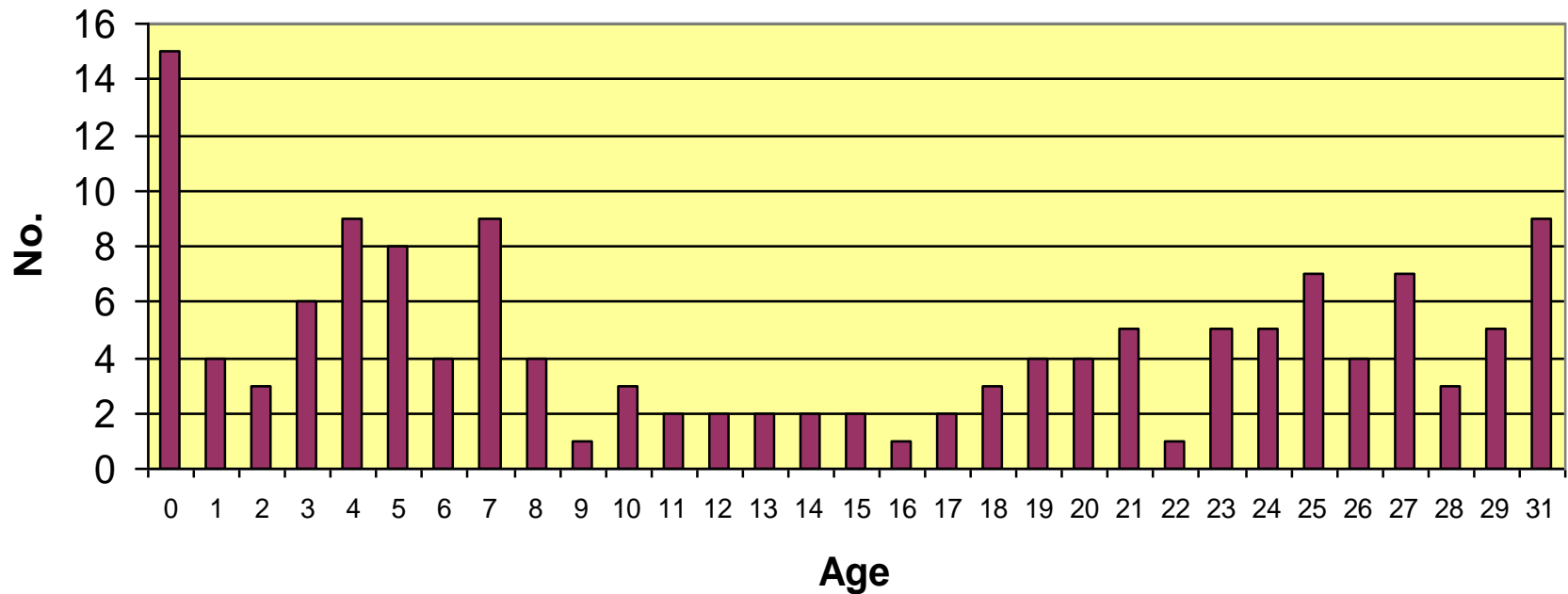
Cruise Vsls Casualties by Gt from 1992 (Vsls > 500gt)





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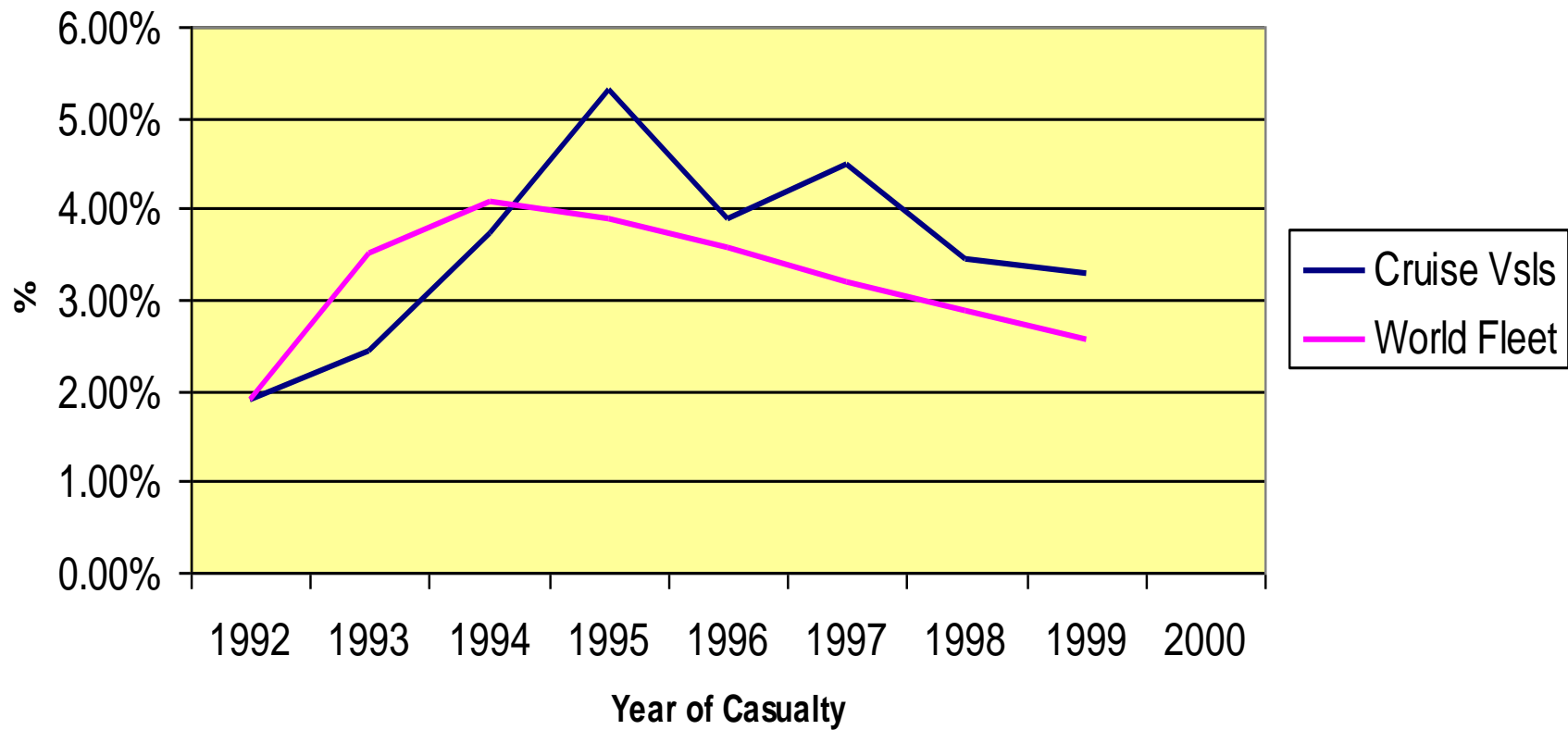
Number of Cruise Vsl Casualties by Age of Vessel VsIs > 15,000 Gt since 1992





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No of casualties as a % of the Fleet (Vsl > 100gt)





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