



## 22nd Transport Middle East 2025 Exhibition and Conference

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# Strategy Highlights

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- **The First Sustainable Cruise Tourism Strategy in Oman.**
- **A Transformation of the Cruise Sector within the Shipping Industry.**
- **A Catalyst to Generate Cruise Sector Growth.**
- **Means to Sustainably Boost Economic Impact.**
- **Benefits the Communities across Key Coastal Towns of Oman.**





# Guiding Principles

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- 1. Primary focus to Generate Growth of Passenger & Call Volumes.**
- 2. Implement a Cruise Sector Orientated Approach.**
- 3. Focus on a 365 Day Approach** (phased approach with Shoulder Seasons).
- 4. Assert Sustainability values into the fabric of the Project.**
- 5. Adopt a Surgical Marketing Strategy.**







# Strategy Goals & Objectives

Areas of national importance impacting the economy, infrastructure and coastal communities.

1. **Ports:** Destination and Port Development with new port options.
2. **Oman Focus:** Spread wealth; Omani Only itineraries and local initiatives.
3. **Turnarounds:** Main opportunities in Muscat and Salalah.
4. **Stakeholders:** Proactive engagement with Stakeholders and local communities.
5. **Value:** Economic Impact and Job Creation.



# Oman Cruise Portfolio



The Strategy adopted a sector orientated approach to expand cruise tourism across Oman's 3000 kms of coastline.

## 11 Focus Ports:

- Muscat
- Salalah
- Khasab
- Dibba
- Zighy Bay
- Al Suwaiq
- Daymaniyat Islands
- Sohar
- Sur
- Duqm
- Masirah





# Salalah Profile



## Attractions

- **Capital:** Oman's Dhofar province
- **Association:** Frankincense and aromas (5 senses)
- **Nature:** Amazing beaches and unique landscapes.
- **Tropical:** coconuts, bananas, fruits and vegetables.
- **Khareef:** Annual monsoon; transforms desert terrain into a lush, green tropical landscapes.
- **Phenomenon:** Attracting visitors near and far.
- **Rare Climatic Conditions:** Seasonal waterfalls.

## Port Facts

- **Sector Suitability:** Marquis
- **Type of Port:** Multipurpose
- **Types of call:** Transit calls for all ship sectors
- **Berths:** Multiple berths available
- **Max LOA:** 350m (Vessels over 350 m LOA require prior approval)
- **Max Draft:** 18m
- **Port Capacity Goal:** 3 Ships per day
- **Tourism Capacity:** Est 8,000 PAX



# Sector Orientated Approach



The Cruise Industry is divided into 4 distinct segments: Mega, Discovery, Luxury, Expedition & Residential:



## MEGA

Ship Size	2500 to 6,500 PAX
LOA/Draft	177-362 m / 6.5-9.8 m
Focus	The ship is the destination
USP's	S-O-T-A Facilities
Markets	All encompassing
Examples	RCCL, Carnival, Costa, MSC



## LUXURY

Ship Size	60 to max 1,000 PAX
LOA/Draft	39-227 m / 2.2-7.3 m
Focus	5* Personalised service
USP's	Exotic luxury experience
Markets	Elite profile \$1,000 per day
Examples	Silversea, Regent, Ponant



## DISCOVERY

Ship Size	500-2500 PAX, smaller/older
LOA/Draft	54-268 m / 3-7.8 m
Focus	Destination is king
USP's	Traditional value cruising
Markets	Mature guests
Examples	FOCL, Celestyal, Marella



## EXPEDITION

Ship Size	300 PAX or less, cozy
LOA/Draft	27-160 m / 3-7.5 m
Focus	Access to remote locations
USP's	Adventure, Nature, Science
Markets	Adventure seekers
Examples	Hurtigruten, Lindblad, Quark



## RESIDENTIAL

Ship Size	165 PAX or less
LOA/Draft	39-227 m / 2.2-7.3 m
Focus	Residents live on board own or lease.
USP's	World Itinerary
Markets	Elite individual owning apartments onboard
Examples	The World, Villa Vie



# Port Sustainability



No.	Topic	Type	Itinerary	Cruise Sector	Key Observations
1	Muscat		HUB	Marquis - All Sectors	HUB of Oman - minimum 5 Berths required (no tendering).
2	Salalah		East	Marquis - All Sectors	Strong Port destination that could generate year-round cruising.
3	Khasab		West	Marquis - All Sectors	Key UAE linking transit Port. Must cater for 5 ships in parallel.
4	Dibba		West	Luxury	Fishing Harbour under development; Luxury option in Musandam.
5	Zighy Bay		West	Luxury (>200)	Niche Marina for small Luxury ships; managed by Six Senses.
6	Al Suwaiq		West	Luxury	Wonderful fortress opposite Port and interesting attractions nearby.
7	Daymaniyat Islands		West	Private Islands; Luxury	"Maldives of Oman", stunning Beaches, exotic and exclusive.
8	Sohar		West	Luxury	Attractive destination that offers promising future potential.
9	Sur		East	Luxury - Expedition	Greatest destination potential of any new Port in Oman.
10	Duqm		East	Luxury - Expedition	Huge port capacity; need to develop Tourism product.
11	Masirah	N/A	East	Not suitable for cruising presently	In development for Expedition cruising; Forests, Mountains, Wildlife

Symbol Key:



Marquis Ports



Discovery Ports



Expedition Ports



Luxury Ports



# Benchmarking - Total Port Calls by Location

Below is the number of Port Calls by location, data is collected by our relevant Local offices.

Port	Country	Total Port Calls 2023-2024	Total Port Calls 2024-2025
Dubai Harbor	UAE	42	36
Port Rashid		96	108
Abu Dhabi Port		121	86
Fujairah		12	4
RAK		6	1
SBY Port		69	54
Doha	Qatar	73	87
Manama	Bahrain	47	33
Dammam	Saudi Arabia	14	8
Khasab	Oman	40	40
Sohar		0	0
Muscat		79	56
Sur		6	2
Dibba		0	0
Dimaniyat Island		0	0
Suwaiq Port		0	0
Salalah		30	1
TOTAL		635	516

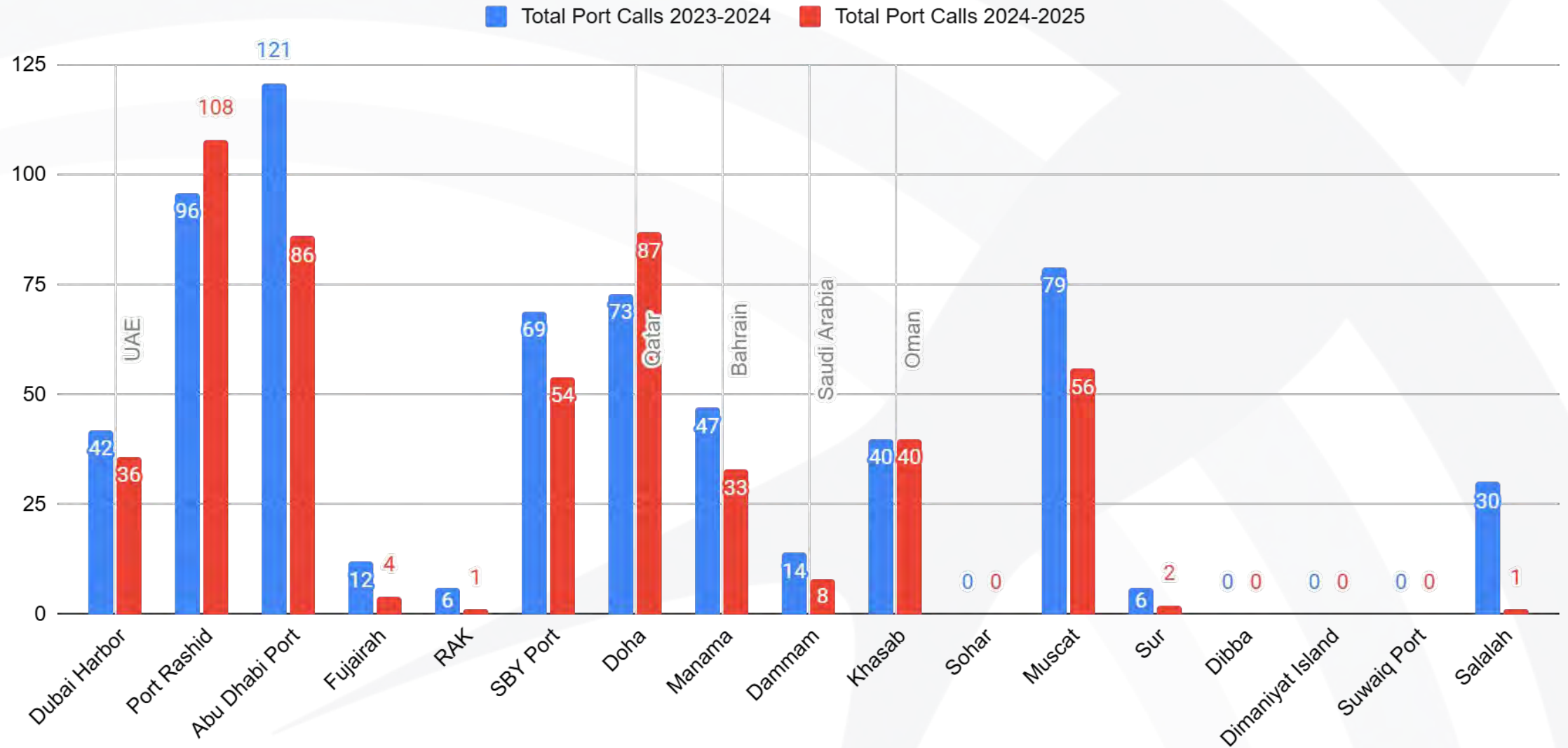






# Arabian Gulf Port Calls by Location

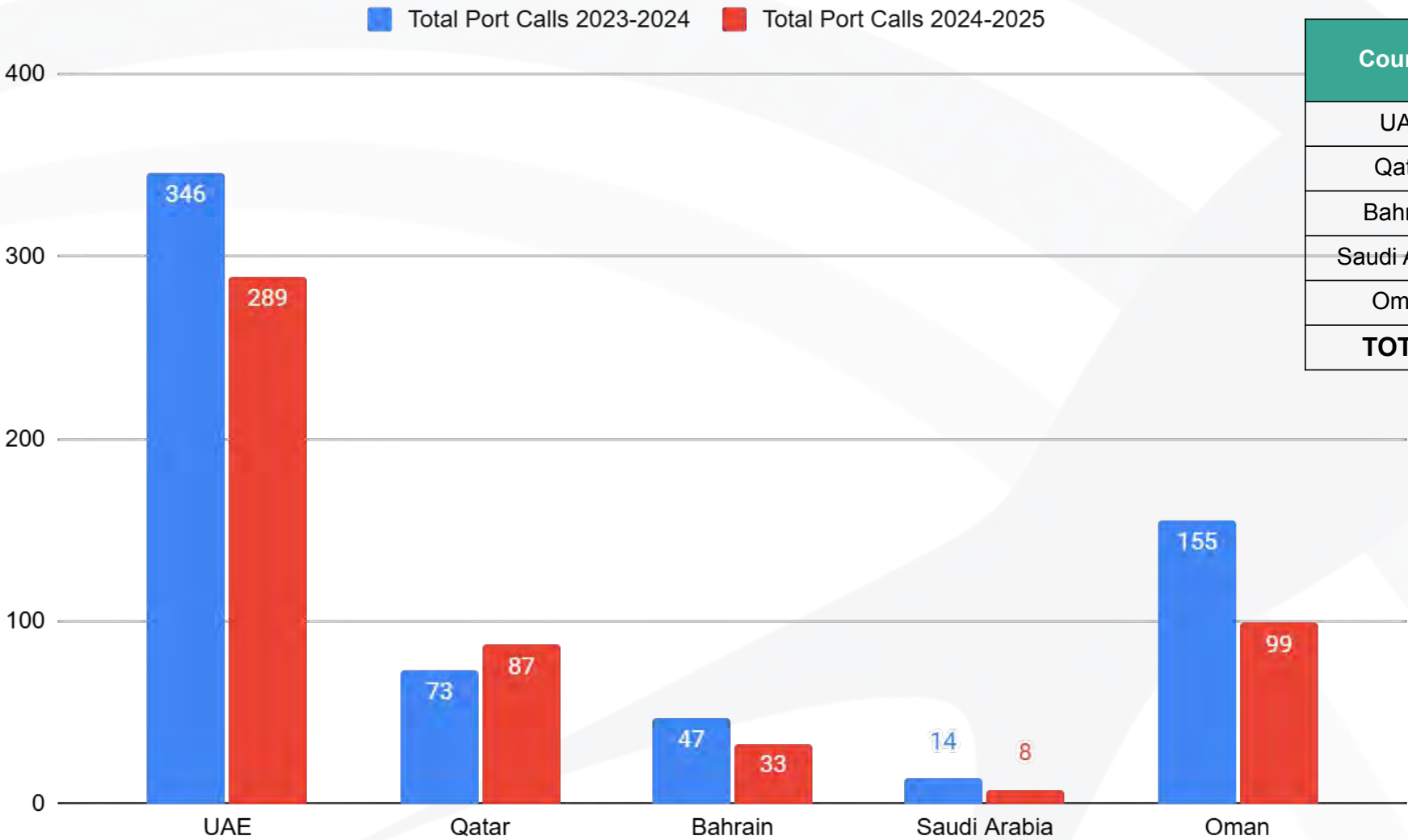
Graph representation on the comparison of the **Total Port Calls of 2023-2024 & 2024-2025 cruise season**





# Arabian Gulf Cruising Port Calls by Country

Below is the Graph representation by country of the Total Port Calls of 2023-2024 & 2024-2025 season comparison:



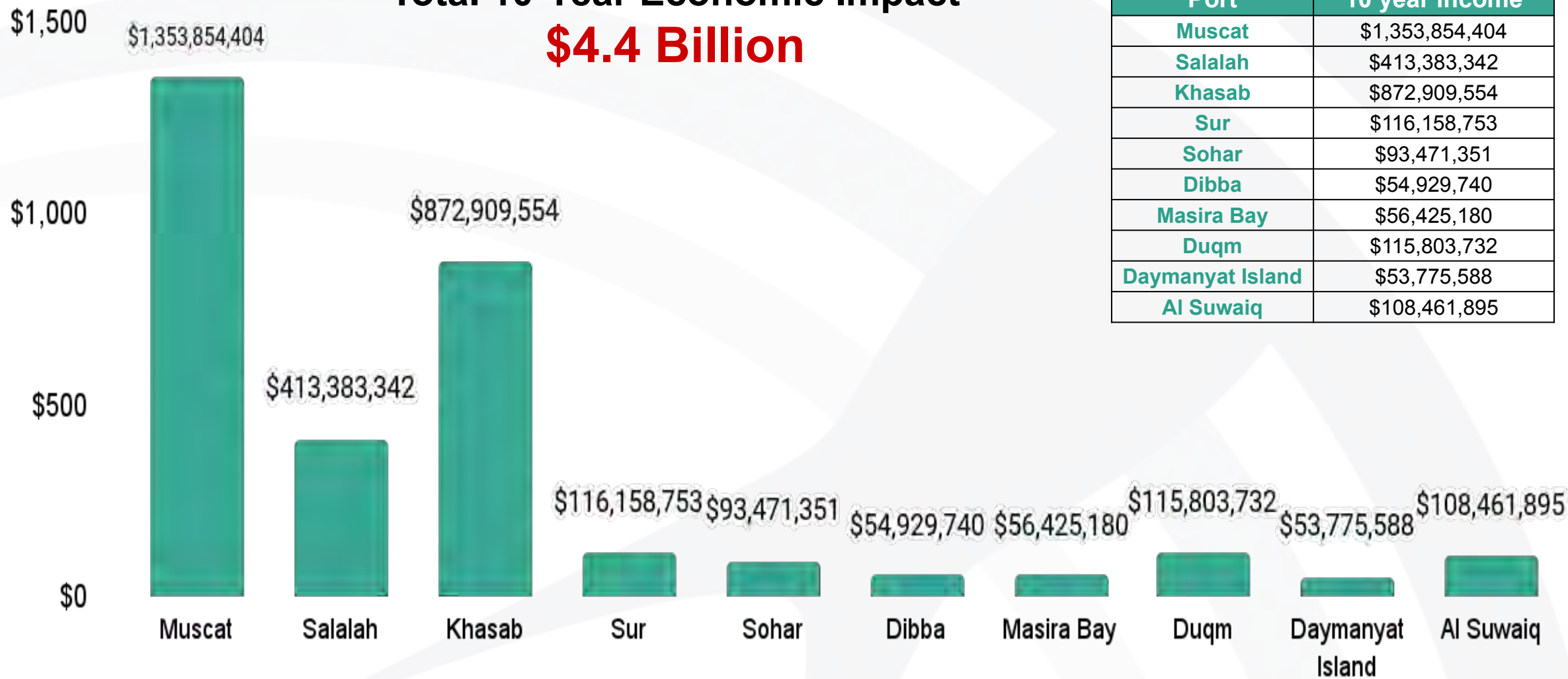
Country	Total Port Calls 2023-2024	Total Port Calls 2024-2025
UAE	346	289
Qatar	73	87
Bahrain	47	33
Saudi Arabia	14	8
Oman	155	99
TOTAL	635	516



# Sustainable Cruise Tourism Strategy - Economic Impact








Total 10-Year Economic Impact  
**\$4.4 Billion**

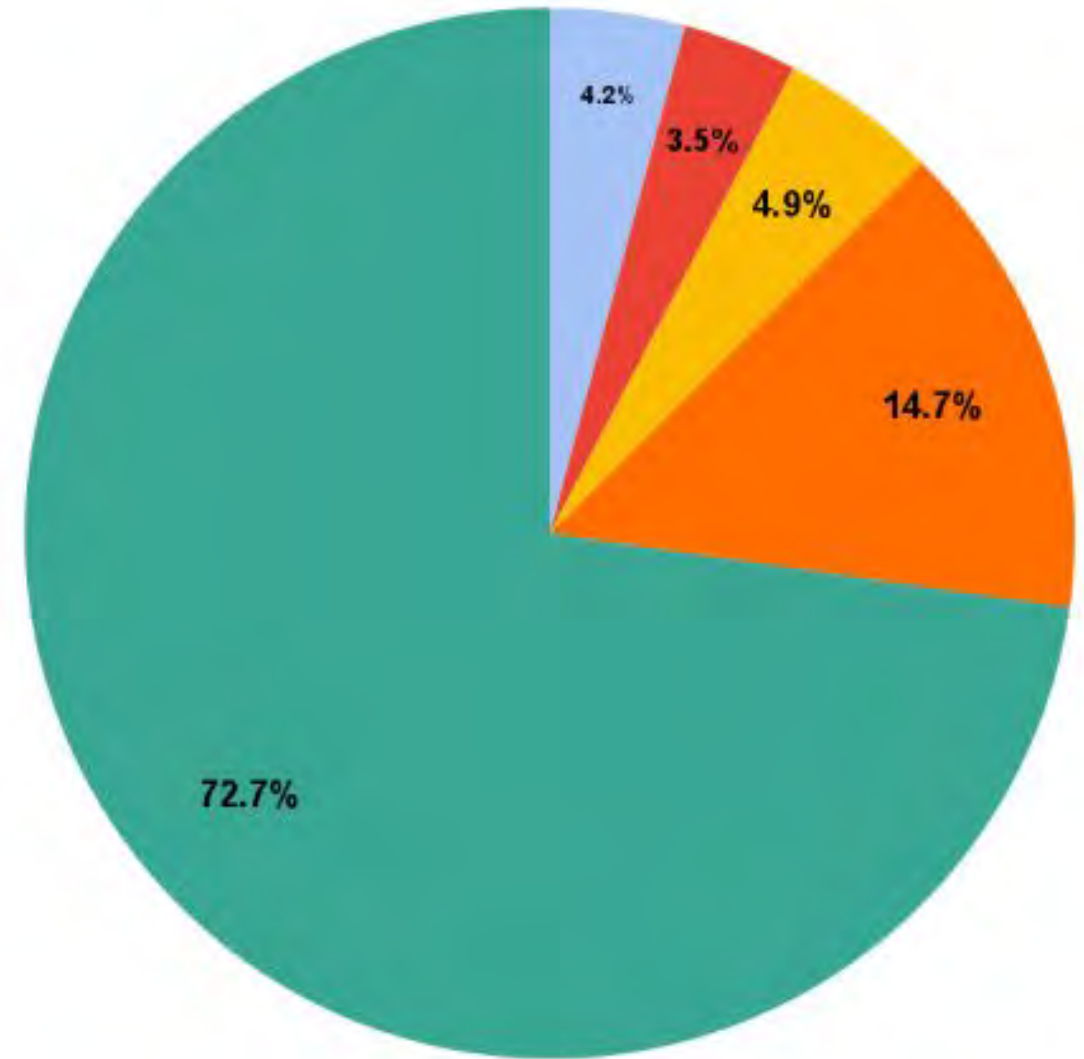


# Sustainable Cruise Tourism Strategy - Economic Impact



## 5 Focus Areas

-  Total Technical Income
-  Total Turnaround Income
-  Total Shore Excursions Income
-  Total Shoreside Spending
-  Total Income Catalytic Effect





# The Law of Water