



**COMMISSION
AGENDA MEMORANDUM**

Item No. 11b

BRIEFING ITEM

Date of Meeting April 28, 2026

DATE: March 30, 2026

TO: Stephen P. Metruck, Executive Director

FROM: Stephanie Jones Stebbins, Managing Director, Maritime
Linda Springmann, Director, Cruise Business & Elliott Bay Operations

SUBJECT: 2026 Cruise Season Overview

EXECUTIVE SUMMARY

The Port of Seattle launched the 2026 Alaska cruise season on April 17 at Pier 66 and continues its market position as North America’s primary gateway for Alaska cruising. The season will bring 330 vessel calls and 2.1 million revenue passengers to the region, the most in the Port’s history. This represents a 5.2% increase in passenger volumes over 2025. As a result, the economic impact may surpass the \$1.2billion previously achieved.

Today’s briefing will also highlight the Port’s work on sustainable maritime fuels and operational changes at the Port’s cruise facilities. Each of these efforts is significant and supported by a committed staff devoted to its success.

SEASON OVERVIEW

The Numbers expected in 2026

- Sixteen ships will homeport in Seattle offering 7 to 11-day roundtrip voyages to Alaska. These vessels represent 10 cruise brands with some brands having multiple ships in the market.
- Eleven homeport ships are expected to connect to shore power moving towards the Port’s 100% goal in 2027.

There will be eight maiden ship calls representing their first voyage to Seattle. The cruise lines partner with the Port to celebrate these new arrivals with the traditional “plaque exchange” ceremony. Several of these moments will include key community leaders, tourism, labor, and local cruise industry partners.

MSC Cruises and Virgin Voyages will join the Seattle homeport fleet in 2026 and have agreed to participate in the Port’s sustainability requirements detailed in the Department of Ecology

Meeting Date: April 28, 2026

Memorandum of Understanding and the voluntary no Exhaust Gas Cleaning System (EGCS) wash-water discharge in Puget Sound. In addition, both ships are also equipped with shore power, and their mid-ship power connection locations will be accommodated by the shore power expansion project underway now.

- a. MSC Cruises – *Poesia* (po-eh-ZEE-uh), which means “Poem” in Italian, will sail to Alaska on Mondays from Pier 91. Launched in 2008, she accommodates 2,550 double-occupancy guests and 1,027 crew. Its maiden call is: May 11.
- b. Virgin Voyages brings *Brilliant Lady* to Seattle, as the cruise line enters the Alaska market for the first time. *Brilliant Lady* will sail on Thursdays from Pier 91. She was launched in 2024 and accommodates 2,700 double-occupancy “Sailors” (guests) and 1,150 crew. She is an adults-only brand, and the only line featuring a tattoo parlor onboard. Its maiden call: May 21.

These new brands bring a unique contribution to our market. As they are both European based; Italy/Swiss and UK, respectively. As such, they expect to source a higher than normal percentage of international travelers which staff expect will result in increased pre/post stays in Seattle.

The economic impact of the Port’s cruise business continues to increase and broaden. In 2025 we partnered with Community Attributes on an updated study who identified the economic impact to the region at \$1.2 billion with 5,200 jobs associated with the business. The economic impact comes from tourism and related activities, wages from jobs, and the provisioning of the vessels in Seattle. With the increased customer base, staff anticipates 2.1 million revenue passengers in 2026, a 5.2% increase over 2025.

Operational impacts in 2026

New Terminal Operator at Pier 91

Several operational and infrastructure changes have occurred at the Port’s cruise terminals that are worth noting. Additionally, community activities may impact operations during the season.

In 2025, the Port conducted a request for proposals for a terminal operator to oversee cruise operations at Pier 91. The contract was awarded to Pacific Cruise Ship Terminals (PCST). The PCST team stood up on-site operations on January 1, 2026 and quickly staffed up their three teams: Terminal Operations (PCST), Security (TSS) and Stevedoring (Metro). The stevedoring team, Metro Cruise Services, has taken on a heavy lift in ensuring all the operational equipment is onsite for a successful season launch.

FIFA World Cup Impacts

The Port’s cruise team has closely tracked the upcoming FIFA Men’s World Cup matches here in Seattle. From June 15 through July 6 there are six Seattle matches with five on cruise days. Due to the expected influx of visitors for the FIFA tournament an overall shortage of hotel rooms could occur. Cruise guests spending on average two nights pre/post around their cruise could

Meeting Date: April 28, 2026

experience limited availability or high rates. This scenario could result in fewer pre/post stays by cruise guests during the World Cup window and possible late sailings if more cruise guests fly in the day their cruise departs. The most impactful day will be Juneteenth (June 19), a holiday, a three-ship day with a ship at Pier 66. We are planning operational alternatives for all trucks, buses, taxis, and Ride Share operators routed to I-5 rather than their typical route south via Highway 99 to SEA. All cruise customers have been reminded of Seattle's FIFA schedule.

Cruise Terminals of America Continues at Pier 66

Pier 66 operations remain with the legacy operator, Cruise Terminals of America (CTA), in partnership with Norwegian Cruise Line Holdings, and the Port Team will work across both operating entities to ensure holistic operations. CTA continues to work closely with city officials on the operation of the street permit and bike lane on cruise days. Early season operations at Pier 66 operations may be impacted by the ongoing work associated with the Pier 66 stairway project. The stair project completion is estimated to be late May.

Shore Power & New Gangways

To meet the Commission Order requiring that all cruise ships connect to shore power by the 2027 staff identified two key projects to meet requirement. First, staff determined that Port ownership of the Pier 91 shore power equipment would support connection operations. The shore power equipment at Pier 91 has been owned by Holland America Line and Princess Cruises since 2005. Staff completed the purchase of this equipment earlier this year. The Port will work with Watts Marine for management of this equipment and operational needs. The cruise lines individually contract with Watts and ILWU for the daily ship connections/disconnects. The Port has a similar arrangement at the Pier 66 cruise terminal.

Second, the shore power expansion project continues to move forward and is at 60% design, however, the actual on-the-ground work will happen at the end of this cruise season, to be ready for the 2027 season.

To support increased efficiencies during embarkation and disembarkation, the Port purchased two new secondary gangways. This purchase was approved by Commission in 2024 and is now installed at Pier 91. Adelte gangways, a Spanish firm, is well-regarded in the cruise industry. The Port's gangways were manufactured in Spain and Florida. The gangway components were shipped to Seattle over the past few months, and a team has been onsite since mid-January working on the assembly process.

Providing Transparency via the Cruise Dashboard

To offer the community access to detailed cruise data, the Cruise Team partnered with the Port's Business Intelligence team to create a Cruise Dashboard on the Port's public website. The Cruise Dashboard was launched in 2023 and now includes full year data for the 2023, 2024 and 2025 cruise seasons. Staff updates the dashboard monthly during the cruise season, which allows the public to see incremental results. The first 2026 update will be completed by June 10, 2026, and will include data for the April and May calls. After that, staff will complete dashboard updates by the 10th of each month throughout the cruise season.

Meeting Date: April 28, 2026

In 2025 the Port and cruise lines partnered to avoid 6,444 metric tons (MT) of carbon dioxide equivalent emissions (CO₂e) because of 203 shore power connections. That figure is up from 3,964 MT of avoided CO₂e in 2024 from 130 connections. This represents strong progress toward the Port's goal of 100% of homeport ships connecting to shore power in 2027 and the Port vision to be a zero-emission seaport by 2050. Note, approximately 5% of calls each year are by ships in-transit, and those ships often do not connect to shore power. The reason for not connecting to shore power is that the ship's systems must be "commissioned" to ensure shipboard and shoreside systems are compatible. The one day call in Seattle does not permit the commissioning process to occur. Homeport ships commission on their first call and then continue to connect on subsequent calls over the season.

Protecting Puget Sound Water Quality

In 2020 the Port of Seattle incorporated a provision in its Terminal Tariff No. 5, which explicitly states "Passenger cruise ships will not discharge graywater, blackwater, or exhaust gas cleaning system wash water, whether treated or not while at berth in Port Terminals." The following year, in response to public feedback citing increasing international attention being paid to the environmental impacts of scrubber wash water, the Port's homeported cruise lines agreed to voluntarily pause all EGCS discharges within Puget Sound.

The Port defers to Ecology's expertise and legal authority regarding the enforcement of water quality standards in Washington state. The Port supports upholding all existing precautionary protections unless Ecology determines that EGCS discharges do not harm water quality. Furthermore, we will retain the prohibition on at berth EGCS discharges as a condition of the use of our terminals. However, it is important to note that the Port's authority to condition cruise ship operations is limited to while they are moored at Port terminals. The Port greatly appreciates the cruise industry's willingness to proactively engage in voluntary agreements that protect air and water quality in Washington.

Sustainable Maritime Fuels Leadership

Pacific Northwest to Alaska Green Corridor Green Methanol Feasibility Study

The Pacific Northwest to Alaska Green Corridor (PNW2AK) project launched in May 2022 as a collaboration among cruise line parent companies, homeports, and Alaska port communities to advance low- and zero-GHG emission cruising between Washington, British Columbia, and Alaska. First Mover partners include the Port of Seattle, Vancouver Fraser Port Authority, Greater Victoria Harbour Authority, the Alaska port communities of Haines, Juneau, Skagway, and Sitka, Carnival Corporation & plc, Norwegian Cruise Line Holdings, Royal Caribbean Group, CLIA, the Global Maritime Forum, Blue Sky Maritime Coalition, and Washington Maritime Blue. Partners formalized their commitment through a Project Charter in 2023.

Meeting Date: April 28, 2026

In 2023, the partners engaged the Mærsk McKinney Møller Center for Zero Carbon Shipping (MMMCZCS) to define a feasibility study using the Center’s green corridor methodology. The Project Consortium—Port of Seattle, Vancouver Fraser Port Authority, CLIA, HY2GEN, and MMMCZCS—signed a Project Commitment Letter in January 2025 to assess a green methanol pathway aligned with the following:

- Vision: Accelerate decarbonization of cruise operations between Washington, British Columbia, and Alaska.
- Goals: Evaluate the feasibility of fueling four vessels operating full-season Alaska itineraries with green methanol by 2032.
- Project Evaluation Criteria:
 - Four cruise ships operating on green methanol
 - Bunkering available at Seattle and/or Vancouver
 - First vessel in service by 2030
 - All four vessels operating on green methanol by 2032

The Consortium assessed the technical, regulatory, and economic feasibility, including fuel production and transportation, storage and bunkering infrastructure at homeports, delivery of methanol-capable dual-fuel vessels, and passenger willingness to pay more for a greener cruise. First Movers convened March 19 to discuss the study’s findings and next steps for the project. The report will be published by MMMCZCS in the coming months.

EPA Planning Grant: Powering Maritime Innovation

Over 2026, the Port of Seattle will continue implementing a multi-pronged planning process to support the adoption of zero- and net-zero emission maritime fuels by cruise ships and other ocean-going vessels. The Port is undertaking this planning work with a three-year grant (2025-2027) from the U.S. Environmental Protection Agency (EPA)’s Clean Ports program, and in close collaboration with the Northwest Seaport Alliance, the Port of Tacoma, and renowned research partners such as RMI, the American Bureau of Shipping, and the National Lab of the Rockies (formerly the National Renewable Energy Lab or NREL).

In 2025, an analysis of future demand for zero and near-zero emission fuels across vessel types was completed, along with an analysis of infrastructure needs and costs for bunkering these fuels in the Puget Sound Gateway and an assessment of current regulations for ensuring safe bunkering. In 2026, the Ports will invite discussion with industry partners about ways of aggregating demand for new fuels among cruise and cargo vessel lines. A Fuel Supply Acquisition Strategy will be developed, and an industry workshop to identify strategies and requirements for safely bunkering fuels will be convened. These studies and discussions will include a strong focus on green methanol as one especially promising new fuel. To ensure early input by stakeholders in near port communities, the Ports will launch a community engagement initiative leveraging a small cohort of trained community liaisons and a new digital community engagement tool.

Meeting Date: April 28, 2026

Finally, a new workforce assessment exploring the job-related impacts and needs associated with the deployment of new maritime fuels will be completed later in the year. These studies and industry and community discussions will inform the development of a final roadmap in 2027, with recommended actions the Ports can take to support industry in the transition to cleaner fuels.

2025 Carnival Biofuel Demonstration Project

Holland America Line (HAL) and the Port conducted a 2025 demonstration project to test the real-world feasibility, cost, operational risks, and emissions implications of using non-fossil marine biofuels—specifically renewable diesel (hydrotreated vegetable oil, or HVO)—for cruise operations departing Seattle. Although the demonstration proved that marine biofuel can be safely bunkered and used on a segregated system aboard the MS Eurodam, the project exposed significant barriers that prevent largescale adoption in Seattle today, including infrastructure gaps, high costs, lack of incentives, fuel and vessel compatibility challenges, and the absence of harmonized carbon intensity certification standards.

The project delivered 360 metric tons (MT) of HVO via barge over three deliveries. The fuel cost was \$2,200/MT—roughly 3x the cost of Marine Gas Oil (also called MGO, which is the conventional low sulfur fuel that cruise ships use)—and about \$1,000 per MT of carbon dioxide equivalent (MTCO_{2e}) avoided, compared to \$120/MTCO_{2e} for similar biofuels in areas within the European Union where advanced biodiesel incentives are available. Without policy parity, the cost gap is a major barrier to scalability. While operations were successful, the demonstration highlights that marine biofuels will not become a scalable decarbonization lever in Seattle without significant policy, infrastructure, and market development.

In conclusion, marine biofuels can be safely used on cruise vessels in Seattle, but they are not yet scalable due to lack of demand, high fuel costs, limited regional infrastructure, vessel specific compatibility challenges, inconsistent carbon intensity certifications, and the inability to access U.S. fuel incentives. Renewable diesel required full segregation from conventional systems, restricting which vessels could participate, and most available fuels exceeded the International Maritime Organization (IMO) carbon intensity threshold, preventing operators from earning GHG reduction credit. Short port calls, seasonal demand, and barge delivery constraints further limit supplier participation. While emissions performance was comparable or slightly improved over MGO, broad adoption will require aligned certification standards, expanded infrastructure, and meaningful policy incentives.

Sustainable Maritime Fuels Collaborative

The Sustainable Maritime Fuels Collaborative (SMF Collaborative)—founded by Washington Maritime Blue and the Port of Seattle, along with leadership from the Northwest Seaport Alliance, Port of Tacoma, Washington Department of Commerce, and the Consortium for Hydrogen and Renewable E-fuels (CHARGE) officially launched in April 2025. The initiative brings together stakeholders across the maritime value chain, including fuel producers, vessel

Meeting Date: April 28, 2026

operators, community groups, tribes, labor, NGOs, research, and government agencies, with the mission to accelerate the availability, affordability, and deployment of low and zero-emission maritime fuels and vessels in the Pacific Northwest.

The SMF Collaborative is guided by a Leadership Committee, members of which represent the value chain, including the Port of Seattle and Northwest Seaport Alliance as well as industry associations CLIA and PMSA. Through working groups, workshops, and pilot projects, the Collaborative aims to identify and address gaps in infrastructure, define regional standards, shape enabling policies, and foster early-stage innovation—while also prioritizing workforce development and environmental justice. The SMF Collaborative was backed by Washington State Legislature funding in 2024 and 2025 and is commencing analysis of supply chain gaps in Washington. The SMF Collaborative will be identifying state-level policy options to support sustainable maritime fuel affordability and uptake by vessel operators calling the Port.

2026 Sustainable Maritime Fuels Summit

The Port hosted the first regional Summit on Sustainable Maritime Fuels at Bell Harbor Convention Center on March 17 and 18. Over the course of the two days, attendees heard from policy makers, fuel producers, and vessel owners and operators on the challenges, gaps, and opportunities for scaling sustainable maritime fuels. The Summit was a highly interactive convening focused on hearing directly from stakeholders and identifying actions that will be undertaken in the near term to advance sustainable maritime fuels. In addition to collecting input and ideas, the Summit provided attendees with the opportunity to hear from Port leadership, WA state lawmakers, cruise and cargo operators, and sustainable fuel producers.

Outcomes of the Summit will help influence the action plans for the SMF Collaborative (see above) and will increase awareness of the ongoing SMF programs at the Port. Actions identified during the Summit will also be considered for future projects at the Port and opportunities for greater collaboration in Washington, the Pacific Northwest, and along the West Coast. A summary of the Summit will be made available to the public.

Star Princess: Seattle's first ship powered by liquified natural gas

This cruise season, the Port welcomes Star Princess to Seattle on May 3, as a new addition to the Port's homeport fleet. Star Princess is one of the newest and most modern cruise ships in the world—just launched in 2025 in Italy—and is Seattle's first call from a cruise ship powered by Liquified Natural Gas (LNG). Star Princess is the second vessel in the Princess Cruises Sphere-class, and sister ship to Sun Princess, which was launched in 2024. Star Princess will call a total of 21 Sundays during the 2026 season.

Fossil LNG is not a climate solution but can provide significant air quality benefits above conventional maritime fuel, including nearly eliminating sulfur and particulate matter emissions. While LNG is commercially available achieving the Port's or regional climate goals through Renewable Natural Gas (RNG) -- is a non-fossil alternative-- that could be a longer-term climate

Meeting Date: April 28, 2026

solution. However, RNG is not currently commercially available at scale globally and carries a 2-3x cost impact.

The Port does not plan to invest in LNG infrastructure; however, the Port will engage with and support cruise lines to ensure safe, environmentally compliant operations. The Port does not regulate fuels that ships bunker in port but strongly encourages ships to use low and zero emissions fuels as feasible.

While alongside the berth in Seattle, Star Princess will fuel LNG from a bunker ship in a similar manner to how cruise and cargo ships currently fuel. In the case of LNG fueling, the fuel will be provided by a Canadian company called Seaspan Energy who sources fuel from FortisBC in Canada. Since LNG is a new type of fuel for ships in Seattle and this will be the first time that LNG is transferred from one ship to another (bunker ship to cruise ship), the Port has been integrally involved in supporting planning, training events, and all required Risk Assessment and hazard mitigation exercises involving the United States Coast Guard (USCG), first responders, ship pilots, industry, Tribal governments, and other regulators. The fueling plan requires a USCG “letter of no objection” and Seattle Fire Department approval to proceed. In addition, the Port partnered with Carnival Corp to present an LNG community briefing to the Port’s Neighbors Advisory Committee in March 2026.

While the use of LNG is new to Seattle, it is not a new maritime fuel to the global maritime industry. LNG bunkering occurs daily around the world and cruise lines have been using LNG in other markets for years. LNG bunkering of cruise ships has occurred in Vancouver BC, Florida, Singapore, Rotterdam, Hamburg and Barcelona, among other cruise destinations. Approximately 60% of the new cruise ships on order will be built with the capability of using LNG. Similar trends exist with cargo ships and other non-cruise ocean going vessels.

ATTACHMENTS TO THIS BRIEFING

- (1) Presentation slides

PREVIOUS COMMISSION ACTIONS OR BRIEFINGS

- December 09,2025 – The Commission authorized purchase of T91 Shore Power Equipment from Princess & Holland America Line and update and funding of P66 & T91 Shore Power Expansion
- October 28, 2025 – The Commission authorized the awarding of T91 Terminal Operations to Pacific Cruise Ship Terminals after finalization of Request For Proposals process.
- February 11, 2025– The Commission was briefed on the Pacific Northwest to Alaska Green Corridor project
- August8, 2023 – The Commission authorized purchase of new Secondary Gangways for T91