

CARNIVAL CORP
Form 8-K
February 22, 2016

UNITED STATES
SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

FORM 8-K

CURRENT REPORT
PURSUANT TO SECTION 13 OR 15(d)
OF THE SECURITIES EXCHANGE ACT OF 1934
Date of Report (date of earliest event reported) February 22, 2016

Carnival Corporation
(Exact name of registrant as specified in its charter)

Republic of Panama
(State or other jurisdiction of incorporation)

001-9610

Carnival plc
(Exact name of registrant as specified in its charter)

England and Wales
(State or other jurisdiction of incorporation)

001-15136

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(Commission File Number)

59-1562976

(I.R.S. Employer Identification No.)

3655 N.W. 87th Avenue

Miami, Florida 33178-2428

(Address of principal executive offices)

(Zip code)

(305) 599-2600

(Registrant's telephone number, including area code)

None

(Former name or former address, if changed since last report.)

(Commission File Number)

98-0357772

(I.R.S. Employer Identification No.)

Carnival House, 100 Harbour Parade,

Southampton SO15 1ST, United Kingdom

(Address of principal executive offices)

(Zip code)

011 44 23 8065 5000

(Registrant's telephone number, including area code)

None

(Former name or former address, if changed since last report.)

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligation of the registrant under any of the following provisions:

- .. Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
- .. Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
- .. Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
- .. Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Item 8.01. Other Events.

On February 22, 2016, Carnival Corporation (the **Company**) completed its offering of 500,000,000 million aggregate principal amount of senior unsecured 1.625% notes due 2021 (the **Notes**). The Notes are guaranteed by Carnival plc, a company incorporated and registered under the laws of England and Wales (the **Guarantor**). The Company intends to use the net proceeds from this offering for general corporate purposes.

The offering of the Notes was registered under the Securities Act of 1933, as amended, pursuant to a registration statement on Form S-3 (File Nos. 333-202619 and 333-202619-01) (the **Registration Statement**) filed with the Securities and Exchange Commission (the **Commission**) on March 9, 2015. The terms of the Notes are described in the Company's Prospectus dated March 9, 2015, as supplemented by a final Prospectus Supplement dated February 15, 2016, as filed with the Commission on February 17, 2016.

In connection with the offering, on February 15, 2016, the Company and the Guarantor entered into an Underwriting Agreement (the **Underwriting Agreement**) with the underwriters listed in Schedule I thereto (collectively, the **Underwriters**). The Underwriting Agreement contains customary representations, covenants and indemnification provisions. A copy of the Underwriting Agreement is attached as Exhibit 1.1 to this Current Report on Form 8-K and is incorporated by reference into the Registration Statement.

The Notes were issued pursuant to an Indenture, dated as of November 6, 2015, by and among the Company, the Guarantor and U.S. Bank National Association (the **Trustee**), as trustee, as amended and supplemented by the Second Supplemental Indenture, dated February 22, 2016, by and among the Company, the Guarantor and the Trustee, as trustee. The Second Supplemental Indenture is attached hereto as Exhibit 4.1 and is incorporated by reference into the Registration Statement.

The Notes will mature on February 22, 2021 and will bear interest at a rate of 1.625% per year. Interest on the Notes will be payable annually in arrears on February 22 of each year, commencing on February 22, 2017. The Notes are unsecured senior obligations of the Company and rank equally with its other unsecured and unsubordinated obligations. The guarantees of the Notes are unsecured senior obligations of the Guarantor and rank equally in right of payment with all other unsecured and unsubordinated obligations of the Guarantor. The form of the Note is attached as Exhibit 4.2 to this Report and is incorporated by reference into the Registration Statement.

The legality opinions of Paul, Weiss, Rifkind, Wharton & Garrison, LLP, Freshfields, Bruckhaus Deringer LLP and Tapia, Linares y Alfaro are attached hereto as Exhibits 5.1, 5.2 and 5.3, respectively, and are incorporated by reference into the Registration Statement.

Item 9.01. Financial Statements and Exhibits.

(d) Exhibits.

- 1.1 Underwriting Agreement, dated February 15, 2016, among Carnival Corporation, Carnival plc and the underwriters listed in Schedule I thereto.
- 4.1 Second Supplemental Indenture, dated as of February 22, 2016, by and among Carnival Corporation, Carnival plc and U.S. Bank National Association, as trustee.
- 4.2 Form of 1.625% Note due 2021 (included in Exhibit 4.1 hereto).
- 5.1 Opinion of Paul, Weiss, Rifkind, Wharton & Garrison LLP.
- 5.2 Opinion of Freshfields Bruckhaus Deringer LLP.
- 5.3 Opinion of Tapia Linares & Alfaro.
- 23.1 Consent of Paul, Weiss, Rifkind, Wharton & Garrison LLP (included in Exhibit 5.1 hereto).
- 23.2 Consent of Freshfields Bruckhaus Deringer LLP (included in Exhibit 5.2 hereto).
- 23.3 Consent of Tapia Linares & Alfaro (included in Exhibit 5.3 hereto).

SIGNATURES

Pursuant to the requirements of the Securities Exchange Act of 1934, each of the registrants has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

Carnival Corporation

By: /s/ Arnaldo Perez
Name: Arnaldo Perez
Title: General Counsel & Secretary

Date: February 22, 2016

Carnival plc

By: /s/ Arnaldo Perez
Name: Arnaldo Perez
Title: General Counsel & Company Secretary

Date: February 22, 2016

Exhibit Index

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