



AUSTRALIAN
PADDOCK to PORT
ALLIANCE
Supporting Australia's cruise economy and jobs

Paddock to Port

The Australian jobs, businesses and
communities behind every cruise visit.



ECONOMIC IMPACT REPORT



AUSTRALIAN **Paddock to PORT** ALLIANCE

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The Australian economy behind every cruise

The Australian Paddock to Port Alliance is made up of the businesses and organisations that power Australia's cruise economy, from farmers and food producers to suppliers, transport providers, ports, travel agents, tourism operators and regional communities. Together, we are telling the story of the jobs, investment and opportunity supported by every cruise.

In 2024–25, cruise tourism generated **\$7.32 billion in economic output**, supported **22,720 full-time equivalent jobs** and contributed **\$2.36 billion in wages**. Passengers spent **\$1.82 billion in Australian destinations**, while cruise lines spent a further **\$1.50 billion** on the goods, services and infrastructure supporting their operations. Ships visited 56 Australian ports and destinations, bringing visitors and economic activity to communities across the country.

That contribution begins long before a ship reaches port and extends well beyond the waterfront. Australian produce is sourced and prepared.

Goods move through warehouses and distribution networks. Ships are provisioned, serviced and supported in port. Passengers stay in local accommodation, dine in restaurants, visit attractions, book tours and shop in the communities they visit.

The value flows further as businesses purchase from suppliers, employ workers and generate household spending. In this way, cruise supports jobs and small businesses across ports, destinations and supply chains, while helping keep regional tourism strong.

This is the economy behind every cruise in Australia, from paddock to port.



Joel Katz

Executive Director

Cruise Lines International Association



Australian cruise economy at a glance

A national economic contribution reaching business and communities across Australia

Total economic output

\$7.32 billion

FTE jobs supported

22,720

Total wages income

\$2.36b

**Direct expenditure
by passengers, crew
and cruise lines**

\$3.38b

**Passenger visit days
in Australian ports
and destinations**

4.14m

**Australian ports
and destinations
visited**

56

Cruise ships recorded 1,700 ship visit days around Australia during the 2024-25 financial year, bringing visitors and economic activity to communities across every coastal state and territory.

BEFORE THE SHIP SAILS

Every cruise starts with Australian businesses

Long before the cruise ship arrives, thousands of Australian businesses supply the goods and services that keep the cruise industry moving.



AUSTRALIAN FARMERS

Fresh produce, meat, seafood and dairy.



FOOD AND MANUFACTURING

Food and essential supplies.



SUPPLY CHAIN LOGISTICS

Warehousing, distribution and transport.



MARITIME SERVICES

Fuel, maintenance, marine services and port operations.



TRAVEL AGENTS

Retail and wholesale distribution





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AFTER THE SHIP SAILS

Every cruise supports Australian businesses, jobs and communities



ACCOMODATION

Hotels and apartments



HOSPITALITY

Restaurants, cafés and
local food



TOURS AND TRANSPORT

Excursions, guides, attractions,
local transport and community
volunteers



RETAIL AND ATTRACTIONS

Shops, galleries and
visitor experiences



Total economic output

\$7.32 billion

CRUISE LINE SPENDING

Every cruise supports thousands of Australian businesses

From farmers and food producers to fuel suppliers, logistics companies, ports and professional services, cruise ships purchase the goods and services needed to operate in Australia. This spending flows through businesses in every state, supporting local supply chains long before passengers step ashore.



\$191.3M
**FOOD AND
BEVERAGE**



\$48.6M
**SHORE
EXCURSIONS**



\$331M
**PORTS AND
MARITIME**



\$331M
**PROFESSIONAL
SERVICES**

\$1.5b

Total spent by cruise lines
in Australia

\$598.4M

Spent on fuel
and operations

56

Australian ports and
destinations visited

Food Facts

Food consumption on an average 10-day cruise

Flour – 1800 kg
Watermelons – 3500 kg
Milk – 4000 ltr.
Coffee beans – 150 kg
Tomatoes – 1400 kg

Fresh eggs – 4000 dz
Oranges – 700 kg
Baked beans – 300 kg
Apples – 400 kg
Cereals – 200 kg

Potatoes – 2000 kg
Chicken – 3200 kg
Beef – 2000 kg
Rice – 2000 kg
Vegemite – 55 kg



CASE STUDY

Supporting our regions



Select Fresh Provideores

Steven Biviano

Group Director of Sales & Cruise Supply (Australia & International)

Select Fresh Provideores is an Australian fruit and vegetable wholesaler with distribution centres across the major capitals. It supplies many thousands of tonnes of produce to cruise ships and serves most of the major cruise lines operating in Australia. "Cruise has been an integral part of our growth strategy. At times it can be worth up to 50% of our business in peak season," says Group General Manager Steven Biviano. "A single voyage can involve supplying 4000 apples, 2000kg of potatoes, or 1000 bunches of bananas."

Select Fresh Provideores works with farmers across Queensland, New South Wales and Victoria to plan, grow and supply fresh produce to cruise ships, constantly reviewing regional supply to align with seasonal quality. "We have many producers who rely on cruise business, it gives them the volume they need through the year," Steven says. "It benefits not only the farmers and producers, but also the wider regional communities, the transport workers, the forklift drivers and people working on the wharves."

Every cruise supports communities across Australia

Cruise tourism reaches every coastal state and territory in Australia, including many regional destinations beyond the major cities. New South Wales represents the biggest share of cruise tourism thanks to Sydney's position as Australia's primary cruise port, followed by Queensland. Together, Sydney and Brisbane act as gateways to support cruising around the country and throughout the region.



Economic output



Jobs





PASSENGER SPENDING

Every cruise brings visitors and spending into Australian communities

Every ship visit creates activity in the destinations passengers and crew visit. Spending flows to hotels, restaurants, cafés, retailers, transport providers, attractions and local tour operators across capital cities, coastal towns and regional communities.



\$564.5M
ACCOMMODATION



\$384.7M
**FOOD AND
BEVERAGE**



\$244.8M
**TOURS AND VISITOR
EXPERIENCES**



\$210.9M
**RETAIL
SHOPPING**

\$1.82b

Passenger
spending

\$53.7m

Crew
spending

4.14m

Passenger visit
days

\$440

Average passenger
spend per day

Every cruise visit creates opportunities for Australian businesses. Passenger spending supports accommodation providers, cafés, restaurants, tour operators, retailers and transport services, creating jobs and strengthening regional economies across Australia.

JOBS SUPPORTED

Every cruise supports Australian jobs

Cruise tourism supports employment far beyond Australia's ports. Every cruise creates opportunities for people working in agriculture, manufacturing, logistics, hospitality, tourism, maritime services and professional industries. As cruise businesses purchase goods and services, employ workers and invest locally, the economic benefits flow throughout Australia's economy.



**FARMERS,
GROWERS,
FISHERIES AND
FOOD
MANUFACTURERS
AND WHOLESALERS**



**MARINE PILOTS,
ENGINEERS,
TERMINAL
OPERATORS AND
MAINTENANCE
TEAMS**



**HOTEL,
RESTAURANT, CAFÉ
AND TOURISM
WORKERS AND
OPERATORS**



**TRAVEL AGENTS,
ADMINISTRATION,
FINANCE AND
BUSINESS SERVICES**

22,720
jobs
supported

11,291
direct jobs
supported

\$2.36B
wages
supported

\$1.1B
direct wages
supported



Keeping the benefits of cruise going for Australia

Australia's Cruise industry delivers far more than memorable holidays. It supports Australian farmers, producers, transport providers, ports, travel agents, tourism operators, retailers and hospitality businesses. It creates jobs, strengthens regional communities and contributes billions of dollars to Australia's economy.

As Australia competes for globally mobile cruise ships, maintaining a competitive operating environment will help ensure these economic benefits continue to flow to Australian businesses and communities.

To secure Australia's place as a leading cruise destination, governments and industry must work together to enhance competitiveness, streamline regulation, and provide the certainty needed for long-term deployment planning.

Without these changes, Australia risks losing further ground to other markets that are moving faster to attract new ships and investment.





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About the Data

The data in this report is drawn from The Value of Cruise Tourism: Economic Impact Assessment of Cruise Tourism in Australia, 2024–25, prepared by AEC Group and jointly commissioned by Cruise Lines International Association Australasia and Australian Cruise Association.

The 2024–25 report is the eighteenth season for which AEC has undertaken this assessment, providing a consistent evidence base for understanding the size and economic significance of cruise tourism in Australia.

AEC Group is a national economic, financial and strategic advisory firm that provides evidence-based analysis to governments, industries and communities across Australia.