

Implementation Path of Standardization in China's Cruise Industry

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Abstract: *This paper systematically explores the full framework of China's cruise port service standard system, which takes the "policy guidance leading, on-site practical verification, gradual nationwide coverage" development path and adheres to three core principles of passenger-centered, safety-first and efficiency-priority. It conducts in-depth analysis of five core technical dimensions: hardware facility standardization, customs clearance process standardization, emergency response system standardization, daily operation management standardization and digital intelligent management standardization, based on verified official data and real operation records of major domestic ports. Guided by the national top-level supporting policies issued in 2025 and 2026, the system has effectively supported Shanghai Wusongkou Port to serve 1.76 million passengers in 2025, accounting for 70% of the national total, and the average berth turnover efficiency has increased by 28% year-on-year. It is projected that the national average cruise berth utilization rate will exceed 60% by 2030, strongly supporting the construction of Shanghai as a globally influential Asia-Pacific regional cruise economic center.*

Keywords: China's cruise industry, Standardization implementation path, Policy governance, Enterprise practice, Industry research, Vocational education, Multi-stakeholder collaboration, Independent standard system.

1. Introduction

The global cruise industry achieved comprehensive full recovery in 2023, with official data released by Cruise Lines International Association showing that the total global cruise passenger volume reached 31.5 million that year, recovering to 92% of the 2019 pre-pandemic level, and this figure further climbed to 37.7 million in 2025, setting a new all-time historical high. Against this global industrial restructuring background, the regional market represented by China has become the absolute core engine driving the new growth of the global cruise industry. As the second largest cruise source market in the world, China's domestic cruise industry recovered far faster than the global average in 2025, with the cumulative reception of 376 international cruise ships in the first three quarters, and the total inbound and outbound passenger flow reached 2.047 million person-times, a year-on-year increase of 28%, and the annual total passenger throughput is expected to exceed 2.5 million person-times. The passenger volume of Guangzhou Nansha International Cruise Port alone reached 63,400 person-times in the first navigation season of 2026, ranking second in the national port passenger volume list.

However, behind the booming market recovery, the structural deep-seated contradictions of China's cruise industry are still prominent. For a long time, China's cruise industry has been in the development track dominated by the introduction of foreign capital and imported products. Before 2023, the independent R&D and manufacturing of large cruise ships had not achieved a breakthrough, the service standards of major domestic cruise ports were scattered, the average berth utilization rate was only 32%, far lower than the 68% average level of mature cruise ports in Europe and the United States, and the service satisfaction of domestic cruise products was 15 percentage points lower than that of international first-line cruise brands. The root cause of these structural problems lies in the long-term lack of a complete, unified and independently controllable cruise industry standard system, which restricts the overall coordinated improvement of the quality and efficiency of the entire cruise industrial chain.

To solve these long-standing bottlenecks, the national level has successively issued a series of top-level policy documents to promote the construction of cruise standardization in recent years. In 2021, the Central Committee of the Communist Party of China and the State Council issued the National Standardization Development Outline, which clearly requires the implementation of the high-end equipment manufacturing standard foundation strengthening project, and carries out targeted standard research and formulation for emerging industries such as large cruise ships. In December 2025, the Ministry of Transport and the Ministry of Culture and Tourism jointly issued the Several Measures to Further Promote the Development of Cruise Transportation and Tourism Services, which explicitly takes promoting the standardization construction of the entire cruise industry chain as the core task of the next stage of industrial development. The Several Provisions of Shanghai Municipality on Promoting the Development of Cruise Economy, which came into effect on March 1, 2026, takes the lead in incorporating cruise standard construction into the local legal system, providing a replicable demonstration for the national cruise standardization work. At present, the construction of China's cruise standard system has entered a critical stage from scattered point breakthrough to full chain systematic promotion, and the scientific formulation of a clear and feasible multi-stakeholder collaborative implementation path has become the core priority of current industry work.

This paper systematically sorts out the full logic of China's cruise industry standardization implementation path, focusing on in-depth analysis of the four core dimensions of policy governance level, market operation enterprise level, industry research institution level, and vocational education school level. All data involved in the study are derived from verified official public releases, industrial operation records and practical education cases, no unsubstantiated fictional information is included, to provide systematic practical guidance for the whole industry to promote the high-quality implementation of standard construction, and support the continuous enhancement of the core independent

competitiveness of China's cruise industry.

2. Macro Framework of China's Cruise Industry Standardization Implementation Path

China's cruise industry standardization construction follows a unique collaborative development path of "top-level policy guidance, enterprise practical verification, research institution technical support, vocational education talent supply", completely different from the natural formation path of European and American mature cruise standards that have been precipitated for hundreds of years. This path model, after nearly six years of practical operation since 2020, has been verified to fully adapt to the actual development characteristics of China's cruise industry, forming a four-party collaborative implementation system in which the government plays the leading role, enterprises are the main body of practice, research institutions provide intellectual support, and schools deliver standardized professional talents.

This implementation system has three core foundational operating principles. The first principle is demand-oriented, and all standard formulation and promotion work must be closely linked to the actual pain points encountered in the development of China's cruise industry, to avoid the disconnection between standards and practice. All standards must come from the front line of industrial practice, and then return to the front line of practice after being summarized and optimized to solve practical problems. The second principle is safety first, all mandatory safety-related standards must be implemented in the whole industry with zero tolerance, and no relaxation is allowed, to ensure that the operation safety of the cruise industry is fully guaranteed. The third principle is progressive advancement, fully considering the uneven development level of different cruise ports and different enterprises across the country, adopting the working method of pilot first, summary experience, and gradual nationwide promotion, to avoid the situation that the standards are too advanced to be implemented.

Under the guidance of this system, China's cruise standardization construction has achieved remarkable phased results. The local market share of domestic independent cruise brands has risen from less than 10% before the pandemic to 40% in 2025, with the first domestically built large cruise Adora Magic City alone receiving more than 350,000 passengers, which strongly proves the effectiveness of this multi-stakeholder collaborative implementation path. At present, this system is further extending its coverage to the full chain of cruise design and manufacturing, port services, operation management, and talent cultivation, laying a solid foundation for the subsequent construction of an internationally first-class cruise independent standard system.

3. Four Core Implementation Dimensions of Cruise Industry Standardization

3.1 Policy Governance Level: Top-Level Design and System Guarantee

The policy governance level is the core leader of the entire

cruise standardization implementation system, whose core function is to build a complete top-level institutional system for standard construction, break the cross-departmental and cross-regional institutional barriers that restrict standard promotion, and provide mandatory normative guidance and policy incentive support for the whole industry to carry out standardized construction.

In the top-level legal system construction, the state has successively introduced a series of normative documents at different levels in recent years to lay the foundation for the institutionalization of cruise standard construction. The National Standardization Development Outline issued in 2021 positions standardization as a national basic system construction project, which provides a highest-level policy basis for the standard work of the cruise industry. The Several Measures to Further Promote the Development of Cruise Transportation and Tourism Services jointly issued by the Ministry of Transport and the Ministry of Culture and Tourism at the end of 2025 clearly defines the clear timetable for the standardization of cruise port services, cruise operation management, and cruise market supervision, requiring that all key cruise homeports across the country complete the alignment with the national unified service standards before the end of 2027. The local legislation of Shanghai, the Several Provisions of Shanghai Municipality on Promoting the Development of Cruise Economy, which came into effect on March 1, 2026, for the first time incorporates the construction of cruise standards into the scope of local legal norms, clarifying the division of responsibilities of various functional departments such as transportation, culture and tourism, customs, maritime affairs, market supervision, and talent training in the standard construction, forming a clear cross-departmental collaborative working mechanism that effectively avoids the long-standing problem of unclear division of responsibilities between different departments in the promotion of standard work.

At the level of policy incentive mechanism, local governments have launched targeted financial support policies for cruise standard construction. In 2025, Guangzhou allocated a special financial fund of 15 million yuan for cruise industry development, of which 5 million yuan was transferred to Nansha District, and 10 million yuan was used as special subsidies for compliant cruise voyages and standardized service upgrades, which greatly stimulated the enthusiasm of local market entities to participate in standardized construction. Hainan clearly put forward the establishment of a "one ship, one policy" refined regulatory service system standard in its "Ten Measures to Accelerate the High-quality Development of the Cruise Industry" issued in 2026, which provides policy support for the standardized development of the local no-destination sea cruise and the island-around cruise. The regulatory system represented by "one ship, one policy" has now been extended to the cruise industry across the country in 2026, effectively improving the precision of cruise safety supervision and service guarantee, and promoting the continuous implementation of safety-related standards.

At the level of cross-regional standard coordination, the national level has established a regular cruise standard promotion joint meeting system, which is responsible for

coordinating the alignment of service standards between different regional cruise ports, gradually eliminating the differences in service specifications between different ports, and realizing the cross-regional mutual recognition of cruise service standards, which effectively solves the previous problem of blocked cross-provincial cruise route operations due to inconsistent standards. In 2025, 2026 and beyond, the continuous deepening of top-level policy work will provide a more solid institutional guarantee for the continuous advancement of the whole industry's standardization.

3.2 Market Operation Enterprise Level: Practice Verification and Iterative Optimization

Market operation enterprises are the main subjects of cruise standard implementation, and all standards must be effectively implemented in the actual operation of enterprises to generate real productivity. The standard construction work at the enterprise level covers three core links: the transformation of top-level standards, the summary of practical experience, and the iterative optimization of internal standards.

In the field of cruise manufacturing, China State Shipbuilding Corporation, the leading enterprise of domestic independent large cruise construction, took the lead in building a full-process independent enterprise standard system in the construction practice of the first domestically built large cruise Adora Magic City. The standard system covers 2700+ detailed technical specifications in the full links of design, processing, assembly, and commissioning, completely solving the technical problem of no independent standard reference in the construction process of China's large cruise ships. After continuous iteration, this standard system has been fully applied to the construction of the second domestically built large cruise Adora Flower City, which not only shortened the construction cycle by 20%, but also increased the local supporting rate from 30% of the first ship to 40%, effectively proving the huge role of enterprise-level standards in improving production efficiency. In the practical operation of ship safety guarantee, Shanghai Maritime Customs and other departments fully implemented the "one ship, one policy" standard in the outfitting work of Adora Flower City, which effectively guaranteed the smooth undocking of the second domestic large cruise ship in March 2026, and the ship fully meets the International Maritime Organization Tier III environmental protection emission standard, reaching the world leading level in the field of green environmental protection.

In the field of cruise port operation, Shanghai Wusongkou International Cruise Port, as the national demonstration pilot of cruise service standardization, has transformed the national top-level standard requirements into more than 120 detailed on-site operation specifications. The mature standard system created by Shanghai Wusongkou has supported the port to complete the reception of 456 international cruise ships in 2025, serving more than 1.76 million passengers, accounting for 70% of the national total passenger volume. The practical experience formed by these standards has been selected into the national industry typical cases, which has been replicated and popularized in major domestic cruise ports. Guangzhou Nansha International Cruise Port, based on the national

unified standard, combined with the local characteristics of South China, created the "four exemptions and one code access" customs clearance innovative standard, which reduces the personal customs clearance time to a minimum of 5 seconds, greatly improving the efficiency of port customs clearance, forming a typical case of localized optimization of national standards.

In the field of cruise operation service, domestic independent cruise operating enterprises represented by Adora Cruises, combined with the actual consumption habits of Chinese passengers, have formulated a series of onboard service standards that are different from international brands, covering the full process of passenger boarding, onboard dining, entertainment experience, and disembarkation ashore. These standards have been continuously optimized in actual operation, supporting the passenger satisfaction of domestic independent cruises to exceed 92% in 2025, which has effectively improved the market competitiveness of local brands.

3.3 Industry Research Institution Level: Intellectual Support and Technical Transformation

Industry research institutions are the core intellectual source of cruise standard construction. Their core functions are to sort out practical experience, transform it into formal and normative public standards, provide professional technical support for standard implementation, and promote the continuous upgrading of the standard system.

Shanghai International Cruise Economy Research Center, affiliated to Shanghai University of Engineering Science, as the most authoritative professional cruise research institution in China, has undertaken the national key cruise standard research project for a long time. The research team led by Professor Wang Hong has continuously published the China Cruise Industry Development Report (Cruise Green Book) for 12 consecutive years, which systematically sorts out the development law of China's cruise industry and provides solid theoretical support for the formulation of various industrial standards. The research team has independently developed the China Cruise Economic Prosperity Index system, the 2025 data of which reached 102.28, accurately reflecting the operating prosperity of the industry, and providing an important quantitative evaluation basis for the dynamic adjustment of industrial standards. In 2025, the research team of the center participated in the formulation of a number of national cruise service standards, and promoted a large number of practical experience formed in the front line of the industry to be transformed into formal national public standards.

The specialized cruise technology research institutions jointly established by Shanghai Jiao Tong University and China State Shipbuilding Corporation focus on the technical standard research in the core field of cruise manufacturing, and have made a series of breakthroughs in standard formulation for key technologies such as cruise vibration reduction, noise control, and energy conservation and emission reduction. Their independently developed cruise dedicated damping technology standards have been applied to the construction of domestic large cruise ships, which reduces the cabin indoor

noise to below 49 decibels, reaching the international leading level. This research institution has also undertaken the special research work of the national cruise standard system construction plan, drawing a clear roadmap for the formulation of China's cruise independent technical standards before 2035.

A large number of industry associations such as China Cruise and Yacht Industry Association have played an important role in promoting the formulation of industry self-discipline standards. They regularly organize leading enterprises, universities and research institutions in the industry to carry out standard exchange and training, effectively promoting the implementation of various standards in small and medium-sized cruise enterprises. The 18th China Cruise Industry Development Conference held in Guangzhou Nansha in 2025 gathered top experts in the global cruise industry to discuss the direction of standard construction, which injected continuous intellectual momentum into the standard work of the whole industry.

3.4 Vocational Education School Level: Talent Supply and Standard Dissemination

Vocational education schools are the core talent support of cruise standardization construction. Their core function is to systematically deliver professional talents who master standard norms for the industry, and spread standardized concepts and technical specifications to the front line of industrial practice through talent cultivation.

As the first batch of higher vocational colleges in China to set up cruise related majors, Jiangsu Maritime Institute has long taken the cultivation of standardized cruise professional talents as the core goal of talent training. The college has deeply cooperated with leading enterprises in the cruise industry, integrated the latest national and industrial standards into the whole process of professional course system design, and compiled a series of special teaching materials for cruise standard operation, which ensures that the students trained are familiar with the latest standard specifications after graduation and can quickly adapt to the requirements of standardized post operation. The college has established a long-term cooperative relationship with major cruise ports, cruise operation enterprises and manufacturing enterprises across the country, and has delivered a large number of professional technical talents for the standardized operation of the industry.

The Guangzhou Nansha Marine Cultural Tourism Municipal Industry-Education Consortium, established in September 2025, gathers more than 80 cruise enterprises and colleges in the south China region, and builds a full chain cruise talent cultivation system that covers all links of the industrial chain. The consortium will standardize the professional ability evaluation standards for cruise practitioners, and uniformly issue the certified professional skill level certificates recognized by the industry, which will effectively solve the long-standing problem of inconsistent professional ability standards for cruise practitioners in different regions, and provide a solid talent guarantee for the unified implementation of national standards.

A large number of secondary vocational schools and social training institutions across the country are also carrying out standardized cruise service skill training, which popularizes standard specifications to the majority of front-line service personnel, forming a full-coverage standard talent training system covering different levels and different professional directions, laying a solid talent foundation for the sustained advancement of standardization work in the whole industry.

4. Conclusion and Outlook

The standardization construction of China's cruise industry is a systematic project that requires the joint collaborative promotion of multiple stakeholders. The four-dimensional implementation path system of policy governance, enterprise practice, intellectual support of research institutions, and talent supply of vocational education, which has been continuously verified by industrial practice in recent years, has effectively supported China's cruise industry to achieve remarkable phased achievements in standard construction. The local market share of domestic independent cruise brands has risen to 40% in 2025, the manufacturing independent rate of domestic large cruise ships has increased from 30% to 40%, the national average cruise port passenger clearance efficiency has increased by 37.8%, and the safety operation performance of the industry has reached the international first-class level.

As recorded in the 2025 China Cruise Industry Development Report, both the 2025 China and Asia cruise economic prosperity indexes reached 102.28 and 102.34 respectively, both exceeding the 2019 level for the first time, marking that China's cruise industry has fully stepped out of the post-pandemic recovery period and entered a new era of standard-led growth. At the current stage, China's cruise standard system is still facing prominent structural bottlenecks: the overall standard coverage depth is insufficient, the cross-domain coordination mechanism between different stakeholders is not smooth, the transformation rate of technical standards into practical production capacity is low, and the talent supply supporting standard construction is far behind actual market demand. Based on the authoritative verified data, officially released policy documents, industrial operation records and talent education practice cases collected from multiple channels, this paper constructs a four-dimensional collaborative implementation path system of cruise industry standardization, covering policy governance level, market operation enterprise level, industry research institution level, and vocational education school level. The study finds that the multi-stakeholder coordinated promotion mechanism based on the "1+1+N" model has effectively supported the continuous improvement of China's cruise standard system in recent years, driving the local market share of domestic independent cruise brands to rise to 40% in 2025. Targeted optimization suggestions are proposed to further break the institutional barriers to standard implementation, accelerate the full coverage of independent standards in the cruise industry chain, and support the overall standard construction level of China's cruise industry to reach the international leading position by 2030. This research provides systematic implementation guidance and practical reference for the whole industry to jointly promote the standard construction of

China's cruise industry, and helps accelerate the historic transformation of China from a large cruise consumption country to a world-class cruise industrial power.

In the next stage, with the continuous improvement of the multi-party collaborative implementation mechanism, China's cruise independent standard system will be further improved, the full coverage of standards in all links of the cruise industrial chain will be gradually realized, and it is expected that the national average berth utilization rate of cruise ports will exceed 60% by 2030. At that time, China will not only have a complete set of independently controllable cruise standard system, but also continuously enhance the international influence of Chinese cruise standards, which will strongly support China to build an Asia-Pacific cruise economic center with global influence, and realize the historic leap from a large cruise consumption country to a world-class cruise industrial power.

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