



Made in Europe

Cruise is a European success story. About 97% of the world's fleet of cruise ships was built in Europe, and 98% of ships on order, based on cost, will be built here. The total investment cruise lines are making in new ships built in Europe from 2024 to 2036 is currently €57 billion, with additional orders anticipated.



Most of the world's cruise ships are also retrofitted and refurbished at European shipyards. Together, tens of thousands of full-time workers and subcontractors are involved in new ship construction and ship refurbishment in Europe.

A diverse supply chain of small and large companies specialises in outfitting and providing cruise ships with European-made products, supporting jobs throughout Europe. With these investments, the cruise industry is essential to Europe's maritime infrastructure, and beyond.



Foreword

Hundreds of thousands of jobs in Europe depend on the cruise industry.

Cruise lines represent 80% of the commercial ship orderbook value for European shipyards, making our industry critical to maintaining Europe's technical know-how in complex shipbuilding. Each ship launched in Europe represents thousands of people involved in the design and build. European companies are involved throughout the cruise shipbuilding value chain - supplying everything from steel plates for the hull, hi-tech onboard equipment, and the interior outfitting.

Beyond shipbuilding, the industrial value of the cruise sector lies in its strong, vast and diverse supply chain of companies across Europe. Furniture makers, glassblowers, and carpet makers, who furnish cruise ships are part of an extensive value chain. Farmers, cheesemakers, pasta makers, and fishmongers are among those supplying cruise ships sailing in Europe with European products. Entire

communities in Europe benefit economically from the building and supplying of cruise ships and from cruise tourism in the places cruise ships visit.

At the same time, the cruise industry is a driver of innovation within Europe, supporting the development of alternative fuels, and new environmental and engine technologies - and as such can be a catalyst for investment in European manufacturing capacity for new technologies.

As the voice of the cruise industry, Cruise Lines International Association (CLIA) is committed to working with the European Parliament, and the European Commission, combining our industrial strength and innovation, to contribute to a strong, sustainable and competitive European economy.



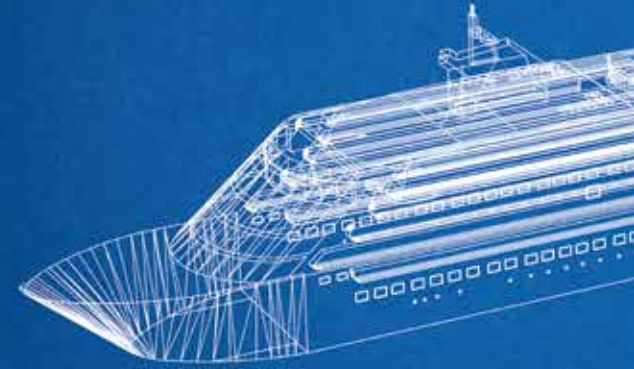
The cruise industry is a driver of innovation within Europe supporting the development of alternative fuels, and new environmental and engine technologies.



Our impact in numbers



Europe is the global leader in complex and innovative shipbuilding with the largest shipyards for passenger ships located in Italy, Germany, France and Finland, as well as shipyards in countries such as Portugal, Croatia, the Netherlands, Norway, and Greece. The world's leading cruise companies build their large and small ocean-going ships in Europe, as do river cruise lines with ships sailing on inland European waterways such as the Danube, Rhine, Seine and Douro rivers. The economic impact of cruise goes far beyond shipbuilding to include a broad ecosystem of large and small suppliers including sustainability and technology innovators.

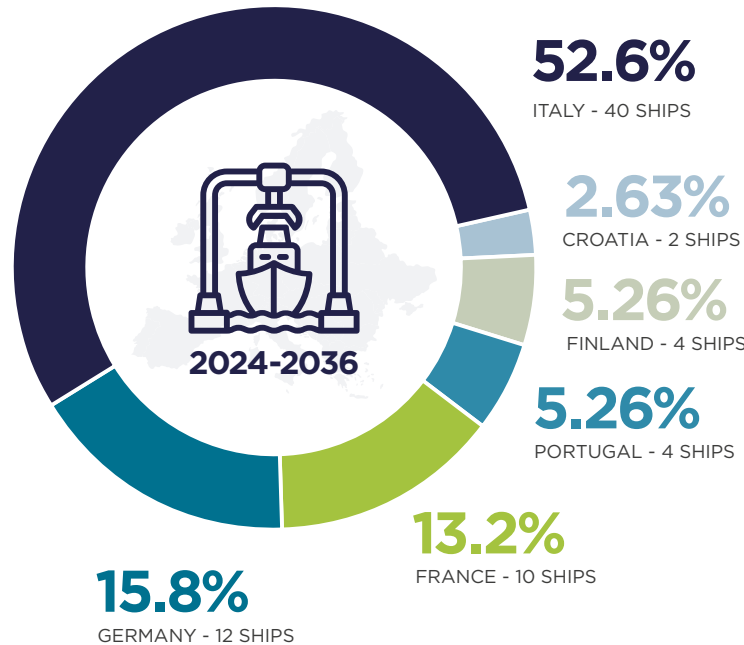


Cruise shipbuilding alone adds significantly to the European economy, **with new orders totaling €57 billion.**

The cruise industry – cruise lines, shipbuilding and its extensive value chain – combines a blend of history, heritage and tradition with innovation for the future. As an industry that is pursuing net zero emissions by 2050, cruise is also a frontrunner in sustainability innovations – including investing billions of euros in new technologies and sustainable energy solutions that will be critical for wider application across the maritime industry, and beyond.

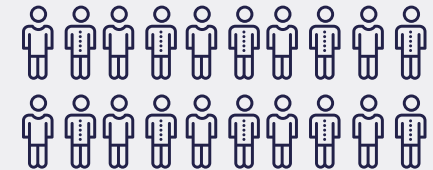
Of the 76 new cruise ships on order around the world* as of September 2024, 72 of the ships will be built in Europe over the next 12 years. This is in sharp contrast with other types of commercial vessels which are now mostly built outside of Europe, including in China and Japan.

As of September 2024, the country-by-country breakdown of new ocean cruise ships on order in Europe from 2024 to 2036 is:



€55 bn+

The cruise industry supported **€55 bn+** in total economic output in Europe in 2023 supporting **440,000 jobs.**



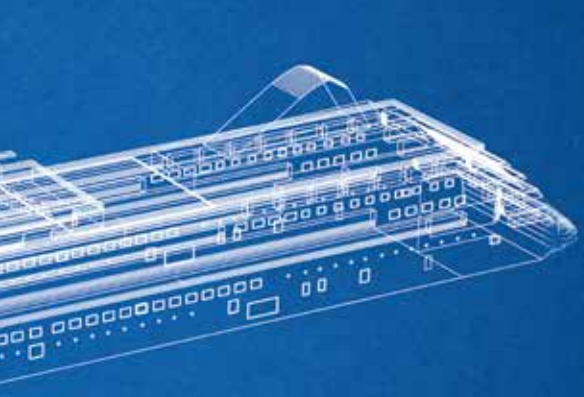
440,000 jobs

87%

Cruise represents **87% of new contracts** (in compensated gross tonnage) placed in European shipyards this year from January to August inclusive.

* Includes ships already delivered in 2024.





“Cruise shipbuilding now represents 80% of the commercial ship orderbook value for European shipyards.”

For an integrated European maritime industrial strategy

CLIA is joining forces with other key sectors in calling for the EU to develop an integrated European maritime strategy to support EU competitiveness.

The vast majority of ocean-going cruise ships are built in European shipyards, using highly sophisticated and innovative technology. That these shipyards continue to thrive under European ownership and control is key to strengthening European competitiveness and resilience. The EU has put forward ambitious measures to strengthen Europe's alternative fuels resilience by fostering green technology manufacturing, a just transition and open trade. The cruise industry is central to this as the industry continues to invest heavily in the fuels of the future, boosting innovation and driving demand throughout the value chain, thereby also contributing to European maritime supply chain security.

The cruise industry supports EU exports and industrial excellence and is the pillar of a “made in Europe” maritime value-chain. In fact, it is essential for maintaining an advanced industrial supply chain

and scaling up new technologies, thus benefitting the entire maritime economy, especially in smaller markets that benefit from the spillover effect. As such, cruise ship building and retrofitting needs to be an integral part of EU industrial policies, including access to EU funds for innovation and infrastructure and green finance mechanisms.

By visiting more than 350 ports in Europe every year, the cruise industry also contributes to the development of coastal communities, which are often remote, and to the peripheral regions. Our focus is responsible travel, and our member cruise companies are collaborating with destinations and ports on such sustainable practices as managing passenger traffic flow and supporting community initiatives, while protecting the economic opportunities that cruise tourism brings.

CLIA believes that enhancing Europe's maritime industrial capacity in critical sectors of the Blue Economy and the maritime value chain is essential to fortifying Europe's economic resilience and competitiveness, thereby strengthening its strategic autonomy within today's volatile global landscape.

The marine technology industry is essential to Europe's economic vitality and plays a crucial role in energy supply and the Blue Economy sectors but faces aggressive competition from Asia. Europe must maintain its position as a leader in complex shipbuilding and maritime equipment manufacturing.

According to SeaEurope (the Shipyards' & Maritime Equipment Association), European marine technology industry encompasses some 300 shipyards and more than 28,000 maritime equipment manufacturers and technology providers. Together, they generate an annual production value of €128 billion and create 1.1 million mainly highly skilled jobs. About 9% of the annual turnover is invested in research, development, and innovation, making the building of cruise ships part of one of Europe's most innovative industries.

At least 70% of a complex ship's value is made up of material, equipment and systems. European maritime equipment manufacturers own nearly a 50% global market share, providing an array of systems, equipment and services contributing to decarbonisation and digitalisation.

This scale of investment makes the cruise sector a vital part of the maritime industry in Europe.



Towards an EU maritime strategic autonomy

European shipyards have developed expertise in cruise shipbuilding which remains unrivalled worldwide.

Cruise ships allow Europe to maintain its technical know-how in complex shipbuilding and industrial innovation, which can then be leveraged into military orders, essential to the security of our continent.

Successful shipyards are essential to Europe's maritime security and defence strategy. Cruise ships play a key role in successful shipyards. As it looks to decarbonise, Europe also needs the

extensive investments being made by cruise companies to support offshore renewable energy goals, and development of critical infrastructure at sea.

Ultimately, this expertise is vital to Europe's open strategic autonomy. With cruise a major part of the orderbook of European shipyards, the maritime industry offers essential contributions to address climate adaptation, energy transition, military security and defence, and vital infrastructure at sea. Europe's objectives depend on a robust cruise shipbuilding industry.



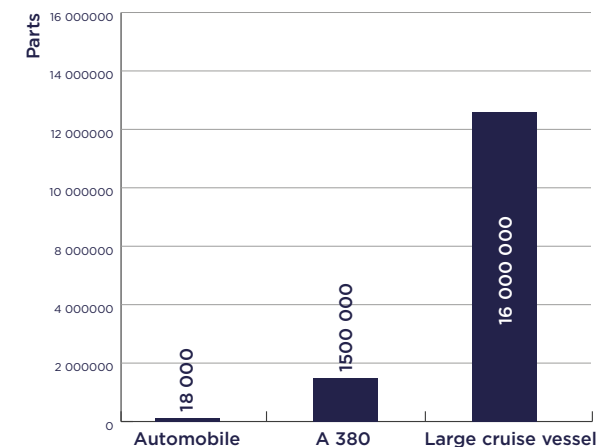
Complex cruise shipbuilding is important to Europe’s marine infrastructure

Cruise ships are incredibly complex vessels to build involving integration of multiple systems and an extensive value chain and requiring sophisticated project management capabilities.

A car manufactured today requires around 18,000 parts. The world's largest aircraft, the A380, requires 1,500,000 parts. Compare this with a large cruise ship (3000+ lower berths) which requires 16,000,000 parts.

The size and vibrancy of the maritime ecosystem, including cruise, are of vital importance offering a safeguard that enables the development of skill sets and competencies, and drives investments in industrial capacities across Europe.

System integration of a complex value chain



* Source: art-paper-the-eu-from-maritime-actor-to-sea-power-web.pdf

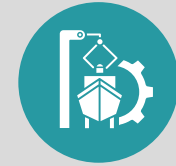
Cruise shipyards in Europe



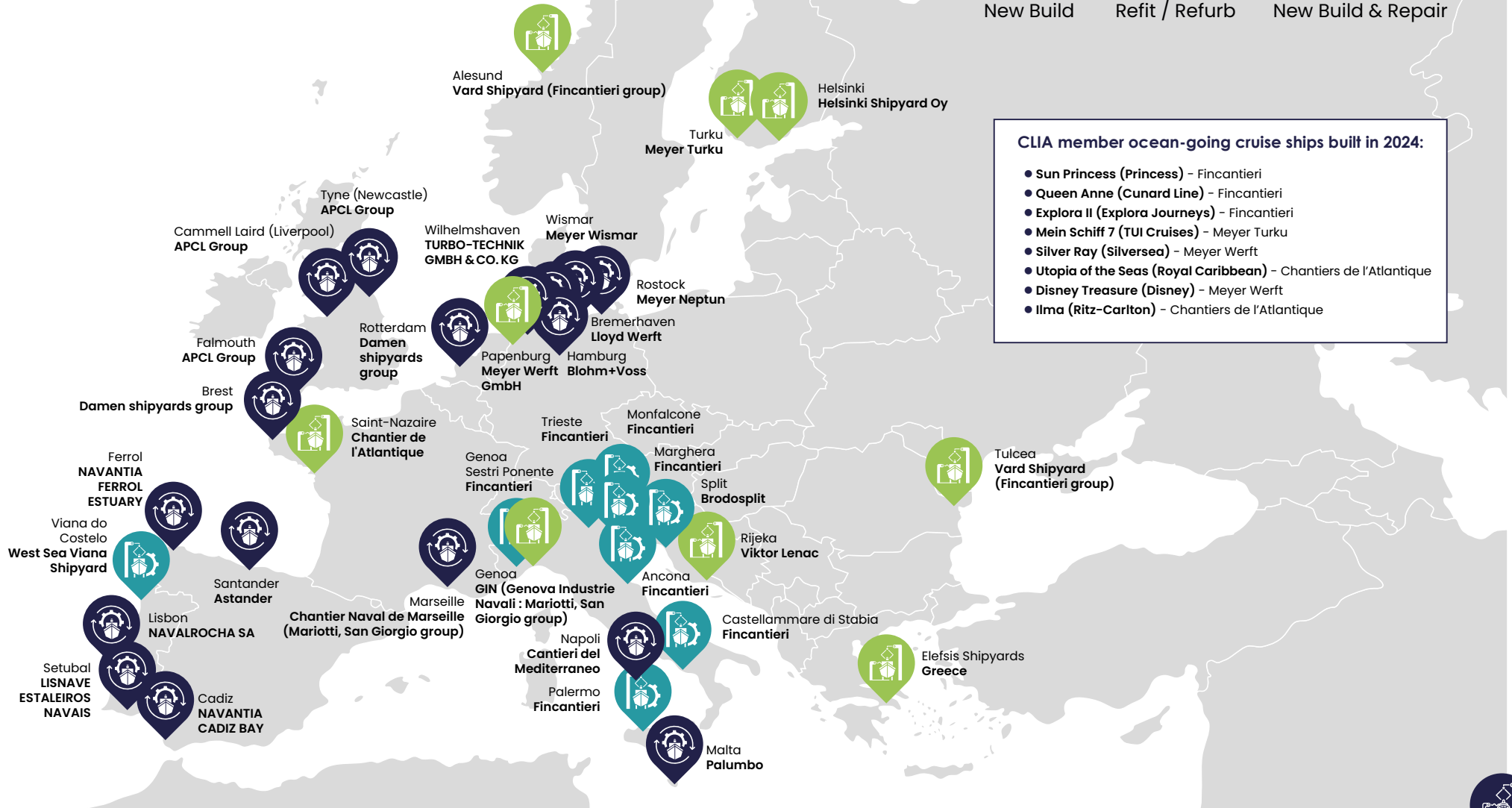
New Build



Refit / Refurb



New Build & Repair

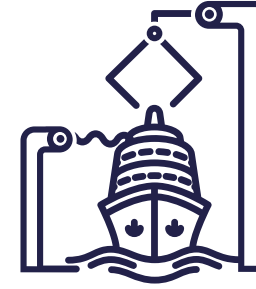


CLIA member ocean-going cruise ships built in 2024:

- Sun Princess (Princess) - Fincantieri
- Queen Anne (Cunard Line) - Fincantieri
- Explora II (Explora Journeys) - Fincantieri
- Mein Schiff 7 (TUI Cruises) - Meyer Turku
- Silver Ray (Silversea) - Meyer Werft
- Utopia of the Seas (Royal Caribbean) - Chantiers de l'Atlantique
- Disney Treasure (Disney) - Meyer Werft
- Ilma (Ritz-Carlton) - Chantiers de l'Atlantique



Cruise shipbuilding, retrofitting, refurbishment, and maintenance



“The value of the delivery of a single ship is up to 1% of all of Finland’s annual exports.”

A thriving cruise industry benefits European shipyards, and the jobs they support. The cruise industry’s contribution to the European economy includes not only newbuilds but valuable ship refurbishment and retrofit projects. Retrofit includes ships being fitted with new environmental technologies such as advanced wastewater treatment systems (AWTS), which treat wastewater more stringently than the primary facilities in many cities and are now in place on more than 80% of the CLIA-member fleet.

Powerhouse shipyards in Europe are vital to local economies. In addition to employing thousands of full-time workers, the shipyards work with thousands and sometimes tens of thousands of subcontractors. Thousands of ship crew arrive as cruise ships are readied to eventually carry passengers. All these people contribute to the local economy beyond what’s happening in the shipyard.

Here’s a look at some of the top shipyards in Europe.





160
year-old shipyard

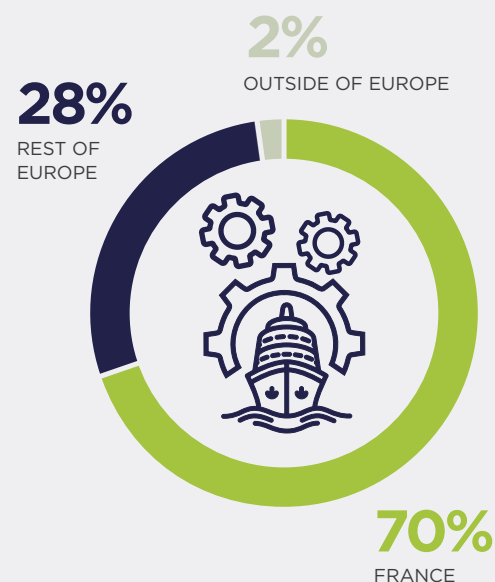
Total
employment
3,500

160
cruise ships
constructed



Chantiers de l'Atlantique

A cruise ship constructed by Chantiers de l'Atlantique in Saint-Nazaire, France, is made up of almost entirely European materials.



Located in France on the Atlantic coast, Chantiers de l'Atlantique is a major player in the design, construction, integration, testing, and turnkey delivery of highly complex ships and offshore installations.

The performance of its ecosystem combines the expertise of its staff, its network of subcontractors and a cutting-edge industrial equipment.



Building MSC Cruises' World Europa

Building a cruise ship is a highly complex operation involving thousands of workers and subcontractors. Here are the manhours it takes to build a ship the size of European-based MSC Cruises' LNG-fueled, 6,774-passenger MSC World Europa at Chantiers de l'Atlantique:



DESIGN
1.2 million working hours



HULL STEEL STRUCTURE
2 million working hours



OUTFITTING (machinery, accommodation) and coordination
6 million working hours



CABINS
0.7 million working hours



Fincantieri

With 230 years of history, Fincantieri, headquartered in Trieste, is a world leading shipbuilding group active in all high-tech marine industry sectors and a leader in the design and construction of cruise ships. Since the 1990s, the company has built more than 100 ships for the world's biggest cruise operators, including some of the largest vessels. A source of company pride is that 1 in every 3 cruise passengers sails on a Fincantieri-built cruise ship. In Italy, the company has about 10,000 employees and generates approximately 90,000 jobs, which double on a global scale thanks to a production network consisting of 18 facilities – eight in Italy – across four continents.



What it can take on average to build a cruise ship at Fincantieri

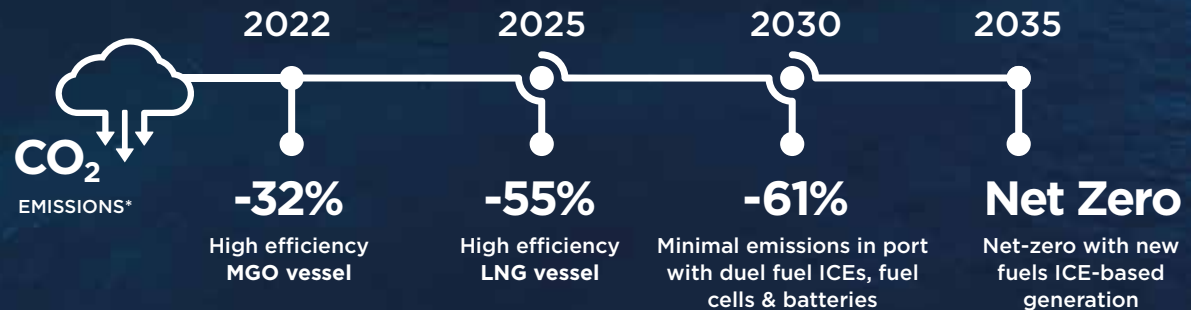
22,000
square metres of public rooms, enough to cover 3 football pitches

3,800
kilometres (or more than 7 times the distance between Rome and Venice) in cables

135,000
hours of planning



Fincantieri has announced that it will use its advanced technological know-how to have designed a zero-emission cruise ship by 2035.



* CO₂ Local Emissions VS 2008

Meyer Werft and Meyer Turku

In August 2024, Meyer Werft in Papenburg, Germany, won its largest contract ever when Disney Cruise Line ordered four cruise ships for delivery between 2027 and 2031.



Meyer Werft, with roots back to 1795, has been supplying the modern cruise industry with ships for more than 40 years, and builds both cruise ships – including the largest cruise ships in the world – and river ships. At its headquarters in Papenburg, the company has more than 3,000 employees and works with many thousands of subcontractors. In addition to Papenburg, Meyer Werft operates the smaller Neptun Werft in Rostock, Germany, which specialises in small ocean ships and river ships.

Meyer Turku

With more than 2,000 employees, plus up to 6,000 subcontractors, Meyer Turku in Finland builds some of the largest cruise ships in the world. The company's roots date to 1737. Most supplies used are European.



More than 80% of the supplies Meyer Werft uses in building cruise ships are sourced from European companies.

CASE STUDY

For the construction of the recently delivered, 2,900-passenger, e-methanol-ready Mein Schiff 7 for German line TUI, Meyer Werft Turku Finland turned to Swedish company SSAB, with its largest shareholders the Swedish state-owned mining company LKAB and the Government of Finland, for the steel plates.



Known for its history of delivering best-in-class ships, Royal Caribbean Group has a longstanding relationship with Meyer Turku. The shipyard in Finland has built 20 ships for Royal Caribbean Group over 28 years including Icon of the Seas which was launched in January 2024. At 365m in length and capable of carrying 7,600 guests, it has been estimated to be the most complex project in the industrial history of Finland.



Navantia

A 40-day refurbishment of a cruise ship at the Navantia yard is estimated to have a positive economic impact of more than €9 million on the local economy of Cadiz.

In Spain, state-owned Navantia (SEPI Group), is focused on shipbuilding and ship repairs, systems and services, and green energy. Since 2011, the company has refurbished more than 100 ships representing 20 cruise lines at its Ship Repairs division, which is based in the Bay of Cadiz. In 2024, the shipyard is refurbishing 16 cruise ships, including three large ships for Royal Caribbean International. Ship repair at the Cadiz yard is a growing source of local employment and income.

Here's what conversion of a large ship at the Navantia shipyard involves:



600

direct jobs



20

or more local companies
(in addition to Navantia)



2,000

people working
at times
of maximum
workload



+1.4 M

hours of work



Chantier Naval de Marseille

A centre for ship repair and transformation in the Mediterranean, French shipyard Chantier Naval de Marseille handles complex projects for large cruise ships. The shipyard was founded in 2010 by Genoa Industrie Navali Holding, one of the leading players in the shipyard industry in the Mediterranean (and owner of ultra-luxury shipbuilder T. Mariotti as well as sister company San Giorgio del Porto in Italy). The company's three dry docks in Marseilles include Forme 10, the largest dry dock in the Mediterranean.

160

full time employees

3,000

employees depending
upon the project

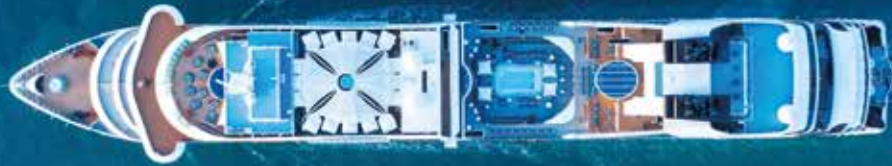
70%

of the shipyard's business
is the cruise industry.



DAMEN Shipyard

A family business founded in 1927, Dutch company Damen operates ship repair yards around the world, has 11,000 employees, and offers all types of ship maintenance, repair, conversion, and refit work. The company's five, well-established cruise ship repair yards in Europe are in the Netherlands and France. With their modern facilities, the yards support, maintain, upgrade, and repair cruise vessels, accommodating ships of all types and sizes.



ONEX Elefsis Shipyards

Greece's shipbuilding and repair operators work with a variety of vessels. Those upgrading cruise ships include ONEX Elefsis Shipyards, established in 1962 in Elefsina, on the mainland about 10 nautical miles from Piraeus.

West Sea Shipyard

West Sea, a part of Martifer Group since 2014, is a shipyard in the North of Portugal with accumulated know-how based on more than 70 years of experience, combining the skills of the ship repair activity with the knowledge in shipbuilding highly specialized vessels. Aligned with our in-house capabilities and skilled workforce, West Sea can undertake shipbuilding and ship repair of vessels up to 200 m in length and 30 m in breadth.

With a substantial track record of cruise and expedition vessels in the 10-year company existence, West Sea is focused on providing vessels with a high degree of integration, innovation and added-value features.

West Sea's current orderbook includes river cruise vessels for the Douro river in Portugal, plus the first ocean going cruise vessel for the Asian market.



Bringing visitors inland on Europe's rivers

River cruises are a significant economic driver in inland Europe, and a growing area of interest among travellers – many of whom extend their cruises with pre- or post-cruise land options. There are hundreds of river ships operating on European rivers and bringing guests to a dozen EU countries. Shipyards building river ships in Europe include Meyer Werft's Neptun Werft in Rostock, Germany, Den Breejen and Damen shipyards in the Netherlands, and West Sea in Portugal.

“At any time of the year, there are more than a dozen river cruise ships being built to replace existing vessels, somewhere in Europe.”

About 99% of all river cruise ships sailing in European rivers are built in Europe.



A diverse, extensive cruise industry supply chain across Europe

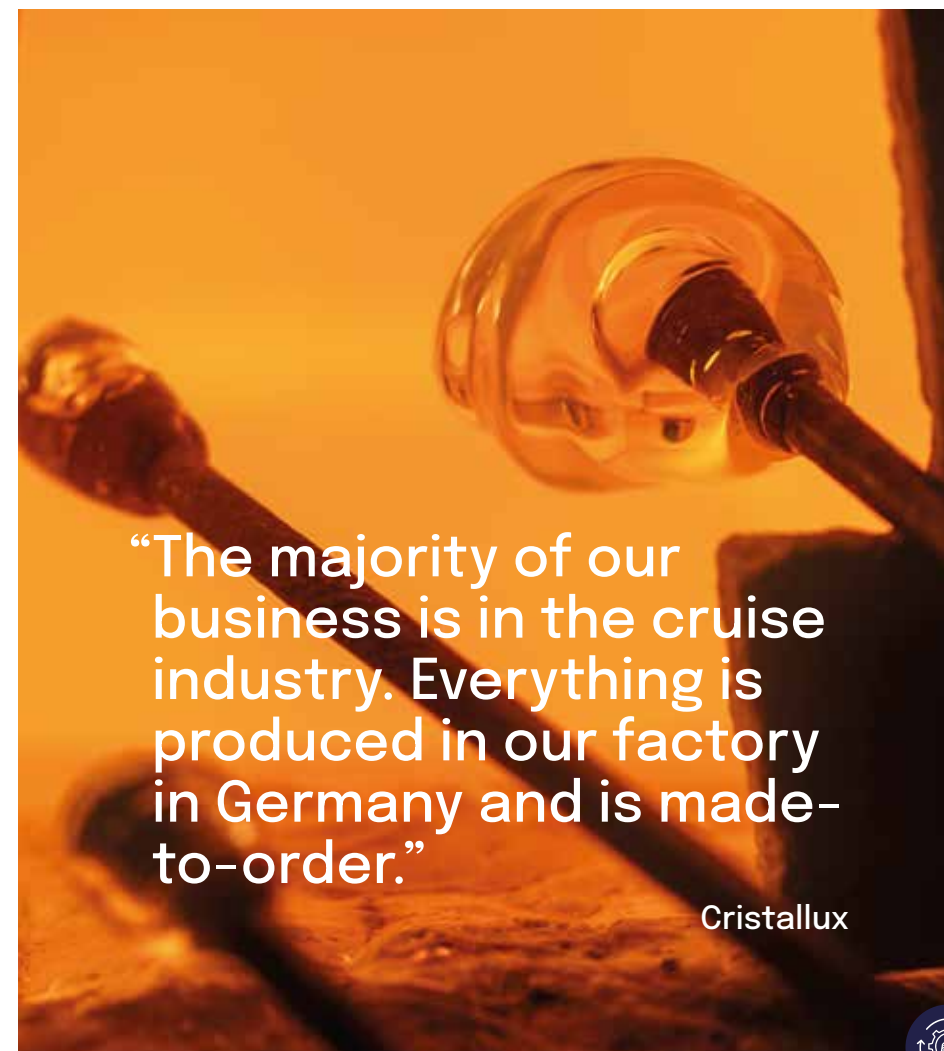


Cruise companies rely on thousands of suppliers across Europe, from small family-owned businesses – some centuries old – to large, publicly traded companies. These suppliers provide cruise ships with everything from engines to exquisite hand-blown crystal chandeliers – and many have worked with the industry for 20 to 40 years or more.

For example, in Greece, of the 110 Greek supply companies that are in the Panhellenic Ship Suppliers & Exporters Association (PSSEA), 90 have more than 20 years' experience supplying the sector, and together they have a total of 2,200 employees. A third-generation, family-owned ship supplies company since 1963, the Piraeus-based Mavrikos company supplies a wide range of products to the cruise sector.

The longstanding nature of this cruise supply chain ecosystem brings added economic impact benefits – affording, on a long-term basis, relationships based on loyalty, trust, security for business and investment planning.

Admire a crystal light fixture onboard a cruise ship and it may have been created by glass masters in the marine division of **Preciosa Lighting**, with nearly 500 professionals headquartered in Kamenický Šenov in the heart of the Czech Republic's Crystal Valley, the oldest known Bohemian glassmaking region. Sit in a comfy lounge on a cruise ship and it may have been created by family owned **Robos**, a Dutch company that relies on cruise for 70% of its business and works with production companies and craftspeople in Eastern Europe, Western Europe, the Baltics, and Southern Europe. In the German Black Forest town of Waldachtal, and sourcing only from locally based suppliers, **Cristallux** has produced decorative, bespoke, light fixtures for cruise ships since 1989, with many of the 30 skilled employees having done their apprenticeships inhouse.



“The majority of our business is in the cruise industry. Everything is produced in our factory in Germany and is made-to-order.”

Cristallux





Tower Supplies started out in 1983 as a family business run out of a van and today works across a range of sectors, the largest being cruise and marine. The company is a major manufacturer and distributor of uniforms, paper products, and cleaning supplies for the cruise industry, with product lines such as personal paper products and hand towels made at manufacturing facilities throughout Italy – where the supply chain has invested heavily in planting trees.

Boat building has been passed down through generations at the family-owned company **Hatecke**, founded in 1903 and today a leading builder of lifeboats and rescue boats for the cruise industry. All production is in Drochtersen, Germany. With more than 80% of its product exported, Hatecke won the Lower Saxony Foreign Trade Award for “small and medium-sized enterprises” in 2024.



A 190-year-old Finnish company focused on the marine and energy sectors, **Wärtsilä** has provided engines for cruise ships right from the start of the modern cruise industry. The company has expanded its portfolio of products to include solutions, technologies and services – such as propellers, thrusters, LNG (liquefied natural gas) systems, exhaust cleaning and waste treatment plants. Committed to innovation and sustainability, Wärtsilä is a leading partner on the cruise industry’s decarbonisation journey and objective of net zero emissions by 2050, supporting the industry’s sustainable future. This includes the development of fuel solutions and exhaust aftertreatment that are suitable for Bio-fuels, carbon-neutral fuels and carbon-free fuels.

Headquartered in Helsinki, and with more than 17,000 employees, the company has a significant presence in Europe. In addition to a newly established Sustainable Technology Hub, with more than 3,000 employees, in Vaasa, Finland, Wärtsilä also has research and development or production facilities in the Netherlands, Germany, Spain and Italy. In its innovation quest, Wärtsilä collaborates with universities and research institutes in Europe through nationally, regionally, and EU funded development projects and/or through research services.



During the voyage: supporting local businesses



Cruise lines prioritise local sourcing of food and other supplies. When cruise ships sail in Europe there is an uptake of local products. This not only supports local farmers, communities, and businesses but provides guests the benefit of being able to taste fresh local produce and other products such as cheeses and pasta. Cruise lines work with organisations such as the Marine Stewardship Council, the Aquaculture Stewardship Council, and local organisations to source food responsibly.

Cruise lines prioritise sourcing local food products during European voyages. Cruise passengers enjoy, for instance:

Italian fruit and vegetables

Thanks to a network of warehouses in the Mediterranean and in northern Europe, Conor SRL, headquartered in Bologna, Italy, supplies high-quality fresh fruit and vegetables to cruise lines throughout Europe. The cruise market is a main area of business during the summer cruising high season.



Fresh German strawberries

Passengers on AIDA Cruises ships departing from Warnemünde, Hamburg and Kiel during strawberry season in 2024, enjoyed fresh strawberries from Karls strawberry farm in Rövershagen, Germany. The programme was part of the cruise line's commitment to using more local product from its home region of Mecklenburg-Vorpommern in Germany, and in addition to supporting the local economy provided guests with a real taste of Germany.



Fresh sustainable seafood

Holland America Line partners with sustainable seafood suppliers throughout the Mediterranean and northern Europe as part of its Global Fresh Fish programme, committed to sourcing and serving fish that meet rigorous sustainability standards, including those certified by the Marine Stewardship Council and Aquaculture Stewardship Council. Among its northern European suppliers are Schmidt Zeevis in Rotterdam and Bjerrfisk in the town of Frederikshavn, Denmark, both of which prioritise sustainable fishing practices. For Mediterranean itineraries the cruise line also collaborates with the Netherlands-based Meeder Group, through its subsidiary Meeder Iberica, to source sustainably caught fish from the Gulf of Biscay, Balearic Sea, and Atlantic Ocean.



Cruise tourism benefits local economies

The economic benefits of cruise tourism include hotel stays pre- and post-cruise and experiences on land at the ports of call visited.

In Europe²:

- + 61% of cruise passengers stayed in a hotel at least one night, 13% stayed both at the start and end of their cruise, 6% stayed 2 nights at both start and end, 3% stayed 3 or more nights at both start and end.
- + 76% of those who sailed took a shore excursion
- + Cruising is a sound investment for coastal communities. More than half of cruise travellers return to the towns and cities they visited on a cruise for longer stays. This generates opportunities for local businesses to develop and market their products and services to new, wider audiences. The cruise industry can lead to the development of new infrastructure and amenities, such as expanded port facilities and improved transportation links.
- + Cruise travellers spend an average of €700 per passenger in port cities over the course of a typical seven-day cruise.



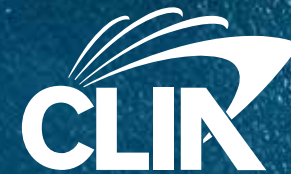
² Based on France, Germany, Italy, and Spain, as of July 2024





The role of a ship chandler

A ship chandler is a retail dealer who supplies cruise ships, the on-the-ground contact handling provisioning, maintenance, permits and other paperwork, and other details while a ship is in port. Historically, chandlers handled repairs for sails and, in the days before refrigeration, stocked sailing ships with salted fish and meat, rope and spare parts for months at sea. Today, they handle everything from fresh fruit and vegetables procured from local suppliers to energy-related needs. These professionals provide a high level of service in a short turnaround period and are an invaluable cruise line partner.



The unified voice of the cruise industry

CLIA is the world's largest cruise industry trade association, providing a unified voice as the leading authority of the global cruise community. On behalf of the industry, together with its members and partners, the organisation supports policies and practices that foster a secure, healthy, and sustainable cruise ship environment, as well as promote positive travel experiences for the more than 30 million passengers who cruise annually. The CLIA community includes the world's most prestigious ocean, river, and specialty cruise lines; a highly trained and certified travel agent community; and cruise line suppliers and partners, including ports and destinations, ship development, and business services.



CLIAGlobal



CLIAGlobal



CLIAGlobal



CLIAGlobal



CLIAGlobal

www.cruising.org