

Competitiveness Analysis and Growth Path for Brand Development of Jiangsu's Cruise Industry

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Abstract: *Driven by policy support, manufacturing breakthroughs and consumption upgrades, China's domestic cruise industry has entered a critical transition phase. Its brand building still faces prominent constraints including intense international competition, severe product homogenization, and core technological shortcomings. This paper systematically proposes targeted development strategies from five core dimensions: consolidating manufacturing foundation, deepening cross-segment industrial chain collaboration, launching differentiated innovative services, optimizing top-level policy support, and expanding high-level international cooperation, to drive China's cruise industry to achieve a historic leap from scale expansion to value leadership, and eventually grow into a new core growth pole in the global cruise economy.*

Keywords: Jiangsu cruise industry; Regional brand competitiveness; Cruise supporting manufacturing; Differentiated operation; Professional talent cultivation.

1. DEVELOPMENT BACKGROUND AND RESEARCH SIGNIFICANCE

Against the backdrop of the full recovery of the global cruise industry, with the total number of global cruise passengers reaching 37.7 million in 2025 and hitting a new historic high exceeding the pre-pandemic level, China's cruise market has also entered a new stage of high-quality development driven by the independent construction of large domestic cruise ships. After the successful delivery of the first domestically built large cruise ship Adora Magic City in 2023 and the smooth sea trial of the second vessel Adora Flower City in 2026, the entire domestic cruise industry is accelerating the construction of an independent and controllable industrial system, and the competition between regional clusters is shifting from the original single port and operation track to comprehensive competition of full industrial chain strength. As the core node of the Yangtze River Delta integrated development strategy and the leading province in China's shipbuilding industry, Jiangsu has inherent top-level industrial advantages and unique resource endowments in the cruise track, which provides unprecedented strategic opportunities for the local cruise industry to build a distinctive regional brand.

Different from Shanghai's core positioning as the national large cruise general assembly and operation headquarters hub, and the Guangdong-Hainan region's advantage in tropical offshore cruise and duty-free consumption scenarios, Jiangsu's cruise brand development logic is rooted in its world-class ship and offshore engineering industrial system. The total value of Jiangsu's ship exports in 2023 reached 65.53 billion yuan, with a year-on-year growth of 37.1%, ranking first in China in export scale. The well-established Tongtaiyang offshore engineering and high-tech ship national advanced manufacturing cluster covers distinct characteristic bases: Nantong focuses on offshore engineering equipment and luxury special cruise manufacturing, Taizhou undertakes large oil tankers and container ships, and Yangzhou excels in large bulk carriers and ro-ro ships. By 2025, the total added value of marine ships and offshore equipment manufacturing in Jiangsu reached 117.98 billion yuan, with a year-on-year growth of 6.5%, firmly maintaining the top position nationwide, and the three core indicators of shipbuilding completion, new orders on hand and backlog orders have ranked first in China for 17 consecutive years, with over 30% of the national share of high-tech energy-saving mainstream ship types. The railway, ship, aerospace and other transportation equipment manufacturing sector saw a 15.7% year-on-year cumulative growth in value added from January to November 2025, far outpacing the provincial overall manufacturing growth of 6.9%, reflecting the strong momentum of high-end ship industrial upgrading. Such a strong industrial foundation is the core source of competitiveness that no other domestic provincial-level region except Shanghai can replicate in the cruise field.

Moreover, Jiangsu is the only province in China that concurrently owns large rivers, grand lakes and vast sea areas, with water bodies accounting for 16.9% of its total territorial area and a navigation channel mileage of about 24,000 kilometers. It has the most abundant water tourism scenario resources in the Yangtze River Delta, and the

Jiangsu Provincial People's Government officially issued the Several Measures on Promoting the Development of the Yacht Industry in November 2025, releasing 21 targeted supporting measures covering the full industrial chain, making the province one of the few regions in China that has issued a top-level special policy for the integrated development of cruise and yacht industries. At the same time, Jiangsu Maritime Institute, located in Nanjing, has taken the lead in building a professional "China-made" cruise talent training system in China, which has achieved three major localized breakthroughs as the first domestic vocational college offering the International Cruise Service major, the first to launch the Cruise Interior Technology major, and the first to develop the International Cruise Operation Management major, outputting a large number of front-line engineers and technical talents for domestic cruise construction, forming an irreplaceable talent support system for the sustainable development of the cruise industry.

However, existing academic research on China's cruise industry mostly focuses on the macro national level or the construction of core homeport cities such as Shanghai and Hainan, and rarely carries out systematic analysis on the brand competitiveness and growth path of Jiangsu, the top shipbuilding province. Most of the practical work in local regions still stays at the scattered level of single project promotion, without forming a top-level design for regional industrial brand building, leading to the fact that Jiangsu's cruise manufacturing strength has not been converted into publicly recognized regional brand influence, and its high-value-added product advantages have not been effectively transmitted to the consumer end. Under this background, this paper takes the brand competitiveness of Jiangsu's cruise industry as the research object, sorts out the existing practical foundation and core advantages, identifies the main constraints, and proposes a systematic growth path, which has important theoretical value and practical guiding significance for promoting Jiangsu's cruise industry to break out of the characteristic differentiated development track and accelerate the construction of the Yangtze River Delta world-class cruise industrial cluster.

2. CURRENT DEVELOPMENT FOUNDATION OF JIANGSU'S CRUISE INDUSTRY

2.1 World-leading Special Cruise Manufacturing and Supporting Industrial System

Jiangsu's cruise manufacturing system does not follow the traditional path of taking large 130,000-ton to 140,000-ton international standard cruise ships as the core entry point, but has formed a differentiated product matrix centered on high-value special cruise ships, which has established its absolute leading position in the global segment market. Relying on Nantong's industrial cluster that gathers 428 regulated above-scale ship and offshore engineering enterprises, where the ship manufacturing scale accounts for about 1/8 of the national total and the offshore engineering equipment scale accounts for about 1/3 of the national total, Jiangsu's special cruise manufacturing capacity has reached the world's top level. The polar expedition cruise ship Douglas Mawson independently designed and built by China Merchants Heavy Industry (Jiangsu) was successfully delivered and set sail from the Haimen base, obtaining Ice Class 1A and Polar Class 6 certifications, which has become a benchmark product in the global expedition cruise market. This breakthrough not only fills the domestic gap in the field of polar cruise manufacturing, but also demonstrates Jiangsu's outstanding competitiveness in high-end cruise segments with its reliable technical support, excellent cost performance and efficient delivery. In Yangzhou, which is one of the three core ship industrial bases in Jiangsu alongside Nantong and Taizhou, the local ship sector recorded a breakthrough in 2025 with 89 above-scale ship and offshore enterprises, an annual shipbuilding capacity of 8 million deadweight tons, the highest number of new ships delivered across the province, and an annual industrial output exceeding 50 billion yuan, further consolidating the full coverage of Jiangsu's cruise manufacturing capacity across different segment product lines. The total ship exports of Jiangsu exceeded 100 billion yuan in the first nine months of 2025, far outpacing the annual total of the previous year, and high-value special ships such as expedition cruises maintained robust growth momentum, laying a solid industrial foundation for the international recognition of Jiangsu's cruise manufacturing brand.

Different from the large cruise general assembly enterprise in Shanghai, Jiangsu has formed a full set of high-matching cruise supporting industrial system covering interior manufacturing, material supply, parts production and ship maintenance and transformation, which is an indispensable core supporting hub for the Yangtze River Delta cruise industrial cluster. Jiangsu's entire high-tech ship industrial chain boasts a 66.2% local supporting procurement rate, with supporting enterprises distributed across Nantong, Suzhou, Wuxi and other regions. Wuxi hosts over 22% of the province's core supporting enterprises, while leading steel producers including Shagang in Suzhou and Nanjing Iron & Steel in Nanjing supply high-quality special marine plates, and Jiangsu-headquartered Asian Anchors in Taizhou ranks as the global leading supplier of anchor systems. A large

number of these supporting enterprises have undertaken more than 22% of the supporting parts supply for China's second domestically built large cruise ship Adora Flower City, covering cruise interior decorative materials, customized cabin modules, special marine structural parts and other fields, which effectively reduces the procurement cost of the main engine factory by more than 12% compared with the full import mode. By the end of 2025, 1539 supporting enterprises in Jiangsu have obtained marine product certification issued by the China Classification Society Jiangsu Branch, forming a huge industrial ecosystem that can support the full localization of cruise core components. This strong supporting capacity has become a core advantage for Jiangsu's cruise brand to resist external trade risks, especially after the new international tariff adjustments for high-value ships in early 2025, the local ship and offshore supporting alliance in Jiangsu rapidly organized coordinated technical research and precise supply-demand docking, further enhancing the resilience of the cruise industrial chain.

2.2 Distinctive River-Lake-Sea Integrated Cruise Operation System

Different from the large international homeport route system of Shanghai, Jiangsu relies on its unique natural endowment of simultaneous possession of large rivers, grand lakes and sea areas, and has formed a characteristic cruise operation scenario system covering the Yangtze River, the Grand Canal, large lakes such as Taihu Lake and the coastal waters of the Yellow Sea. A number of well-operated characteristic cruise products represented by the Nanjing Yangtze River cruise have created distinctive brand influence that cannot be replicated in other regions. Since the maiden voyage of the Yangtze Legend cruise in 2021 filled the gap in Jiangsu's river cruise market, the sector expanded to dual-vessel operation in 2024 with the launch of Yangtze River Love, the largest inland twin-hull river cruise in the country. The two vessels have cumulatively completed 2600 voyages, sailed 78,000 kilometers, operated for 5200 hours in total, and carried 558,800 passengers to date. Nanjing has become the only city along the Yangtze River that regularly offers daytime cruise services, with 90% of its passengers traveling on daytime routes. The city has launched not only regular daytime itineraries, but also signature products such as sunset night tours, New Year's Eve river banquets and ecological research cruise routes, and Wuma Ferry has become the only intermediate stop for inter-provincial cruise vessels in Jiangsu, receiving over 13,000 cross-provincial tourists to date. The ongoing Qianzhou Ecological Route planning in Nanjing further integrates the local unique landscape of mountains, rivers, islets and urban areas, developing nature-themed experiences such as bird watching and finless porpoise observation to enrich the brand connotation of Jiangsu's ecological cruise.

Jiangsu has built a comprehensive safety guarantee system for river cruise operations, providing a solid operational foundation for the sustainable development of the regional cruise brand. Faced with the complex navigation environment of the Nanjing section of the Yangtze River, where an average of 1500 vessels pass daily, the local maritime authority has established a full-chain safety management mechanism that combines enterprise responsibility implementation, cross-department joint supervision, emergency system construction and technology-enabled dynamic control. Nanjing Maritime Bureau has delimited the No.5 bridge opening of the Nanjing Yangtze River Bridge as a dedicated cruise navigation channel, deployed a dedicated VTS monitoring console, cumulatively dispatched more than 5000 law enforcement personnel for targeted patrols, and promoted the installation of AI intelligent monitoring systems on cruise vessels that support 18 types of scenario-based automatic early warning, achieving full-process, all-dimensional oversight through the all-element "Big Maritime Traffic Management" platform and the "air-ground-water" integrated patrol system. To further unlock the consumption potential of the yacht cruise market, Jiangsu provincial government issued the Several Measures on Promoting the Development of the Yacht Industry in November 2025, outlining 21 targeted policies covering three core dimensions. On the service side, it optimizes administrative processes to streamline yacht club registration, certificate handling and crew certification procedures, drastically cutting approval time. On the consumption side, it coordinates with relevant departments to scientifically demarcate yacht navigation zones and berthing areas, promotes supporting dock construction and upgrades maritime search and rescue capabilities. On the industrial side, it provides full-process service for new yacht construction, launching and sea trials, organizes professional training for yacht club safety management personnel, and delivers targeted security guarantees for large-scale cruise events, further completing the top-level policy system for Jiangsu's entire cruise industry chain development.

2.3 Industry-leading Professional Cruise Talent Cultivation Ecosystem

The shortage of cruise engineering and service talents is a universal bottleneck restricting the high-quality development of China's cruise industry, and Jiangsu has taken the lead in building a complete multi-level professional talent cultivation system represented by Jiangsu Maritime Institute, which has formed a distinctive localized "Jiangsu Model" for training front-line practical cruise talents with absolute leading advantages in the

domestic industry. As early as 2023, the school joined hands with CSSC to build the CSSC Industrial College, which has now evolved into a core platform that supports three landmark major categories: the Cruise Interior Technology major, included in the national “Double High” key major group, the International Cruise Service major, the earliest launched in domestic vocational education, and the International Cruise Operation Management major, the first at the vocational undergraduate level. The school has also led the formulation of the national professional standard for Cruise Interior Technology, the national professional profile for International Cruise Operation Management, and Jiangsu province’s credit recognition system for the Cruise Interior Technology major, building a complete set of localized talent cultivation standards that fit China’s independent cruise industry development. Its innovative “two-track four-wheel” education model, which pairs the “On-site Engineer Program” for cruise interior technical personnel and the “Cruise Direct Program” for service personnel with four collaborative mechanisms of industry-education integration, has been widely adopted by over 100 domestic institutions and enterprises as a benchmark case.

To further deepen the integration of talent cultivation with real industrial demands, in June 2025, Jiangsu Maritime Institute joined hands with China Jiangsu International Economic and Technical Cooperation Group and Adora Cruises under CSSC to officially inaugurate the China Jiangsu International Cruise Industry College, marking that the localized cruise talent cultivation ecosystem in Jiangsu has extended to the real cruise operational frontline. China Jiangsu International Group, as the national leading enterprise in the cruise talent service sector, has cumulatively dispatched over 20,000 cruise crew members since 1993. Adora Cruises provides full support for the on-board internship program, offering post practice opportunities, executive lectures and career guidance resources, launching the “Hai Zhi Ying” targeted talent cultivation plan that embeds the entire practical training process on the Adora Magic City cruise vessel, realizing deep integration between talent cultivation and the real industrial chain. The complete multi-level talent supply system in Jiangsu that covers vocational college students, undergraduate majors, postgraduate programs and enterprise targeted custom training has become the irreplaceable core intellectual support for the long-term sustainable development of Jiangsu’s cruise regional brand.

3. MULTI-DIMENSIONAL COMPETITIVENESS EVALUATION AND EXISTING BRAND CONSTRAINTS

From the five core dimensions of manufacturing strength, talent supply, policy support, scenario innovation and regional synergy, Jiangsu’s cruise industry brand already has distinct competitive advantages unmatched by other provincial-level regions. The manufacturing competitiveness dimension ranks top in China, with the 66.2% local supporting rate for high-tech ships far exceeding the national average level, and the special cruise segment represented by polar expedition cruises already holding a global leading market share. In the talent supply dimension, the complete localized cultivation system of Jiangsu Maritime Institute fills the domestic gap, with over 60% of frontline technical personnel for the first two domestic large cruise vessels coming from the Jiangsu training system, the highest concentration of high-quality practical cruise talents nationwide. In the policy support dimension, Jiangsu is one of the very few provinces that have issued special provincial-level supporting documents for the yacht and cruise industry, forming a full policy coverage that spans manufacturing, operation and consumption. In the scenario innovation dimension, the river-lake-sea integrated product system breaks the limitation of single coastal or inland cruise products, covering the full consumption spectrum of mass sightseeing, cultural experience, ecological research and high-end leisure. In the regional synergy dimension, the complete supply chain in Jiangsu seamlessly connects with Shanghai’s large cruise general assembly base, which is the core foundation for building the Yangtze River Delta world-class cruise industrial cluster.

Despite these outstanding advantages, the brand development of Jiangsu’s cruise industry still faces prominent constraints. First, the public recognition of the unique advantages of the industrial system is insufficient. Most of the market’s existing cognition of Jiangsu’s ship industry still stays at the level of conventional bulk cargo carriers and container vessels, and few consumers and industrial practitioners are aware of the leading position of Jiangsu in the segment of special cruise manufacturing and full supporting services, resulting in the mismatch between strong industrial capabilities and low brand influence. Second, the deep integration between the manufacturing end and the operation end is insufficient. Jiangsu’s high-quality special cruise products such as expedition cruises mainly target overseas international customers, failing to connect the manufacturing capacity with the domestic consumer market, and the potential of local characteristic cruise operation brands has not been fully released due to insufficient integration with manufacturing capabilities. Third, the core connotation of the regional brand is not clear enough. At present, there is no unified top-level design for the brand positioning of Jiangsu’s cruise industry, and scattered resources have not been integrated to form a unified regional iconic image, leading to the coexistence

of repeated investment and resource gaps. Fourth, compared with the international advanced level, the independent design capability of high-end cruise products in Jiangsu still needs further improvement. The overall localization rate of core components for high-value cruise products is still less than 30%, which restricts the further enhancement of the brand's global high-end competitiveness.

4. TARGETED BRAND GROWTH PATH FOR JIANGSU'S CRUISE INDUSTRY

4.1 Build Differentiated Brand Positioning: Create the "Jiangsu Cruise" Industrial Icon

Jiangsu should avoid the homogeneous competition track of large standard international cruises, and take the differentiated special cruise and full supporting system as the core positioning of the regional brand, building a globally influential "Jiangsu Cruise" industrial iconic label. Focus on highlighting the unique advantages of polar expedition cruises, luxury custom boutique cruises, green zero-emission new energy cruise products, forming the brand cognition that "Jiangsu is the global high-value special cruise manufacturing base". At the same time, integrate the characteristic cultural elements of the Grand Canal and Jiangnan water towns into the consumer end brand, creating a series of iconic product lines such as Grand Canal Cultural Cruise, Yangtze River Ecological Cruise, and Taihu Leisure Cruise, so that the industrial strength can be fully transmitted to the terminal consumer market. This differentiated positioning can help Jiangsu quickly establish a unique brand moiety in the domestic cruise market that is completely different from other regional clusters.

4.2 Full Chain Empowerment: Build an Independent and Controllable Cruise Industry Ecosystem

A special provincial-level project for cruise core technology research should be launched, leveraging the 66.2% existing local supporting rate of high-tech ships to focus on breakthroughs in the localization of cruise core systems such as underwater production systems, dynamic positioning systems and high-end power equipment. Target the existing gap that the overall supporting rate for high-value cruise products is still less than 30%, organize the formation of a collaborative innovation consortium led by leading manufacturing enterprises, specialized and sophisticated supporting enterprises, universities and research institutes, to open the final mile from laboratory technology to shipboard application. Accelerate the digital transformation of the cruise manufacturing sector, promote the widespread application of digital twin technology and intelligent robotic welding solutions in production lines, further enhance the production efficiency and customization capability of Jiangsu's cruise products, and consolidate the brand's core technological competitiveness.

4.3 Scenario-driven Product Innovation: Expand the Full Spectrum of Characteristic Cruise Consumption

Leverage the unique river-lake-sea water resources of Jiangsu, further expand the "cruise +" integrated product system on the existing operational foundation. Optimize the existing Yangtze River cruise, Grand Canal night tour products, launch more high-quality themed itineraries such as cultural research, ecological leisure and intangible cultural heritage experience. Give full play to the policy dividend of the Several Measures on Promoting the Development of the Yacht Industry, build a number of characteristic yacht cruise clusters around Taihu Lake, Jinji Lake and the coastal waters of Yancheng, develop niche high-end leisure products targeting affluent groups in the Yangtze River Delta, to form a full spectrum product system that covers mass sightseeing, mid-range leisure and high-end custom services, and continuously enrich the market reputation and influence of Jiangsu's characteristic operation brands.

4.4 Deepen Yangtze River Delta Synergy: Build an Integrated Collaborative Brand System

Fully integrate into the Yangtze River Delta world-class cruise industrial cluster construction strategy, establish a deep collaborative mechanism between Jiangsu's supporting manufacturing system and Shanghai's large cruise general assembly and operation base. Jointly carry out collaborative research on key technologies, build a cross-regional shared cruise talent pool, open inter-provincial connected cruise routes that link Nanjing, Suzhou, Shanghai and other nodes, and achieve the mutual recognition of cross-provincial cruise service standards, passenger inter-modal transport systems and market resource sharing. Break the administrative boundary restrictions, so that the manufacturing advantages of Jiangsu and the operation advantages of Shanghai can complement each other, to jointly enhance the overall global competitiveness of the Yangtze River Delta cruise brand.

4.5 Expand International Layout: Participate in Global Cruise Standard Construction

Support leading Jiangsu cruise manufacturing enterprises to “go global”, expand the international market share of special cruise products such as expedition cruises, and participate in the formulation of international cruise technical standards represented by polar navigation safety and new energy green cruise rules. Collaborate with leading international classification societies such as DNV and LR to carry out joint certification of Jiangsu-made cruise supporting products, enhance the global recognition of the “Jiangsu Cruise” brand, and gradually realize the transformation from a high-quality cruise manufacturing base to a global high-end cruise brand supplier.

5. CONCLUSION AND OUTLOOK

Jiangsu’s cruise regional brand development has inherent non-replicable core competitive advantages rooted in the top-ranked ship and offshore engineering industrial system, the industry-leading localized talent cultivation ecosystem, the inclusive policy support system and the unique river-lake-sea integrated tourism scenario resources. By taking differentiated positioning as the core, full chain technological empowerment as the foundation, scenario-driven innovation as the breakthrough point, Yangtze River Delta synergy as the support, and international layout as the extension, Jiangsu’s cruise brand will break through the current constraints of low recognition and insufficient integration, and build a globally influential iconic regional industrial brand.

It is expected that by 2030, the independent supporting rate of high-value special cruise products in Jiangsu will exceed 70%, the regional market share of domestic Jiangsu-made characteristic cruises will rank first in the national segment, and the total output of the cruise industry chain will exceed 200 billion yuan. At that time, Jiangsu will become the world’s most important special cruise research and development, manufacturing and supporting base, making irreplaceable contributions to the construction of China’s independent cruise industrial system and the high-quality development of the global cruise economy.

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