

中国邮轮港口发展现状与展望

Development Status and Prospects of China's Cruise Ports

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PART 1

中国邮轮港口布局

China's Cruise Ports Layout

邮轮港口布局规划 Cruise Port Layout Planning

- 适应中国邮轮运输发展需要，指导港口合理布局，促进邮轮旅游业健康可持续发展，2015年交通运输部印发了《全国沿海邮轮港口布局规划方案》。

In 2015, Ministry of Transport of the People's Republic of China issued the National Coastal Cruise Port Layout Plan to meet the development needs of China's cruise transportation, guide the rational layout of ports, and promote the healthy and sustainable development of the cruise tourism industry.

- 中国邮轮港口划分为**邮轮母港、始发港和访问港**。
China's cruise ports are divided into three types: home ports, departure ports and call ports.



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全国沿海邮轮港口布局规划方案

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近年来，随着我国经济社会稳步发展和人民生活水平日益提高，邮轮旅游市场呈现持续快速发展态势，邮轮运输正在成为我国水路运输新的增长点。目前，我国沿海邮轮港口处于起步发展阶段，为指导港口合理布局，推进码头设施有序建设，促进我国邮轮旅游业持续、健康发展，特编制《全国沿海邮轮港口布局规划方案》。

一、发展现状

（一）总体情况。

我国现已成为亚洲地区最大的邮轮市场，国际三大知名邮轮公司嘉年华、皇家加勒比、丽星均已进入我国，海航旅业、渤海轮渡等国内企业正在积极拓展邮轮业务，并初步形成了以日韩线、越南线、台湾线等始发航线为主，国际挂靠航线为辅的格局。

2014年沿海港口到港邮轮466艘次、完成旅客吞吐量171万人次，“十二五”期间前四年年均增长速度分别达到23%和40%。上海港、天津港、三亚港和厦门港已建成10个邮轮泊位，设计年通过能力420万人次。青岛港、深圳港和北海港等港口在建邮轮泊位15个，设计年通过能力465万人次。

（二）发展特点。

我国邮轮运输发展呈现以下特点：一是处于起步发展阶段，市场规模快速扩张，2014年沿海港口邮轮到港数量和邮轮旅客吞吐量分别较2006年增长3倍和10倍；二是邮轮航线由国际挂靠为主转变为始发为主，2014年始发航线邮轮到港数量和邮轮旅客吞吐量比重分别达到79%和86%，分别较2006年提高了57个和69个百分点；三是邮轮运输主要集中在上海港、天津港、三亚港和厦门港4港，2014年上述港口邮轮到港数量和邮轮旅客吞吐量分别占全国的90%和97%，其中上海港比重分别达58%和72%；四是船舶大型化趋势明显，在我国运营的最大邮轮船型已由3万吨级（载客量1000人）发展到15万吨级（载客量3800人）；五是邮轮运输呈现较为明显的季节性特征，天津港等北方港口主要集中在夏季，三亚港等南方港口主要集中在冬季，旺季到港邮轮数量占比超过80%。

二、发展趋势

（一）市场发展趋势。

我国和周边国家及地区邮轮旅游资源丰富，具备形成东北亚、东南亚、台湾海峡及南海等邮轮航区的资源条件。随着我国居民收入水平逐步提高和消费结构加快升级，我国邮轮旅游消费群体规模将不断扩大。邮轮旅游作为新兴休闲度假方式，发展前景广阔，市场需求在较长时期内仍将保持快速增长。预计2030年沿海邮轮旅客吞吐量将达到3000万人次左右，年均增速约20%。

邮轮港口布局规划 Cruise Port Layout Planning

- 规划至2030年形成以**2~3个邮轮母港为引领、始发港为主体、访问港为补充**的港口布局。

The Plan proposes that by 2030, a coastal port layout will be formed in China, led by 2-3 cruise home ports, dominated by departure ports and supplemented by call ports.

- 规划大连港、天津港、烟台港、青岛港、上海港、厦门港、深圳港、三亚港等**12个邮轮始发港**。

Designate 12 cruise departure ports including Dalian, Tianjin, Yantai, Qingdao, Shanghai, Xiamen, Shenzhen and Sanya.



豪华邮轮“招商伊敦”号（右）与“蓝梦之歌”号停靠在青岛国际邮轮港区
Luxury cruise ships "China Merchants Edun" (right) and "Blue Dream Song" are berthed at Qingdao International Cruise Terminal.



厦门国际邮轮母港片区
Xiamen International Cruise Home Port Area

邮轮港口布局现状 Current Status of Cruise Port Layout

中国邮轮港口基本形成了上海、天津、厦门、深圳、三亚等邮轮始发港为主的总体格局。

China's cruise ports have basically formed an overall pattern dominated by cruise departure ports such as Shanghai, Tianjin, Xiamen, Shenzhen and Sanya.

中国邮轮港口共建成28个邮轮泊位，设计年通过能力1236万人次。

China has completed the construction of 28 cruise berths in its cruise ports, with a designed annual capacity of 12.36 million passengers.

港口名称 Port Name	泊位数量(个) Number of Berths (units)	最大吨级 (万 GT) Maximum Tonnage (10,000 GT)	通过能力 (万人次) Handling Capacity (10,000 passenger trips)
上海港 Shanghai Port	6	22.5	440
天津港 Tianjin Port	4	22.5	92
厦门港 Xiamen Port	3	22.5	120
深圳港 Shenzhen Port	2	22.5	78
三亚港 Sanya Port	1	8	60
舟山港 Zhoushan Port	1	10	50
温州港 Wenzhou Port	1	10	22
青岛港 Qingdao Port	3	22.5	66
大连港 Dalian Port	2	10	130
北海港 Beihai Port	2	5	100
广州港 Guangzhou Port	2	22.5	75
福州港 Fuzhou Port	1	15	23



PART 2

中国邮轮运输市场

China's Cruise Market

发展阶段 Development Stages

□ 中国已成为亚洲最大、全球仅次于美国的第二大邮轮客源国市场。

China has become the largest cruise source market in Asia and the second largest in the world, second only to the United States.

起步发展

- 国际访问港邮轮数量稳步增长。
- 国内出境游航线处于试验阶段。

2005年
以前

Initial Development Stage

- The number of international call port cruises grew steadily.
- Domestic outbound cruise routes are still in the pilot phase.

快速发展

- 专业化邮轮码头加快建设。
- 2019年接待邮轮804艘次，旅客吞吐量414万人次。

2006-
2019年

Rapid Development Stage

- The construction of professional cruise terminals accelerated.
- In 2019, China's coastal ports received 804 cruise ship calls and handled 4.14 million passengers.

震荡调整

- 2020-2022年受疫情影响基本停滞。
- 2023下半年恢复运营，旅客16.8万人次。
- 2024年全面恢复，旅客192.1万人次。

2020年
至今

Shock Adjustment Stage

- From 2020 to 2022, it was basically at a standstill due to the impact of the pandemic.
- Operations resumed in the second half of 2023, with a passenger throughput of 168,000 person-times.
- In 2024, China's cruise industry fully recovered, with passenger throughput reaching 1.921 million.

发展特点 Development Features

专业化码头建设成效显著 Specialized Terminal Construction Has Achieved Remarkable Results

- 天津港、青岛港、上海港、厦门港、深圳港、广州港均可满足世界最大的22.5万总吨邮轮靠泊要求。
Tianjin Port, Qingdao Port, Shanghai Port, Xiamen Port, Shenzhen Port and Guangzhou Port are all capable of accommodating the world's largest cruise ships with a total tonnage of 225,000 GT.

邮轮运输高度集中化 Cruise Shipping is Highly Centralized.

- 主要在上海、天津、三亚、深圳、厦门5个港口，2024年邮轮旅客吞吐量占全国的97%，其中上海港比重达64%。
It is mainly concentrated in 5 ports: Shanghai, Tianjin, Sanya, Shenzhen and Xiamen. In 2024, the cruise passenger throughput of these ports accounted for 97% of the national total, of which Shanghai Port accounted for 64%.

船舶大型化趋势明显 The Trend of Ship Upsizing is Evident

- “MSC荣耀号” (17.2万吨级，载客量5700人) 以中国上海、深圳为母港开启运营。
MSC Bellissima, a 172,000-ton cruise ship with a passenger capacity of 5,700, has started operations with Shanghai and Shenzhen in Chinese mainland as its home ports.

航线产品逐步拓展 Route Products are Gradually Expanded

- 全球知名邮轮公司均进入中国市场，形成以东北亚、东南亚为主要目的地的始发出境航线为主，入境访问港及沿海游航线为辅的格局。
World-renowned cruise lines have entered the Chinese market, forming a structure dominated by outbound departure routes to Northeast and Southeast Asia, supplemented by inbound port-of-call and coastal cruise routes.

邮轮船队初具规模 The Cruise Fleet Has Taken Initial Shape

- 中国正在运营的本土邮轮公司共有7家共8艘运力，成为推动中国邮轮市场加快复苏的核心动力。
There are 7 local cruise companies operating in China with a total of 8 ships in service, which have become the core driving force for accelerating the recovery of China's cruise market.



PART 3

中国典型邮轮港口

Cruise Shipping Development Features

上海吴淞口国际邮轮港 Shanghai Wusongkou International Cruise Terminal

- 2011年10月开港运营，依托良好的区位优势和大规模的客源市场支撑，邮轮旅客规模稳居中国第一、亚洲第一、全球第四。

Opened in October 2011, Relying on its favorable location advantages and large-scale source market support, the scale of cruise passengers has remained the first in China, the first in Asia and the fourth in the world.



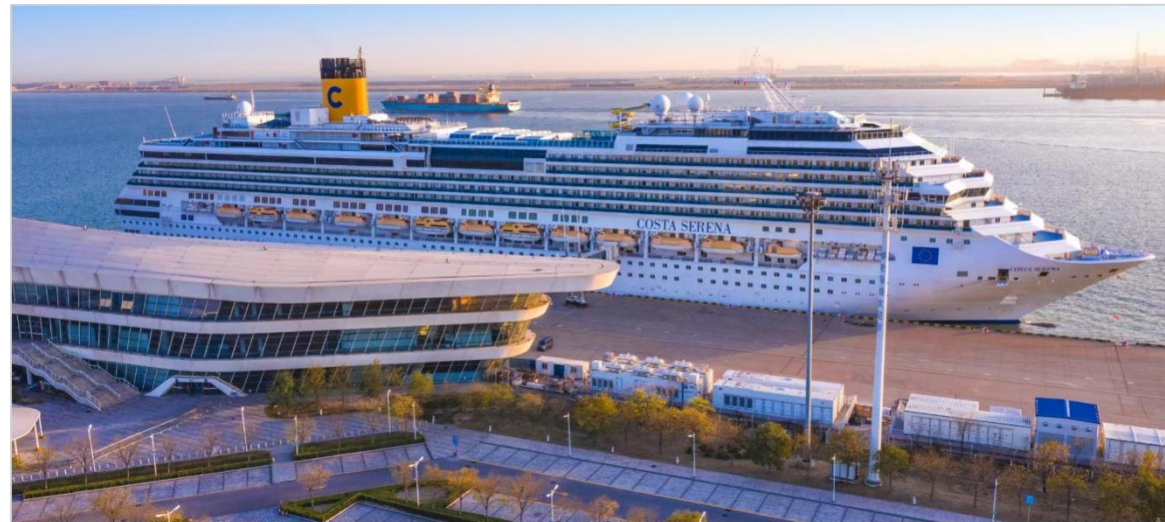
- 码头岸线1600米，4个15~22.5万GT邮轮泊位。
shoreline of 1,600 meters and 4 cruise berths of 150,000-225,000 GT
- 截至2024年底，已累计接待国际邮轮超2300艘次、出入境旅客1500万人次。

By end-2024, it has handled over 2,300 international cruises and 15 million inbound/outbound passengers cumulatively.

天津国际邮轮港 Tianjin International Cruise Terminal

- 2010年6月开港运营，中国北方地区的大型邮轮母港，邮轮航次和旅客规模位居中国第二。

Opened in June 2010, the large cruise home port in northern China, with the number of cruise calls and passenger scale ranking second in China



- 码头岸线 1112 米，4个22.5万GT邮轮泊位。
shoreline of 1,112 meters and 4 cruise berths of 225,000 GT
- 2025年前三季度，共接待国际邮轮73艘次、出入境旅客25万余人次。
In the first three quarters of 2025, it received 73 international cruise calls and more than 250,000 inbound and outbound passengers

深圳太子湾国际邮轮港 Shenzhen Taiziwan International Cruise Port

- 2016年11月开港运营，中国华南地区最大的邮轮母港，中国首个“海陆空铁”一体化口岸，交通便捷。

Opened in Nov 2016, the largest cruise home port in South China and China's first "sea-land-air-rail" integrated port with convenient transportation



- 码头岸线698米，2个10~22.5万GT邮轮泊位。
shoreline of 698 meters and 2 cruise berths of 100,000-225,000 GT
- 集邮轮、海上旅游、客运交通、游艇综合一体化发展。

Integrates cruise ships, marine tourism, passenger transportation and yacht development.

三亚凤凰岛国际邮轮港 Sanya Phoenix Island International Cruise Terminal

- 2007年开港运营，地理位置优越，拥有自贸港政策优势。

It opened for operation in 2007, boasting a favorable geographical location and the policy advantages of a free trade port.



- 码头岸线370米，1个 8 万GT邮轮泊位。
shoreline of 370 meters and 1 cruise berth of 80,000 GT.
- 以访问港航线为主，截至2024年底，已累计接待邮轮超1600艘次、游客203万人次。

It mainly operates call port routes. By the end of 2024, it has accumulated more than 1,600 cruise calls and 2.03 million tourists.



PART 4

中国邮轮发展展望

Outlook for China's Cruise Industry Development

政策环境 Policy Environment

□ 邮轮经济政策：明确行业发展重点，构建标准规范，创新口岸通关，推进邮轮经济持续健康发展。

Cruise Economy Policies: Clarify industry development priorities, establish standards and norms, innovate port customs clearance, and promote the sustainable and healthy development of the cruise economy.

2018

《关于促进我国邮轮经济发展的若干意见》
《Several Opinions on Promoting China's Cruise Economy Development》

2022

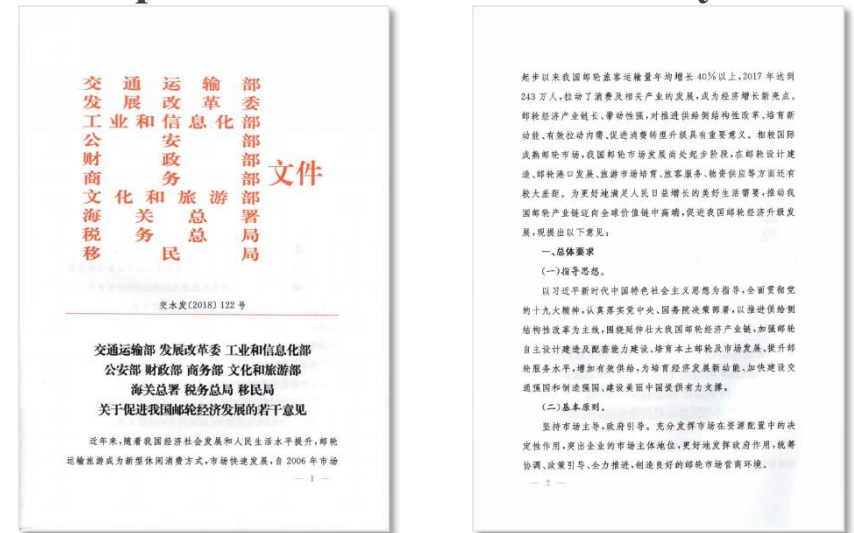
《关于加快邮轮游艇装备及产业发展的实施意见》
《Implementation Opinions on Accelerating Cruise & Yacht Equipment and Industry Development》

2024

《关于推进海南邮轮港口海上游航线试点落地实施的通知》
《Notice on Promoting the Pilot Implementation of Hainan Cruise Port Coastal Tourism Routes》

2024

《国际邮轮在中华人民共和国港口靠港补给的规定》
《Regulations on Port Call and Supply of International Cruises in the People's Republic of China》



发展优势 Development Advantages

👥 巨大的消费群体 Large consumer base

- 中国14亿人口，未来消费将成为带动中国经济增长的核心动力。
China has a population of 1.4 billion, and consumption will become the core driving force for China's economic growth in the future.
- 相较于美国3.5%市场渗透率，中国仅有 0.17%。
Compared with the 3.5% market penetration rate in the United States, China's is only 0.17%.

🏖️ 丰富的旅游资源 Abundant tourism resources

- 绵长的海岸线与多元文化底蕴，为开发多样化邮轮航线提供了得天独厚的优越条件。
China has a long coastline and diverse cultural heritage, providing unique favorable conditions for the development of diversified cruise routes.

🔗 产业链日趋成熟 Maturing industrial chain

- 邮轮设计制造、运营、物资供应到港口服务，完整产业链已初步形成。
China has initially formed a relatively complete industrial chain from cruise design and manufacturing, operation, material supply to port services, creating conditions for the future development of the cruise industry.

🏛️ 政府的高度支持 Strong government support

- 上海、天津、海南等地方政府出台促进邮轮经济高质量发展的扶持政策，试点推动邮轮产业规范化规模化发展。
Local governments such as Shanghai, Tianjin and Hainan have successively introduced supportive policies to promote the high-quality development of the cruise economy, and piloted the standardized and large-scale development of the cruise industry.

发展趋势 Development Trends

□ 在消费升级和政策支持的背景下，中国邮轮产业将迅速恢复，并迎来新的重要发展机遇。

Against the background of consumption upgrading and policy support, China's cruise industry will recover rapidly and usher in new important development opportunities.

自主设计建造与绿智技术双突破

国产邮轮核心竞争力跃升

dual breakthroughs in independent design and construction and green and intelligent technology will further enhance the core competitiveness of domestic cruise ships

爱达·魔都号：中国自主设计建造的首艘大型邮轮

爱达·花城号：系列化设计的第二批国产大型邮轮

Adora Magic City: China's first domestically designed & built large cruise ship

Adora Flower City: Second batch of domestic large cruise ships with serialized design

基础设施与运营服务双提升

产业保障体系持续完善

dual improvements in infrastructure and operation services will continuously improve the industrial support system

港口配套设施不断完善，接待能力持续增强
打造专业化、市场化、国际化运营服务团队。

Improved port supporting facilities & enhanced reception capacity
Build professional, market-oriented & international operation service teams

航线产品多元化创新布局

邮轮+文旅航线加速扩容

the diversified innovation and layout of route products will accelerate the expansion of "cruise + cultural tourism" routes

在日韩传统航线基础上，开发东南亚等新航线 邮轮+ 文旅” 模式创新。

Develop new routes like Southeast Asia based on traditional Japan-South Korea routes
Innovation of "Cruise + Cultural Tourism" model

携手共创邮轮产业的未来

Jointly Create the Future of the Cruise Industry



Thanks

November 2025