



CAIRNS REGIONAL COUNCIL

MARINE AND DEFENCE INDUSTRY

2024/25



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decisions

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Industry Snapshot - 2024/25



\$1,391M

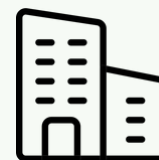
Output / Total Sales



2,531

Local Jobs

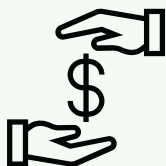
2.8% of total local jobs



340

Local Businesses

2.2% of total GST Registered Businesses



\$647M

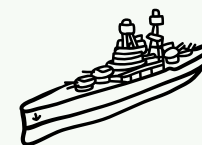
Gross Value Added

6.1% of total industry value added

**5YR
GROWTH**



KEY SUB-INDUSTRIES



Defence

\$287M Value Added

996 Jobs



Scenic & Sightseeing

\$105M Value Added

397 Jobs



88

**Cruise Liners docked
at the Port of Cairns in
2024/25**

Sources: NIEIR, 2026; ABS ABR 2026; Ports North, 2025

Industry Size and Composition

	 Output/Sales	 Value Added	 Employment
Direct	\$1,391M	\$647M	2,531

	Indirect/Flow-on Impacts		
Industrial	\$582M	\$232M	1,886
	+	+	+
Consumption	\$402M	\$236M	2,303

Total Impact	\$2,375M	\$1,115M	6,720

In 2024/25, the Marine and Defence Industry in Cairns was estimated to have generated \$647M in direct plus an additional \$468M in indirect impacts for a total contribution of \$1,115M in Value Added. The industry supported 2,531 jobs directly and an additional 4,189 in indirect employment.

The largest sub-industry for direct employment was Defence with 39% of the total employment.

Sub-Sector Employment, 2024/25 Top Sub-Industries



Private/Public Sector Split

It is estimated that in 2024/25, the Private Sector supported 1,489 jobs and \$351M in value added in the Marine and Defence industries.

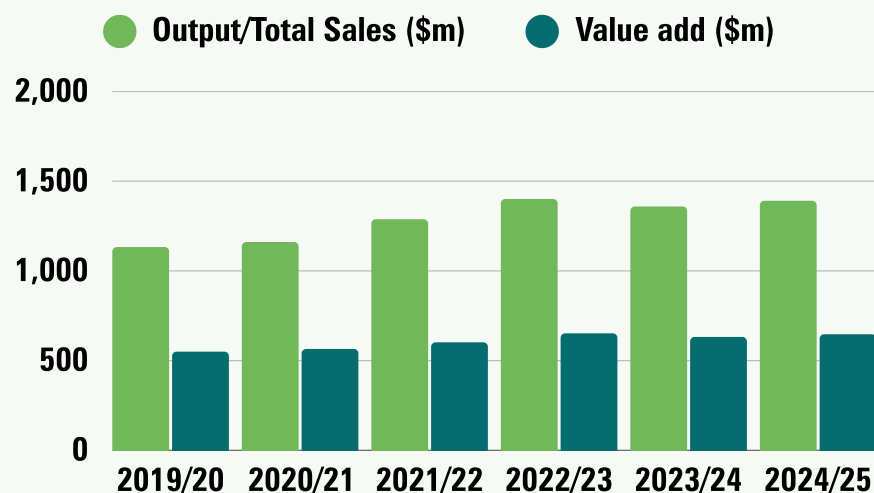
The Public Sector was estimated to support 1,042 jobs and \$296M in value added, the majority being in Defence and Port Terminal Operations.

Source: NIEIR, 2026

GROWTH TRENDS

In 2024/25, there were an estimated 2,531 employees working in the Marine and Defence Industries in Cairns and 2,429 full-time equivalents. The industries generated \$647M in Value Added, or \$255,453 per employee (\$266,238/FTE). Change in the industries has averaged 1.5% p.a. for employment over the last five years and 4.2% p.a. for value added. Economic growth has been above the state average, but employment lower suggesting increased productivity.

Economic Value, Cairns Region, Financial Year

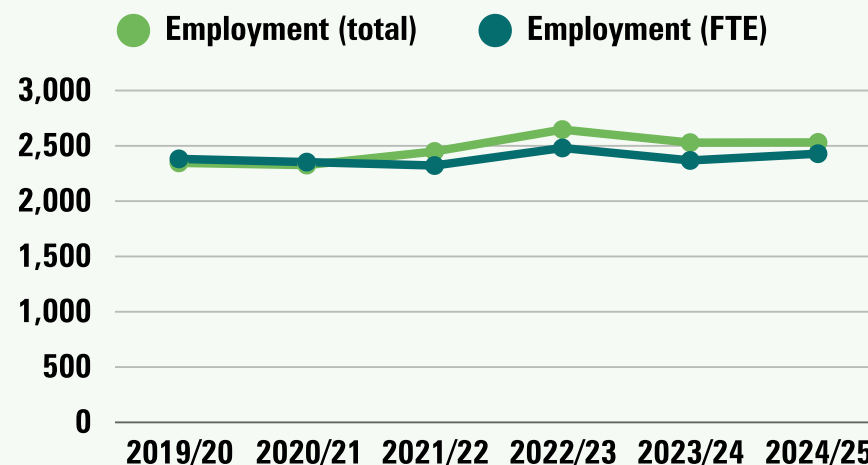


**5 YEAR
AVERAGE
ANNUAL
INDUSTRY
GROWTH**

4.2%
Output/Sales
3.8% p.a.

3.3%
Value Added
2.7% p.a.

Average Employment, Cairns Region, Financial Year



**5 YEAR
AVERAGE
ANNUAL
INDUSTRY
GROWTH**

1.5%
Employment
2.5% p.a.

0.4%
FTEs
0.4% p.a.

Sources: NIEIR, 2026

COMPETITIVE ADVANTAGE



The Port of Cairns, managed by Ports North, is one of Australia's most northern seaports and with the Marine Precinct it caters for bulk (petroleum products, sugar, fertiliser and LPG), projects and general cargo, cruise shipping, fishing fleet and reef vessel operations.



Cairns is home to the HMAS Cairns Navy Base and is the location of The Royal Australian Navy's Regional Maintenance Centre North-East (RMCNE). Established under Defence's Plan Galileo, this is one of four RMCs that are strategically located across Australia, comprising an integrated Commonwealth of Australia and industry workforce focused on developing capability to meet demand in the region. Initially optimised to maintain selected homeported capabilities, RMCs will mature over time to be able to conduct a level of maintenance on all naval fleet units.



Cairns has a strong specialisation in maritime maintenance, repair and overhaul services, supporting 45% of QLD's jobs in this industry.

Cairns' world class Marine Precinct services approx. 15% of all Australian registered vessels and 80% of all North Queensland registered vessels, longer than 15 metres.



Cairns' proximity to natural assets such as the Great Barrier Reef allows it to attract 80-90 cruise ship visits a year and support numerous water based sight-seeing activities. Cairns also provides world-class superyacht berths at Marlin Marina.



Cairns boasts world-class education facilities such as James Cook University, CQUniversity, and TAFE Queensland's Great Barrier Reef International Marine College.

These institutions not only provide exceptional education but also foster workforce development, enhance supply chain capability, and promote technology and knowledge transfer in the city and broader region.

Sources: NIEIR, 2026; ABS ABR 2026; Ports North, 2025; PWC, 2022

MARINE WORKFORCE PROFILE

The profile of workers in the Marine Industry in Cairns was similar to the state as a whole in terms of age with a median age of 45. Workers were less likely to be male (72% vs 77%) and more likely to be born overseas than their state counterparts.

Approximately 70% of the workforce had Certificate III or above qualifications and 36% were working in professional or managerial roles.

In 2021, the FTE median income of the local workforce was higher than the state median possibly due to a more qualified workforce.

KEY CHARACTERISTICS OF THE MARINE INDUSTRY, 2021 - CAIRNS REGION



45 years

Median Age

QLD - 45 years



\$78,175

Median Income FTE

QLD - \$76,302



72%

Male

QLD - 77%/23%



28%

Female



73%

Full Time

QLD - 76%



29%

Born Overseas

QLD - 25%



10%

Owner Manager

QLD - 16%



5.6%

Identified as First Peoples

QLD - 3.5%



36%

Professionals/Managers

QLD - 31%



20%

**Degree or
Above**

QLD - 16%

50%

**Certificate III to
Advanced Diploma**

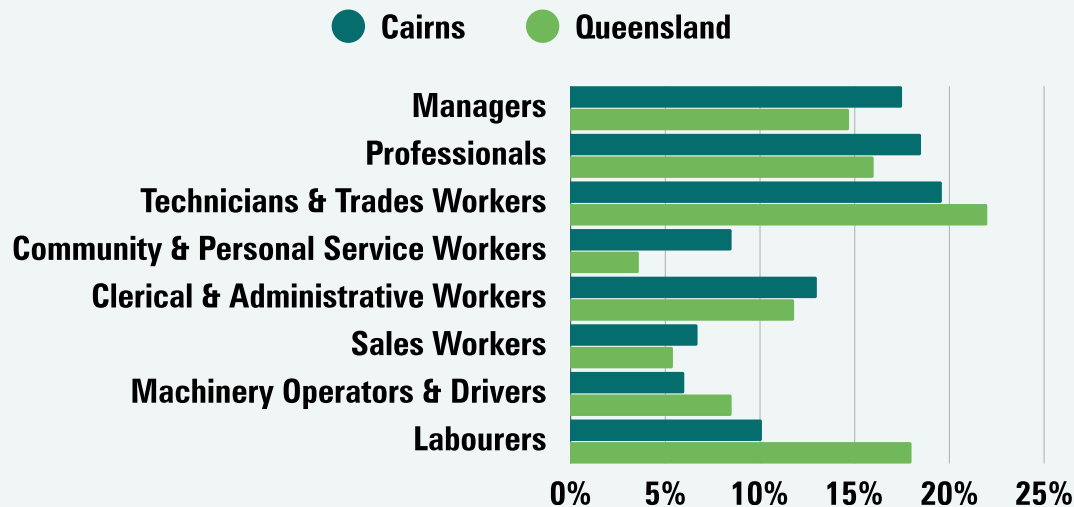
QLD - 48%

Sources: ABS Census of Population and Housing, 2021

MARINE EDUCATION & SKILLS

The **Marine Industry** in Cairns had a higher share of workers in professional occupations in 2021 (36%) compared to the QLD average (31%). The top occupations were Marine Transport Professionals and Deck and Fishing Hands. The industry had a much higher share of qualified workers (73%) than the QLD average (66%), and a higher share with degree level qualifications (20% vs 16% for QLD).

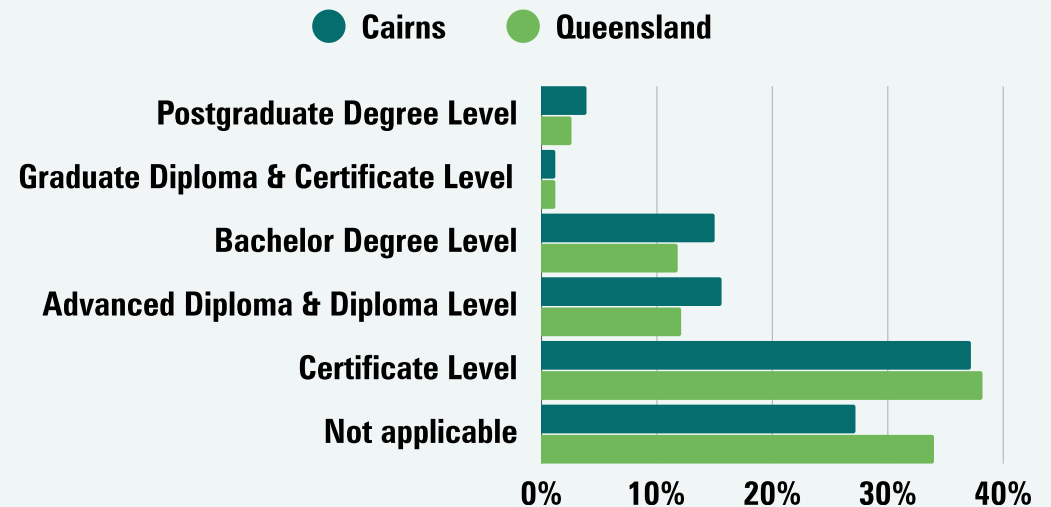
Local Workforce Occupations, 2021



Top Occupations

- Marine Transport Professionals
- Deck and Fishing Hands
- Structural Steel and Welding Trades Workers
- Metal Fitters and Machinists

Local Workforce Qualifications, 2021



Top Study Fields

- Marine Craft Operation
- Engineering and Related Technologies
- Business and Management
- Metal Fitting, Turning and Machining

Sources: ABS Census of Population and Housing, 2021

DEFENCE WORKFORCE PROFILE

The profile of workers in the Defence Industry in Cairns was less male orientated than the state as a whole in 2021 (72% compared to 78%).

Approximately 73% of the workforce had Certificate III or above qualifications and 40% were working in professional or managerial roles.

In 2021, the FTE median income of the local workforce was higher than the state median, likely due to a higher % of workers employed in senior positions.

KEY CHARACTERISTICS OF THE DEFENCE INDUSTRY, 2021 - CAIRNS REGION



33 years

Median Age

QLD - 32 years



\$92,901

Median Income FTE

QLD - \$85,177



72%

Male



28%

Female

QLD - 78%/22%



91%

Full Time

QLD - 91%



13%

Born Overseas

QLD - 15%



N/A

Owner Manager

QLD - 16%



8.8%

Identified as First Peoples

QLD - 4.0%



40%

Professionals/Managers

QLD - 36%



21%

**Degree or
Above**

QLD - 23%

52%

**Certificate III to
Advanced Diploma**

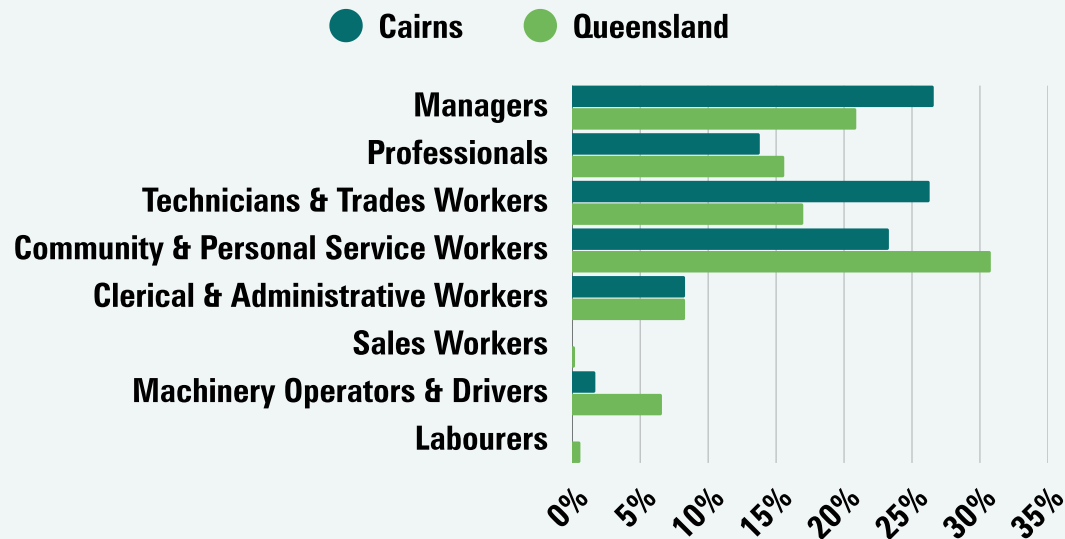
QLD - 45%

Sources: ABS Census of Population and Housing, 2021

DEFENCE EDUCATION & SKILLS

The **Defence Industry** in Cairns had a higher share of workers in professional occupations in 2021 (40%) compared to the QLD average (36%). The top occupations general Defence Force Members (majority) and Commissioned Officers. The industry had a higher share of qualified workers (75%) than the QLD average (70%), but a slightly lower share with degree level qualifications (21% vs 23% for QLD).

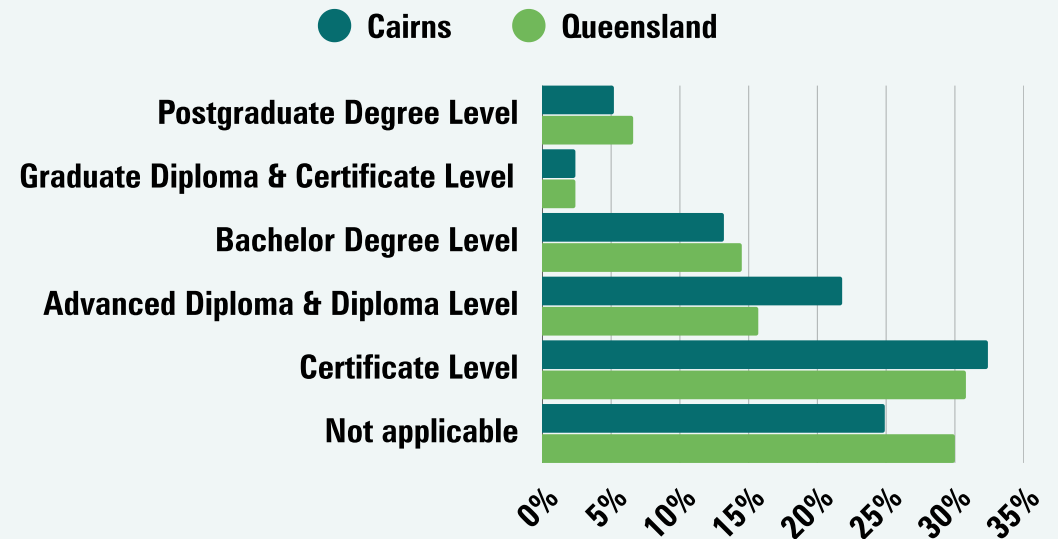
Local Workforce Occupations, 2021



Top Occupations

- Defence Force Members - Other Ranks
- Commissioned Officers (Management)
- Senior Non-commissioned Defence Force Members
- Electronics Trades Workers

Local Workforce Qualifications, 2021



Top Study Fields

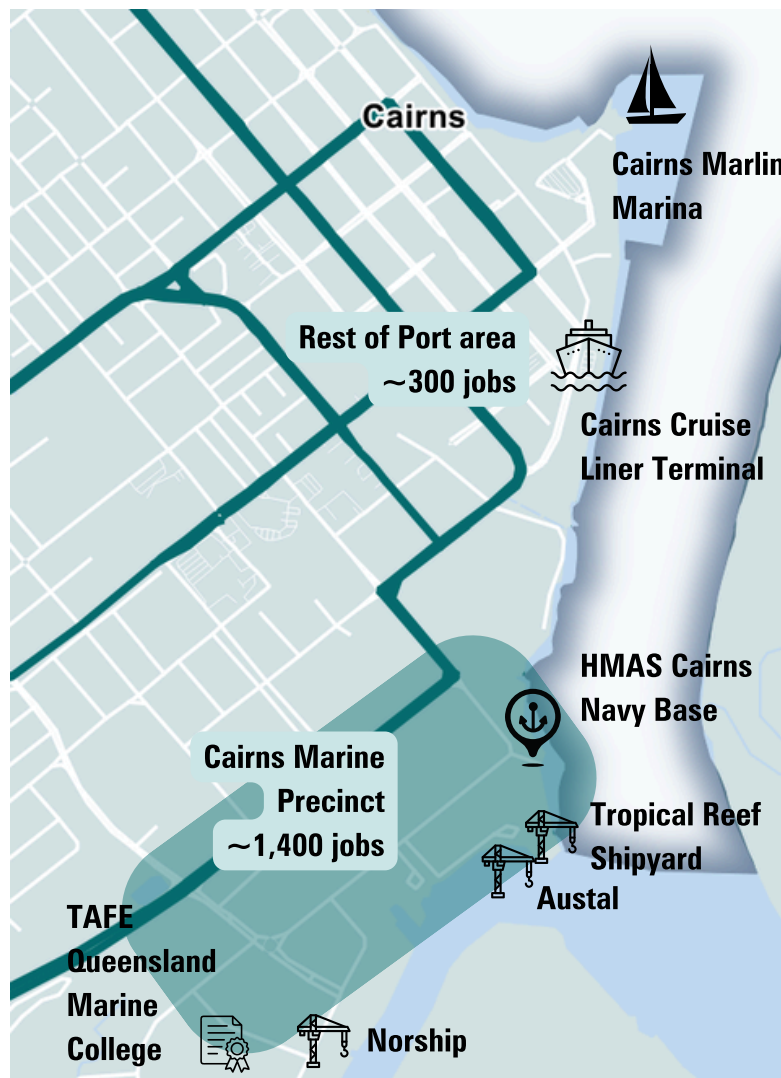
- Engineering and Related Technologies
- Business and Management
- Electrical and Electronic Engineering and Technology

Sources: ABS Census of Population and Housing, 2021

Main employment precincts



Estimated Industry Jobs, 2021

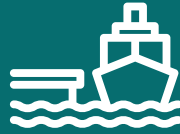


Sources: ABS Census of Population and Housing, 2021

Key employers

- Austal Australia
- BAE Systems Australia
- Cairns Cruising Yacht Squadron
- Great Barrier Reef International Marine College
- HMAS Cairns/ Australian Navy
- Maritime Safety Queensland / Queensland Water Police
- Norship
- NORSTA Maritime Pty Ltd
- Northern Fisheries
- Ports North
- Seaswift
- The Big Boatshed
- Tropical Reef Shipyard

PROJECTS & TRENDS SHAPING THE FUTURE



Cairns Shipping Development Project

The \$120M+ project completed in 2020 widened and deepened the Trinity Inlet shipping channel to make port access easier for large vessels like cruise ships and visiting overseas Navy vessels. This project will support growth in the sector over the coming decade.



Cairns Marine Precinct expansion

Supported by joint Federal and State Government investment and led by Ports North, the Cairns Marine Precinct expansion will deliver a new marine common-user maintenance, repair and overhaul facility (CUF) featuring a 5,000-tonne shiplift, hardstand areas, climate-controlled sheds for blasting and painting and a wet berth for in-water maintenance. An EOI will officially open on July 13 inviting private sector partners to co-invest, design, build and operate the CUF.



Major Navy Investment

HMAS Cairns has completed a substantial \$250M wharf upgrade. This is a part of the Navy Capability Infrastructure Subprogram (NCIS), supporting the next generation of Navy vessels, including the Hunter class frigates, Supply class auxiliary oiler replenishment ships, and Arafura class offshore patrol vessels. The new 212-metre wharf will enable Arafura class vessels to operate from HMAS Cairns, reinforcing the Royal Australian Navy's presence in North Queensland and enhancing Australia's maritime security.



Superyachts

State Government strategies are targeted at growing the Superyacht industry after the Federal Government removed tax barriers to foreign-owned superyachts. Cairns has the potential to leverage its existing expertise to support increased visitation and maintenance expenditure.

SWOT Analysis

STRENGTHS

- Large port which has recently had major improvements to access
- Home to the HMAS Cairns Navy Base
- Proximity to key water based tourism assets and fishing grounds that enables growth in recreational and commercial vessels
- Well-established, major shipyards providing vessel maintenance, repair and overhaul services, supported by strong local supply chains



WEAKNESSES

- Lack of sufficient local training providers in some key areas e.g. Marine Craft Construction Trade/Apprenticeship
- Skills shortage exacerbated by designated area migration agreement (DAMA) not covering some specific maritime skills areas
- Capacity of current infrastructure limits ability to cater to a wider variety of larger vessels



THREATS

- Growth in superyacht facilities and marine precincts in SE Qld can potentially draw business away from Cairns
- International competition from locations in Asia with lower labour and material costs
- Energy and fuel cost rises to impact profit margins for some time
- Skilled labour shortages will impact competitiveness unless addressed



OPPORTUNITIES

- Major Marine Precinct investments allow the precinct to meet the needs of heavier, longer and more complex modern vessels
- Cairns' designation as a Regional Maintenance Centre provides long-term sustainment opportunities
- Targeted infrastructure and investment in complementary facilities/services can enable superyacht market
- Cairns' expertise supports opportunities in the expanding market for marine modular components
- Construction is underway on a \$17.6M upgrade and expansion of the Great Barrier Reef International Marine College which will enable the capacity to train up to 1,500 students per year, up from 900 today





For more economic data on the
Cairns Region, visit economy.id

