

NZCA - 2026 conference
Cruise Supply Chain & Local Sourcing
August 13th 2026





Jeremy Goodman P&O Cruises

June 2023



- AKL Season Jun '23-Dec '23
- NZD5m in local spend in '23
- Learnings from '23 reduced NZ local sourcing in '24

The life of a ship

- ~3000 guests, ~1000 crew members
- Load ~400 pallets every 10 days at their homeport
- Over 20 culinary outlets per ship
- Culinary team of approx. 150
- Stores team of 8
- Produce 15,000-20,000 meals per day
- Menu cycle up to 14 days
- Ships stop **once** every 3-5 years for Dry Dock



The Supply Chain Cycle: Local Sourcing



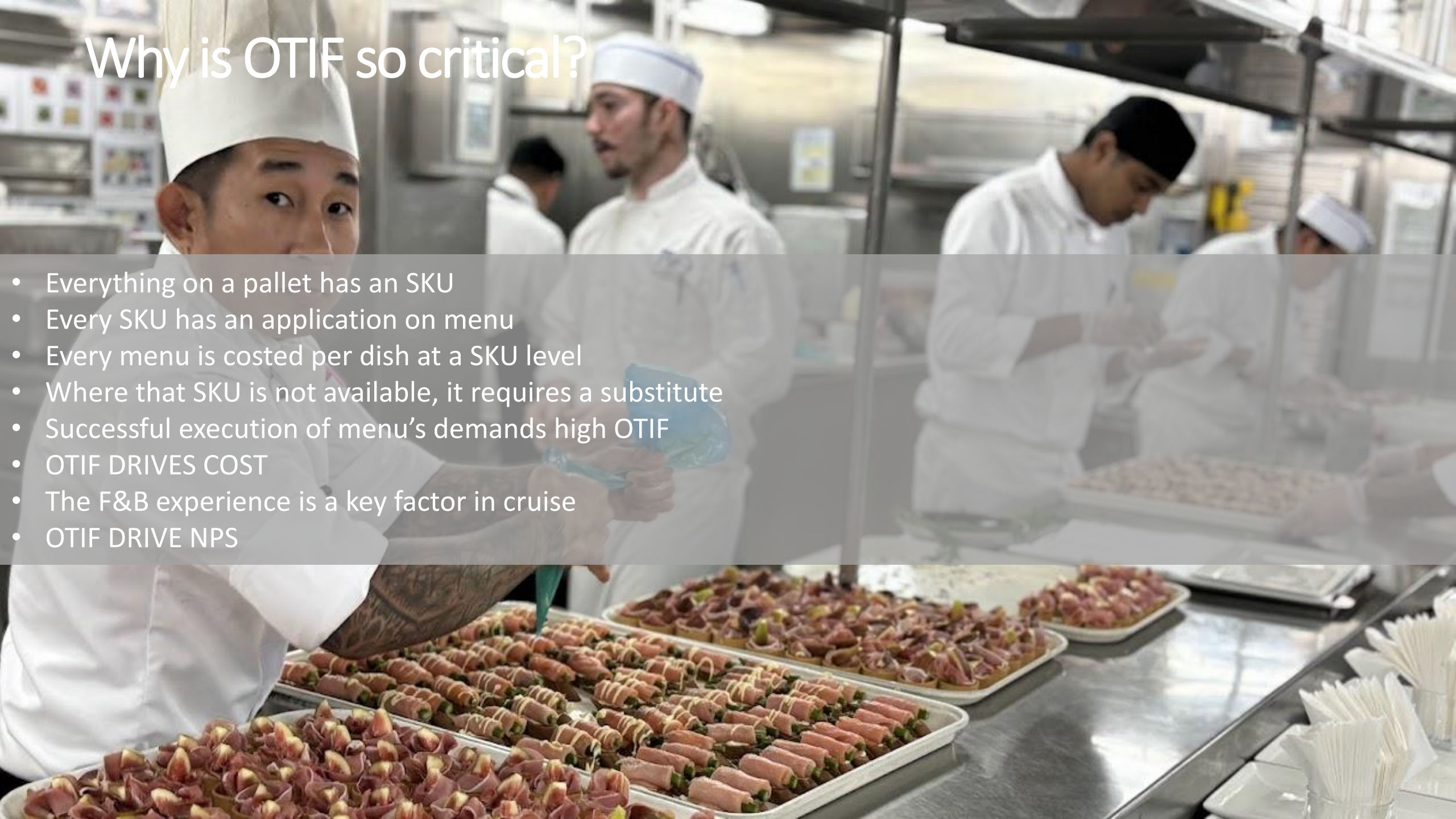
Measuring Operational Success: OTIF

- Ships load ~400 pallets every ~10 days
- Ships order locally supplied items 2-3 weeks in advance
- Items coming from overseas require an additional 1-3 months lead time
- Supply Chain operational success is measured by OTIF
- IF = every SKU has arrived in full
- OT = ready for the ship to reconcile



Why is OTIF so critical?

- Everything on a pallet has an SKU
- Every SKU has an application on menu
- Every menu is costed per dish at a SKU level
- Where that SKU is not available, it requires a substitute
- Successful execution of menu's demands high OTIF
- OTIF DRIVES COST
- The F&B experience is a key factor in cruise
- OTIF DRIVE NPS



'23 - '24: Why the Switch?

Internal

- **Product:** Variances to AU Spec
- **Menu:** Adapting to a different market
- **Appetite:** Supply risk vs logistics costs
- **Challenge:** Forecasting reliability

External

- **Macro:** War, trade routes, tariffs
- **Logistics:** Shipping, import restrictions
- **Environment:** Weather, quota's
- **Demographics:** Population/Market size

- Hybrid setup allowed for higher OTIF, driving better NPS
- Focus remained on product meaningful to NZ suppliers and NZ guests
- The nature of external factors will drive continuous change



The Supply Chain Cycle: Sending from AU



Suppliers: What do we look for?

- **The right product:** we know will work in our environment
- **Consistency:** Constant consistency of spec and reliability
- **Logistical prowess:** be as close to the ship as possible; the final mile can make or break everything
- **Ability to Hedge:** this is a long-term game & there needs to be a little 'give & take'
- **Continuous learners:** suppliers that take time to understand us
- **Open to conversation:** Difficult conversations; they are an important part of any relationship
- **Reliable:** If you're not part of the solution, you're a part of the problem

June 2024



- '24 focus on celebrating NZ's strengths
- Maintained local NZ product where most meaningful to guests & suppliers
- Every season changes, everywhere!

CARNIVAL LOCAL SOURCING SUPPORT REGIONS

all over NEW ZEALAND

New Zealand's fertile land and rich surrounding waters support a diverse range of high-quality agricultural products and a world-class seafood industry.

KEY AGRICULTURAL PRODUCTS



DAIRY

Milk, cheese, butter, yogurt, milk powder



MEAT & WOOL

Beef, lamb, venison, wool



HORTICULTURE

Fruits, vegetables, nuts, kiwifruit, wine



ARABLE CROPS

Wheat, barley, oats, maize, seeds



OTHER PRODUCTS

Honey, eggs, timber, flowers, essential oils



TASMAN SEA

SOUTH ISLAND

NELSON & MARLBOROUGH

Wine grapes, seafood, shellfish, apples, hops

WEST COAST

Timber, dairy, beef, wild foods (honey, mushrooms)

CANTERBURY

Arable crops (wheat, barley, oats), beef, sheep, dairy

SOUTHLAND

Sheep, beef, horticulture, forestry, wild seafood (crayfish)

NORTHLAND

Kiwifruit, avocados, citrus, vegetables, timber

WAIKATO

Dairy, beef, sheep, maize, vegetables

MANAWATŪ-WHANGANUI

Sheep, beef, dairy, arable crops, vegetables

COOK STRAIT

NORTH ISLAND

BAY OF PLENTY

Kiwifruit, avocados, citrus, vegetables

HAWKE'S BAY

Wine grapes, apples, pears, stone fruit, vegetables, lamb

TARANAKI

Dairy, beef, vegetables

WELLINGTON REGION

Sheep, beef, dairy, vegetables, wine

OTAGO

Stone fruit, cherries, berries, vegetables, wine, sheep

★ Capital City
● Major City



New Zealand has one of the world's largest Exclusive Economic Zones (EEZ) – over 4 million km² – supporting sustainable fishing for future generations.

LOCAL FISH & SEAFOOD

New Zealand's surrounding waters are rich and diverse, supporting a world-class seafood industry and sustainable fishing.

1 NORTHLAND & EAST COAST WATERS (Pacific Ocean)



Snapper

Caught in inshore and mid-depth coastal waters.

2 BAY OF PLENTY & HAWKE'S BAY WATERS (Pacific Ocean)



Orange Roughy

Found in deep water off the continental shelf.

3 COOK STRAIT & WELLINGTON WATERS



Blue Cod

Common in rocky reefs and deeper coastal waters.

4 TASMAN SEA (WEST COAST WATERS)



Green Lip Mussels

Sustainably farmed in the clean, nutrient-rich waters of the Marlborough Sounds and Golden Bay.

5 SOUTHERN OCEAN (SOUTH OF NZ)



Tarakihi

Found in deeper waters off the southern coast.

Ora King Salmon

Premium New Zealand king salmon, farmed in the cool, clean waters of the south.

Note: Map is illustrative and not to scale.

— — — Dashed line indicates general location of fishing area.

CARNIVAL LOCAL SOURCING SUPPORT REGIONS

New Zealand's fertile land and diverse waters

Celebrating the best of NZ

NORTH ISLAND

NORTHLAND

Kiwifruit, avocados,
citrus, vegetables,
timber

Whangārei

BAY OF PLENTY

Kiwifruit, avocados,
citrus, vegetables

Auckland

Tauranga

LOCAL FISH & SEAFOOD

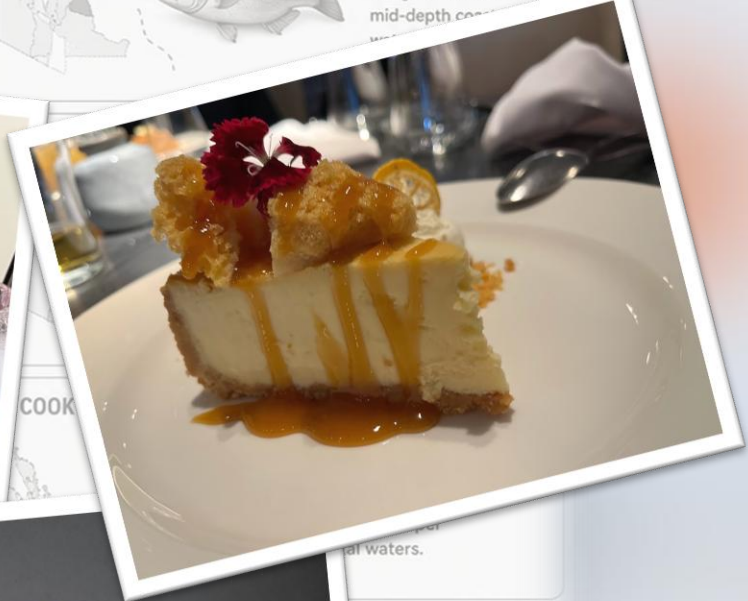
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NORTHLAND & EAST COAST WATERS (Pacific Ocean)



Snapper

Caught in inshore and mid-depth coastal waters.



ARABLE CROPS
Wheat, barley, oats,
maize, seeds



OTHER PRODUCTS
Honey, eggs, timber,
flowers, essential oils



Pastoral Farming
(Sheep, beef, deer)



Cropping & Arable
(Wheat, barley, maize, etc.)



Horticulture
(Fruit, vegetables, wine)



Forestry

Note: Map is illustrative and not to scale.



Christchurch

Stone fruit, cherries,
berries, vegetables,
wine, sheep

City
City

Wellington



(S)

Green Lip Mussels

Sustainably farmed in the clean, nutrient-rich waters of the Marlborough Sounds and Golden Bay.

deeper waters
southern coast.

Salmon

New Zealand king salmon, farmed in the cool, clean waters of the south.

Dashed line indicates general location of fishing area.

Looking Forward: 2026 & 2027



- Local NZ's loadings for every voyage
- Local BTG wine list
- Enhanced spirits program & partnership



- Full turns throughout the season
- Local NZ's loadings for every voyage



- Establish hybrid local sourcing program
- Potential for local F&B program

Thank You



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