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Cruise Food and Beverage Trends Report 2024

Written by Holly Payne in January 2024

www.seatradecruiseevents.com/fnbsea

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EXECUTIVE SUMMARY



The global food and beverage market is expected to be worth \$8.9tn by 2026 with six leading cruise lines accounting for over \$2bn in food and beverage annually, according to 2022 research by Seatrade Cruise. On food alone, Carnival Corporation and plc, Royal Caribbean Group and Norwegian Cruise Line Holdings spent \$863m, \$653m and \$263m, respectively, in 2022.

Based on findings from this 2024 Cruise F&B Trends Report, tendencies towards local culinary options are set to continue, surpassed only by demand for authentic cultural food experiences and immersive dining. Collectively, this indicates momentum through experiential dining and/or opportunities for passengers to connect with communities visited via their gastronomy.

Interestingly, while plant-based produce, sustainably sourced seafood and zero-waste cooking are central to the industry's development, for the second consecutive year, cruelty-free produce is one of the least likely areas where there will be progress.

The beverage segment meanwhile continues its thrust towards nurturing health and wellbeing, as passengers look to guilt-free alternatives. Craft-spirit blends and cocktails retain their popularity;

however, low to zero alcohol options come top of the pyramid for 2024/25, closely followed by health supplement drinks and low to zero calorie beverages. Crypto cocktails, bioengineered brews and high protein substitutes on the other hand are not forecast to gain traction in the near future.

Eco-friendly packaging, seafood and plant-based products are highest in demand and the most difficult to procure. Price increases, supply chain disruption and longer lead times for orders also present challenges.

While the variety of cuisine served on board will continue to be vast, inspired by delicacies around the world, orders will increasingly be made via technology. Ordering apps, self-service kiosks and virtual menus will become more prevalent, with artificial intelligence for supply chain and waste management likely to prevail.



ABOUT THE AUTHOR

Holly Payne is deputy editor of Seatrade Cruise News, Seatrade Cruise Review – the official magazine at Seatrade cruise events worldwide – and Seatrade Cruise's editor video production. She has experience managing a range of highly successful international business and consumer titles and has a history of overseas work documenting people and places of diverse cultures. Her work on the cultural heritage of Sudan, part of a collaborative ethnographic volume, can be found in The British Library, The British Museum, The Fitzwilliam Museum, Durham University, Bodleian Libraries, Paris' Institut du Monde Arabe among other academic institutions.

METHODOLOGY



As the basis for this second Cruise F&B Trends Report, Seatrade Cruise conducted an online survey between October and December 2023 involving 74 participants, representing cruise lines, manufacturers, distributors, suppliers of food or beverage, or both. The

views of associations, training providers and consultancies were also captured. Each person was invited to answer 15 standardised questions, and to give additional comments where considered necessary.



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STATE OF THE MARKET



On a day-to-day/week-to-week basis, the top three challenges predicted for 2024/25 include inflation/price increases (68.92%), supply chain disruption (48.65%) and longer lead times for restocking/orders (35.14%), corresponding with the results of 2023's Cruise F&B Trends Report.

Almost a third of respondents said they were currently unable to connect with cruise line buyers (32.43%), and slightly less said they were unsure of current food and beverage trends leading the way in cruise (29.73%).

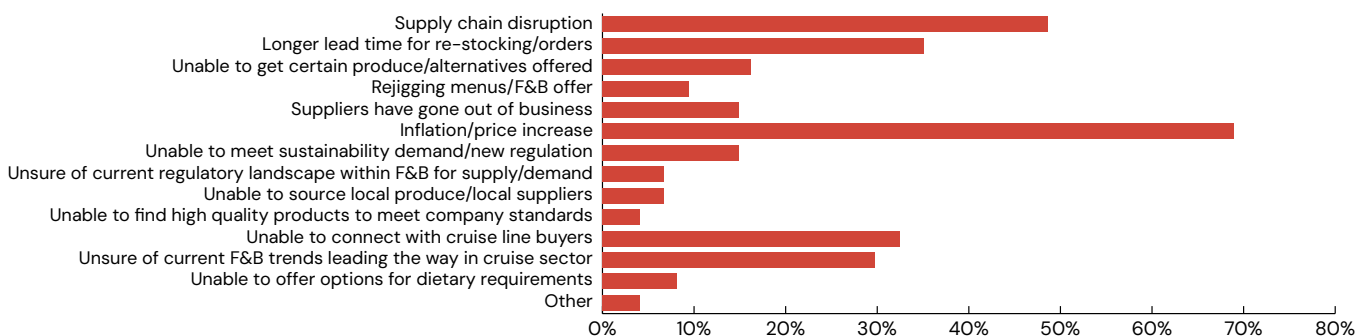
Obtaining certain produce/alternatives was considered less critical, accounting for 16.22% of votes – higher than the amount of people who either reported suppliers had gone out of business (14.86%) or were unable to meet sustainability demands/new regulations (14.86%).

To a lesser extent, complexities were associated with rejigging the food and beverage offer/menus (9.46%), and being unable to provide options for dietary needs (8.11%).

The least problematic areas envisaged are lack of knowledge around the current regulatory landscape for food and beverage supply/demand scoring 6.76%, the inability to source local produce/local suppliers, chalking up the same number of votes, and being unable to find high quality products to meet company standards at 4.05%.

A further 4.05% of survey participants who indicated 'other' specified they were unable to obtain information from culinary/purchasing teams on current brands stocked on board in order to determine if they could provide superior quality items at a lower price.

What are the top three challenges you encounter on a day-to-day/week-to-week basis?



FOOD TRENDS



Asked to identify the top three food trends most likely to take off during the period 2024/25, respondents opted for authentic cultural food experiences (45.21%), immersive dining (32.88%) and local culinary options (31.51%). The latter is down on last year's figure, when local culinary scored highest (61.11%), followed by sustainable seafood (35.19%) and meat substitutes (24.07%). This year's results imply progress towards experiential dining. Dining experiences considered 'Instagramable' also scored highly, amassing 19.18% of the vote in comparison with the 18.52% scored in the 2023 report.

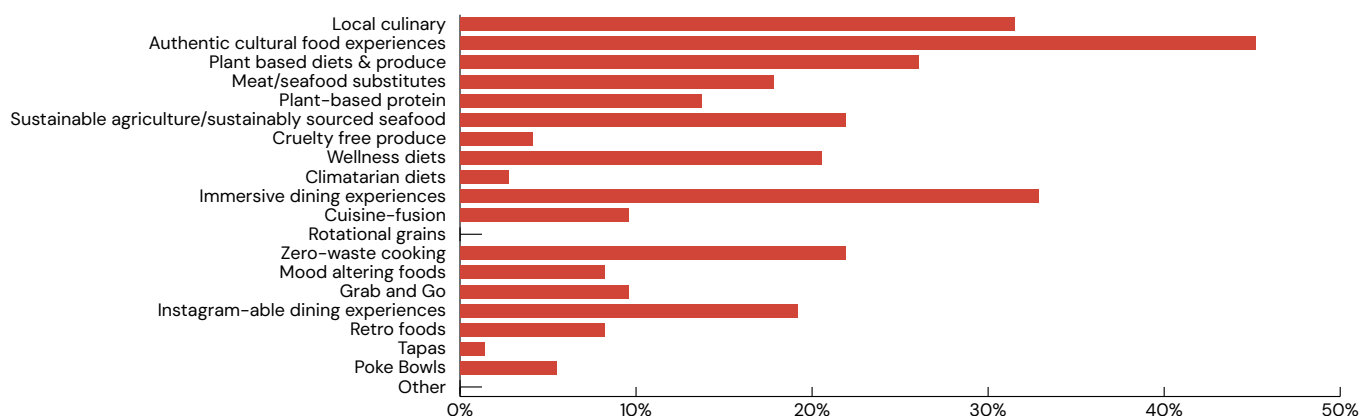
Significantly, sustainability, a prominent concept for the cruise industry as it moves towards a carbon-free future, is predicted to be a key focus in the culinary space. In the survey,

26.03% chose plant-based diets and produce, 21.92% selected sustainable agriculture/ sustainably sourced seafood, the same number specified zero-waste cooking, and 20.55% listed wellness diets. To a lesser extent meat/seafood substitutes and plant-based protein were seen as important, racking up 17.81% and 13.70% of votes. This is in contrast with cruelty-free produce, which garnered 4.11% of votes.

Less desirable will be fusion and grab & go options, each scoring 9.59%, along with retro foods and mood-altering cuisine, individually scoring 8.22%.

Poke bowls (5.48%), climatarian diets (2.74%), tapas (1.37%) and rotational grains (0%) share the lowest percentage of votes.

What are the top three food trends you predict to take off in 2024/25?



DRINK TRENDS



Survey results suggest a focus on health and wellbeing in regard to drinking. Quizzed on the top three drinks trends predicted to take off in 2024/25, low to no alcohol beverages amassed 46.58% of votes, health/wellness supplement drinks gathered 39.73% of votes and low to no calorie beverages, 30.14% votes.

Craft-spirit fusion and cocktails remain popular (39.73% and 27.40%), followed by the democratisation of wine (17.81%) and mood-altering drinks (16.44%).

Drinks to go, coffee alternatives and specialty teas each scored 13.70%, followed by cold brew coffee at 9.59%.

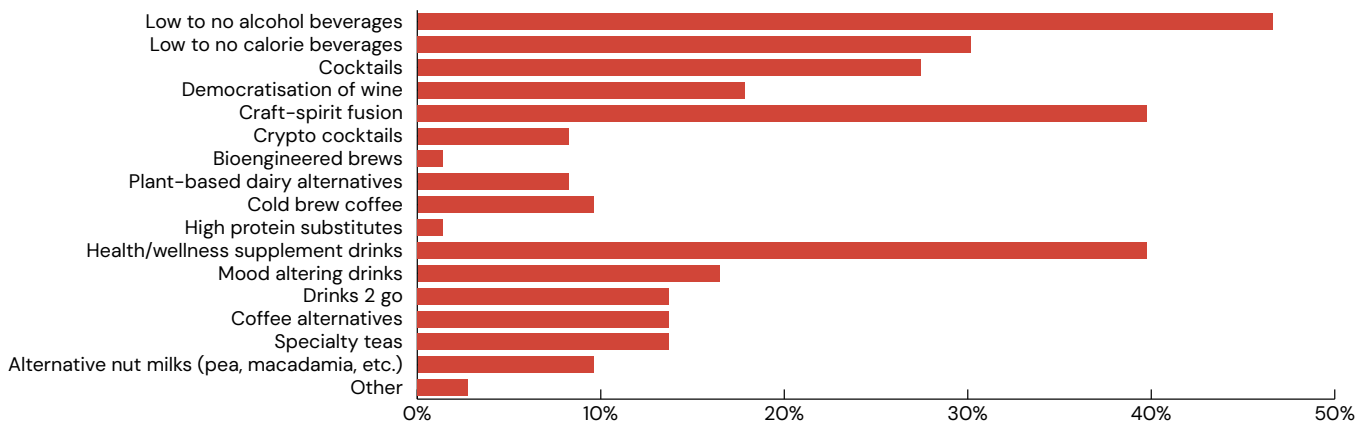
Alternative nut milks picked up 9.59% of the vote, while plant-based dairy alternatives racked up 8.22%.

According to the findings there will be less focus on crypto cocktails, bioengineered brews and high protein substitutes; the former scored 8.22% of the vote and the latter two scored 1.37% each.

The 2.74% who made up the remaining number of survey participants chose 'other,' stipulating sessionable premium lager and crafts, as well as boba drinks.



Cruise lines have made updates to their beverage packages. What are the top three beverage trends you predict to take off in 2024/25?



FOODS FROM AROUND THE WORLD



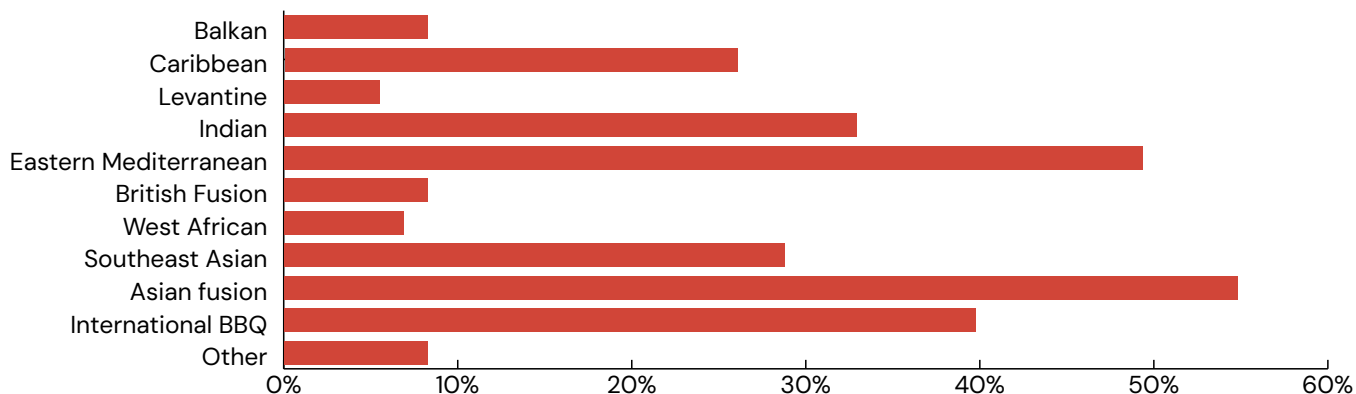
Cruise ship cuisine will continue to be expansive through 2024 and beyond. Survey participants foresee several varieties of international cuisine taking off in particular, ranging from Asian fusion with the highest number of votes (54.79%) to Levantine with the least amount of votes (5.48%).

A firm favourite continues to be Eastern Mediterranean cuisine (49.32%), which outstripped all other options in the previous

Cruise F&B Trends Report. In this survey, it surpassed international BBQ (39.73%), Indian (32.88%), Southeast Asian (28.77%) and Caribbean (26.03%). Balkan and British fusion each score 8.22%, followed by West African at 6.85%.

8.22% of survey participants indicated 'other,' listing a combination of brunch, Korean, Kosher, Peruvian and South American cuisine.

Which cuisine(s) do you see taking off at sea in 2024 and beyond?



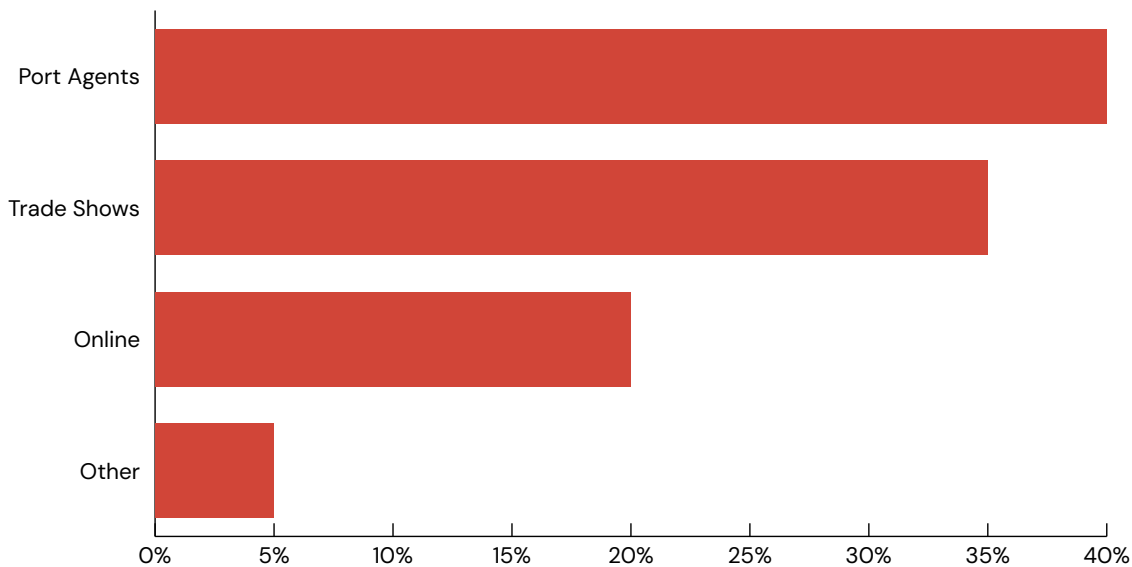
SOURCING IN REMOTE AREAS



Questioned on ways to meet local suppliers in remote port destinations, 40% said they use port agents, 35% rely on trade shows and 20% use

the internet. A total 5% use other means to meet local suppliers in areas off the beaten track.

How do you meet local suppliers at remote port destinations?



IN-DEMAND



Eco-friendly packaging is top of the list of products in demand and hardest to procure, accounting for 36.49% of votes. Just below a third of respondents identified seafood (32.43%), significantly more than opted for red meats (14.86%), poultry (5.41%) and meat substitutes (14.86%). In comparison, the 2023 Cruise F&B Trends Report showed seafood was the most difficult to acquire (44.44%), followed to a lesser extent by poultry (31.48%) and red meats (25.93%).

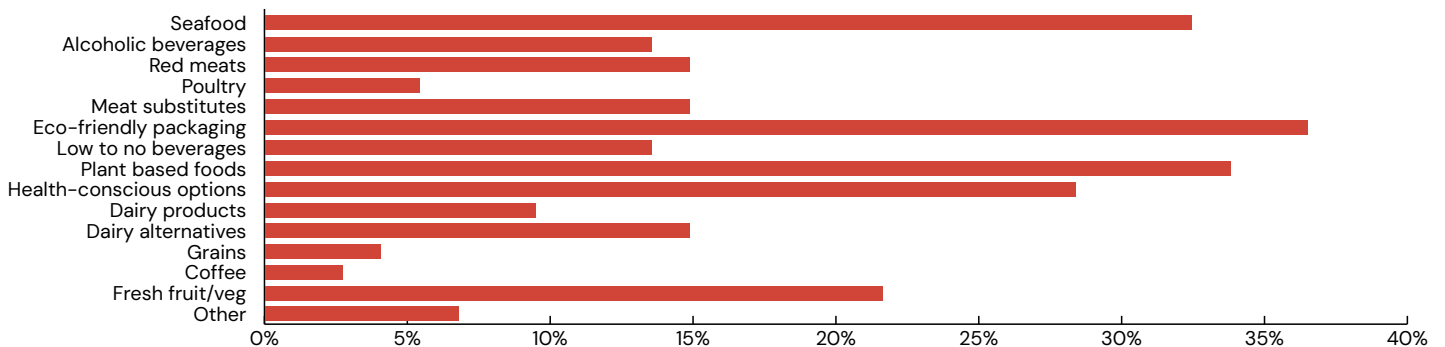
Plant-based foods were flagged as the most difficult to acquire for the period 2024/25 by

more than a third of respondents (33.78%), in addition to health-conscious options (28.38%), fresh fruit and vegetables (21.62%), dairy alternatives (14.86%) and dairy products (9.46%).

Alcoholic and low to no beverages each clocked up 13.51% of votes while grains and coffee scored 4.05% and 2.70%.

The number of people who considered items, beyond the scope of this survey, more in-demand/harder to acquire was 6.76% of those who participated in the survey chose ,other.'

Which products are currently "in demand" and hardest to procure?



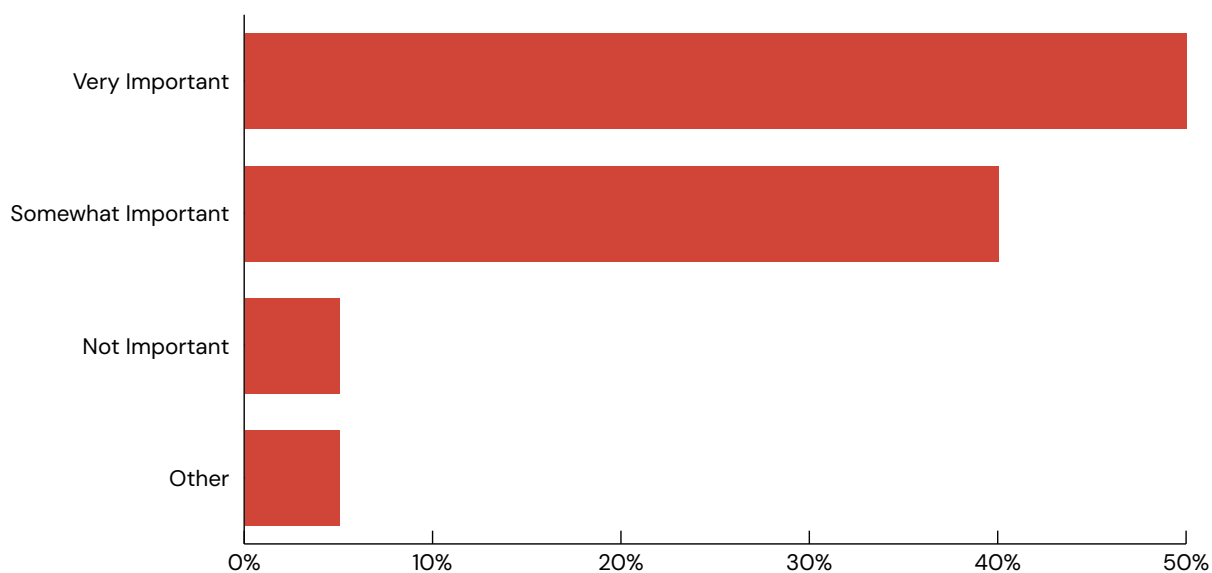
STORAGE



Half of respondents said a bonded warehouse was 'very important' for storing products, 40% described it as 'somewhat important' and 5%

said it was 'not important', the remaining 5% chose 'other.'

How important is a bond of warehouse for your products?



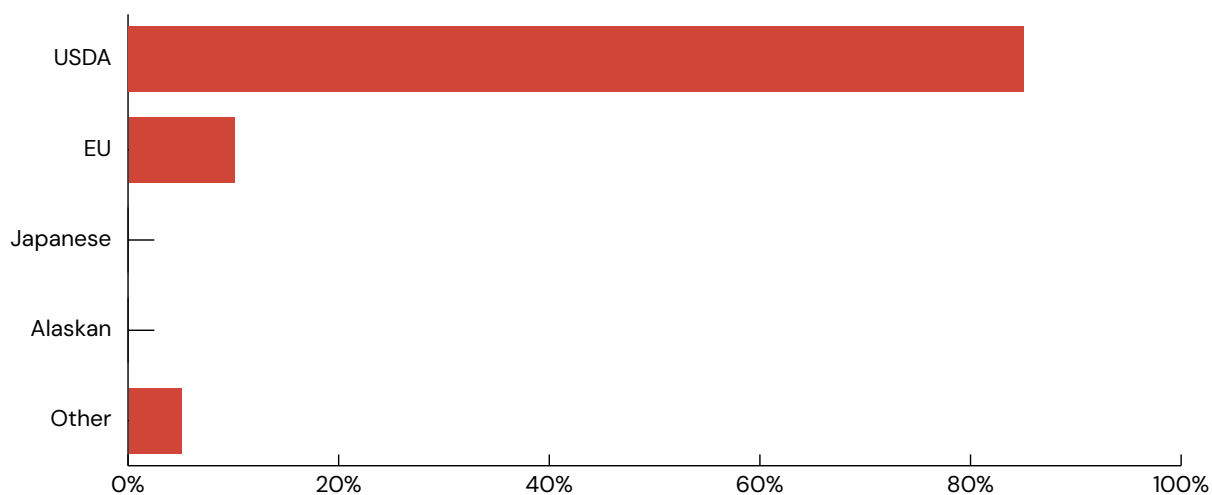
CERTIFICATION



The overwhelming majority (85%) of those surveyed said certification from the United States Department of Agriculture (USDA) is a prerequisite for suppliers to be able to service their cruise line,

followed by European Union certification (10%). The remaining 5% selected 'other,' commenting 'not sure' to knowing which certifications are required for suppliers to service their cruise line.

What certifications are required for suppliers to service your cruise line?



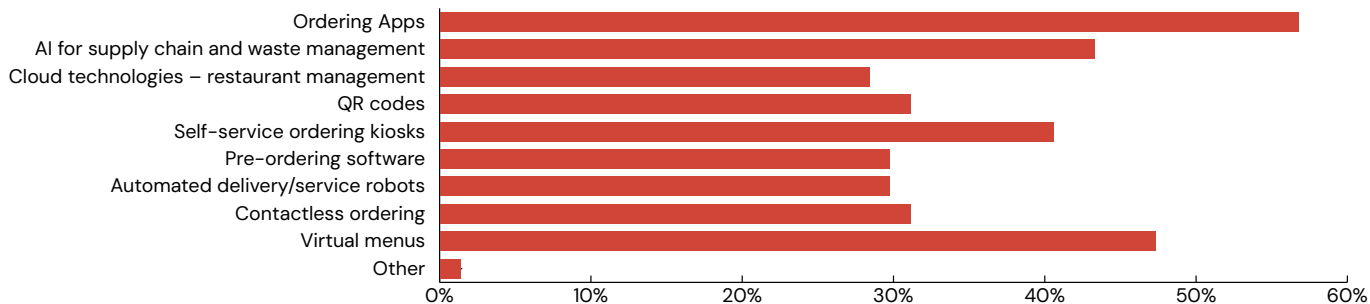
TECHNOLOGY



Ordering apps (56.76%), virtual menus (47.30%), artificial intelligence for supply chain and waste management (43.24%) and self-service ordering kiosks (40.54%) rank as the most likely technological innovations to be found within the cruise industry in the years to come.

Just under a third cast their vote for QR codes and contactless ordering – each accumulating 31.08% of votes – while pre-ordering software and automated delivery/service robots each received 29.73%, and cloud technologies for restaurant management scored 28.38%. The remaining 1.35% who selected 'other' said they predict a 'return to basics.'

Which of these technological innovations do you think will be big in cruise in the coming years?



F&B@SEA IS BACK FOR 2024!

After a hugely successful debut in 2023, F&B@Sea is back for 2024! The one-of-a-kind food and beverage experience will take place in its new home in **Mana Wynwood Miami, 10-11 April**. This two-day event connects cruise lines with suppliers across cruise drinking and dining in a vibrant, immersive marketplace. Plus, attendees will sample goods, witness thrilling live demos and become fluent in F&B trends.

F&B@Sea are also excited to announce the launch of the F&B@Sea Awards happening at the event on 11 April. The awards are aimed at recognising leadership and innovation within the global food and beverage cruise community and are open to both cruise lines and suppliers. Alongside a great panel of judges the awards are also proudly sponsored by Campari Group.

Find out more about F&B@Sea and the Awards here: www.seatradecruiseevents.com/fnbsea

