

F&B@Sea

Cruise Food and Beverage Trends Report 2025

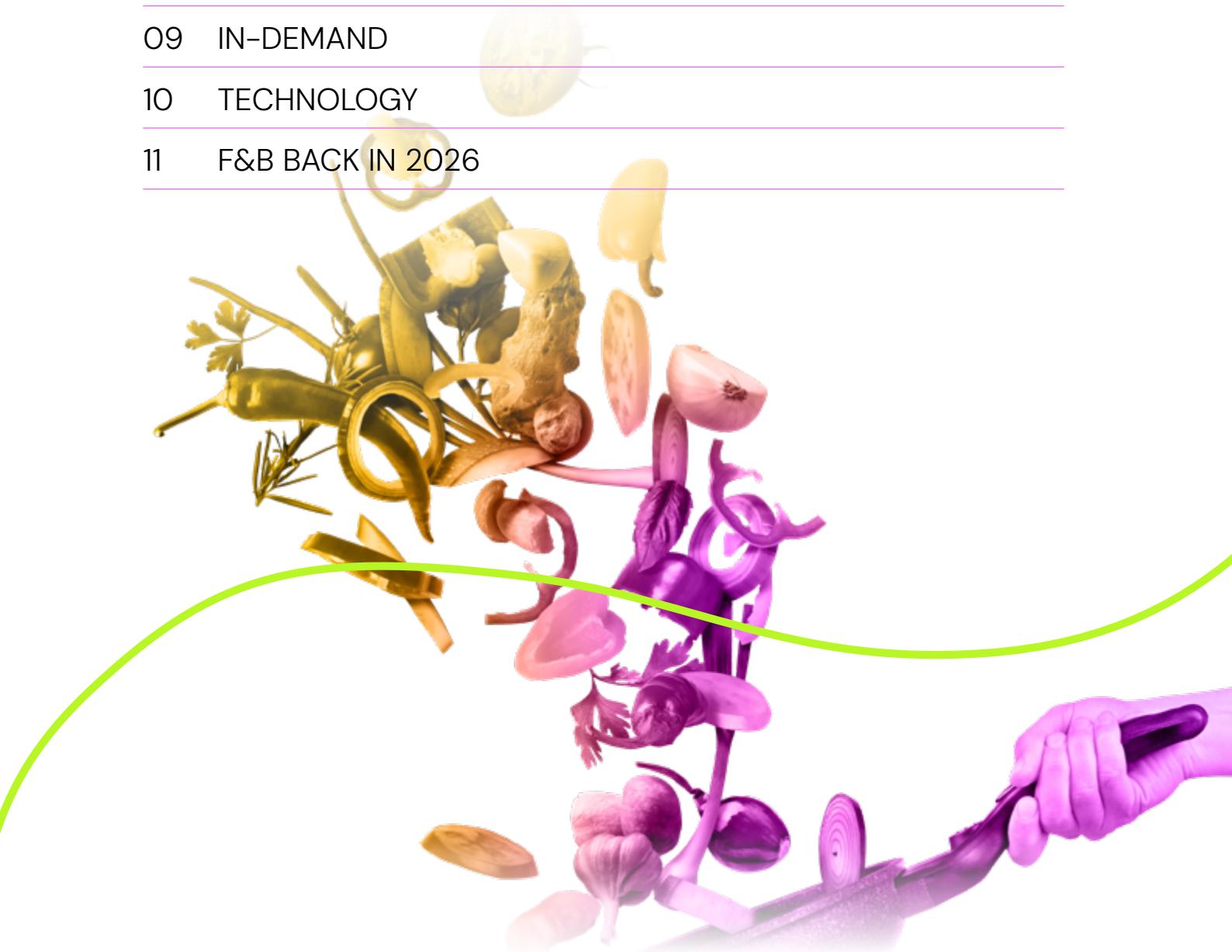


Written by Holly Payne in January 2025

Find out more: 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.

A desire for healthy and nutritious food options is set to steer the cruise industry culinary scene for the period 2025/26, with authentic food experiences and immersive dining projected to have a weaker influence than in 2024.

Asked to predict the top three food trends most likely to take off, survey participants first identified health and wellness/functional foods followed by emerging cuisines/flavours and authentic, hyper-local food experiences.

By comparison, authentic cultural food experiences, immersive dining and local culinary options were recognised as the leading three food trends in the 2024/25 survey.

Modern twists on classical dishes, upgraded grab-and-go or room service and 'over the top' sweets and desserts are the least likely food trends to accelerate in 2025/26.

The uplift in health-conscious options also extends to the beverage segment with drinks containing low to no-alcohol predicted to take off, in line with last year's survey results. Specialty teas and tisanes are among the least likely options to gain traction, along with premium bottled waters.

Overall, while cuisine at sea will continue to be diverse and encapsulate dishes and ingredients from around the world, fusion food is set to become a significantly more popular choice for cruise menus, while Asian flavours and Middle Eastern & Mediterranean cuisine will also be firm favourites. This builds on the results of the previous survey where the category of Asian fusion scored the highest number of votes.

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About The Author

Holly Payne is deputy editor of Seatrade Cruise News and Seatrade Cruise Review, the official magazine at Seatrade cruise events worldwide, and editor of video production. She has experience managing a range of highly successful international business and consumer titles and has a history of overseas work documenting diverse cultures. Her work on the cultural heritage of Sudan, part of a collaborative ethnographic volume, can be found in museums and academic institutions around the world.

EXECUTIVE SUMMARY

Inflation or price increases impacting budgets is the leading cause of concern in the field of cruise food and beverage for the period 2025/26 – the foremost challenge identified in the previous survey. On the other hand, supply chain disruption and longer lead times for restocking/orders are set to become less challenging, replaced by difficulties in connecting with suppliers or key decision-makers, as well as training and retaining kitchen/dining room staff.

Meanwhile, allergen-free options and eco-friendly packaging emerge as the most in-demand and difficult to procure products – the latter remaining at the top of the list for a second consecutive year.

Technology in the food and beverage space is projected to shift during the period 2025/26, moving from an emphasis on ordering apps and virtual menus to AI and innovation for personalised F&B experiences. Technology innovations determined to have the greatest impact on cruise dining include data analytics for personalised dining, AI for supply chain optimisation and waste reduction, cloud technology for restaurant management, and restaurant reservation systems.



METHODOLOGY

An online survey conducted by Seatrade Cruise between October and December 2024 is the foundation for the Cruise Food and Beverage Trends Report 2025, which reflects the current observations and future predictions of 48 professionals from the F&B space, including cruise lines, manufacturers, distributors, suppliers of food and/or beverage, associations, training providers and consultancies. Each individual was

invited, via Seatrade Cruise's communication channels (website, email, social media etc.) to answer 15 standardised questions and to provide additional comments where necessary.

This is the third annual Cruise F&B Trends Report published by Seatrade Cruise with previous issues available to download at:

www.seatradecruiseevents.com/fnbsea

STATE OF THE MARKET



Asked to identify the top three challenges encountered on a day-to-day/week-to-week basis, a substantial number of survey participants identified inflation or price increases impacting budgets as the leading cause of concern (39.58%). This represents a continuation of the previous survey where inflation or price increases was indicated as the foremost challenge for 2024/25 by an overwhelming number of respondents (68.92%).

While the Cruise Food and Beverage Trends Report 2024 and Cruise Food and Beverage Trends Report 2023 pointed to supply chain disruption and longer lead times for restocking/orders as being significant, new data suggests these factors are currently of lesser concern, replaced by difficulties in connecting with suppliers or key decision-makers (31.25%) in addition to kitchen/dining room staff training and retention (27.08% – however staff shortages affecting service garnered a lesser 16.67% of votes).

Supply chain disruption and delivery changes instead made up around a fifth of the vote in 2024/25 (22.92%), closely followed by the challenge of maintaining quality and consistency in deliveries (20.83%). Sourcing also continues to pose obstacles, including difficulty sourcing items in specific regions (18.75%, which is higher than last year's 16.22%) and difficulty finding high-quality, compliant products (16.67%).

In contrast, awareness of trends in the cruise food and beverage space is improving, with 14.58% of respondents indicating a lack of current F&B trend or new product information – almost half than in last year's survey (29.73%).

Intricacies around product availability equally show signs of abating based on the new data: Frequent menu changes due to product availability stands at 10.42% of votes and limited local product availability, 6.25%. In the 2024 report, the inability to source local produce/local suppliers amounted to 6.76% of votes.

The need for more options in relation to dietary preferences was considered to be of modest concern in 2025 accumulating 8.33% of votes, whereas being unable to provide options for dietary needs represented 8.11% of votes in 2024.

Meeting sustainability and food waste reduction goals received 6.25% of votes this year, while in the previous survey, 14.86% of respondents said they were unable to meet sustainability demands/new regulations.

Uncertainty about regulatory compliance represented 6.25% in this year's survey, while identifying new listing opportunities was selected by 2.08% of respondents in the previous survey.

FOOD TRENDS

A desire for healthy and nutritious food options is predicted to dominate the at sea culinary scene for the foreseeable future, whereas authentic food experiences and immersive dining take on less influence than in 2024.

Asked to predict the top three food trends most likely to take off in 2025/26, survey participants first identified health and wellness/functional foods (43.75%) followed by emerging cuisines/flavours (37.50%) and authentic, hyper-local food experiences (31.25%). In comparison, the major three food trends recognised

for 2024/25 were authentic cultural food experiences (45.21%), immersive dining (32.88%) and local culinary options (31.51%). Immersive dining in particular is expected to become less popular in 2025/26, representing just 22.92% in this year's survey.

Notably, tapas, small plates and shared dishes show signs of becoming more prevalent on board cruise ships in the future, gaining 14.58% of votes this year versus the 1.37% for tapas in 2024.

In addition, whereas in last year's report there was a move towards plant-based options, this year will see these options become less fashionable: 18.75% of respondents recognised plant-based, vegan, and vegetable-forward cuisines as a major trend, equitable to the number of participants as selected sustainable, zero-waste menus (18.75%), and 16.67% chose meat/seafood alternatives and plant-based proteins.

In last year's survey, 26.03% chose plant-based diets and produce, 21.92% selected sustainable agriculture/sustainably sourced seafood, the same number chose zero-waste cooking, and meat/seafood substitutes racked up 17.81%.

Familiar comfort and retro foods acquired 18.75% of the vote this year.

'Instagramable' dining experiences – which rose in popularity from 18.52% in 2023 to 19.18% last year – loses its impetus with 16.67% in the latest survey.

Modern twists on classical dishes, upgraded grab-and-go or room service and 'over the top' sweets and desserts are the least likely food trends to develop in 2025/26, scoring 14.58%, 12.50% and 10.42%, respectively.

DRINK TRENDS

Drinks containing low to no-alcohol lead the way for 2025/26 in the cruise beverage sector. Asked to predict the top three beverage trends likely to take off during this period, almost half of survey respondents (45.83%) observed the trend, in accordance with last year's results (46.58%).

Advanced mixology techniques (i.e. smoked drinks) follows with a 37.50% share of votes and health-conscious drinks (such as kombucha) with 27.08%.

Over a fifth of respondents (22.92%) considered beverage tastings and classes a leading trend.

In the last survey, the category of cocktails was picked by more than a quarter of survey participants (27.40%). Latest results point to classic cocktails with a modern twist leading the way in the cocktails category (16.67%), followed by canned cocktails (12.50%), savoury cocktails (i.e. with spices/umami) (10.42%) and innovative frozen cocktails (4.17%).

More broadly, tendencies towards alcohol consumption are on the decline: Global wines (beyond the USA, France, Italy and Spain) achieved 14.58% of votes, hyper-local craft spirits/beers gained 14.58% of votes, regional alcohol options (i.e. raicilla, soju) earned 8.33% and ultra-premium spirits, 2.08%.

The exotic juices, milkshakes and smoothies category is meanwhile expected to take off by 16.67% of those surveyed.

- Categories each scoring 10.42% were: cold brew or nitro coffee; energy drinks or caffeinated waters; mood-enhancing or adaptogenic drinks; plant-based or nut-based drinks.
- Specialty teas and tisanes picked up 6.25%.
- 2.08% selected 'other' while zero votes were attributed to premium bottled waters.

FOODS FROM AROUND THE WORLD



Asked which cuisines will become more popular on cruise menus in 2025/26, fusion (classic dishes with global ingredients) led the way with half the number of votes (50%) closely followed by Asian flavours (45.83%) and Middle Eastern & Mediterranean cuisine (33.33%).

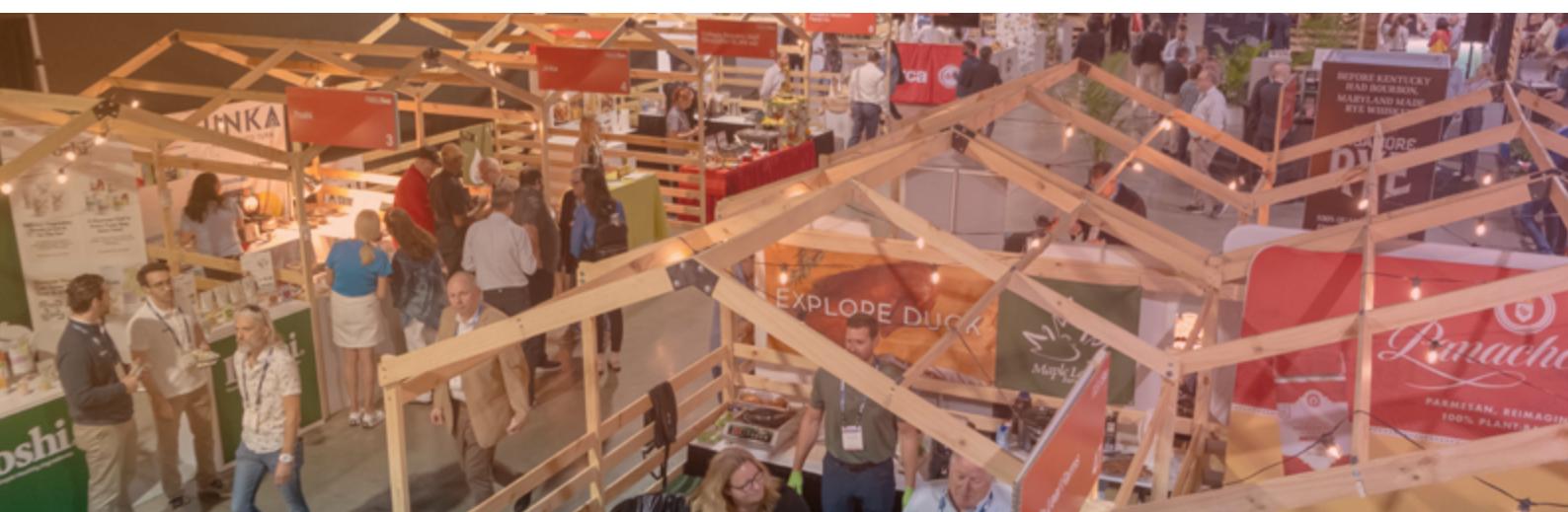
Southeast Asian cuisine also scored highly (i.e. Thailand, Indonesia) with 31.25%.

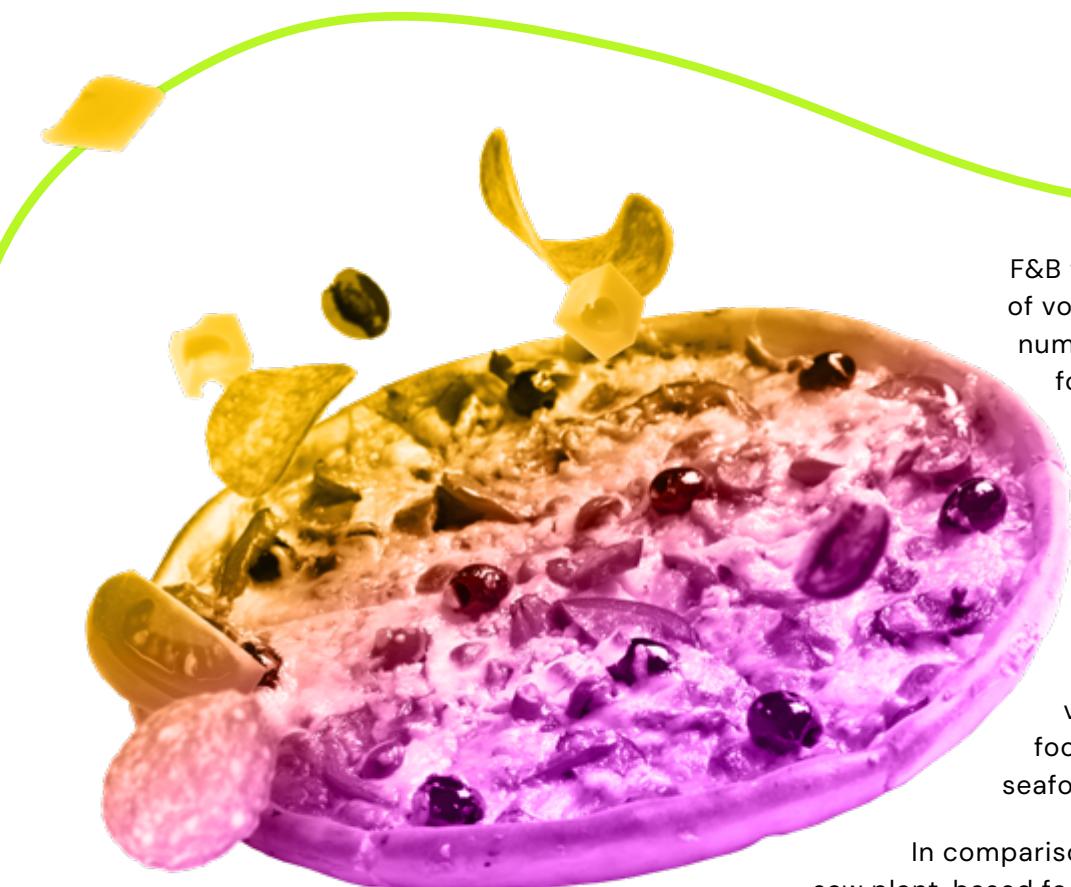
In 2024, Asian fusion achieved the highest number of votes.

Latin American flavours, regional North American cuisine (i.e. New Orleans, Alaska) and Indian cuisine each scored 25% of votes.

Caribbean cuisine gained 20.83%, while African flavours and Iberian flavours (i.e. Spain, Portugal) each received 18.75%.

The remaining 2.08% selected the category 'other' and specified: 'good, old fashioned quality food base products'.





Allergen-free options and eco-friendly packaging are foreseen as the most in-demand and difficult to procure products for 2025/26, each with 39.58% of votes. The latter remains at the top of the list for a second consecutive year, scoring 36.49% of votes in last year's survey.

The innovative packaging solutions category receives 25%.

Local/regional artisan products will also prove difficult to acquire, chosen by 37.50% of survey participants, while custom-made products received 31.25% of votes and premium ingredients racked up 25% of votes.

Sustainable seafood maintains its position as one of the most difficult, in-demand items to acquire, selected by 31.25% of survey participants – a small reduction on last year's data where it received 32.43% of votes. Predictions suggest proteins, including poultry and meats, will be easier than sustainable seafood to acquire, receiving 10.42% of votes.

F&B technology receives 29.17% of votes – more than double the number of participants who voted for kitchen equipment (12.50%) or dining room supplies (i.e. flatware and linens) (4.17%).

Sourcing meat free and non-dairy items is predicted to encounter challenges. Dairy and dairy alternatives received 25% of votes, followed by plant-based foods with 22.92% and meat/seafood substitutes with 8.33%.

In comparison, 33.78% of respondents saw plant-based foods as the most difficult product to acquire for the period 2024/25; meat substitutes scored 14.86%, and dairy alternatives and dairy products received 14.86% and 9.46%, respectively.

Bakery items and ethnic and speciality ingredients collected almost a fifth of the number of votes each, receiving 18.75% and 22.92%, whereas frozen goods and produce (fruit/vegetables) were considered easier to acquire, fostering 8.33% and 6.25% of votes.

In the drink segment, alcoholic beverages are projected to be the most in demand and difficult to obtain, receiving 18.75% of votes, versus 13.51% in the previous survey.

The same trend applies for coffee/tea, which received 16.67% of votes, in contrast to the 2.70% votes for coffee in the 2024/25 survey.

12.50% voted for bar mixes while 2.08% said the most in demand item was beyond the scope of this survey, describing all natural lemonades as the most challenging item to acquire.

Trends in technology in the food and beverage space are set to shift during the period 2025/26, moving away from an emphasis on ordering apps and virtual menus in favour of AI and innovation for personalised F&B experiences.

Technological innovations determined to have the greatest impact on cruise dining include data analytics for personalised dining (41.67%), AI for supply chain optimisation and waste reduction (39.58%), cloud technology for restaurant management (37.50%) and restaurant reservation systems (37.50%).

Data-driven sustainability initiatives was also seen as key by a number of respondents (31.25%), while the category of smart kitchen equipment and IoT integration attracted less votes (29.17%).

Self-service ordering kiosks are likely to be less prominent in the year ahead, voted for by just over a quarter of respondents (27.08%) versus more than a third in the previous survey (40.54%).

QR code menus and digital training for kitchen/dining staff register just over a fifth of votes, (22.92% and 20.83%, respectively). By comparison, just under a third cast their vote for QR codes in the 2024 survey (31.08%).

While automated delivery/service robots received 29.73% of votes in last year's survey, the category received less than a fifth of votes in this year's survey at 18.75%.



Augmented reality for enhanced menu interaction, and blockchain for supply chain transparency each score 16.67% of votes, becoming the least likely innovations to impact cruise dining moving forward.



F&B@Sea, the only dedicated cruise food and beverage event, is back in 2025! The one-of-a-kind food and beverage experience will take place at Mana Wynwood Miami, April 9-10. 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 second F&B@ Sea Awards happening at the event on April 10. 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.

Find out more about F&B@Sea and the F&B@Sea Awards here:

www.seatradecruiseevents.com/fnbsea