

INDUSTRY INSIGHT:

THE BOOMING CRUISE MARKET STILL FORCES BAD TECHNICAL DECISIONS



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A WATTS Brand

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About the perspective behind this insight

This paper draws on an in-depth interview with Stelio Bardi, a senior marine industry professional with more than three decades of experience in cruise ship newbuilding.

Stelio has worked closely with major European shipyards and international shipowners throughout his career. For over 30 years, he has collaborated with BLÜCHER® on marine drainage systems and has been directly involved in procurement discussions, technical evaluations and supplier selection on some of the world's largest cruise ship projects.

His perspective is shaped by daily interaction with shipyards, shipowners and technical teams in Italy and across Europe. The observations presented here reflect how decisions are actually made under commercial and operational constraints.

A market that looks perfect from the outside

From the outside, the cruise industry has rarely looked stronger.

Orderbooks are full well into the next decade. New vessels are planned and financed years in advance. Shipyards have secured work through 2032 and beyond. For many suppliers and owners, the recovery after the pandemic did not simply restore activity. It accelerated it.

In most industries, this kind of demand creates room for better decisions. It allows time, investment and long-term thinking. It gives owners leverage to demand quality and reliability rather than focusing on short-term savings.

But in cruise shipbuilding, the opposite is happening.

Despite strong demand and long visibility, technical decisions are becoming more constrained and more price-driven than before. The market is booming, yet the freedom to choose better solutions is shrinking.

To understand why, it is necessary to look past the headline numbers and into how ships are actually being ordered, designed and built today.



A booming market with no breathing room

Piping is a vital system on every cruise ship. Around 90% of the piping runs through public areas (also includes cabin area), which magnifies the operational and reputational impact of a failure. A single leak often requires opening walls, ceilings, and finished areas creating disruption that passengers immediately notice.

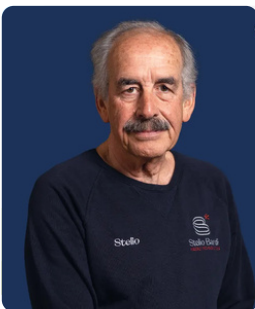
Cruise ship orders now stretch into the early 2030s. Projects are planned even further ahead. For shipyards, this creates security, and for shipowners, it creates urgency. The challenge is no longer whether ships will be built, but rather how fast they can be delivered.

This pressure defines everything that follows.

Shipyards are operating at full capacity, while skilled labour is limited and engineering resources are stretched. Any delay has a cascading effect across multiple projects and customers.



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The biggest concern is to have possibility to get ships in a short time, because the shipyards have no capacity to cover the market needs.

Stelio Bardi | Stelio Bardi Marine Technologies

A vessel that enters service sooner generates revenue sooner. In that context, refinement becomes a risk rather than a benefit.

On the outside the market looks healthy, but behaves defensively. Decisions aim to avoid friction, redesign, and what worked on the last ship is reused.

Capacity constraints shapes technical choices

Capacity limits are not abstract. They shape daily decisions.

Shipyards cannot scale output simply by hiring more people. Cruise shipbuilding requires specialised skills, long learning curves, and tightly coordinated engineering. Adding volume without adding complexity becomes the central objective.

This is where repetition enters the picture.

To increase output, shipyards rely on platform-based designs. Hulls are repeated. Machinery layouts are reused. Technical systems follow established templates. Only visible areas such as interiors, branding elements, and passenger spaces are adapted to each owner.

From a production perspective, this approach is logical. It reduces engineering hours. It simplifies procurement. It lowers the risk of errors during construction. It allows parallel work across projects.

From a technical perspective, it narrows choice.

Once a platform is defined, changing a core system becomes difficult. Even small modifications can ripple through drawings, approvals, classifications, and supplier coordination. What looks like a better solution on paper often loses against the cost of deviation.

In this environment, the safest decision is the familiar one.



Standardisation rewards the lowest common denominator

Standardisation does not automatically lead to lower quality. In theory, repeated designs can be refined over time, though in practice, refinement requires intention and space.

Today, repetition is driven by speed.

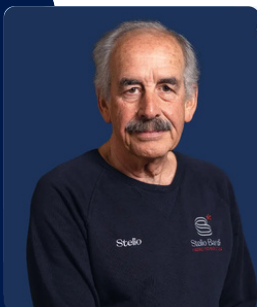
When shipyards repeat designs to cope with volume, the priority is consistency, and not necessarily improvement. Technical systems that are already accepted by owners, yards and regulators remain untouched.

This creates a self-reinforcing decision loop that shapes how technical choices are made across fleets.

- Once a solution is accepted, there is little incentive to revisit it
- Even superior alternatives must overcome the cost and disruption of change across multiple ships
- Familiar, proven, and easy-to-integrate options are consistently rewarded
- Durability, lifecycle performance, and long-term risk reduction are deprioritized unless schedules are at risk
- Repetition becomes safer than reassessment

The result is an industry optimized for copying decisions at scale. As Bardi puts it:

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In the past years there was more margin of action. Nowadays, the freedom to choose or to convince to choose one product over the other is limited.

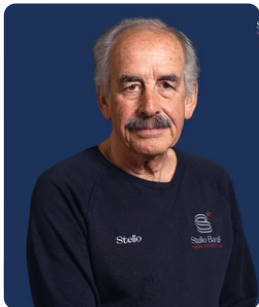
Stelio Bardi | Stelio Bardi Marine Technologies

Scale changes the stakes of material choice

As ships grow larger, material decisions carry greater consequences.

A modern cruise ship contains kilometres of piping hidden behind walls and decks. These systems are installed once and remain in place throughout the ship's service life. They are rarely visible, but they are fundamental to safety and reliability.

At scale, cost pressure is always present. Yet as Stelio Bardi points out, price is not the defining difference between materials:



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The most important difference besides the price is the fact that stainless steel does not burn.

Stelio Bardi | Stelio Bardi Marine Technologies

From a technical perspective, this distinction is decisive. As Bardi adds:

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Being a technician and being in this business since for ever – to have a plastic that burns is difficult to understand.

Stelio Bardi | Stelio Bardi Marine Technologies

BLÜCHER® long experience in the cruise industry reflects this view. When systems extend across an entire vessel and cannot be replaced without major disruption, fire behaviour and material integrity become long-term responsibilities.

Why stainless steel becomes the obvious choice

Hidden systems must perform reliably for decades. They must also behave predictably under extreme conditions.

When material choice is evaluated over the full lifetime of the vessel, stainless steel addresses fundamental requirements:

- **Fire safety:** Stainless steel does not burn and maintains integrity under high temperatures.
- **Long-term durability:** It resists ageing, deformation, and degradation over decades of operation.
- **Predictable performance:** Material properties remain stable, reducing uncertainty over time.
- **Lifecycle responsibility:** Systems that cannot be replaced without major disruption should be built for permanence.

Short-term savings are visible at delivery, though long-term safety and reliability define the ship's true performance. When these factors are considered together, stainless steel becomes the obvious and responsible choice for critical onboard systems.

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Contact Us



www.BLUCHER.com



+45 99 92 08 00



Pugdølvej 1 7480 Vildbjerg DK - Denmark