

Mediterranean & Southern Europe

Europe's largest leisure fleet, an ageing engine park and charter fleets that renew on a calendar.

Potential signal 5/5 · Indicative, September 2026

approx. 2.5 M

leisure boats in ES, IT, FR, GR, HR, PT, MT

12 to 18 yrs

typical outboard life before repower

EU Stage V

emissions rule accelerating two-stroke replacement

Weekly

Malta to Gavà consolidated lane

BOATS

Centre consoles, RIBs 5 to 9 m, sailing tenders, charter monohulls and catamarans

ENGINES

Honda, Yamaha, Suzuki, Mercury, Tohatsu; 115 to 350 hp dominate repowers

PARTS

Service kits, impellers, anodes, propellers, controls; Mediterranean online supply fragmented

VENDORS

Gasán/GasánZammit (Malta), regional wholesalers in Iberia and Italy, Robledo Logística (Gavà hub)

ECONOMICS

Tourism-led demand, euro pricing, VAT intra-EU supply rules, strong seasonality (March to July)

VESSEL VIEW

Home market. Vessel Trade lane operating; parts via BOND7 from Gavà.

REGIONAL SIGNALS

- Charter fleets in Greece, Croatia and the Balearics renewing 8 to 12% of engines a year
- Independent workshops under-served by brand networks in secondary regions
- Second-hand boat market pulling demand for mid-power repowers (115 to 250 hp)
- Marina saturation shifting spend from new boats to engines and refits

METHODOLOGY AND SOURCES

Potential scores are comparative planning signals, not forecasts. Indicative, September 2026. Sources include EBI, NMMA, Acobar, São Paulo Boat Show and Vessel's operating dataset.

Independent trader and reseller. Brand names and model references identify products only.