VESSEL MARKET BRIEF

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 and PT (EBI, indicative)

12 to 18 yrs

typical outboard life before repower

EU Stage V

emissions rule accelerating two-stroke replacement

Weekly

EU hub to Iberia 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
European operating partners, regional wholesalers in Iberia and Italy, Robledo Logística (Spain 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 our Spain hub.

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.