

EBI Economic Index 2026

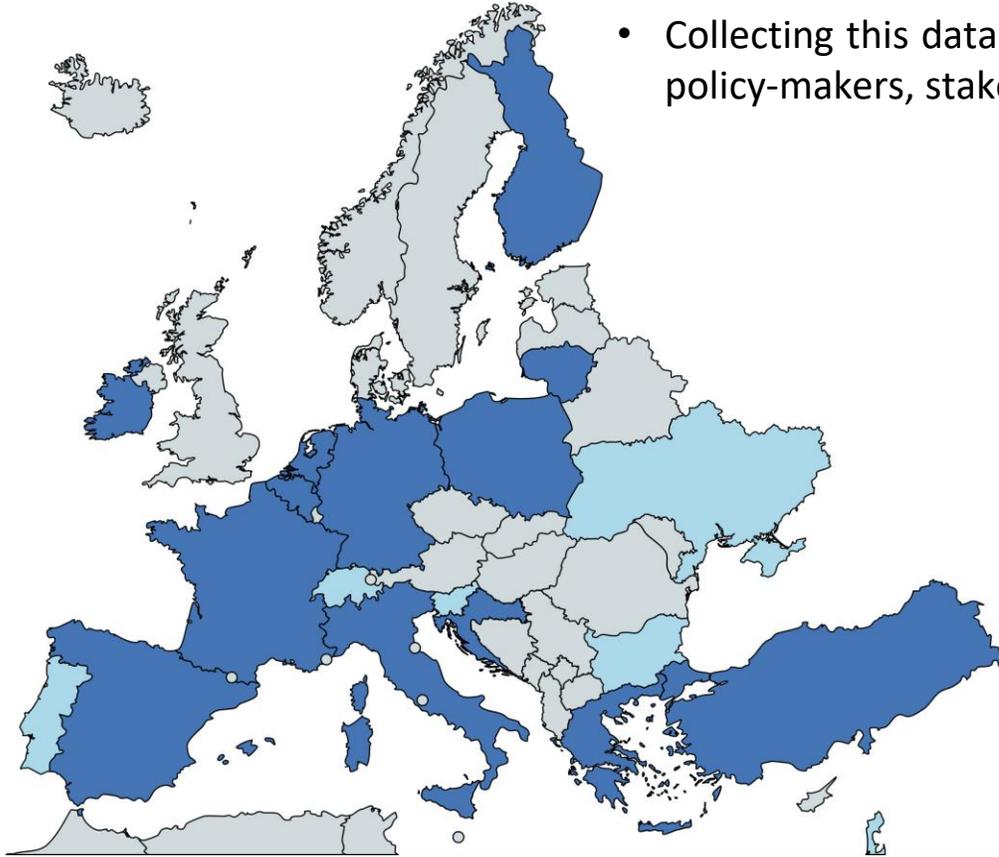


Advancing a sustainable boating and nautical tourism industry
Made In Europe

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- It may be used internally and members may share individual data points or selected insights externally where necessary.
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Participation, rationale & methodology

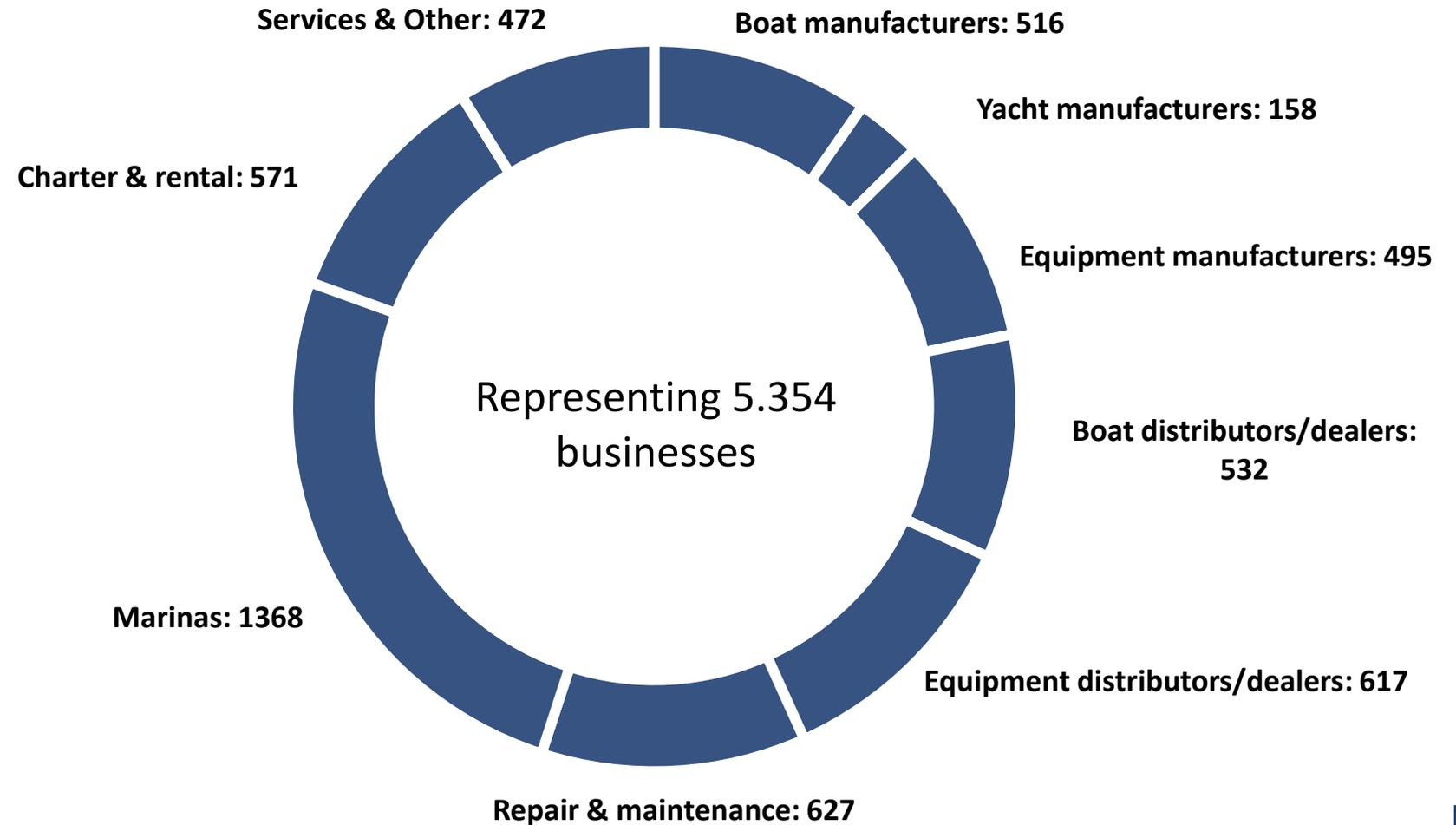


- The EBI Economic Index presents the most recent economic trends about the boating industry in Europe
- Collecting this data supports EBI's strategy and provides important information for policy-makers, stakeholders and media, facilitating the Secretariat job in Brussels

- Data was collected through online survey run in December 2025 – January 2026
- Includes qualitative data concerning revenue and employment trends and outlook for next year, as well as from external sources, estimations, and previous available years

Our membership

**32 members
across 21
countries &
growing**

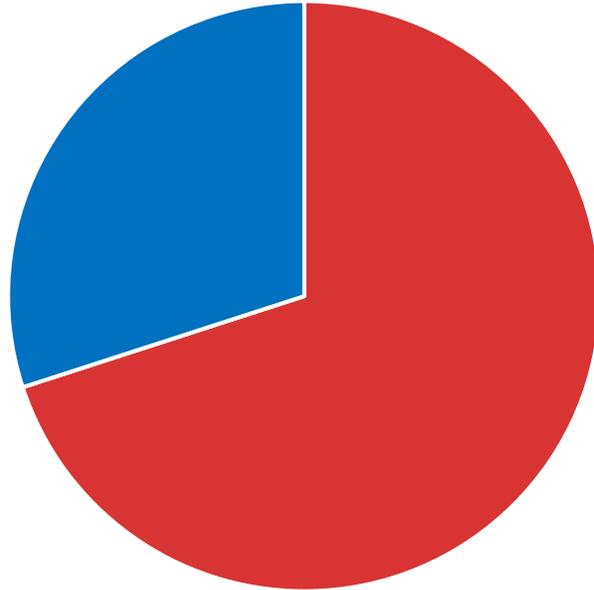


Economic and asset indicators (Europe)

- Total yearly revenue: €45.56 billion
- Total direct employment: ~241.000 people
- Total number of boats: 4.2 million *(12/18 responses)*
- Boat split:
 - Sail: 28.6%
 - Motorboats: 71.4%
- Charter/rental boats total: 10,538 *(6/18)*
- New boats sold total: 43,034 *(6/18)*
- Used boats sold total: 117,080 *(4/18)*
- Total number of marinas: <18,380 *(11/18)*
- Total number of berths: <1.2 million *(11/18)*

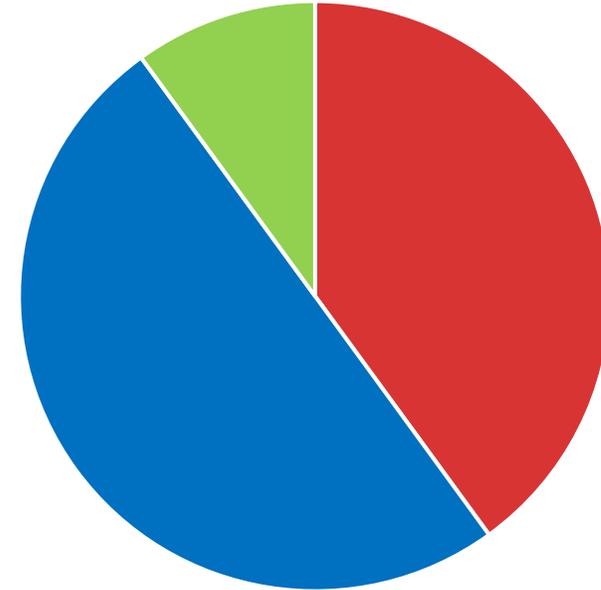
Trend 2025: Entire industry

Revenue



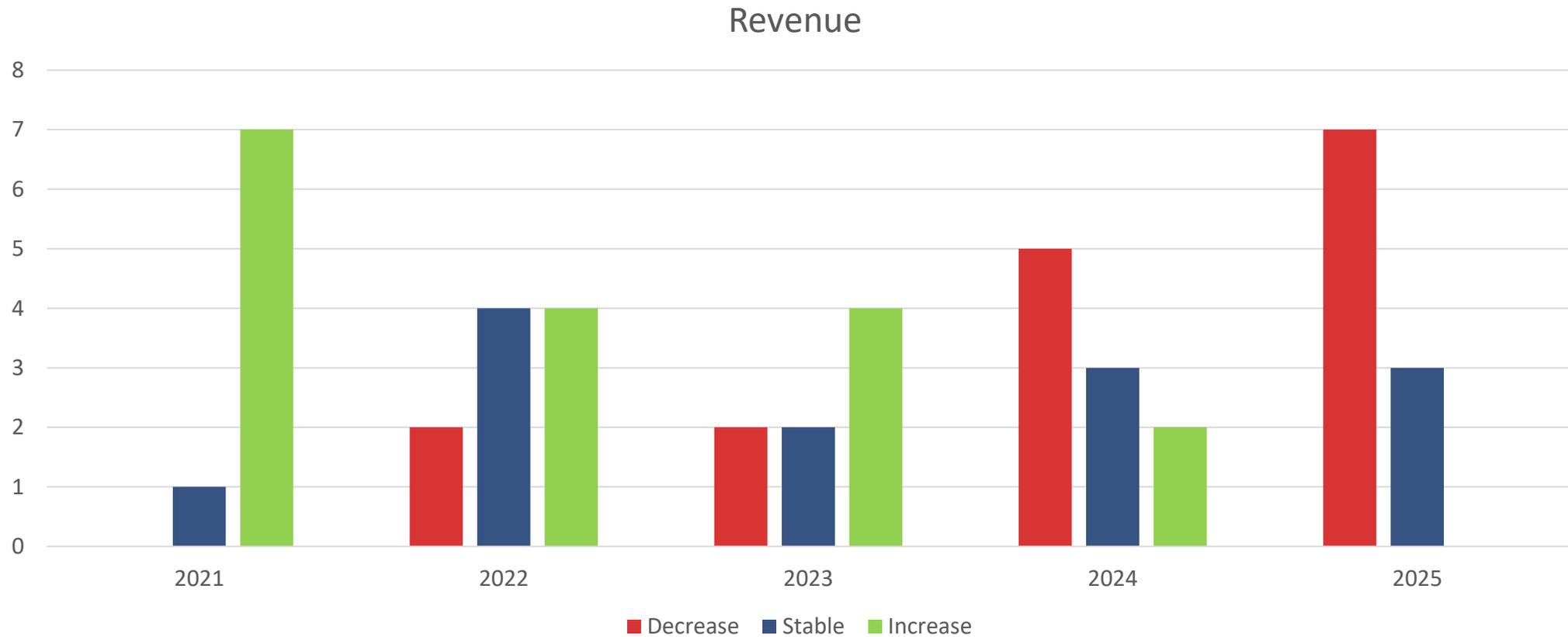
■ Decrease ■ Stable ■ Increase

Employment



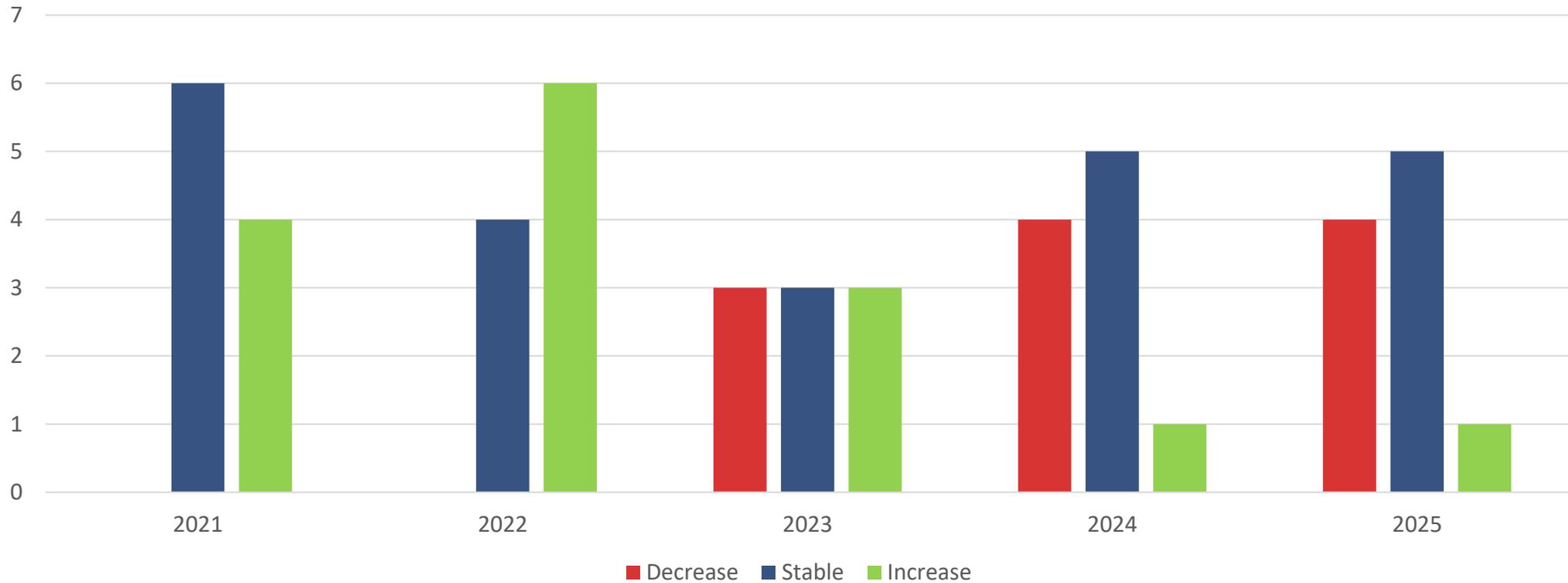
■ Decrease ■ Stable ■ Increase

Trend 2021-2025: Entire industry

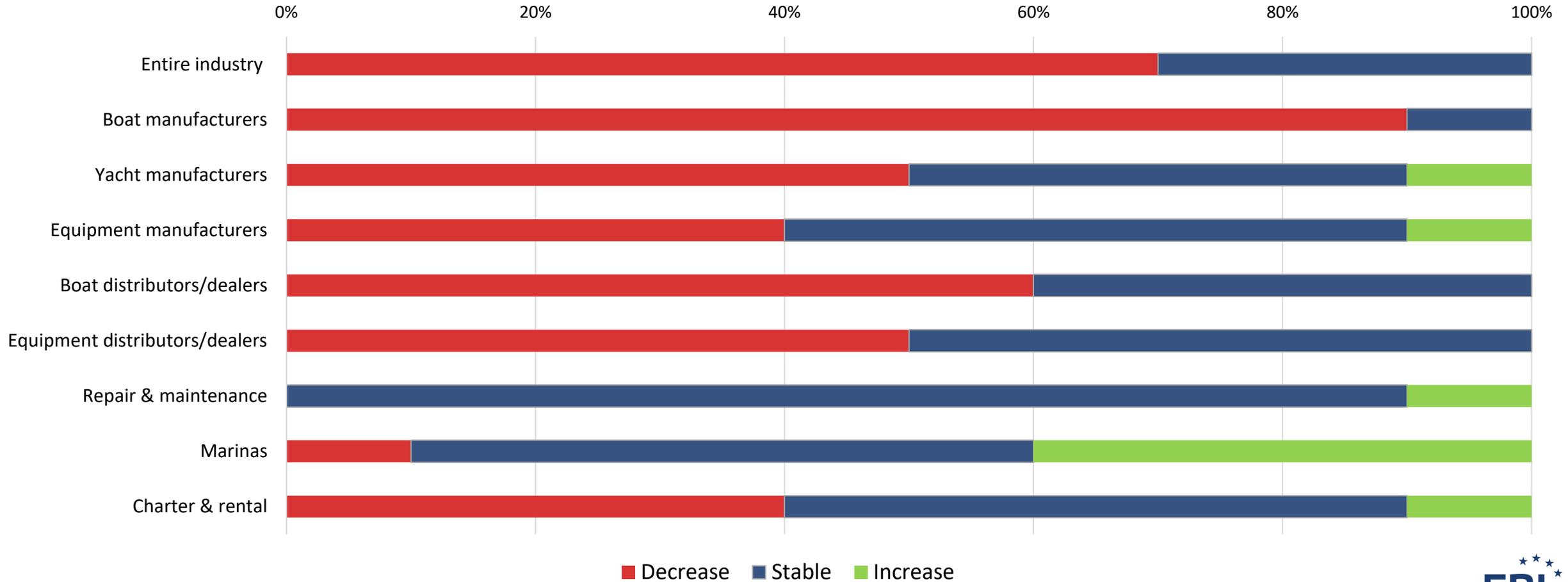


Trend 2021-2025: Entire industry

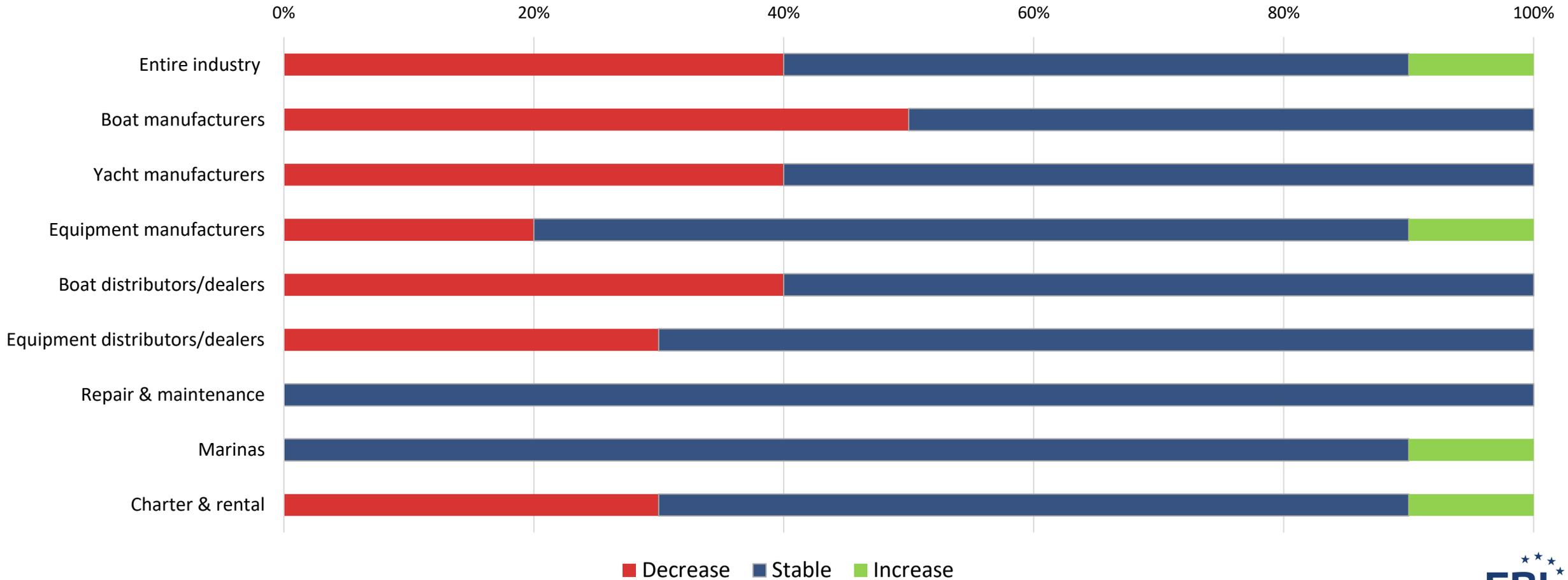
Employment



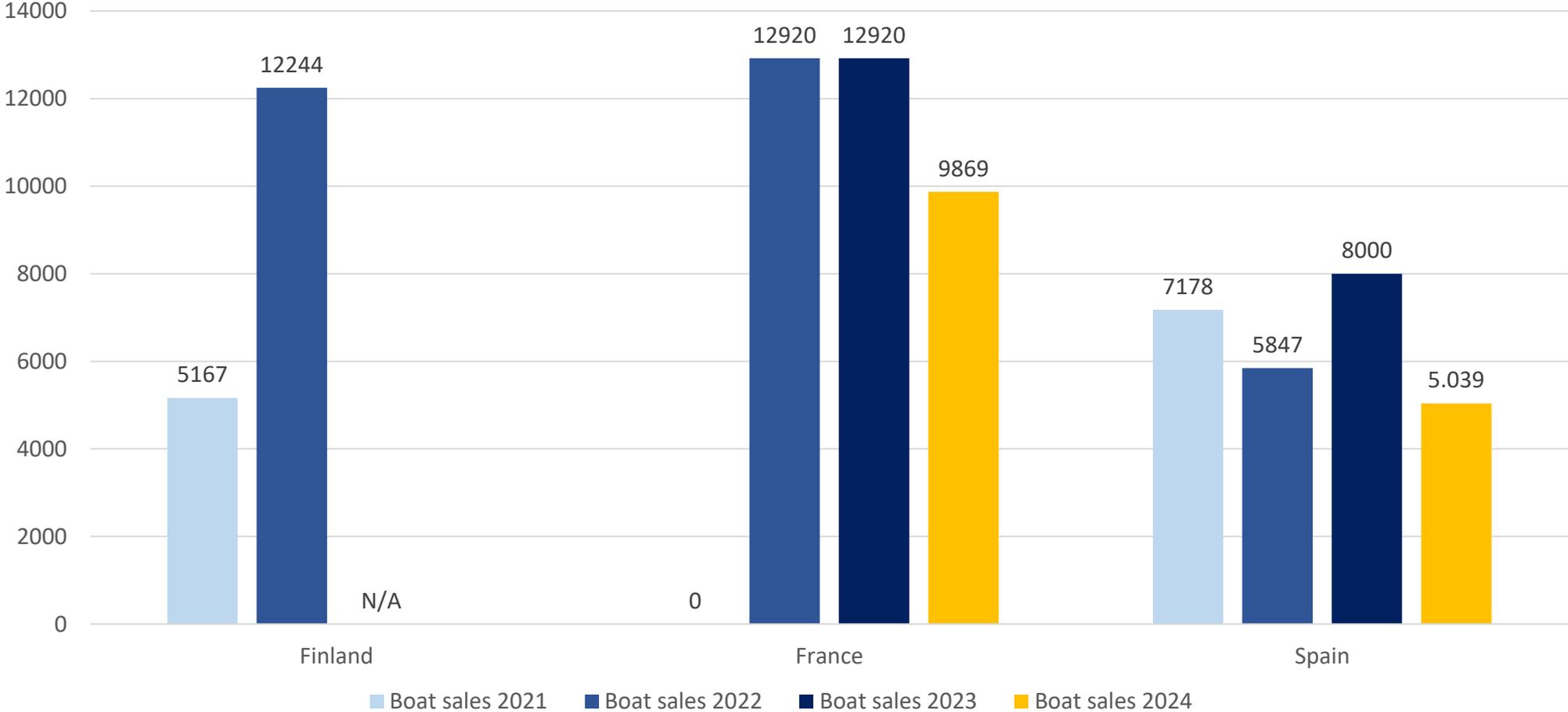
Revenue trends 2025: All sub-sectors



Employment trends 2025: All sub-sectors

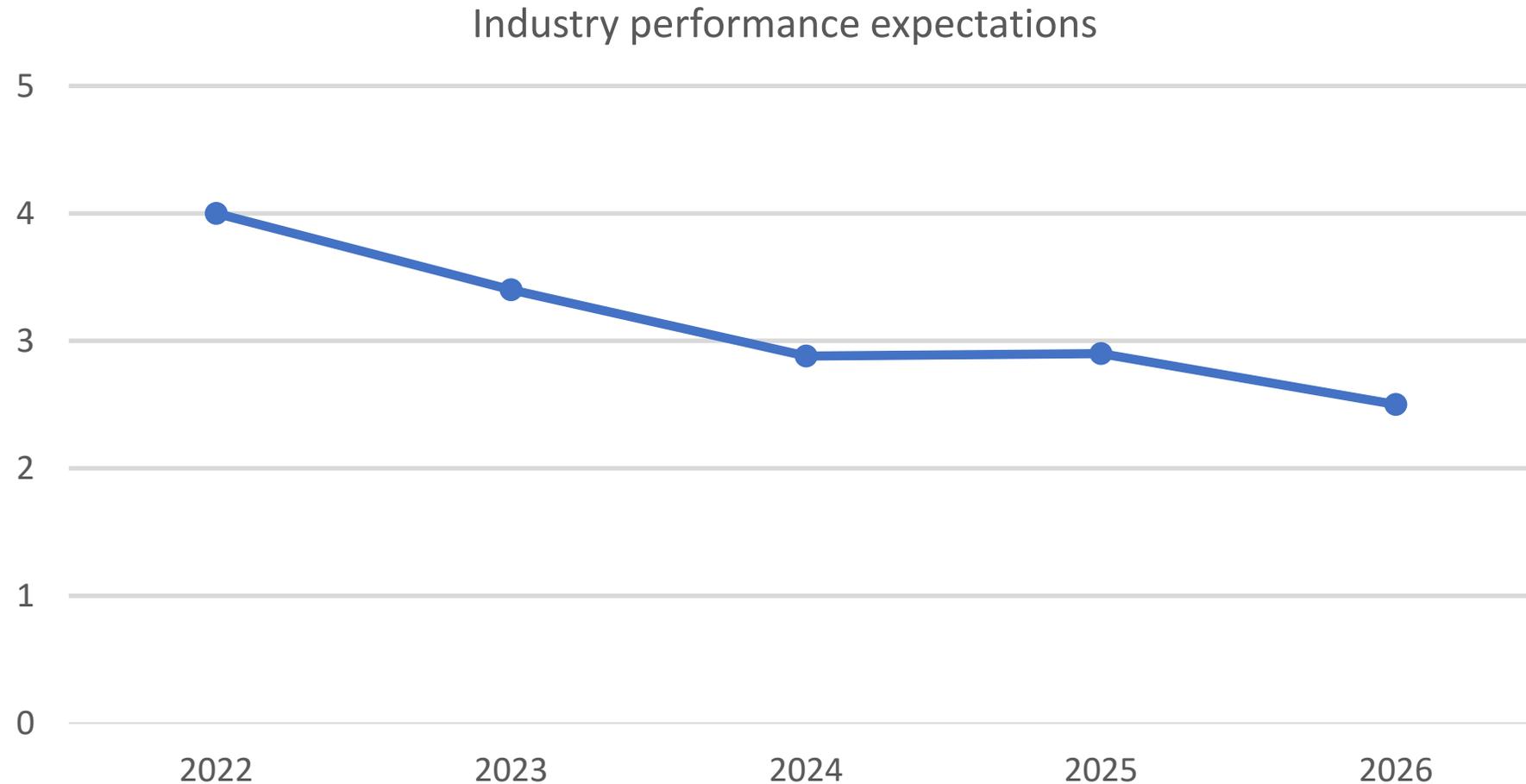


Boat sales: 2021-2024

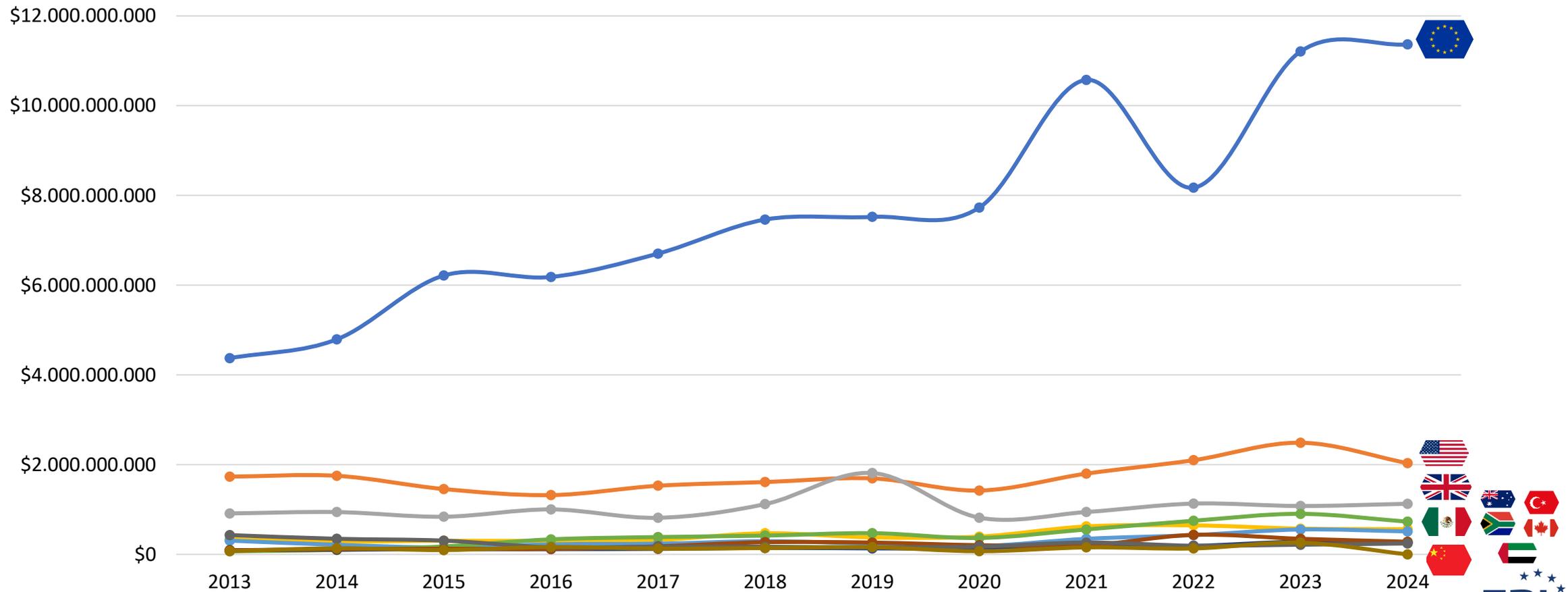


Outlook for next year

What is your outlook for the industry in 2026? (1 = Very poor, 5= Very good)

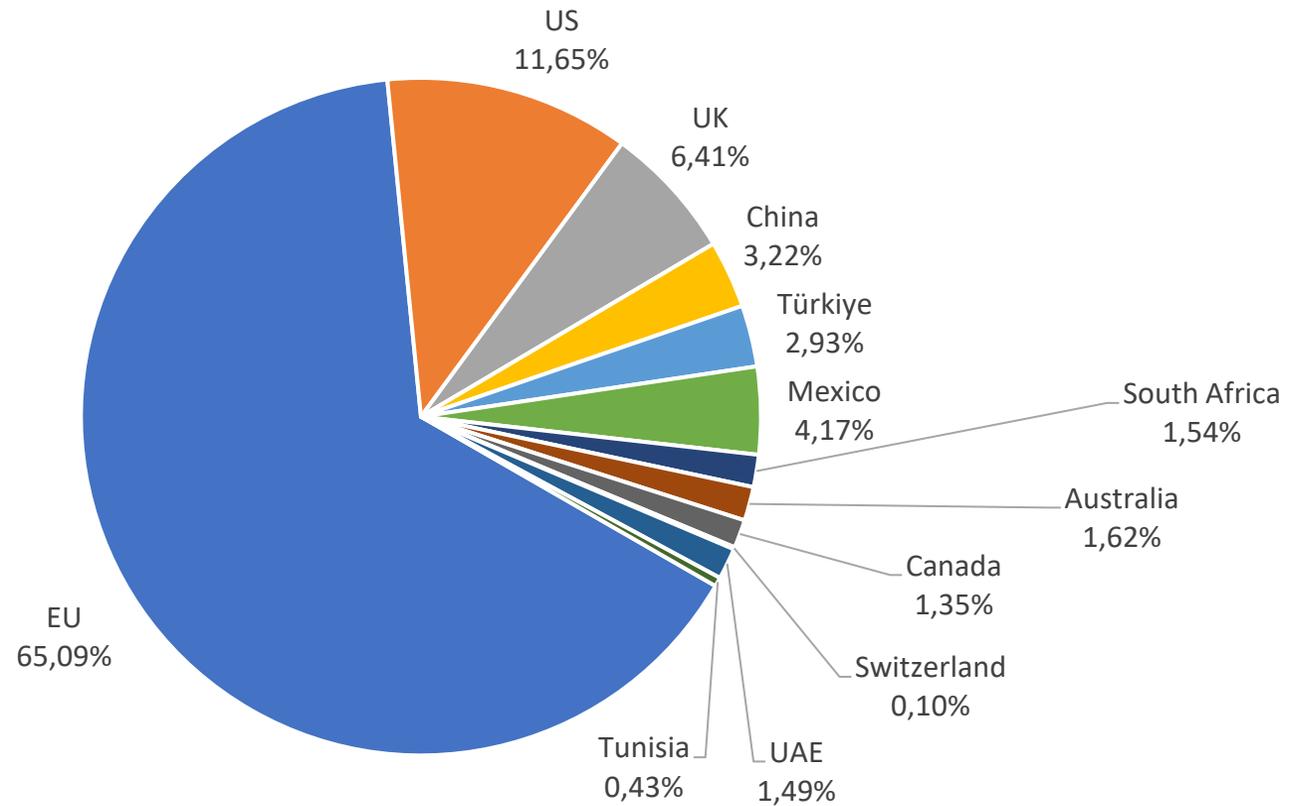


Comparison of biggest exporters



Source: UN Comtrade

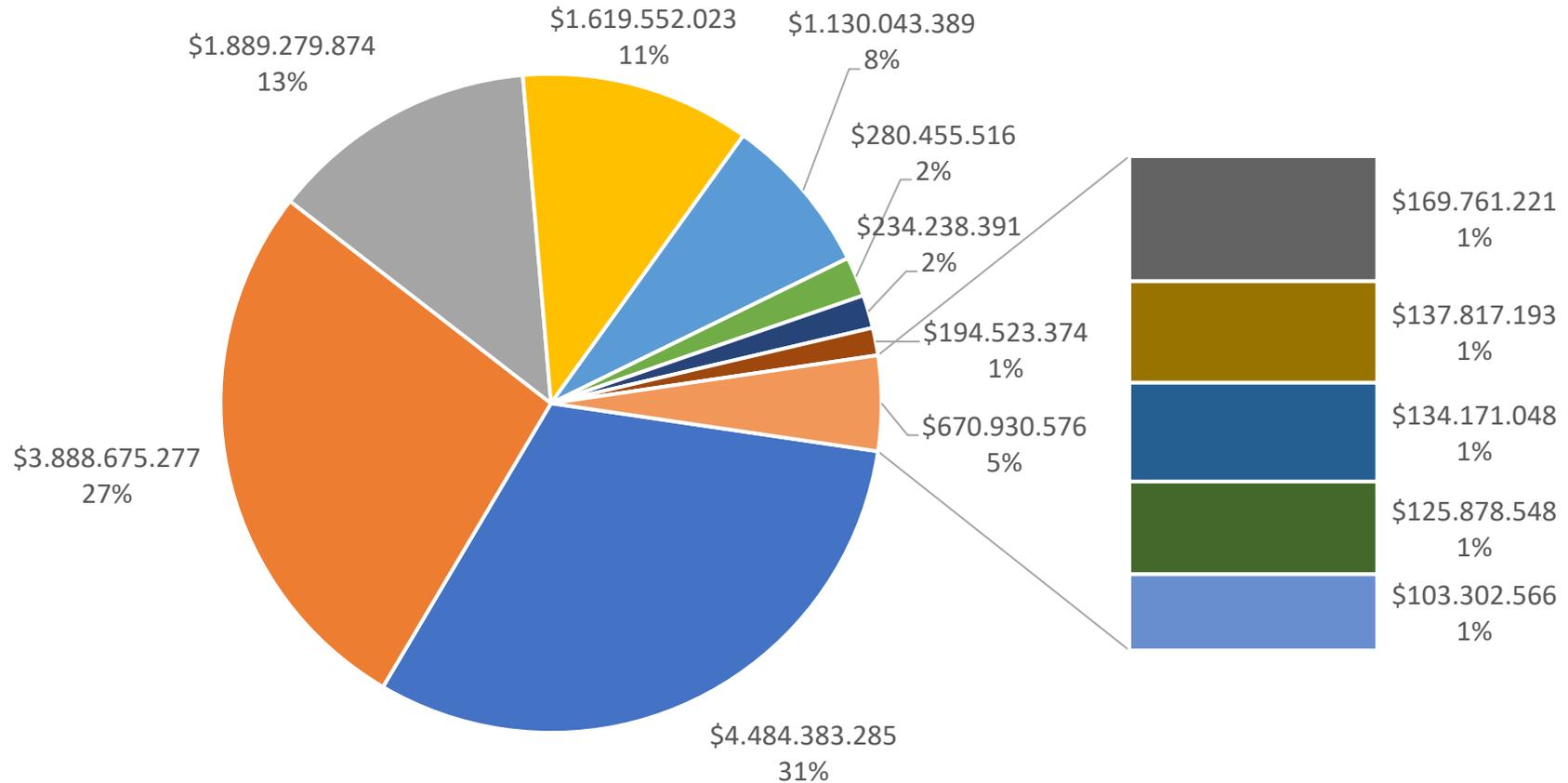
Main exporters of recreational boats (2024)



■ EU ■ US ■ UK ■ China ■ Türkiye ■ Mexico ■ South Africa ■ Australia ■ Canada ■ Switzerland ■ UAE ■ Tunisia

Source: UN Comtrade

Main exporters of recreational boats (2024)

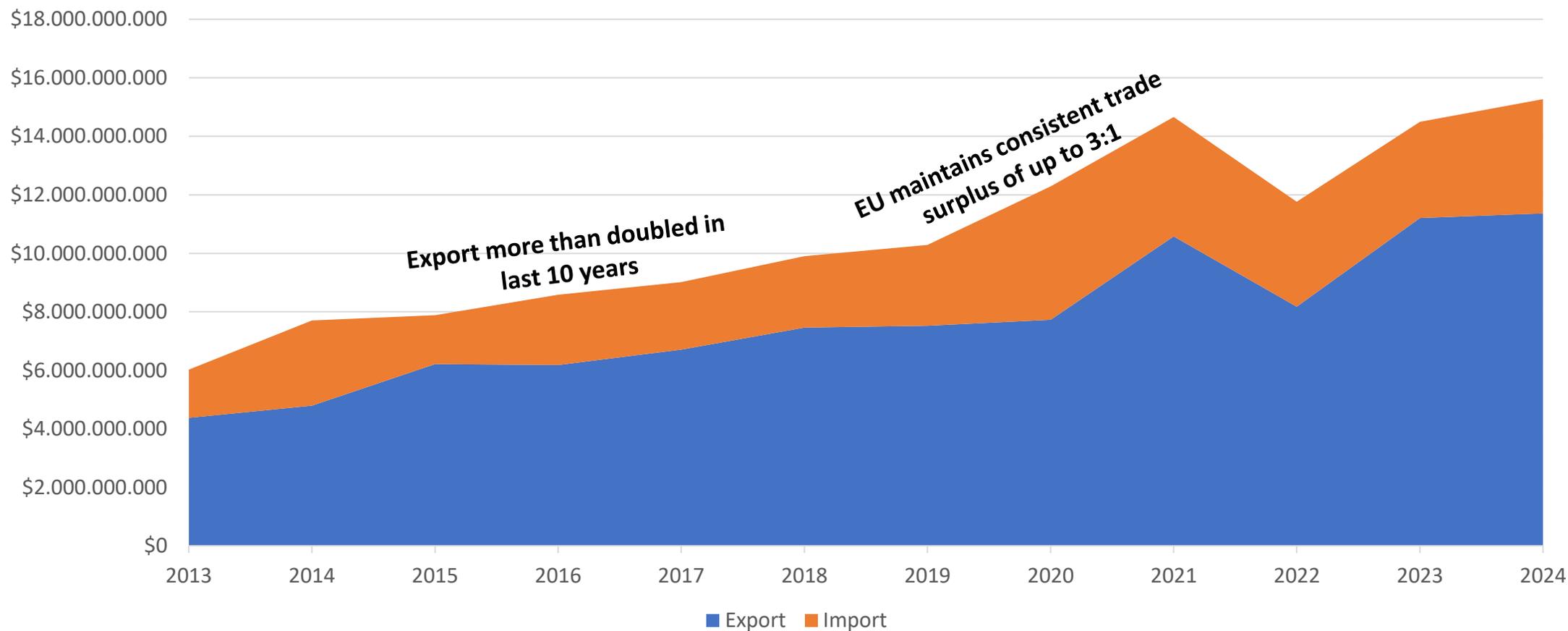


■ Italy ■ The Netherlands ■ Germany ■ France ■ Poland ■ Finland ■ Spain ■ Croatia ■ Cyprus ■ Greece ■ Sweden ■ Slovenia ■ Portugal

Source: UN Comtrade



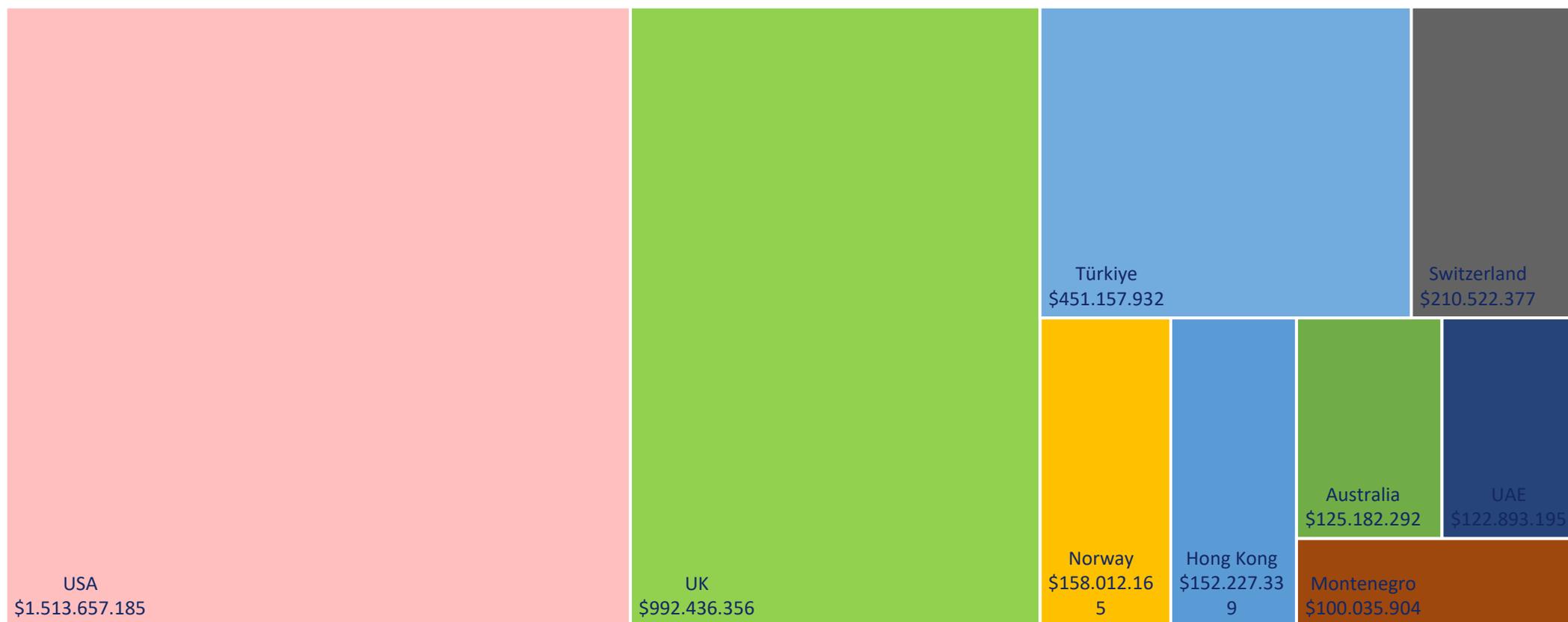
EU import-export balance of recreational boats (2013-2024)



Source: UN Comtrade



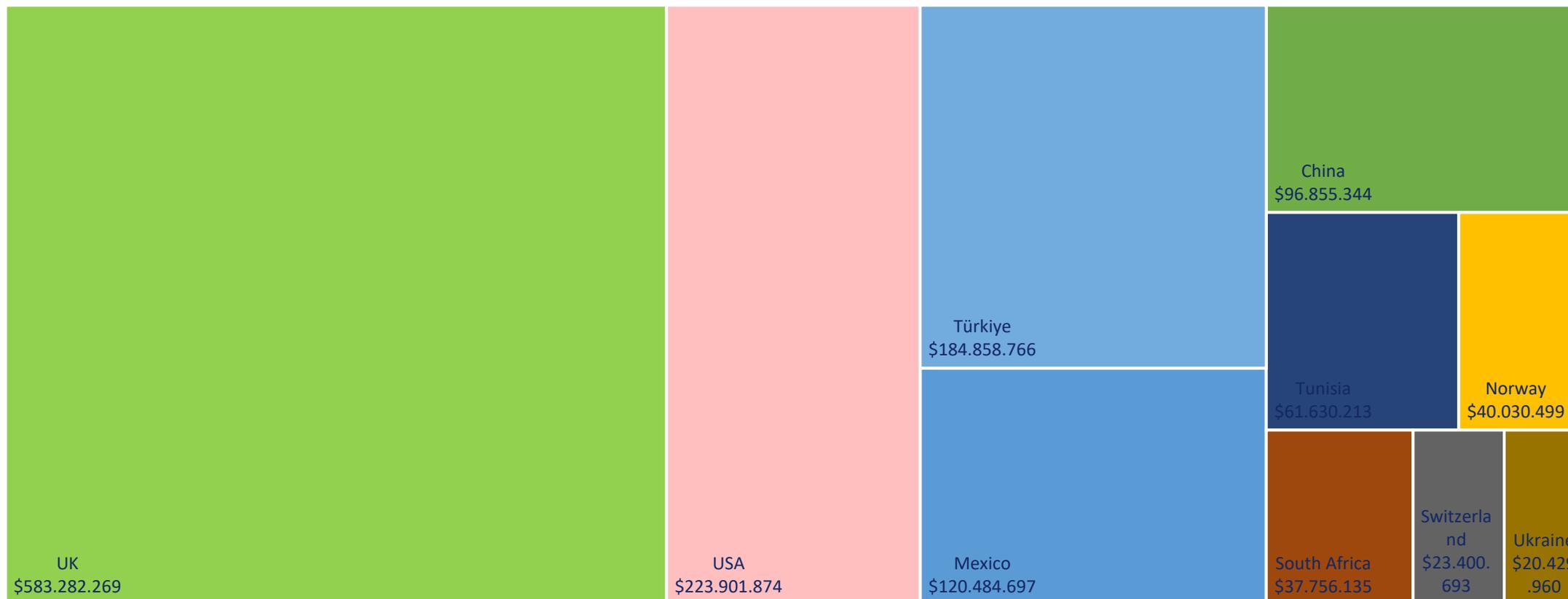
Export destinations from EU for recreational boats (2024)



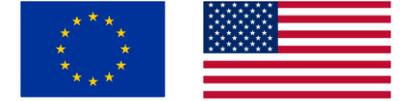
Source: UN Comtrade



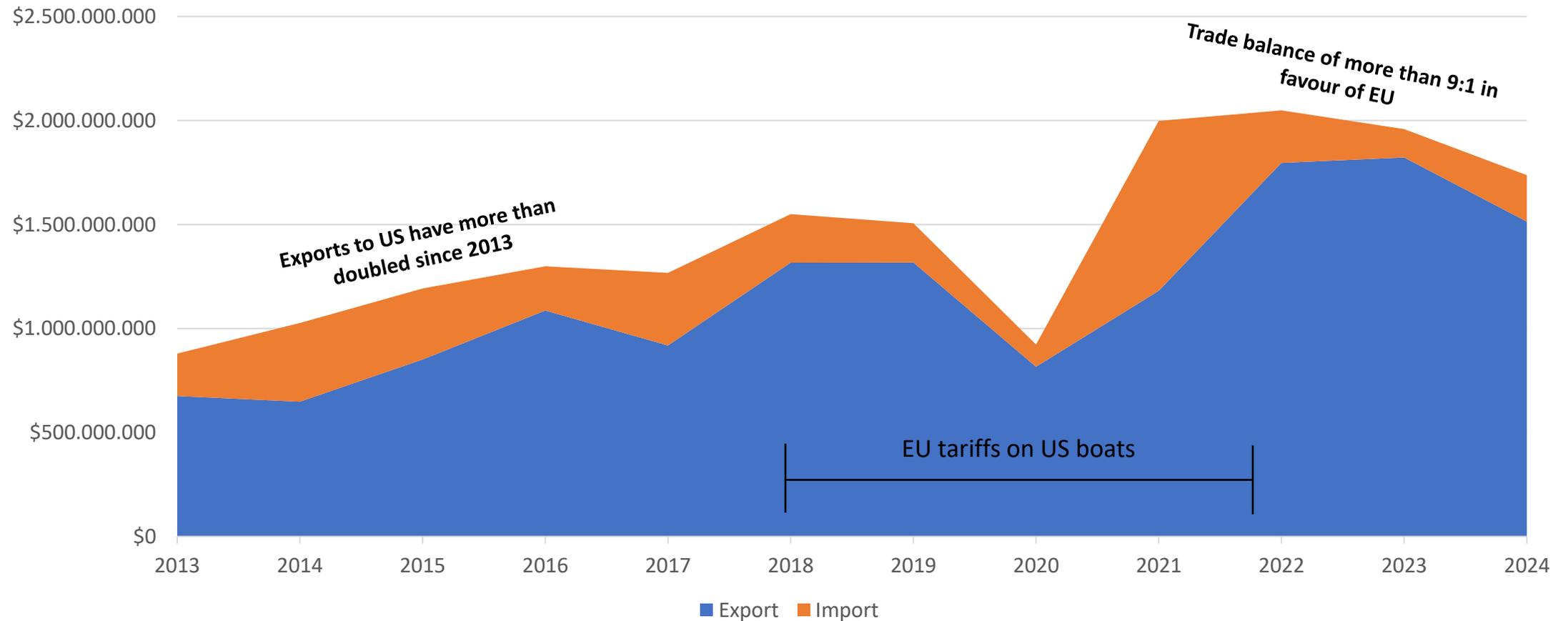
Imports of recreational boats into EU (2024)



Source: UN Comtrade



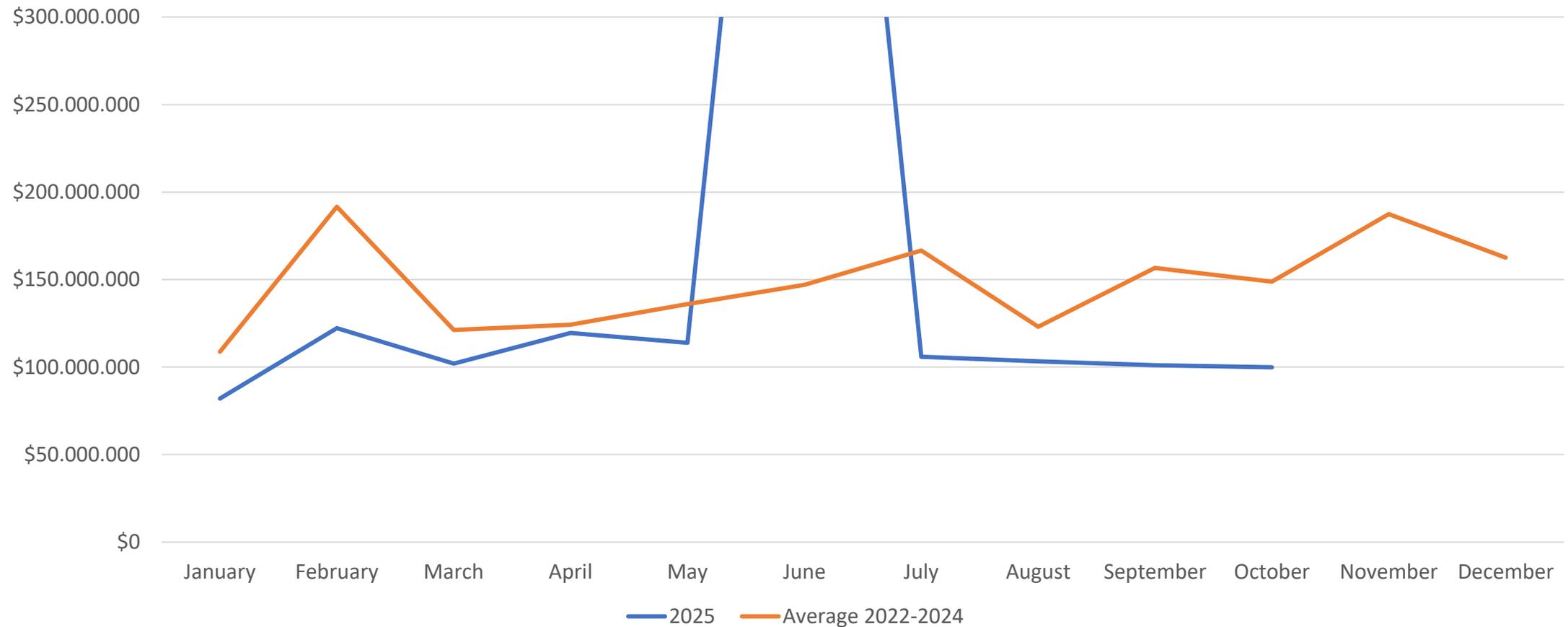
EU-US trade in recreational boats



Source: UN Comtrade



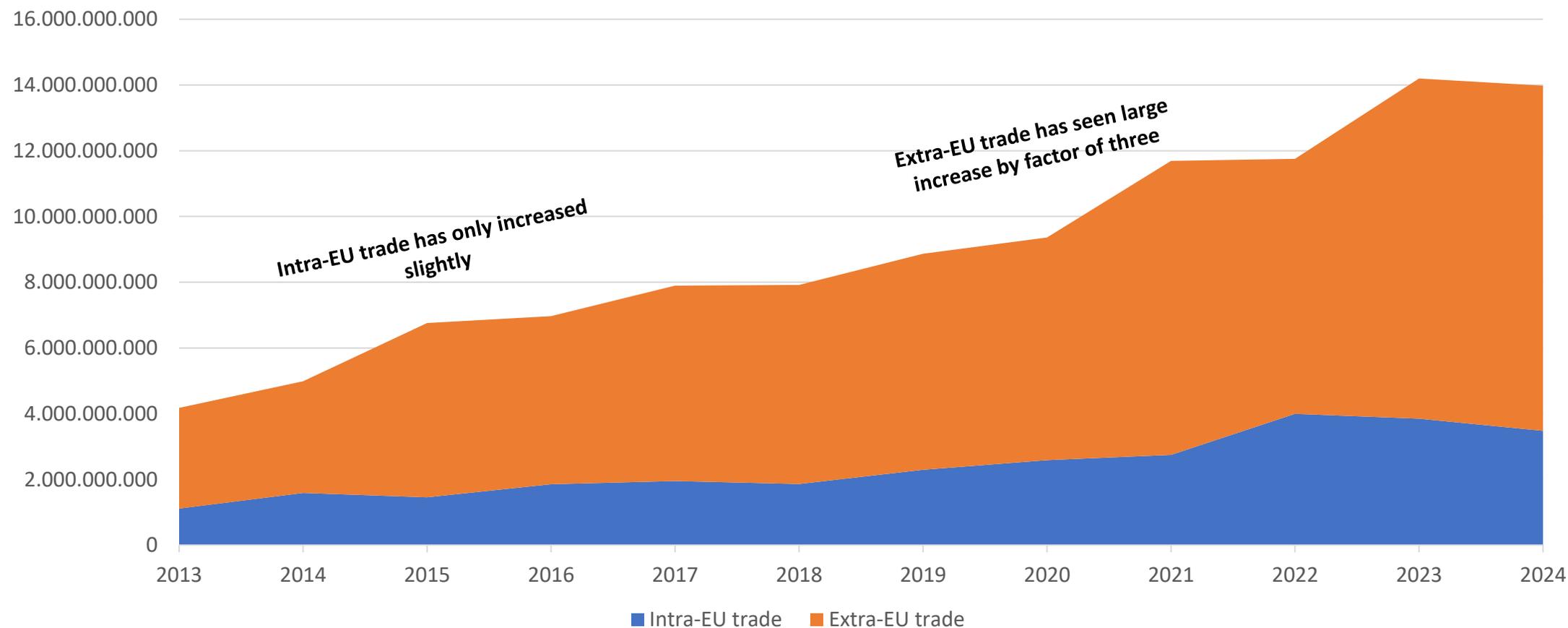
EU-US trade: where are we now?



Source: UN Comtrade



Balance of exports: intra vs extra-EU



Source: Eurostat

Industry concerns for 2026

- **Consumer confidence and demand softness:** households more cautious; weaker orders (notably small boats); saturated second-hand market.
- **Macroeconomic headwinds:** inflation/purchasing power, high interest rates, tighter access to credit; job cuts and workforce stability concerns.
- **Geopolitical and trade uncertainty:** broader instability; potential **US–EU tariffs/trade friction** impacting export markets.

Industry concerns for 2026

- **Cost and capacity pressures:** rising marina costs, lack of mooring space, fluctuating material/logistics costs, high stock levels in parts of the market.
- **Regulatory and fiscal burden:** increased taxes, environmental standards/regulation, administrative requirements affecting competitiveness.
- **Demographic and lifestyle shifts:** changing leisure patterns and fewer young/new boaters entering the market.

Opportunities for 2026

- Consumer confidence and purchasing power may gradually improve, supporting modest growth in the leisure durables market.
- Boat shows and new product launches are expected to translate strong visitor engagement into orders, with the Paris Nautic Show also seen as a positive catalyst.
- Competitiveness can be strengthened through innovation, updated model portfolios, and products aligned with new customer expectations, while avoiding over-regulation.

Opportunities for 2026

- Environmental performance and eco-oriented features are increasingly viewed as a market advantage, particularly where industry leadership is recognised.
- Aftermarket activity offers growth opportunities through refit, repowering and maintenance, including potential demand linked to public tenders.
- Several manufacturers report investments in capacity and equipment and anticipate re-hiring, highlighting both a recovery signal and the ongoing need to secure skilled employees.
- Spain may benefit from its perception as a safe and attractive destination for investment and nautical consumption, reinforced by international and digital-worker profiles.

Thank you for your attention!



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**Advancing a sustainable boating and nautical tourism industry
Made In Europe**