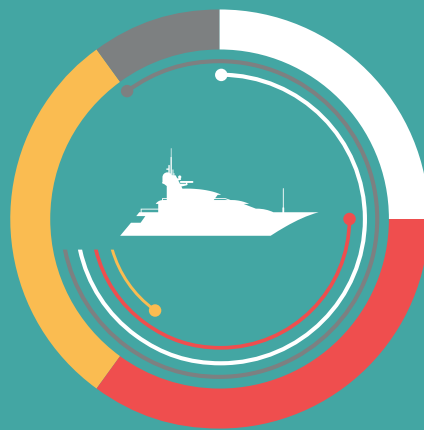


SMARTER SUPERYACHT INSIGHT BY

BOAT | **PRO**



2025 THE STATE OF SUPERYACHTING

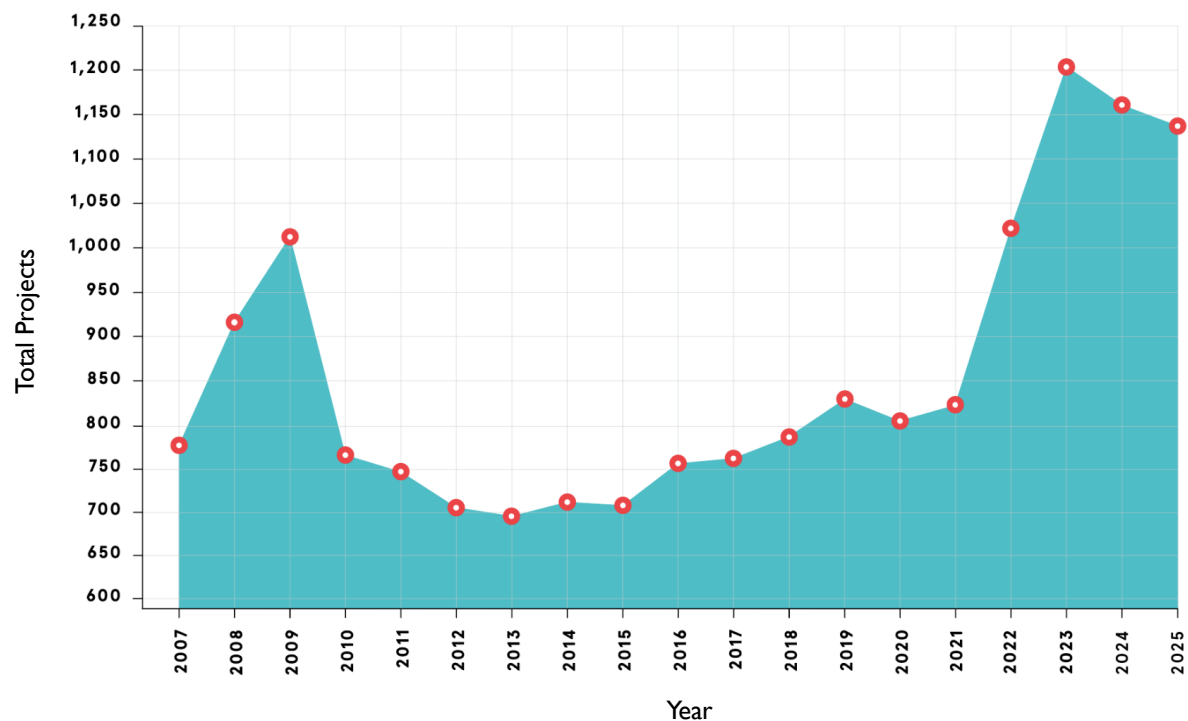
GLOBAL FLEET: 1985, 1995, 2005, 2015, 2025

This is an interval snapshot of the 24m+ market, demonstrating how it has evolved over the last 40 years



GLOBAL ORDER BOOK 2007-2025

Each year we publish our GOB in Jan issue of BI which counts all hulls in build or on order



45,487m

Total length of superyachts in production declined slightly down by 0.5%



507 vs 471

(Average GT) Boats are getting fatter. Average gross tonnage of boats under construction up 7.6 % year on year



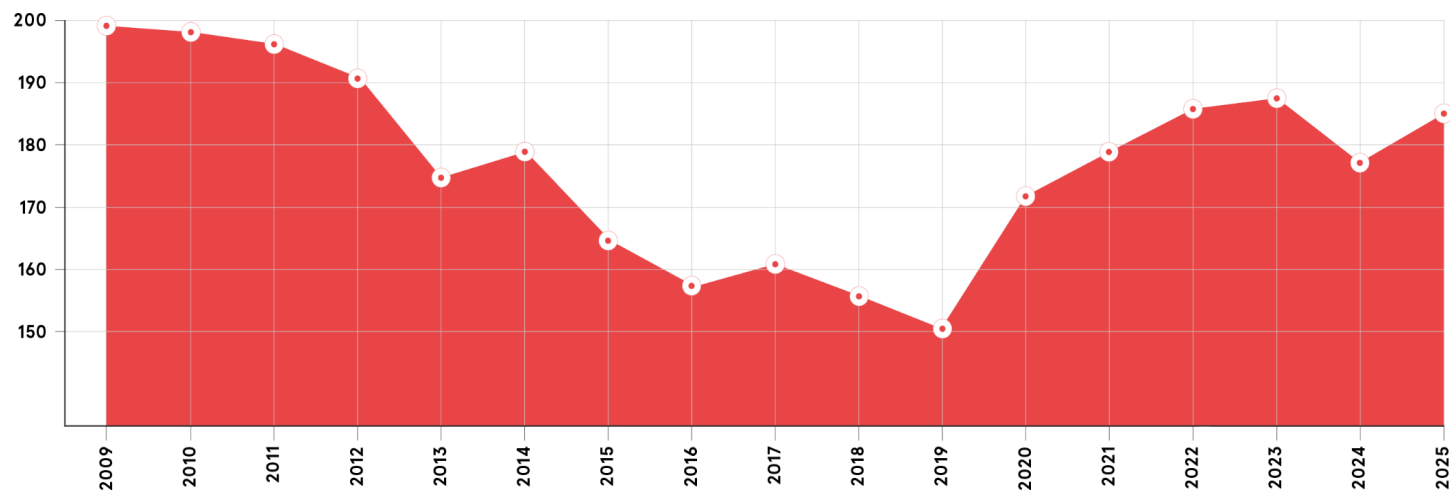
1,138 vs 1,166

Total projects inbuild or ordered in 2025 show slight decline

ACTIVE SHIPYARDS

Number of active shipyards building yachts 24m and above LOA

In 2009 there were just under 200 active shipyards and in 2025 185 active shipyards



72

Shipyards building
1 project



78

Shipyards building
3 or more superyachts



42

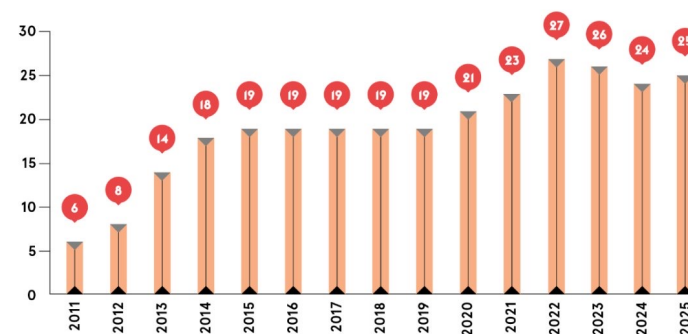
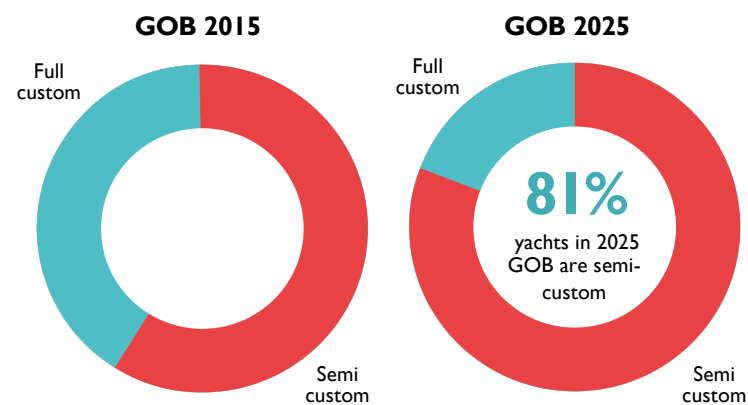
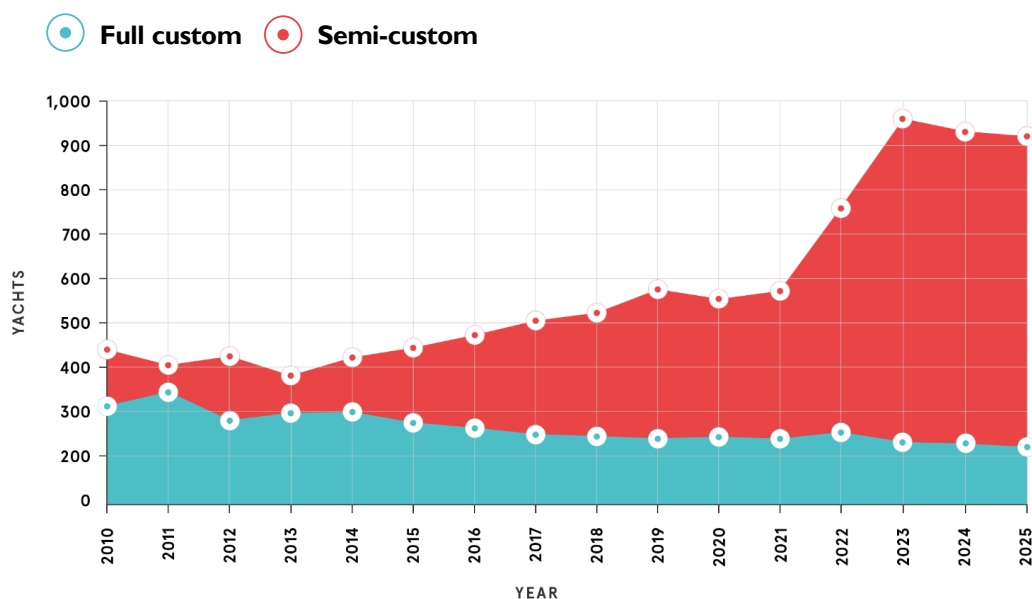
Shipyards building
5 or more superyachts



25

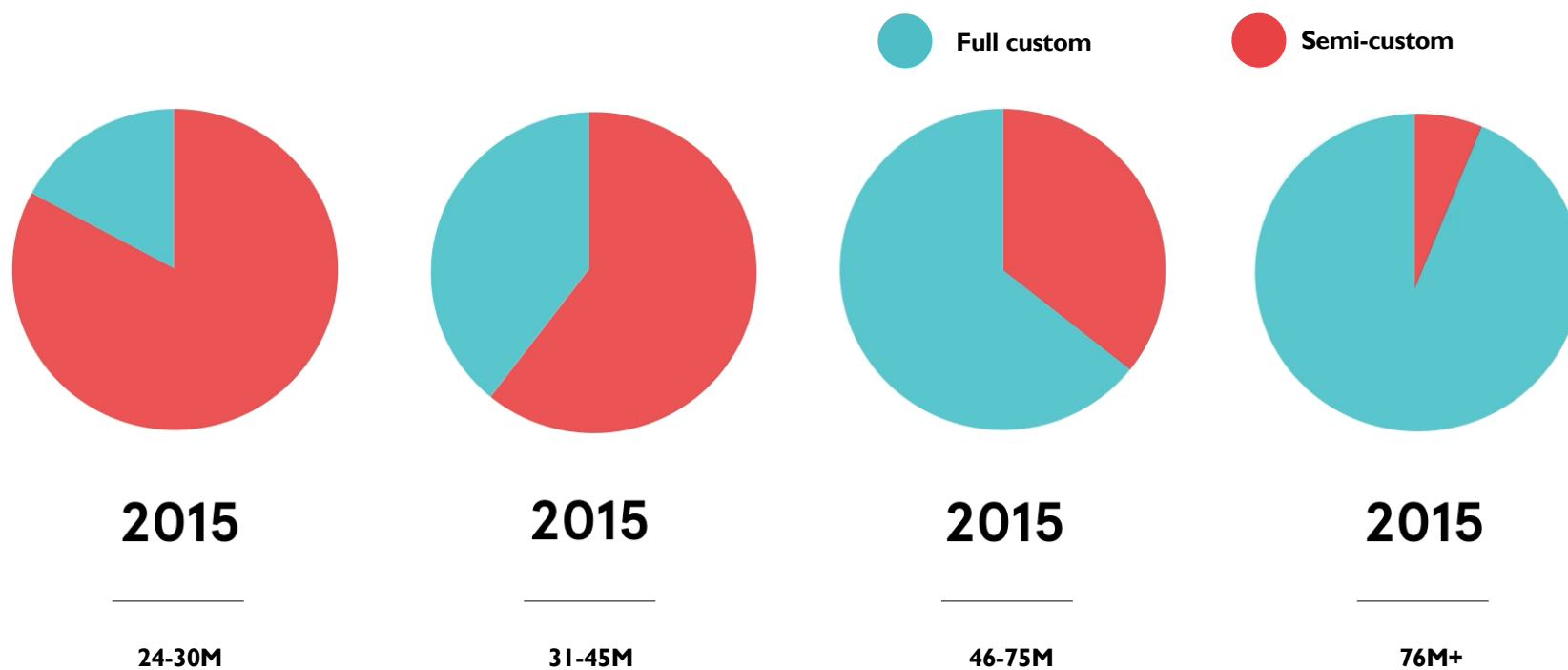
Shipyards building
10 or more superyachts

GLOBAL ORDER BOOK – IN DETAIL



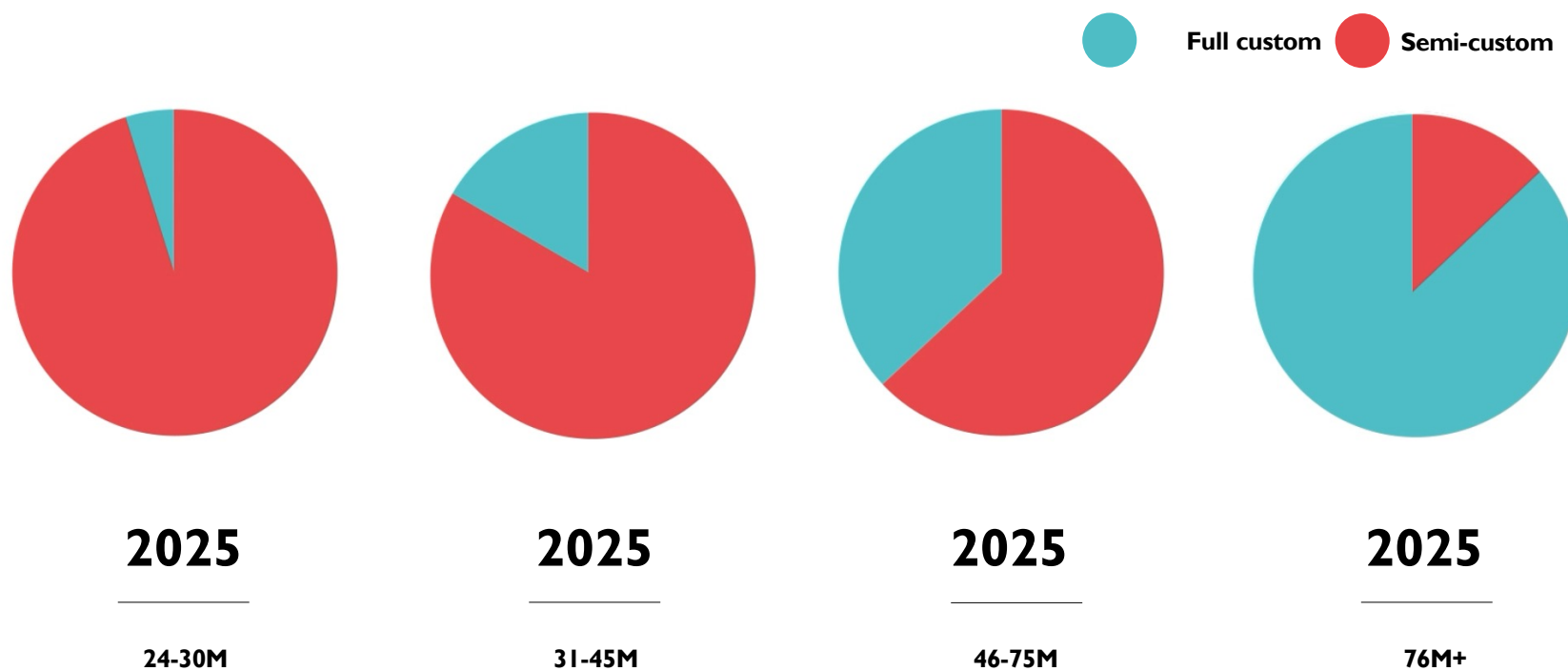
FULL CUSTOM vs SEMI-CUSTOM

How GOB has evolved over a ten-year period by vessel size & FC vs SC



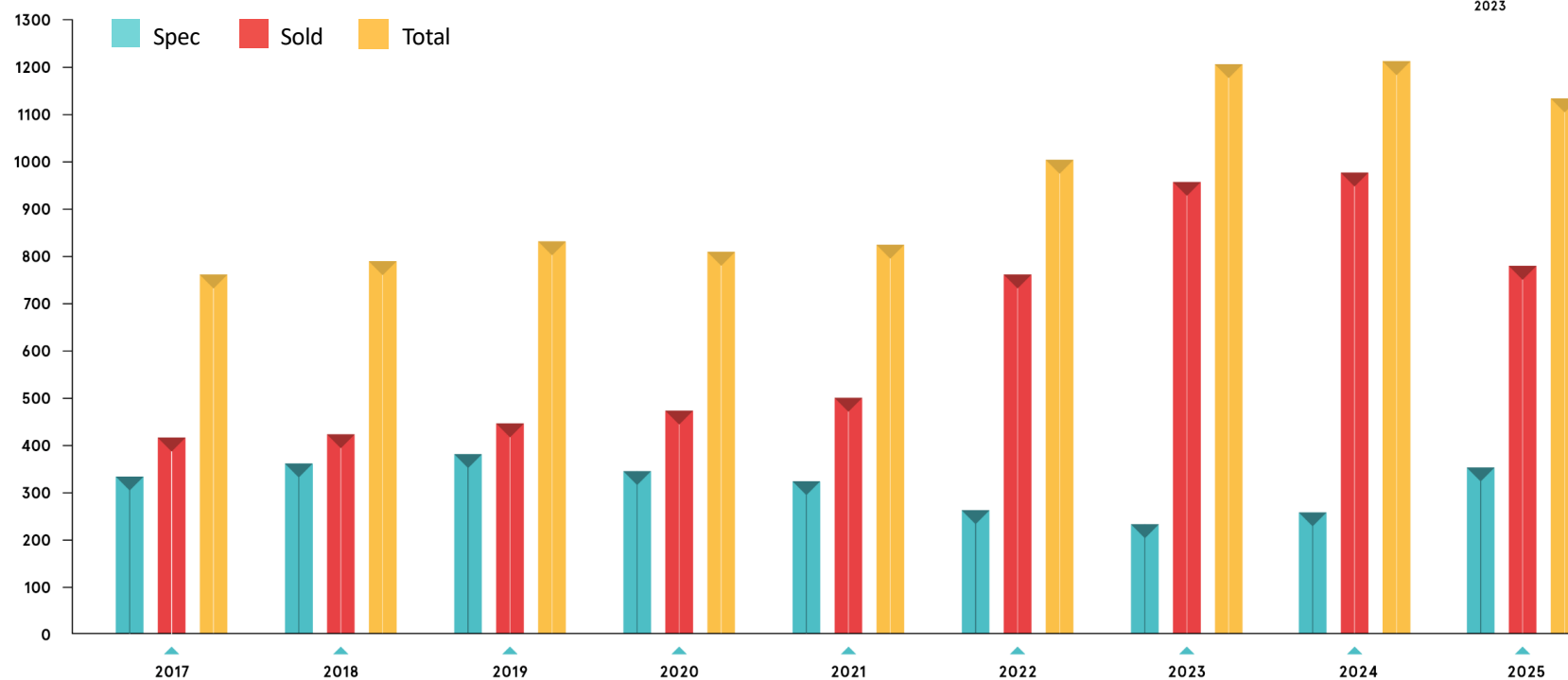
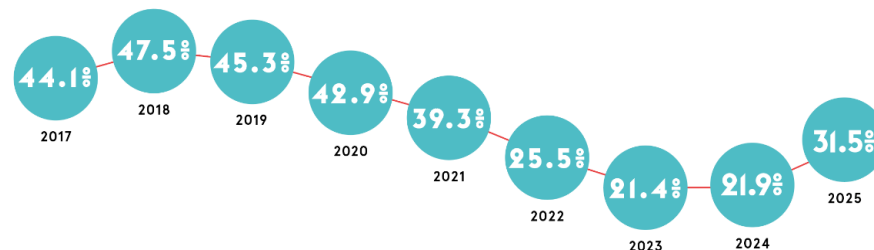
FULL CUSTOM vs SEMI-CUSTOM

Countries such as Italy 85% of its production is SC whilst Germany just 1.6%



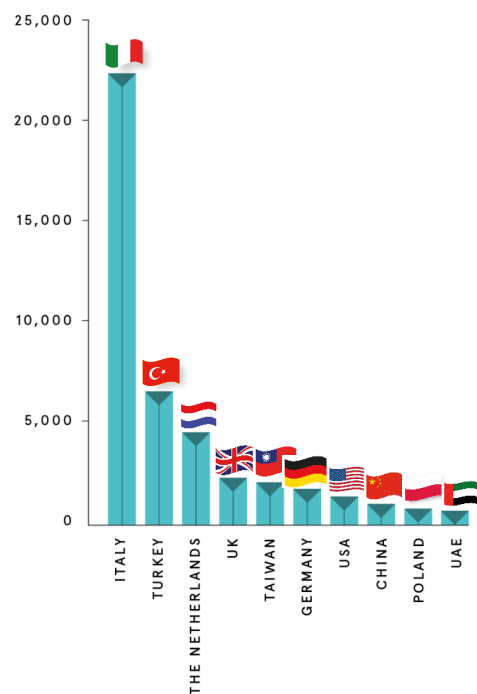
THE SPECULATION GAME

Nine years of the GOB, comparing “on spec” verses sold boats

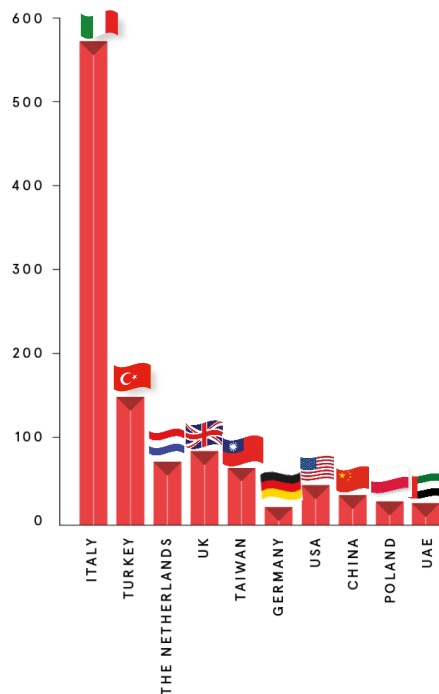


COUNTRY LEADERBOARD

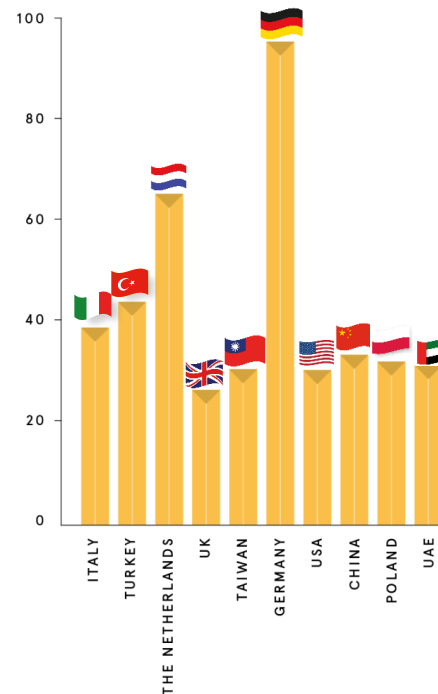
Total LOA Metres



Number of projects



Average LOA Metres



25 years

Italy has topped the global leaderboard of builder nations for the last **25** years, with 576 projects in GOB Av LOA 38.8m.



8.9%

Turkey's order book has expanded almost **9%** in a single year and is now building 146 projects Av LOA 43.9m. 37% on spec



+8

US orders are on the rise after a period in the doldrums. The country is building **41** superyachts, up on last year's **33**

CATEGORY GROWTH



Explorers in the GOB

58

2020

64

2021

85

2022

88

2023

99

2024

105

2025

Multihulls in the GOB

22

2020

34

2021

42

2022

50

2023

72

2024

66

2025



DELIVERED
EXPLORER FLEET

786

AVERAGE LOA
37.19m

AVERAGE GT
493

GOB
9.2%



DELIVERED
MULTIHULL FLEET

218

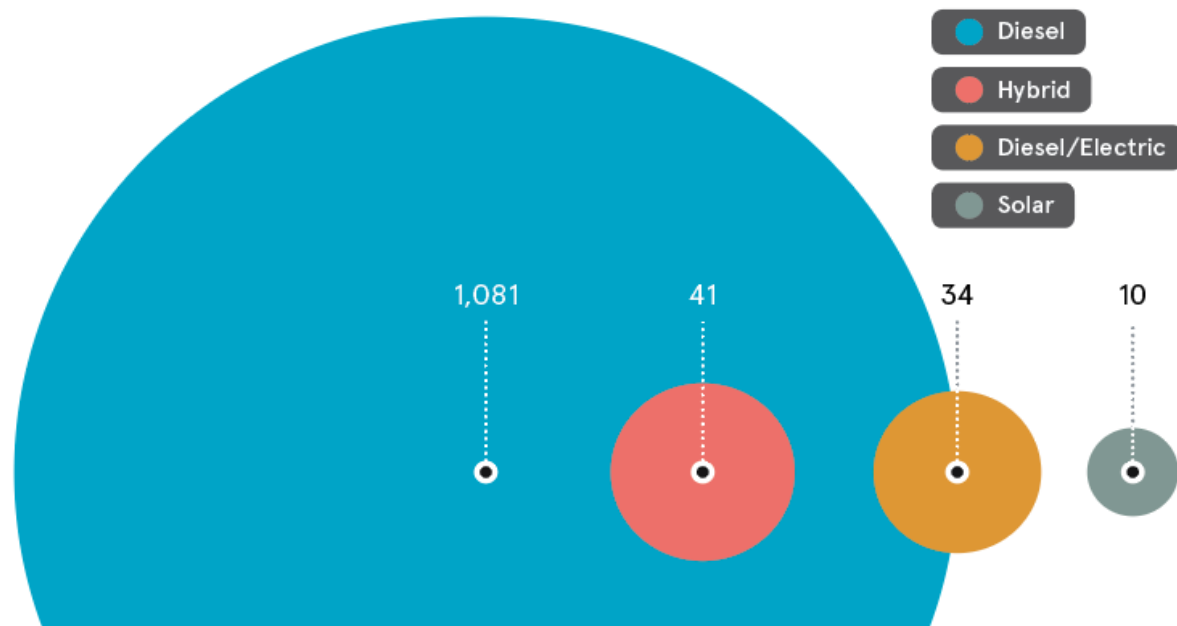
AVERAGE GT
242

AVERAGE LOA
30.21m

GOB
5.8%

PROJECTS BY ENGINE TYPE

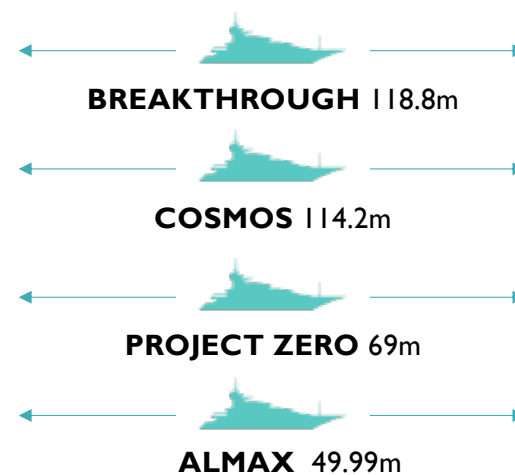
The number of projects in this year's GOB, by mode of propulsion
94% of GOB are powered by diesel



“The real problem of sustainability is that everyone is focused on the small number of yachts built every year, but no one seems to be focused on the massive existing fleet running on old engines.”

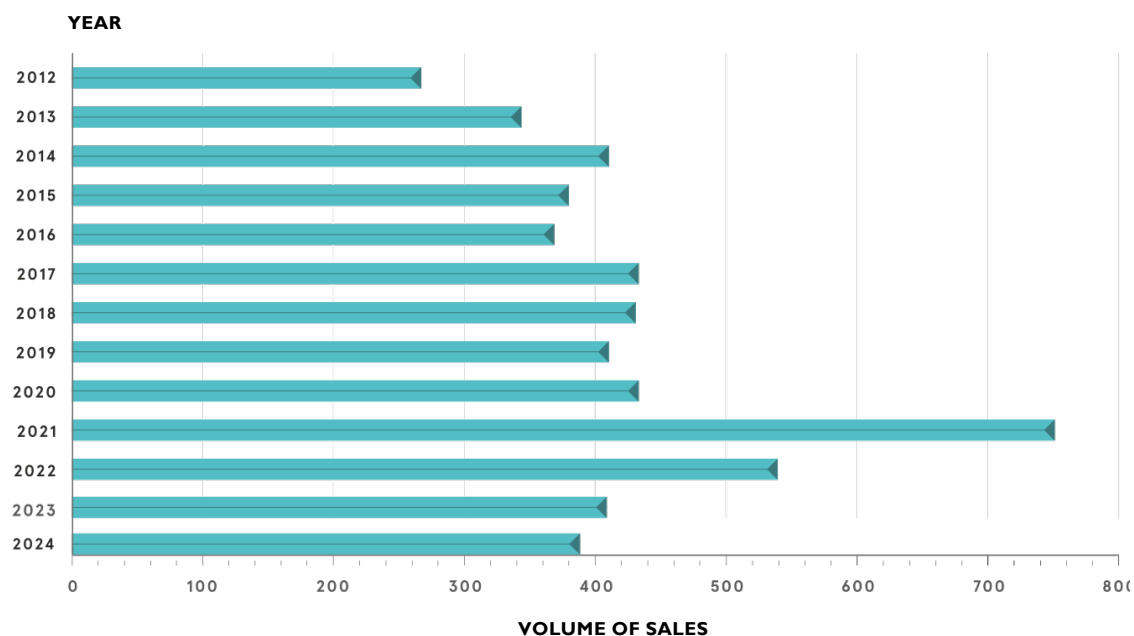
Former chairman of a major yacht builder

Source: McKinsey Global state of yachting 2025



FULL-YEAR BROKERAGE 2012–2024

Brokerage sales, Jan-Dec



2012



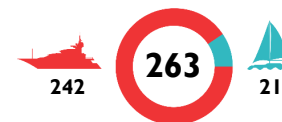
€24,772

Average Asking Price
per GT



€8.4mil

Average asking price



Brokerage sales,
motor vs sail

2024



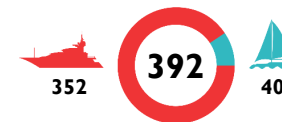
€33,486

Up 35%



€11.1mil

Up 32.1%



Brokerage sales,
motor vs sail (up 48%)

BROKERAGE IN NUMBERS 2025 vs 2024 YTD

January – August sales

JANUARY – AUGUST	YTD 2024	YTD 2025	% CHANGE
Sales	267	333	+25%
Total Value of Sales	€2.9B	€4.1B	+41%
Average sales value	€11.01M	€12.29	+11.6%
# New listings	322	585	+81.7%
# New listings value	€5.6B	€7.5B	+34%
# Average new listings value	€17.31M	€12.77M	-26.23%

LARGEST LISTINGS BY LOA

2024
Breakthrough
118.8m Feadship
POA (**SOLD**)

2025
Ahpo
115.1m Lurssen
€340M

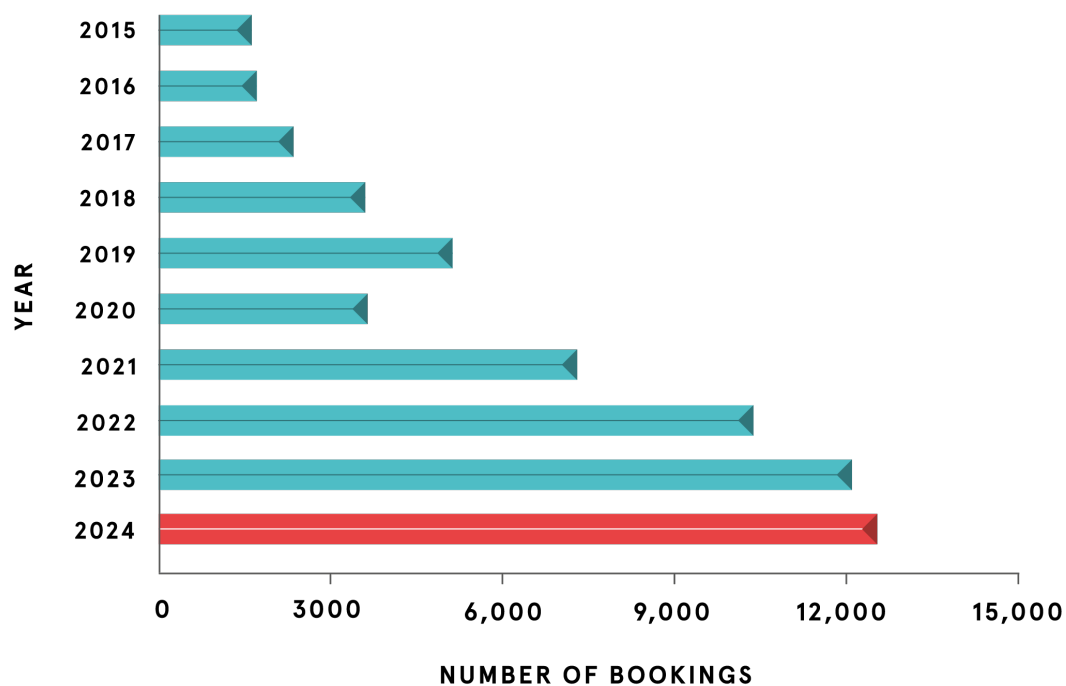
LARGEST SALE BY LOA

2025
Project Omega
122m POA Lurssen

2024
Phoenix 2 90m
€124m

ANALYSIS OF CHARTER BOOKINGS

Timeline showing the number of total bookings from 2015-2024 Source : YACHTFOLIO (MYBA)



€8.7B

Market size per year

70%

Increase in the number
of charter bookings
from 2021 to 2024

12.5k vs 12.1k

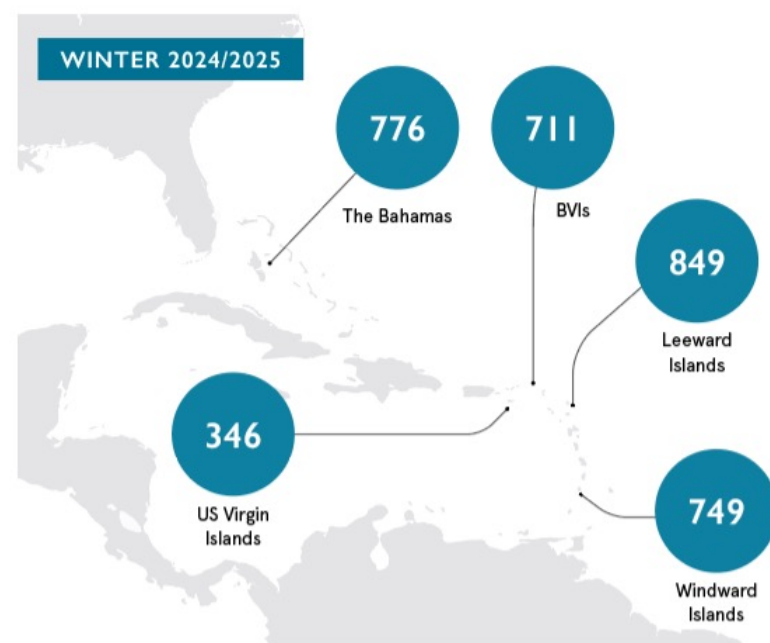
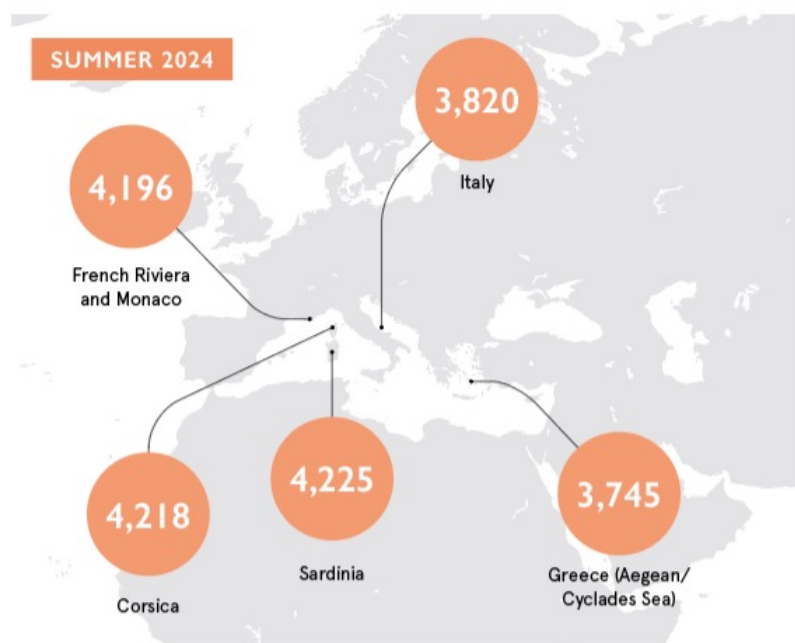
The number of bookings reached
in 2024 – up 3.7 % from 2023

8.4 days

Average booking duration

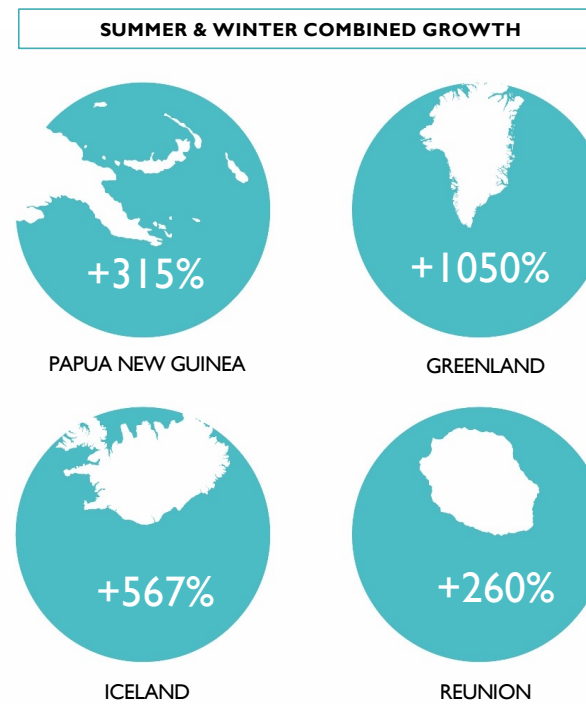
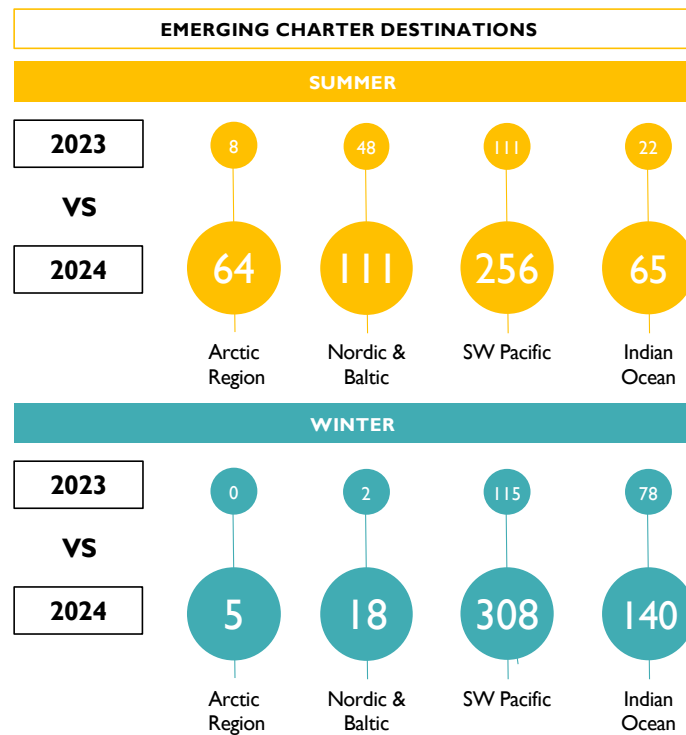
THE TOP 10 CHARTER LOCATIONS (SUMMER & WINTER)

The most popular charter locations, by number of bookings Charter Report BOATPro | YACHTFOLIO (MYBA)



EMERGING CHARTER DESTINATIONS

Charter locations with the biggest increase in booked yachts :YACHTFOLIO (MYBA)



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THANKYOU

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