

# Charter Market in Pula 2020 – 2026: A Detailed Analysis of Price, Fleet and Occupancy Trends

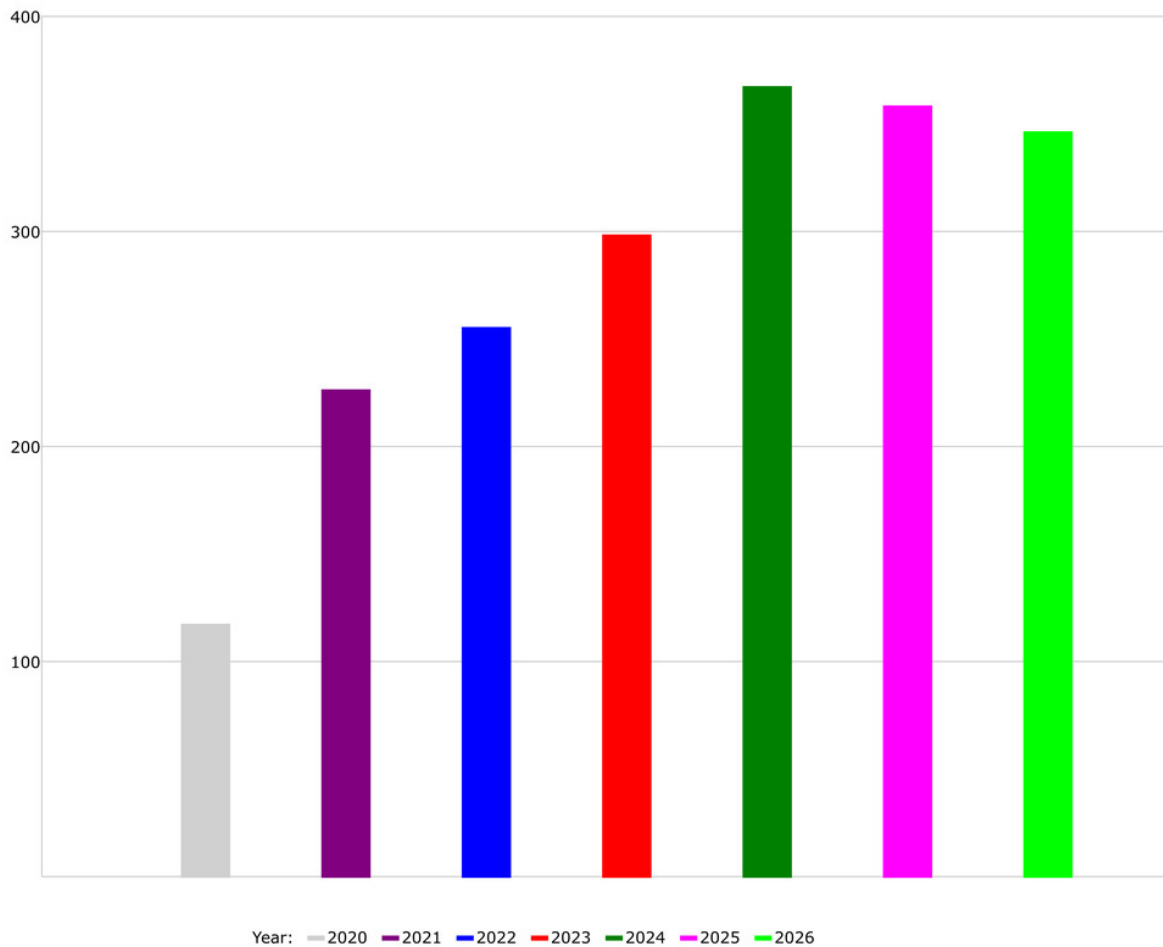
Given that we monitor tourism development in Pula on a daily basis, we have taken particular interest in analysing multi-year data on yacht charter activity in our waters. Nautical tourism represents one of the most recognisable and valuable components of Pula's tourism offer, and a detailed review of fleet development, pricing trends and occupancy rates provides us with a clearer understanding of market dynamics and future development directions.

The data includes charter vessels located in Pula's marinas – ACI Pula, Marina Pomer, Marina Veruda and Marina Polesana – which together form a strong infrastructural foundation for the development of the charter sector in the northern Adriatic. The analysed data was obtained from a platform that has been successfully operating in the [yacht charter sector in Croatia \(Yacht-Rent\)](#) for more than 20 years and represents one of the longest-standing and most relevant sources of information on the charter market.

## Expansion of the Charter Fleet and Signs of Stabilisation

The number of charter vessels in Pula grew significantly from 2021 to 2024. The year 2020 was exceptional due to the COVID-19 pandemic, and its data cannot be considered fully representative for long-term market evaluation. As early as 2021, a strong recovery took place, with the fleet nearly doubling compared to the previous year. Growth continued in 2022 and 2023, reaching a peak in 2024 with 367 vessels.

In 2025, we recorded a slight decrease to 358 vessels, which may indicate the beginning of market rationalisation. After an intensive investment cycle, the market appears to be entering a stabilisation phase in which quality of supply, differentiation and capacity management will play a more significant role than purely quantitative growth.



## Trends in Average Weekly Charter Price per Person

An analysis of the operational season (from April to November) shows a clear seasonal increase in prices towards the peak in July and August. Following the pandemic-affected 2020 season, both 2021 and especially 2022 saw strong price growth. In 2022, peak summer prices exceeded €630 per person, representing one of the highest averages in the observed period.

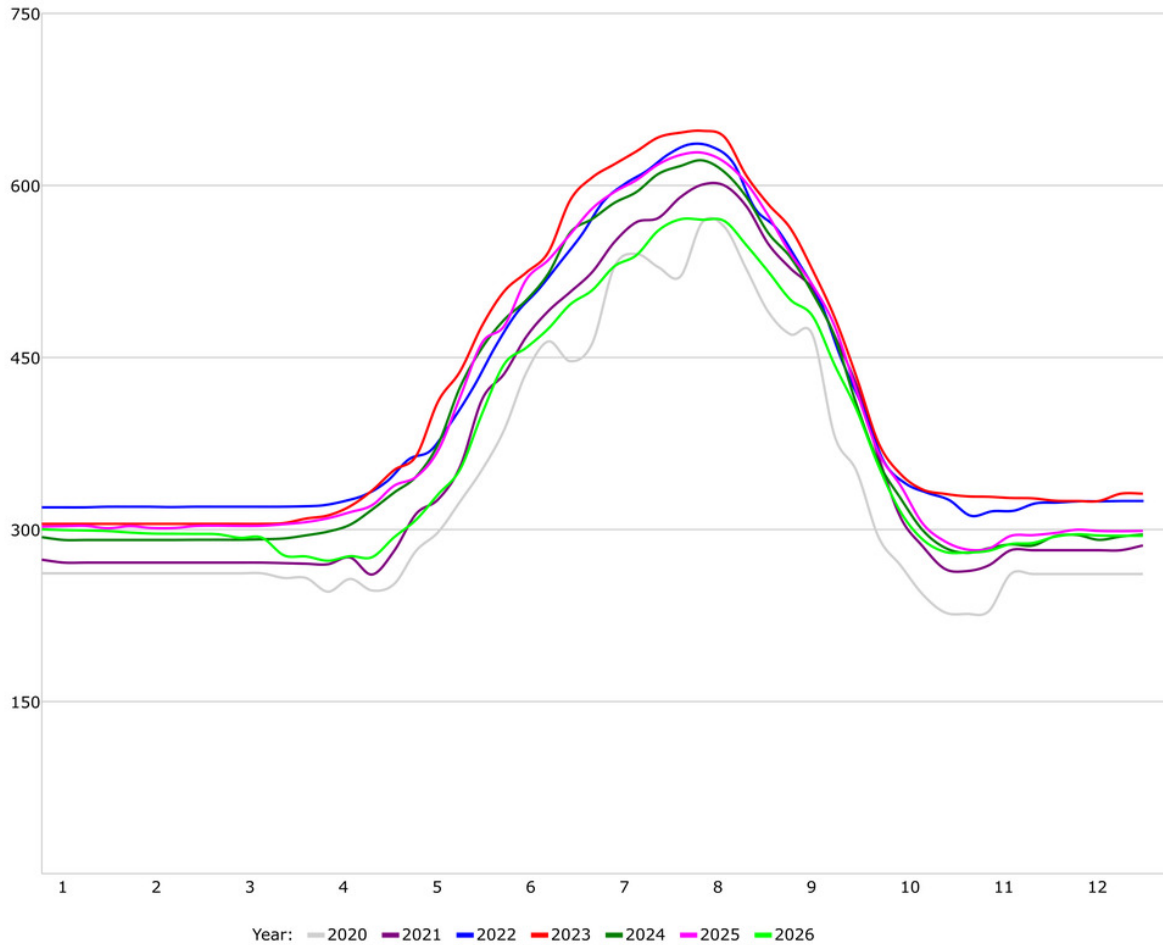
This increase can partly be attributed to post-COVID enthusiasm. After a period of travel restrictions, demand for safer and more isolated forms of holidays – such as staying on a yacht – rose significantly. Nautical tourism was perceived as a type of vacation offering greater privacy and control over the surrounding environment.

In 2023 and 2024, prices remained high but showed signs of stabilisation. Peak values continued to exceed €620, though without significant additional growth. In 2026, which is still ongoing, the summer maximum currently reaches around €570, suggesting a mild downward pressure from increased market supply.

It is important to note that as vessels age, their market value and charter price naturally decline. The arrival of new, higher-priced vessels partially offsets this effect. However, if the pace of new entries is slower than the ageing of the fleet, or if overall supply becomes too large, the average price may stagnate or slightly decrease – a trend that is beginning to emerge in the current season.

Price per person €/week

Yacht-Rent.com



## Occupancy: The 2022 Peak and Gradual Normalisation

Occupancy rates are perhaps the most revealing indicator of market dynamics. The year 2022 stands out in particular, with several summer weeks exceeding 90% occupancy and a peak of 91.16% at the end of July. This confirms exceptionally strong demand in the immediate post-pandemic period.

In the years that followed – 2023, 2024 and 2025 – occupancy remained very solid but rarely exceeded 85%. In August, occupancy generally ranged between 75% and 85%, meaning that even during the absolute high season the

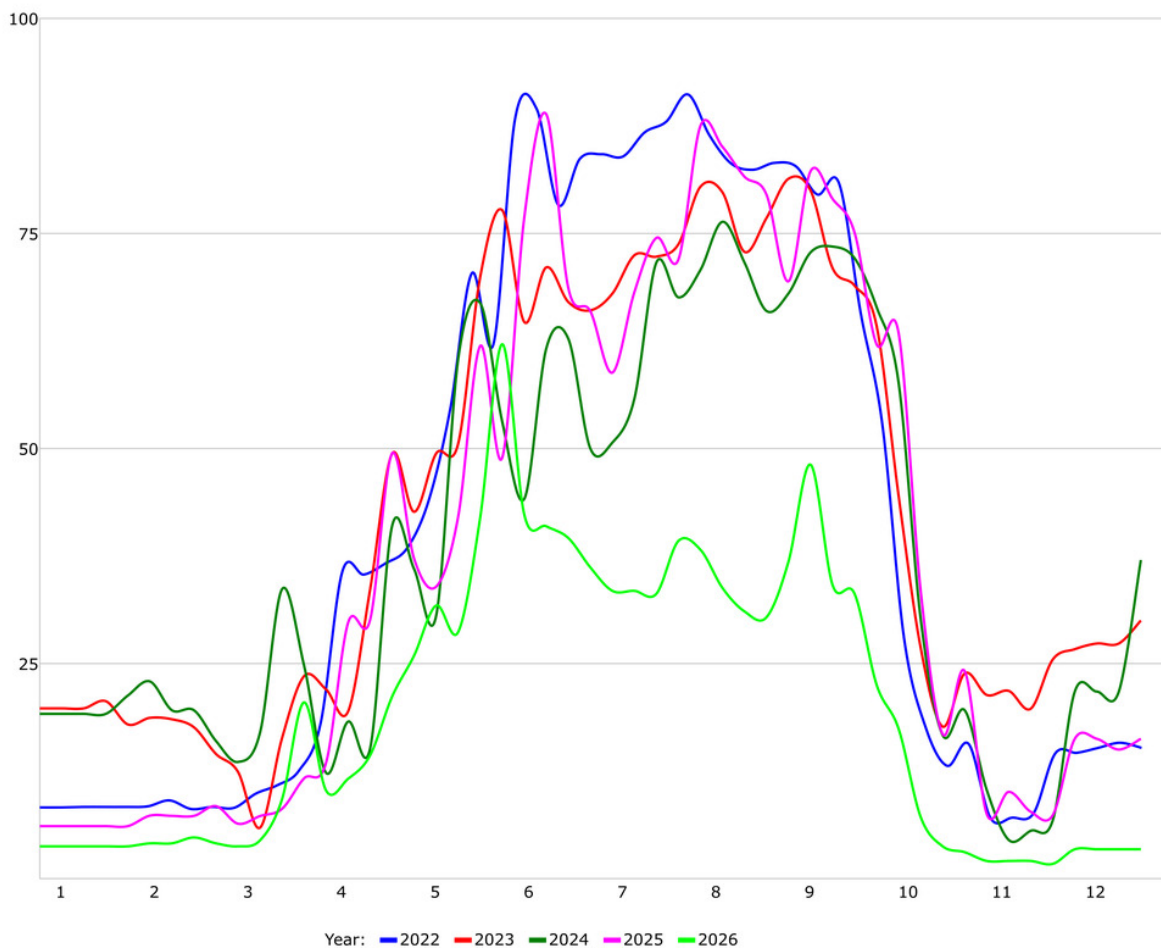
market no longer reached the extreme levels recorded in 2022. This trend can be directly linked to the increased number of vessels available on the market.

Another interesting and recurring pattern is the slightly weaker occupancy observed between mid-June and mid-July. This “mid-peak gap” appears consistently across several consecutive years. One possible explanation lies in changing demand structures – some guests prefer June due to more favourable pricing, while a significant portion of July bookings materialises later, temporarily creating a dip between two demand waves.

The current 2026 season shows a more moderate start compared to previous years. Occupancy during June and July has so far been noticeably lower than in 2022, though it must be emphasised that the season is still ongoing and data is continuously updated. A trend of stronger bookings in June and September is also visible, which over the past few years may be attributed not only to more competitive pricing but also to more moderate temperatures during those periods. So far in August, occupancy stands at around 40%, confirming a pattern of gradual market normalisation rather than peak saturation.

**Booking rate %**

Yacht-Rent.com



## What Do These Trends Tell Us?

The combination of strong fleet growth and gradually lower peak occupancy rates indicates that the market is entering a phase of maturity. Today's supply is significantly larger than in 2021 or 2022, while demand, although stable, no longer shows the extraordinary surges characteristic of the immediate post-pandemic period.

The fact that August no longer exceeds 90% occupancy but instead stabilises between 75% and 85% demonstrates that there is room for further optimisation. This does not suggest weakness of the destination, but rather a return to realistic market conditions following an exceptional growth phase.

We firmly believe that such detailed analysis contributes to a deeper understanding of the real dynamics of the charter sector in Pula. The data clearly illustrates how the market has evolved, where its peaks and sensitivities lie, and in which direction it is moving. Pula remains a strong and competitive nautical hub, yet future development will depend on smart capacity management, fleet quality and adaptation to new demand patterns.

We will continue to systematically monitor these indicators, as we are convinced that precise data interpretation is key to understanding and further strengthening our nautical tourism offer.

Data source for yacht charter statistics in Pula: [Yacht-Rent statistics for Pula](#)