

Updates from GCE Blue Maritime Cluster - World Orderbook October 2025

Introduction:

This section will provide updates from our database **GCE BMC World Orderbook**. There are several data sources for this dataset, however, the main data source is BRL Shipping Consultant. Other sources added to the dataset is for instance information from Cruise Industry News.

In the report we will share information about the latest updates in the cruise and ferry markets every second month or quicker

- For an overview of the Cruise Market, also check out our Cruise Analysis and lists (December 2023): [LINK](#)
- You can also subscribe to the **GCE World Orderbook** – accessing all segments, by signing up [here](#).
- The Cruise industry News reports for Retrofit and Expedition Cruise Market can be found on this [LINK](#)

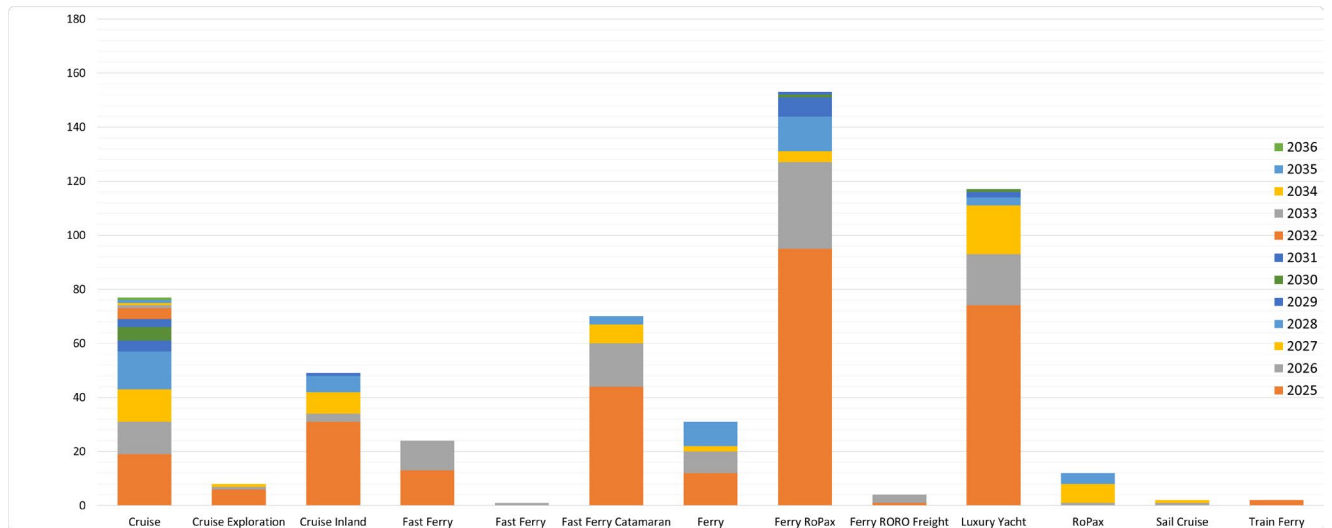


Figure 1- GCE World Orderbook - Status Cruise and Ferries 30th September 2025

Radetiketter	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Totalsum
Cruise	19	12	12	14	4	5	3	4	1	1	1	1	77
China	1	2		2									5
Croatia	1	1	1										3
Finland	2	1	2										5
Meyer Turku	2	1	2										5
Carnival Cruise Line	1												1
Yard: Meyer Turku Hull: 1397	1												1
Royal Caribbean Cruise	1	1	2										4
Star of the seas	1												1
Legend of the seas		1											1
HERO OF THE SEAS			1										1
Yard: Meyer Turku			1										1
France	3	1	1	2	1	1							9
Chantiers de l'Atlantique	1	1	1	2	1	1							7
MSC		1	1		1	1							4
WORLD ASIA			1										1
WORLD AFRICA				1									1
Yard: Chantiers de l'Atlantique						1							1
Yard: Chantiers de l'Atlantique							1						1
Royal Caribbean Cruises				1									1
Oasis Class 7				1									1
Celebrity Cruises		1		1									2
Celebrity XCEL		1											1
Celebrity Edge				1									1
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Figure 2 - Example of data extraction of world orderbook

Cruise:

As per today there are 77 larger cruise ships in the orderbook in addition to 8 expedition cruise ships and 49 river cruise ships and inland passenger vessels.

Among the larger shipyards: Fincantieri:39, Meyer Werft: 7, Chantier de l'Atlantique: 9

Over the last month, there have not been two firm new contracts on large Cruise Ships.

Royal Caribbean confirms fifth Icon Class Ship at Meyer Turku

Royal Caribbean Group and Meyer Turku have signed a long-term framework agreement securing the right for Royal Caribbean to build vessels at the Turku shipyard through 2036.

Fincantieri and TUI Cruises

Fincantieri and TUI Cruises, which is a joint venture between TUI AG and Royal Caribbean Cruises, have signed a contract for the design and construction of two cruise ships

Radetiketter	Cruise	Cruise Exploration	Cruise Inland	Sail Cruise	Totalsum
Australia			1		1
Chile		1			1
China	5	1	1		7
Croatia	3				3
Egypt			3		3
Finland	5				5
France	9		5	2	16
Germany	7		22		29
India			1		1
Italy	40	1			41
Netherlands			7		7
Portugal	4				4
Russian Federation			1		1
Switzerland	1				1
Undisclosed			2		2
United Kingdom			1		1
USA	3		3		6
Vietnam		5			5
(tom)			2		2
Totalsum	77	8	49	2	136

Figure 3 - Cruiseships newbuildings world-wide - 31st August 2025

Ferries:

As per today there are 280 ferries in the orderbook. We currently work with the data provider to better distinguish between double-ended car ferries and larger RoPax vessels (which is currently a mix)

The last month we have seen several developments in the RoPax and RoRo Market.

Some highlights:

TT-Lines returns to Jinling Shipyard for ro-pax newbuilds

Jinling Shipyard and TT-Line Company held a Letter of Intent (LOI) signing ceremony in Europe for one plus one second-generation ro-pax vessels.

Stena RoRo signs LOI for up to six new Ro-Ro cargo ships

Stena RoRo has signed a Letter of Intent (LOI) with China Merchant Industries Weihai for the construction of two Ro-Ro cargo ships, with options for an additional four vessels (2+2+2)

New Zealand Government and GSI

The New Zealand Government, through its procuring company Ferry Holdings Limited, has secured GSI (Guangzhou Shipyard International) as the builder of two new ferries for the state-owned, KiwiRail-operated Interislander.

Radetiketter	2025	2026	2027	2028	2029	2030	2031	Totalsum
Fast Ferry	13	11						24
Fast Ferry		1						1
Fast Ferry Catamaran	44	16	7	3				70
Ferry	12	8	2	9				31
Ferry RoPax	95	32	4	13	7	1	1	153
Ferry RORO Freight	1	3						4
Train Ferry	2							2
Totalsum	167	71	13	25	7	1	1	285

Figure 4 - Overview of Ferry orderbook by delivery year – as per 31st August 2025

Radetiketter	Fast Ferry	Fast Ferry Catamaran	Ferry	Ferry RoPax	Ferry RORO Freight	Train Ferry	Fast Ferry	Totalsum
Australia	1	11						12
Bangladesh				7				7
China		2	1	34	4			41
Denmark				1				1
Estonia			4					4
Finland		2	1					3
France				1				1
Germany	3		3	3				9
Greece		1		2				3
Hong Kong		9						9
India			14	26				40
Indonesia		3		3				6
Italy		4		2				6
Japan				5				5
Kenya				1				1
Korea (South)		1		2				3
Lithuania				1				1
Netherlands		2	2	16				20
New Zealand	1			3				4
Norway		2	5	3				10
Philippines		2						2
Poland				11				11
Romania		2		6				8
Russian Federation		6				1		7
Singapore	3	3						6
Spain		12		4		1		17
Sweden	10							10
Taiwan	1							1
Turkey				13				13
United Kingdom	3							3
USA	2		1	7				18
Vietnam		8		2			1	3
Totalsum	24	70	31	153	4	2	1	285

Figure 5 - Overview of Ferry orderbook by building country – as per 31st August 2025

Check out the complete orderbook in the newsletter.