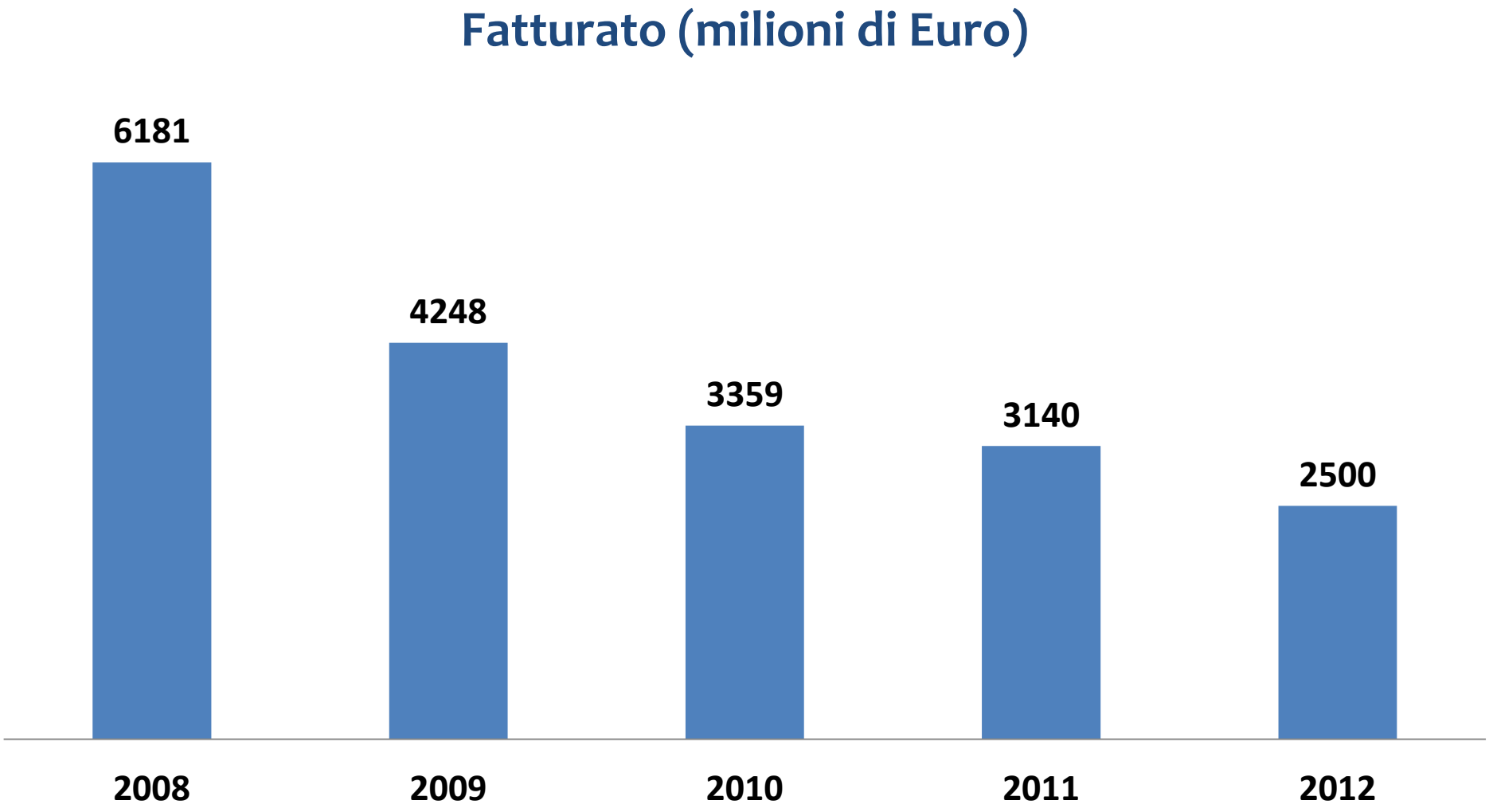
Il mercato dei grandi yacht in Italia, una realtà in evoluzione tra cantieristica, servizi e management di bordo

THE INTERNATIONAL PROPELLER CLUB
PORT OF GENOA

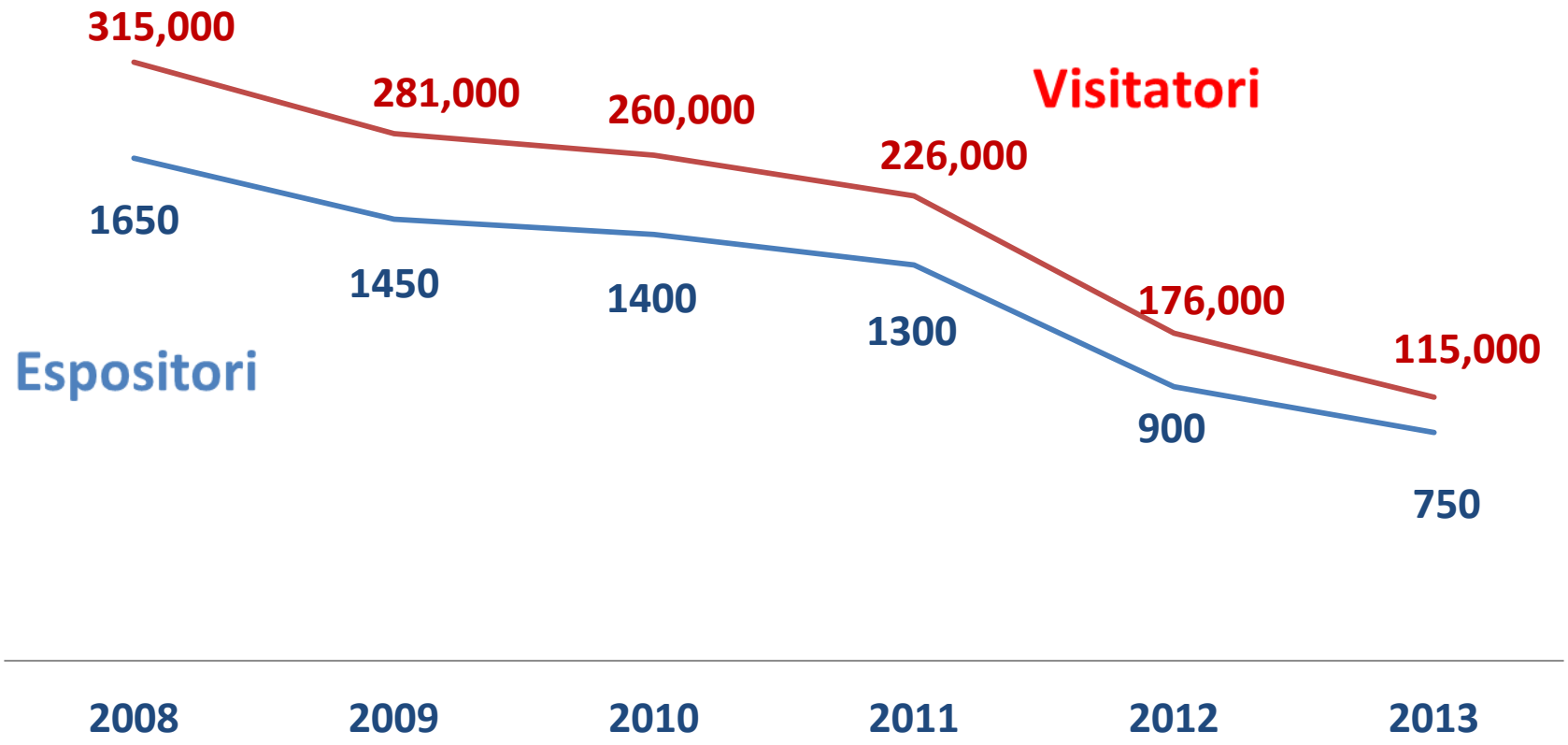
Genova, 28 Gennaio 2014

Il mercato nautico italiano nel suo complesso

Industria nautica italiana in 5 anni



Salone Nautico Internazionale di Genova nel quinquennio



La realtà dei Super yacht

Azzam - Lürssen Yachts

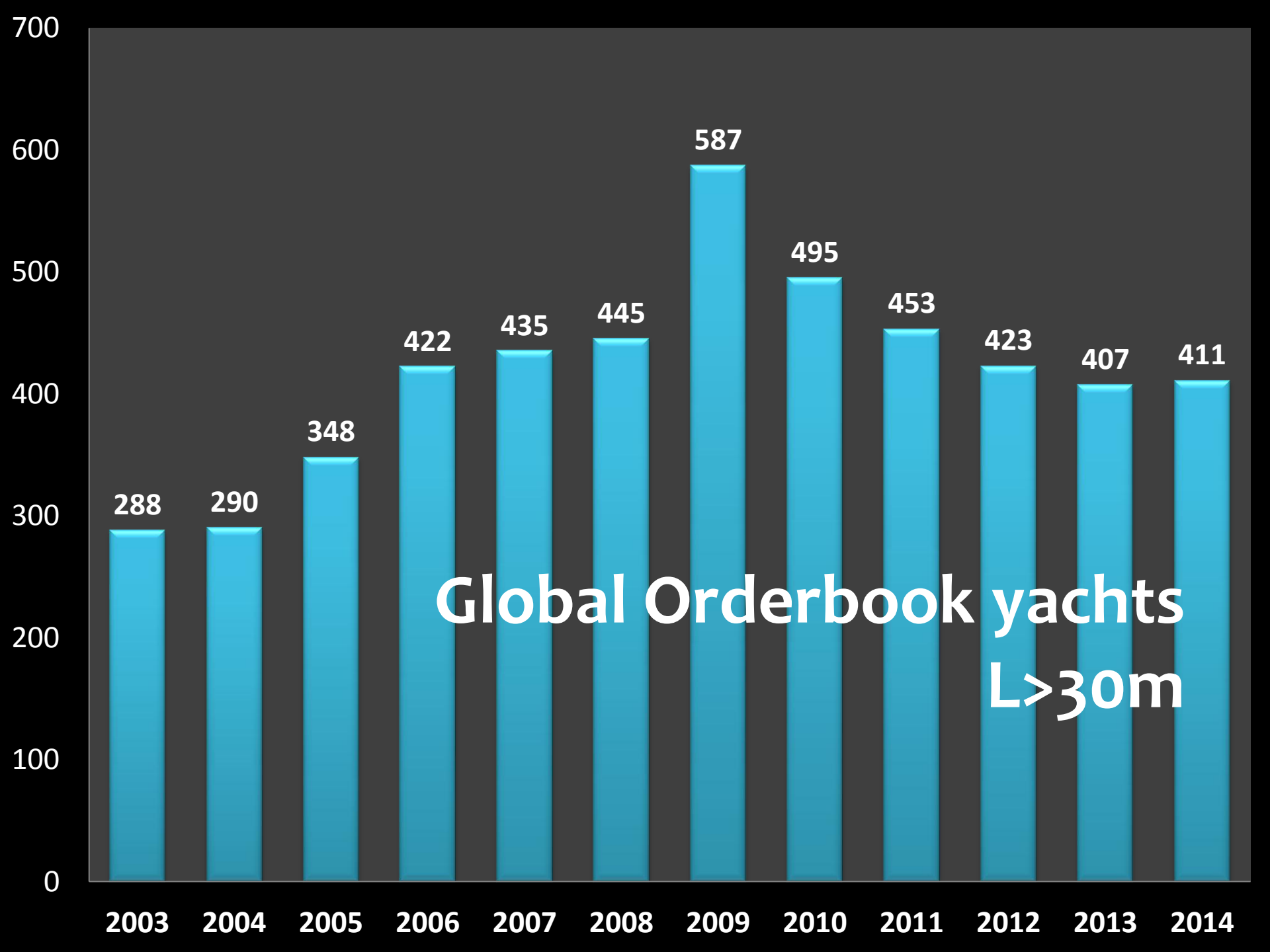
April 2013: the largest yacht in the world

- 180 m length - beam of 18 m
- A main salon with a lengths of 29 m
- Top speed of over 30 knots
- Powered by 2 gas turbines and 2 diesel engines
- Total of 94000 horse powers.
- *build only in 3 years plus 1 year of engineering*
- *Italian Design Nauta Yacht*
- *Builder* Lürssen Yachts, Bremen Germany
- Cost estimated 500 milions euro

An overview of the global Superyacht Industry

An overview of the global Superyacht Industry

- Total global order book: **411**
- Average Loa of yachts in build: **47.8m**
- Average Loa of 2013 deliveries: **44.5m**
- Number of orders placed in 2013: **117**
- Number of deliveries in 2013: **146**
- Total Loa of deliveries made in 2013: **6,500m**
- Number of yards recording orders in 2013: **100**
- Number of yards making deliveries in 2013: **70**
- Number of yards signing new orders in 2013: **47**


700
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2003
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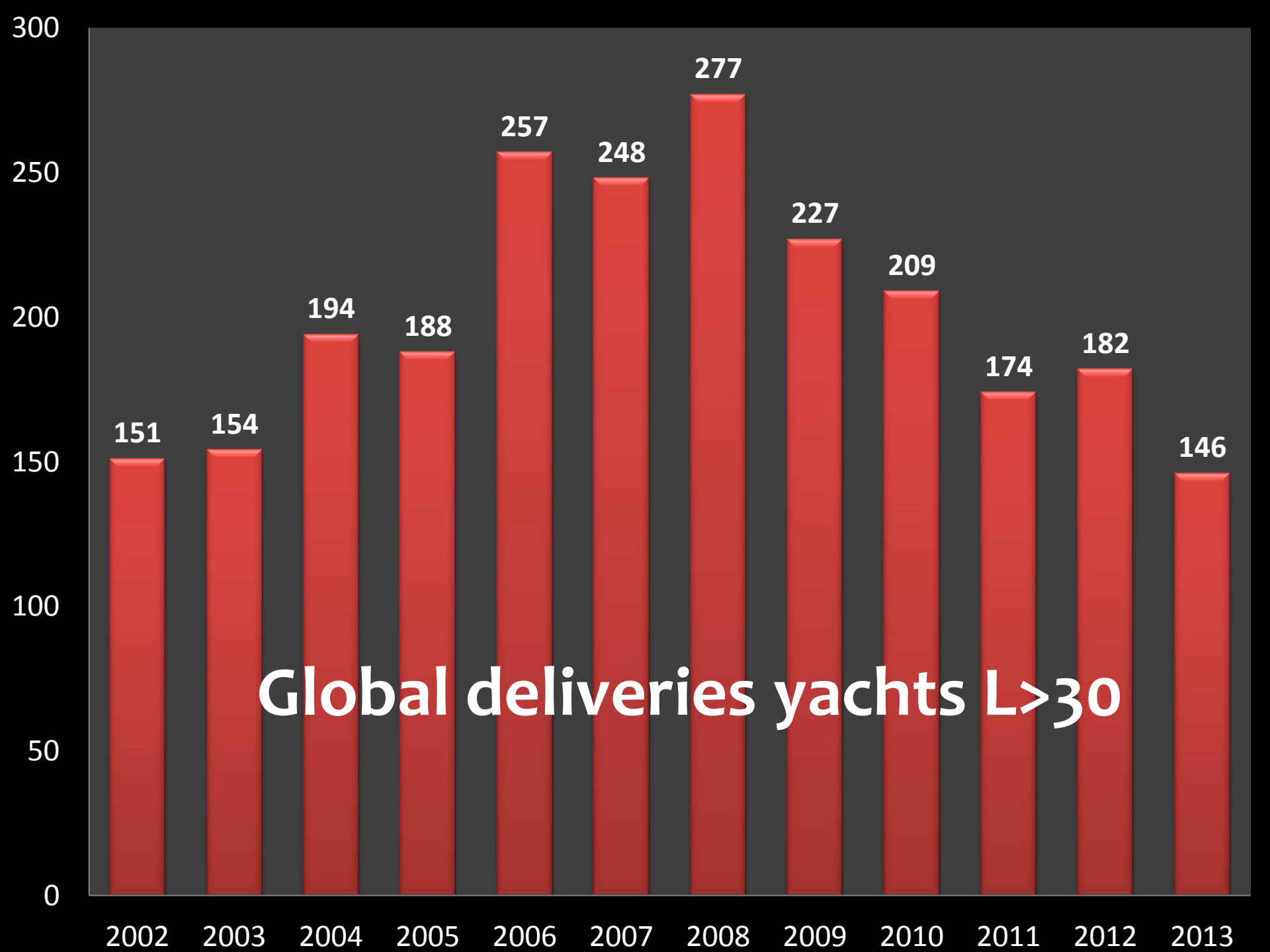
2014
Global Orderbook yachts
L>30m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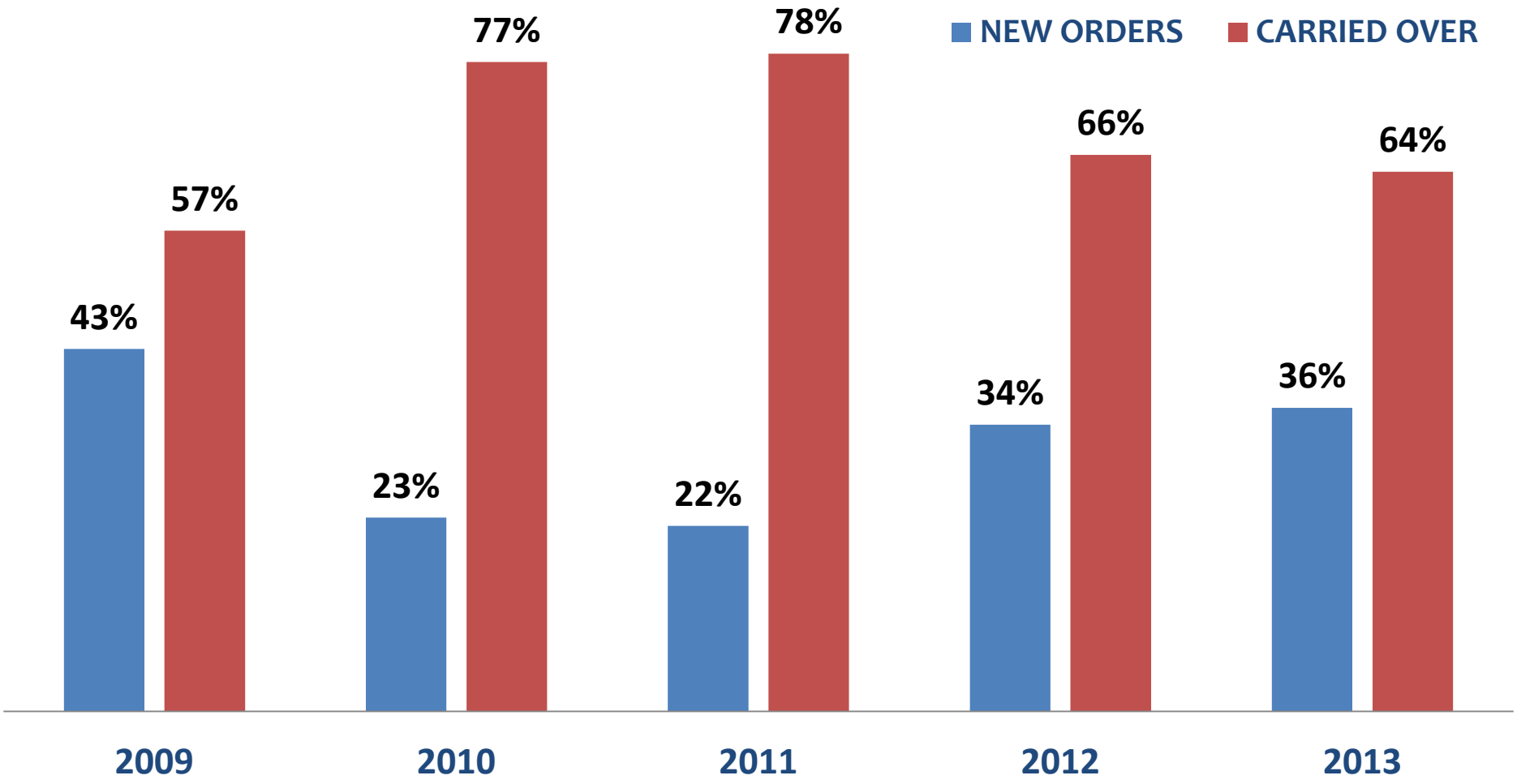
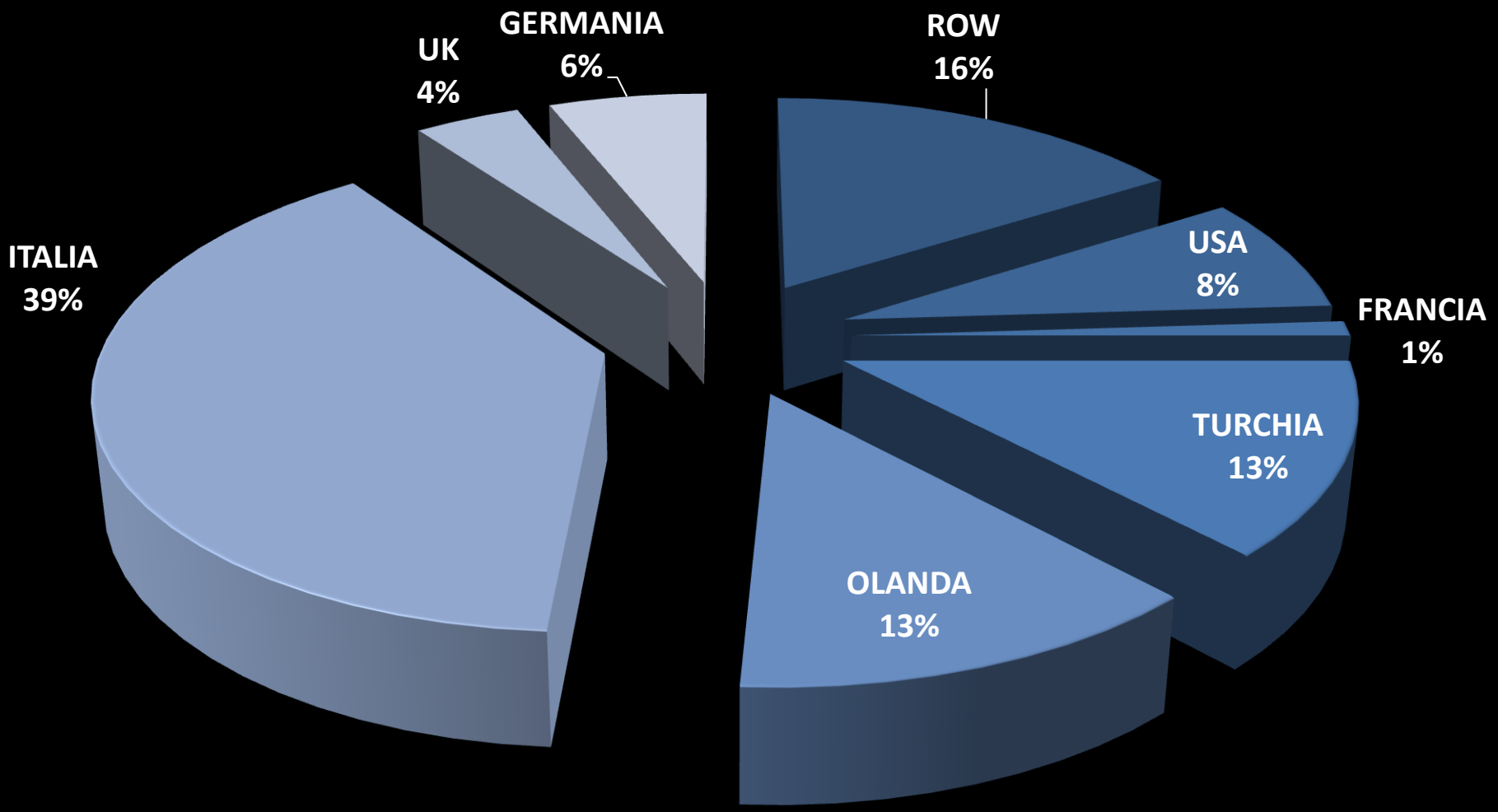
Global deliveries yachts L>30

Status of the Super Yacht Industry

Rapporto tra nuovi ordini e ordini esistenti



Share global orderbook by countries



Top 10 yards by size yachts delivered

Top yards by 30-40 M

❑ **AZIMUT**	**158**
❑ BROWARD	107
❑ **BENETTI**	**100**
❑ WESTPORT	96
❑ SUNSEEKER	86
❑ **FERRETTI**	**83**
❑ **OVERMARINE**	**75**
❑ **FIPA-MAIORA**	**48**
❑ **PISA**	**43**
❑ **FALCON**	**42**

Top yards by 40-50 M

❑ FEADSHIP	55
❑ **BENETTI**	**40**
❑ HEESEN	36
❑ TRINITY	30
❑ **CRN**	**24**
❑ **BAGLIETTO**	**24**
❑ **PERINI NAVI**	**22**
❑ **MONDO MARINE**	**20**
❑ PALMER JOHNSON	20
❑ CHRISTENSEN	19

Top 10 yards by size yachts delivered

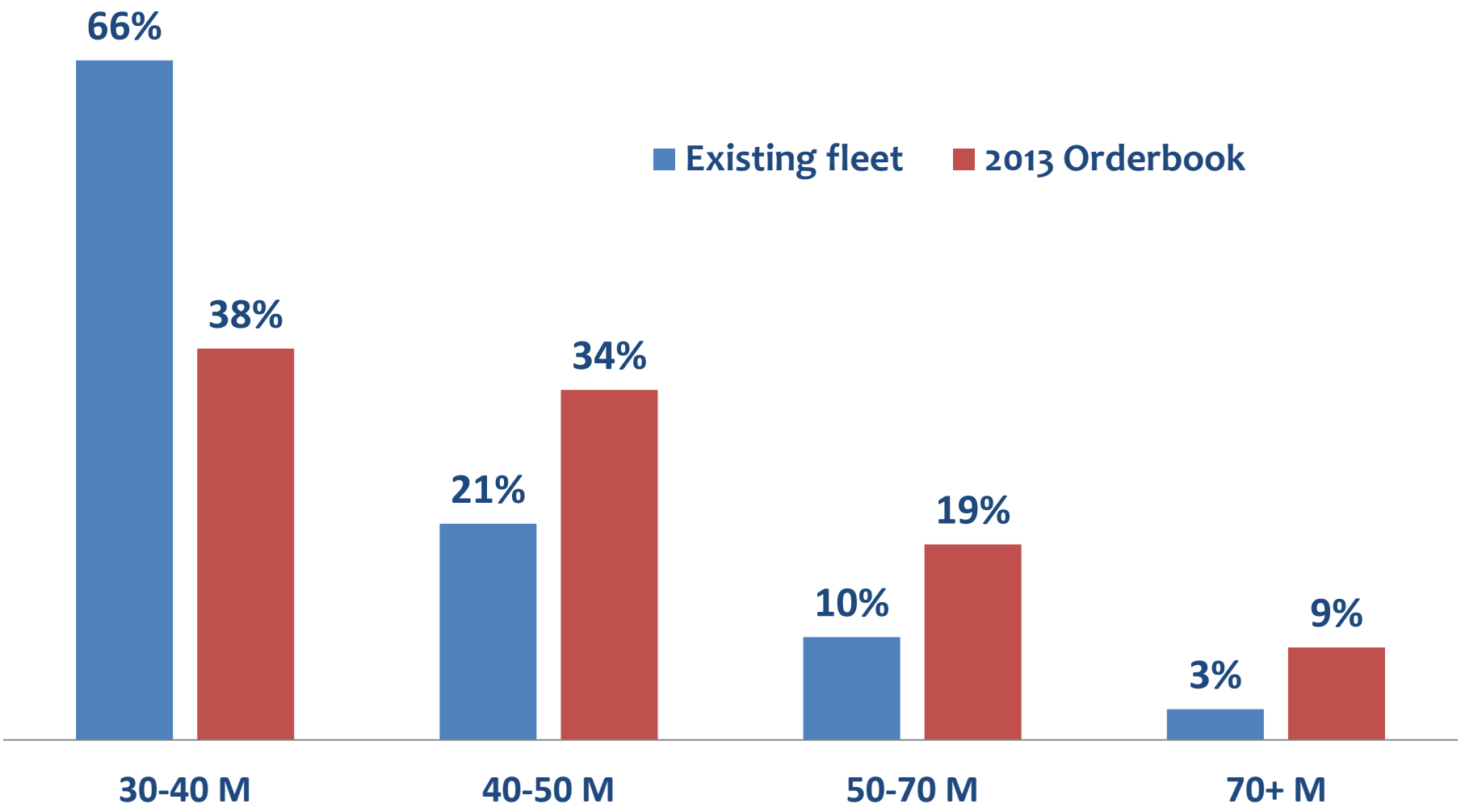
Top yards by 50-70 M

FEADSHIP	54
BENETTI	**33**
AMELS	32
PERINI NAVI	**21**
CRN	**16**
LURSSEN	15
ABEK. & RASM.	13
TRINITY	13
CODECASA	**12**
OCEANCO	8

Top yards by 70+ M

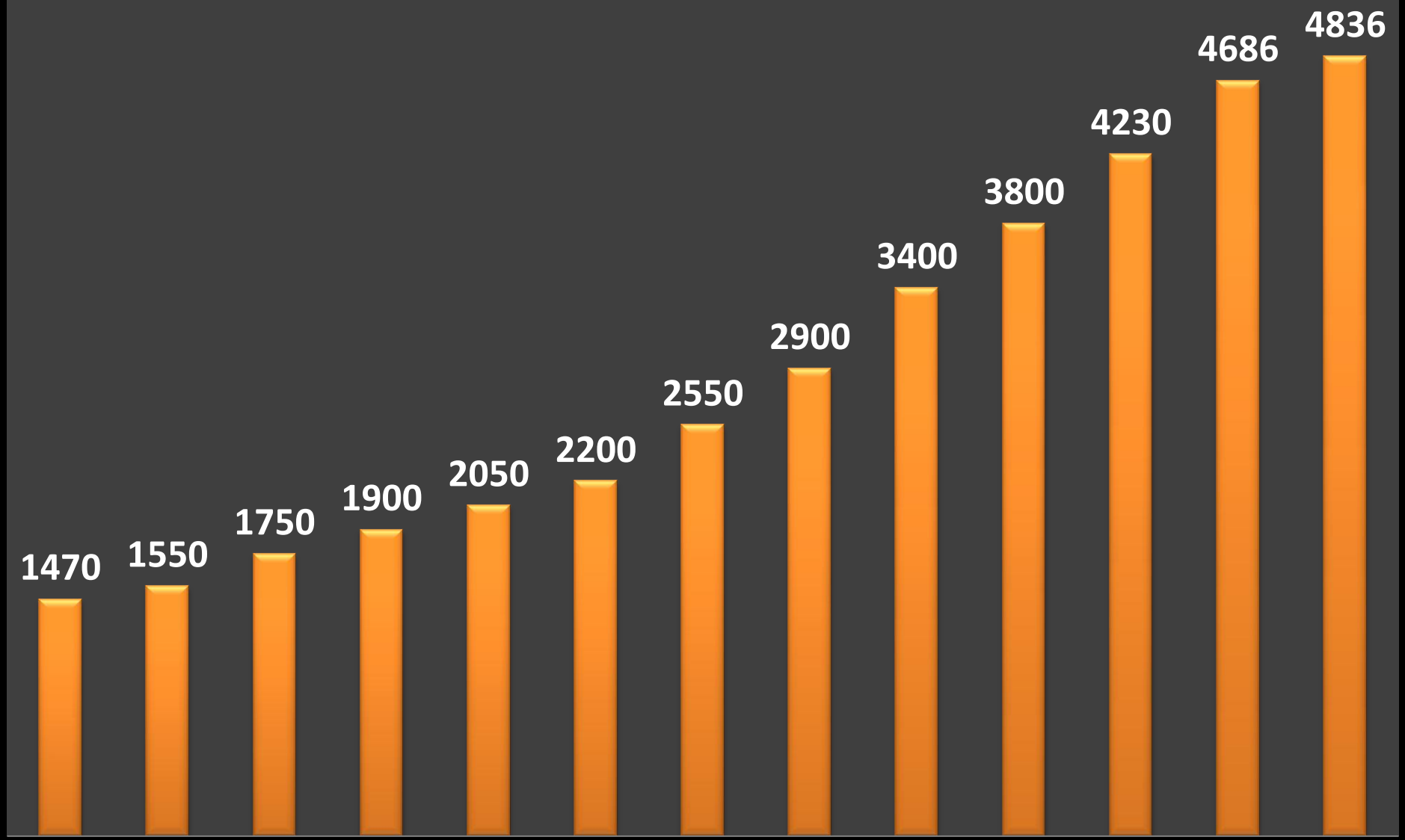
LURSSEN	26
OCEANCO	11
BLOHM+VOSS	10
FEADSHIP	10
NOBISKRUG	5
ABEKING & RASMUSSEN	4
AMELS	3
HANSEATIC	3
KRUPP	3
PENDENNIS	3

Lunghezza Yacht: Fleet vs Orderbook

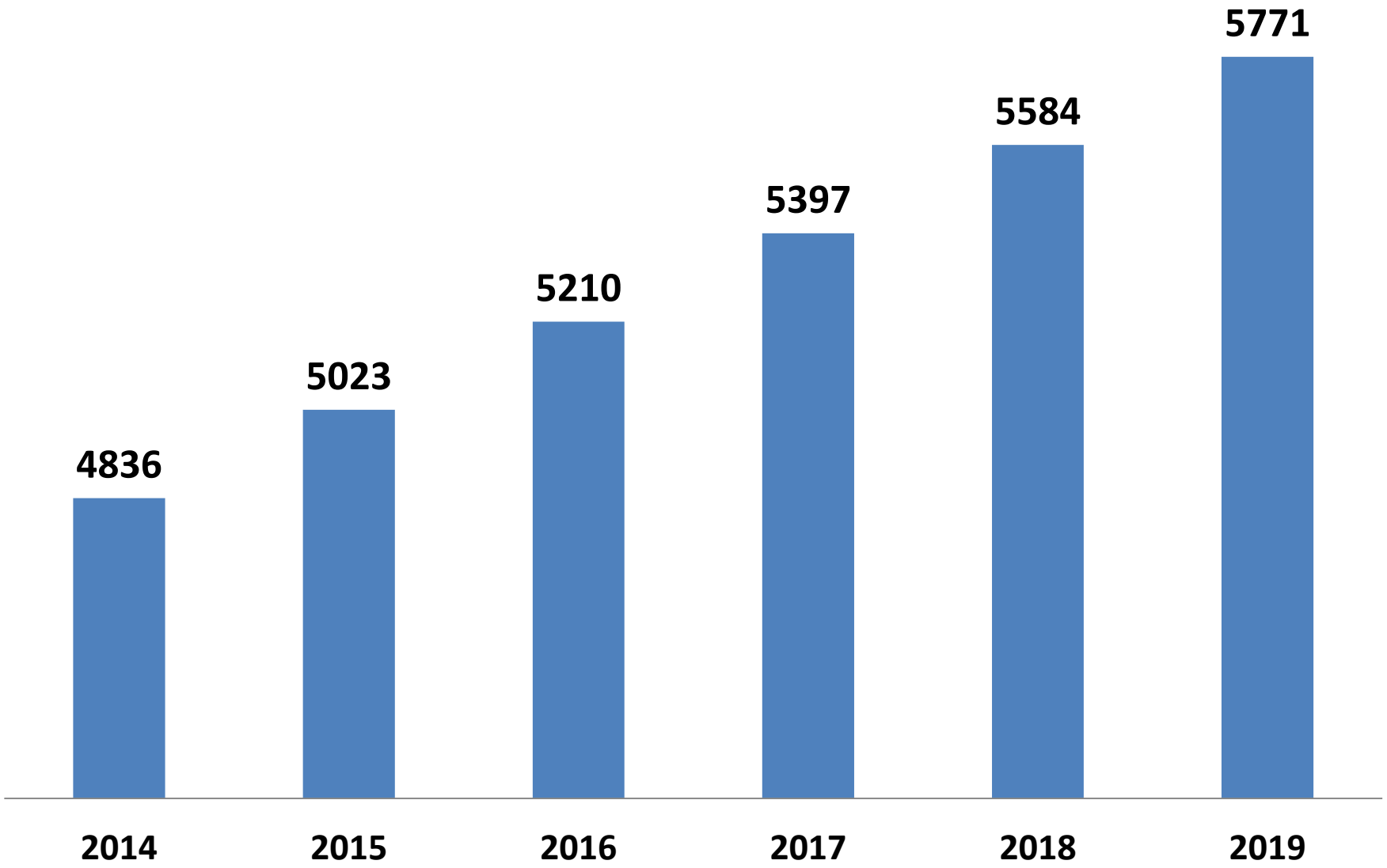


La flotta mondiale dei grandi yacht

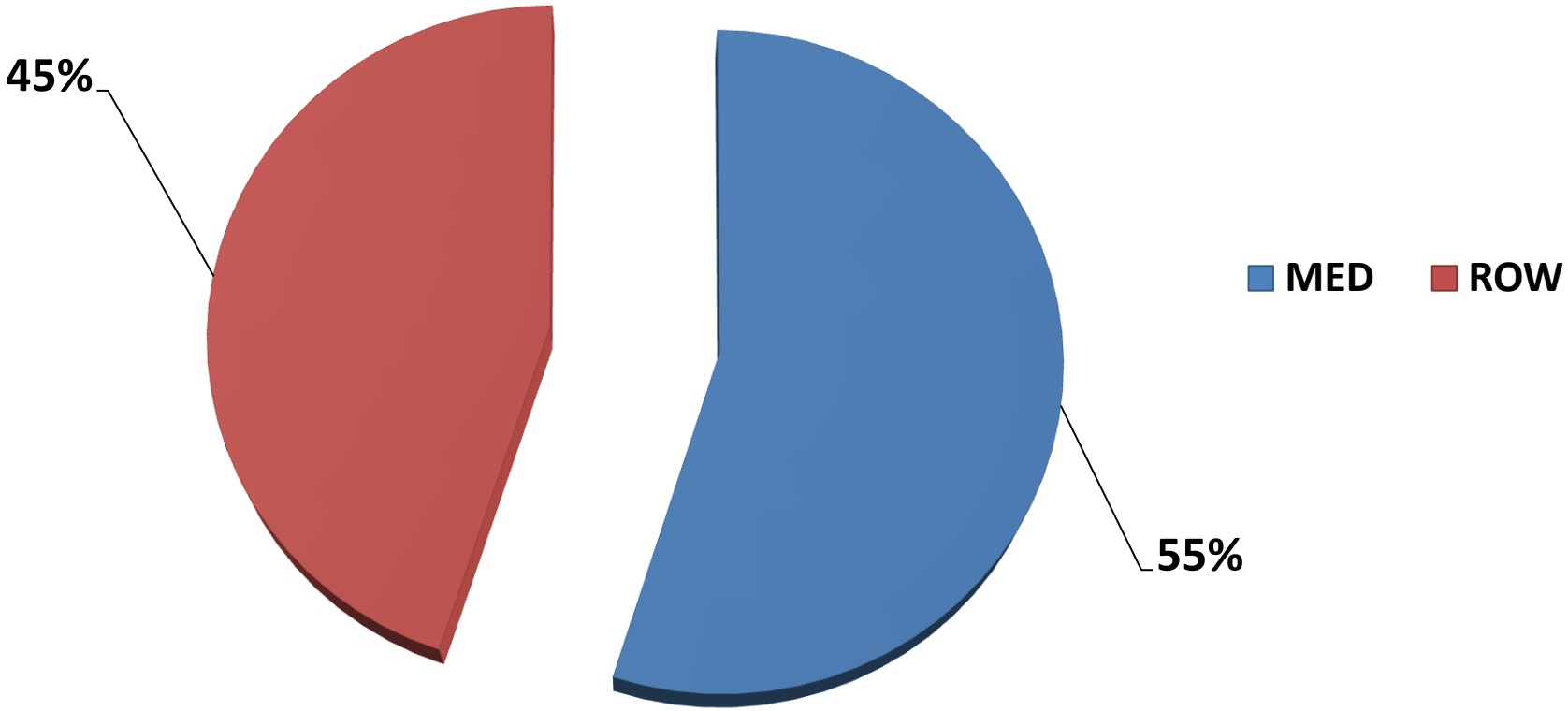
Crescita della flotta nel ventennio



Flotta mondiale nel quinquennio

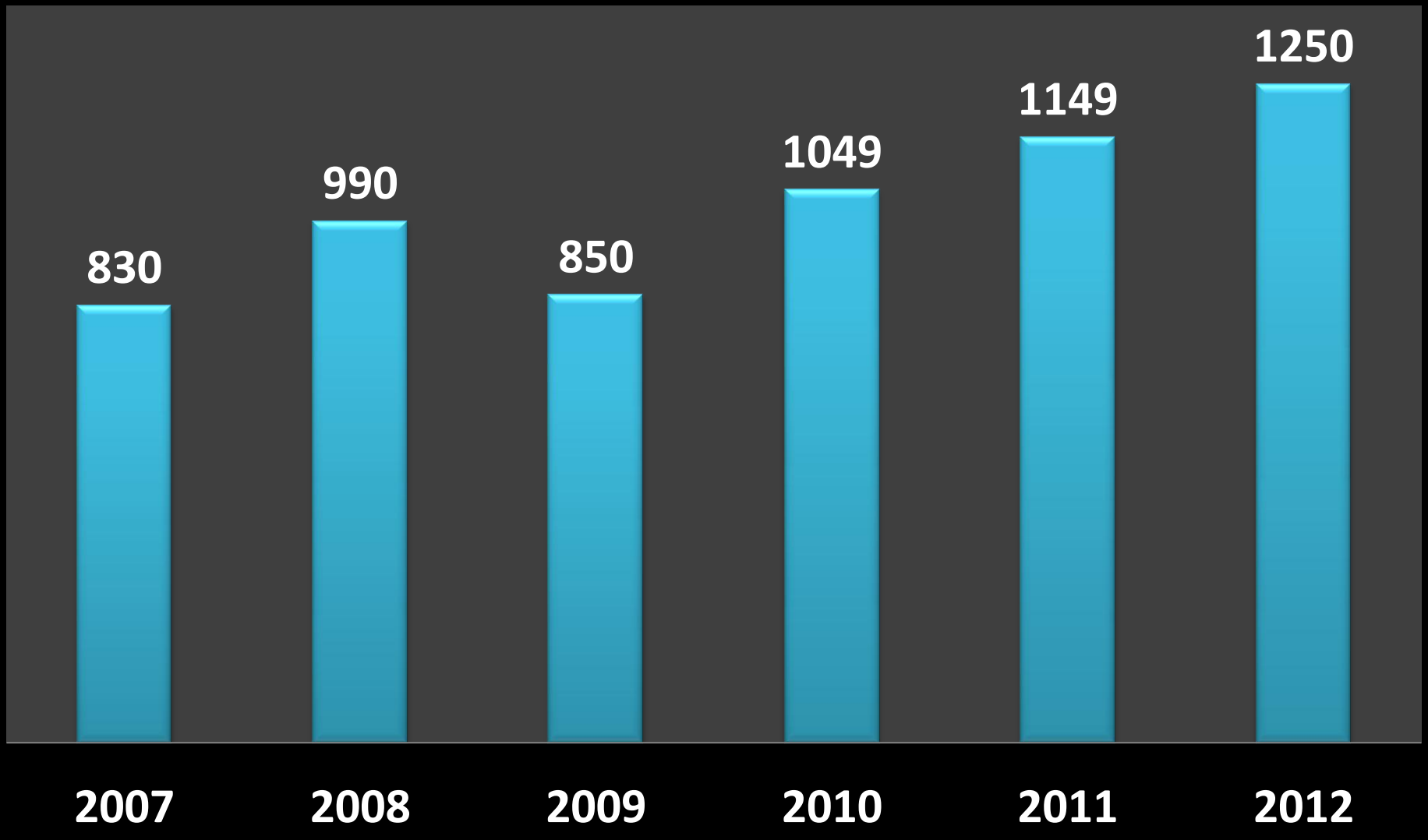


Superyacht home port market share: the Med leadership

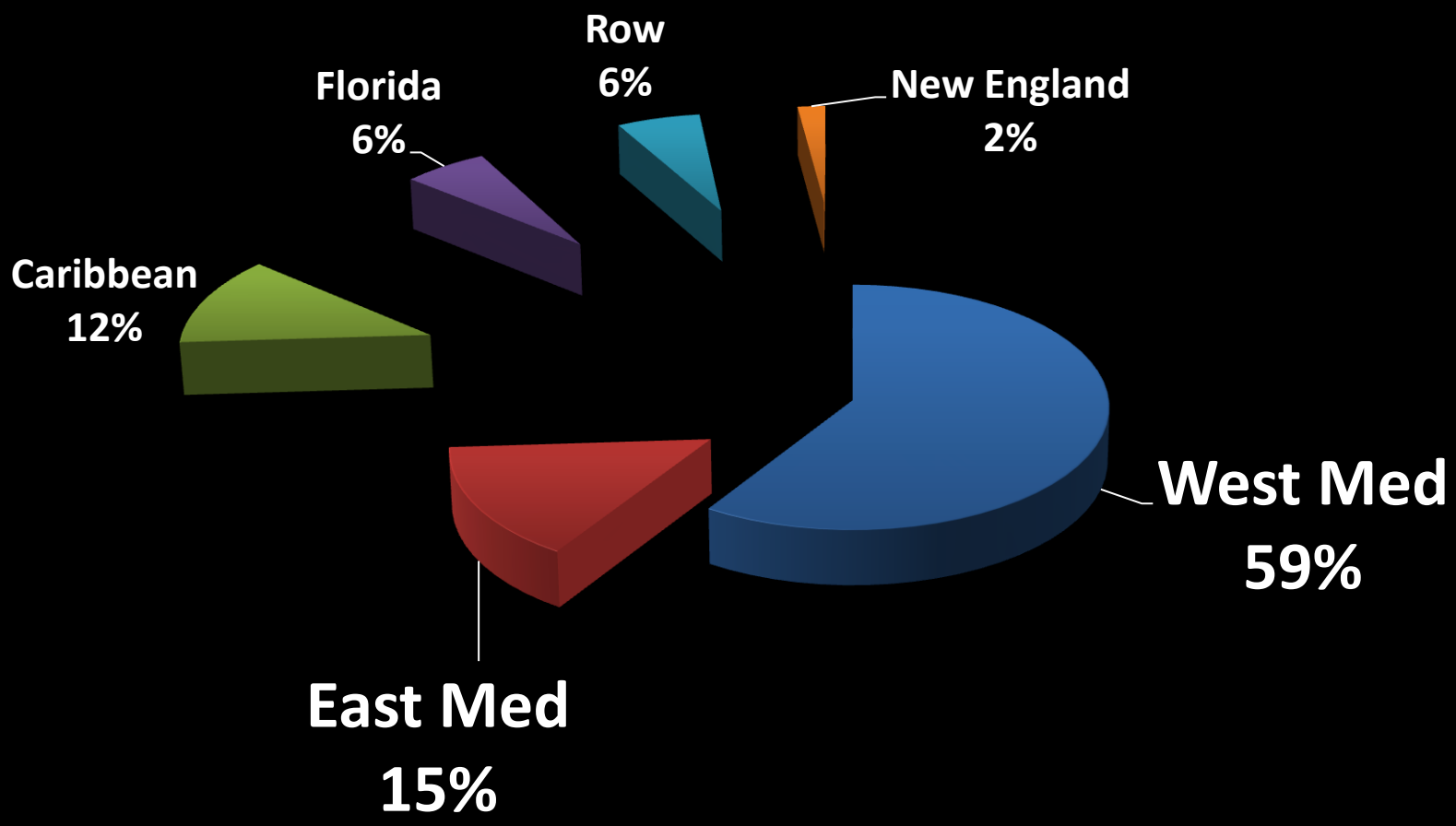


International Charter

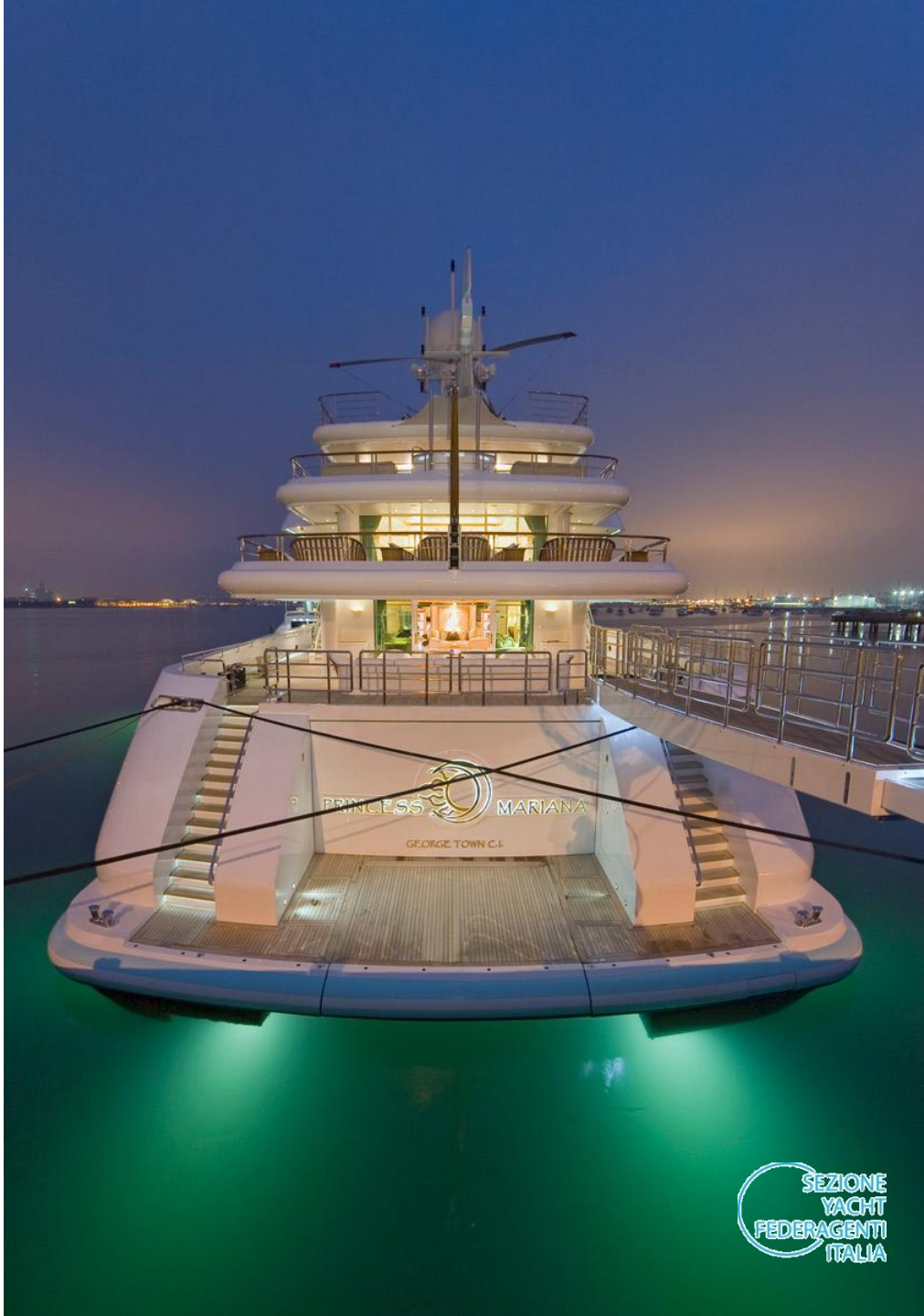
Global superyacht Charter trend



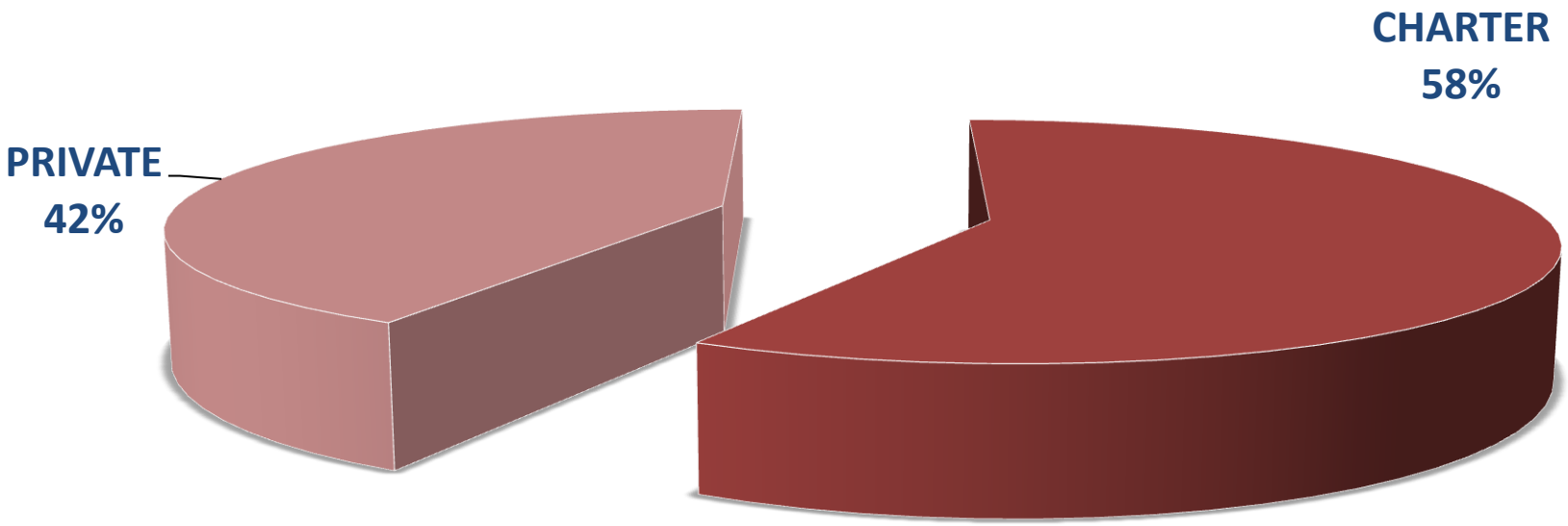
Destinazioni Charter Internazionale



Dati dello Yachting lungo le coste italiane



Traffico Yacht (privato/charter)



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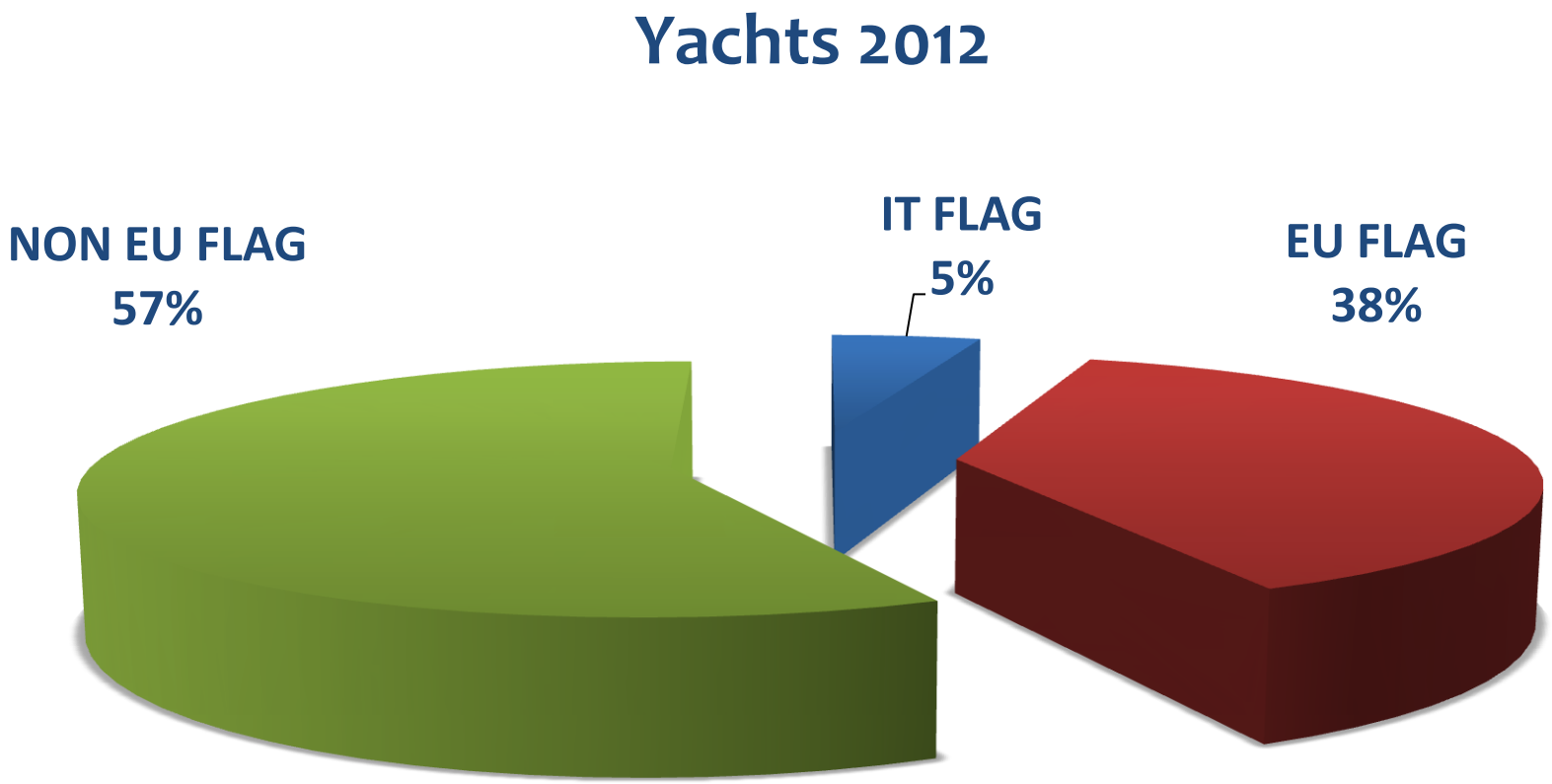
Bandiere Yacht lungo le coste italiane



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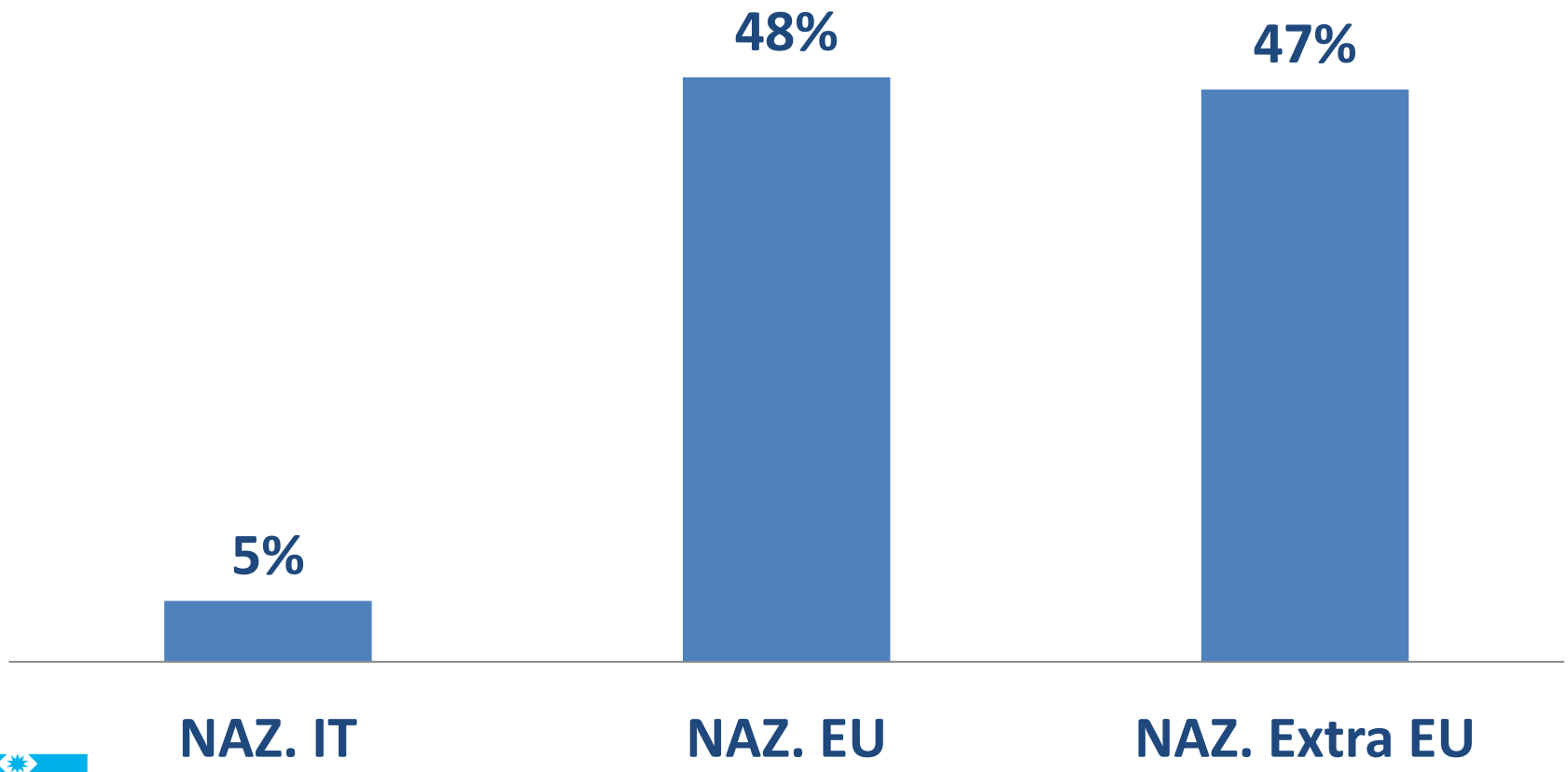
Nazionalità equipaggi



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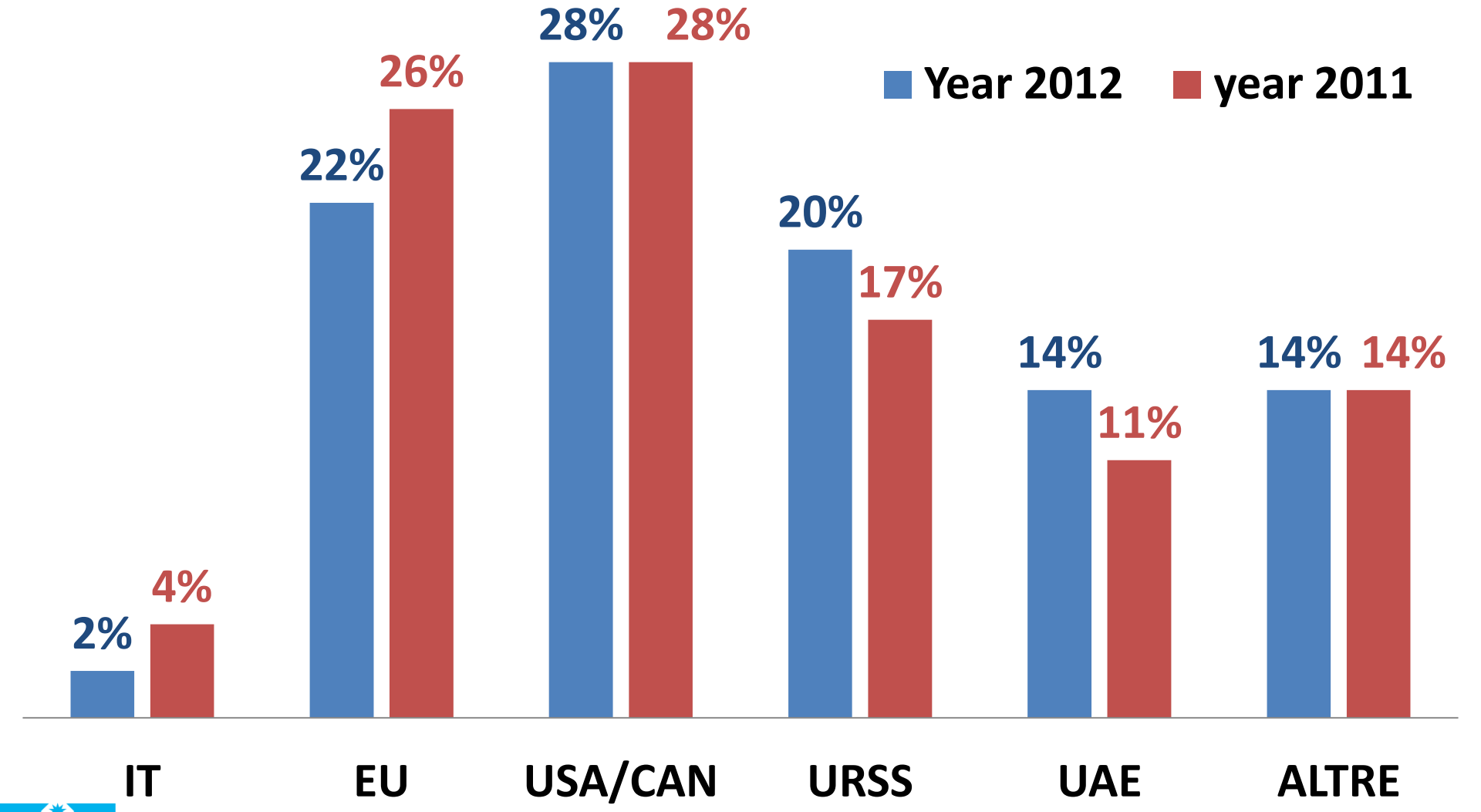
Nazionalità armatori/ospiti



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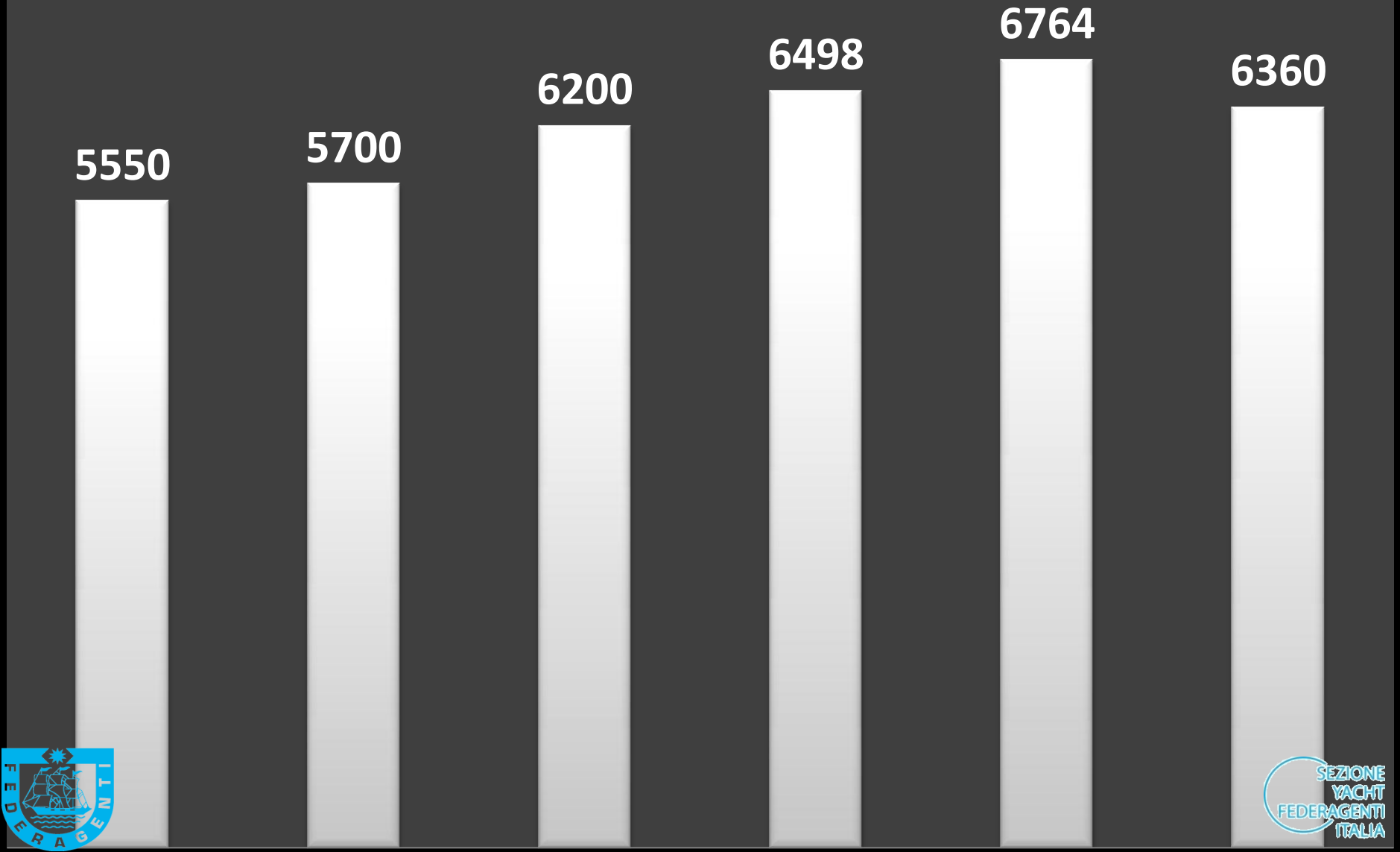
Toccate SuperYacht lungo le coste italiane



Cinque elementi strategici per lo sviluppo

1) La leadership dei nostri cantieri

2) La flotta dei Superyacht nel Mediterraneo

3) Il Charter internazionale nel Mediterraneo

4) L’attrattiva delle coste italiane

5) Italy as a Yacht Hub

La strategia di sviluppo

- Offerta ricettiva, logistica e servizi a terra di qualità per i grandi yacht e gli equipaggi
- Filiera lunga industriale e complesso integrato di servizi dedicati al service e all'assistenza tecnica
- Promozione di poli territoriali di eccellenza per servizi tecnici altamente qualificati
- Attività formative per equipaggi e personale addetto ai servizi ai grandi yacht
- Promozione integrata del Sistema Paese sui mercati internazionali
- Legislazione e normativa più «customer friendly»

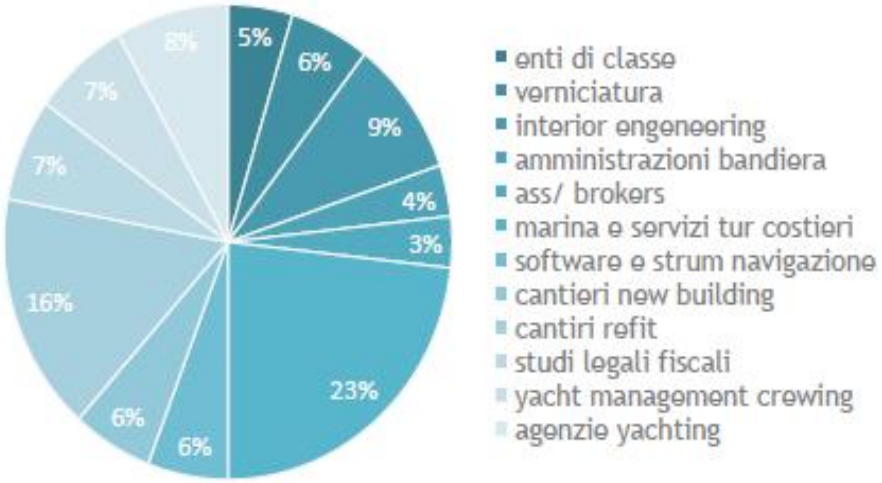
YARE - L'EVENTO

BUSINESS AS "UNUSUAL"

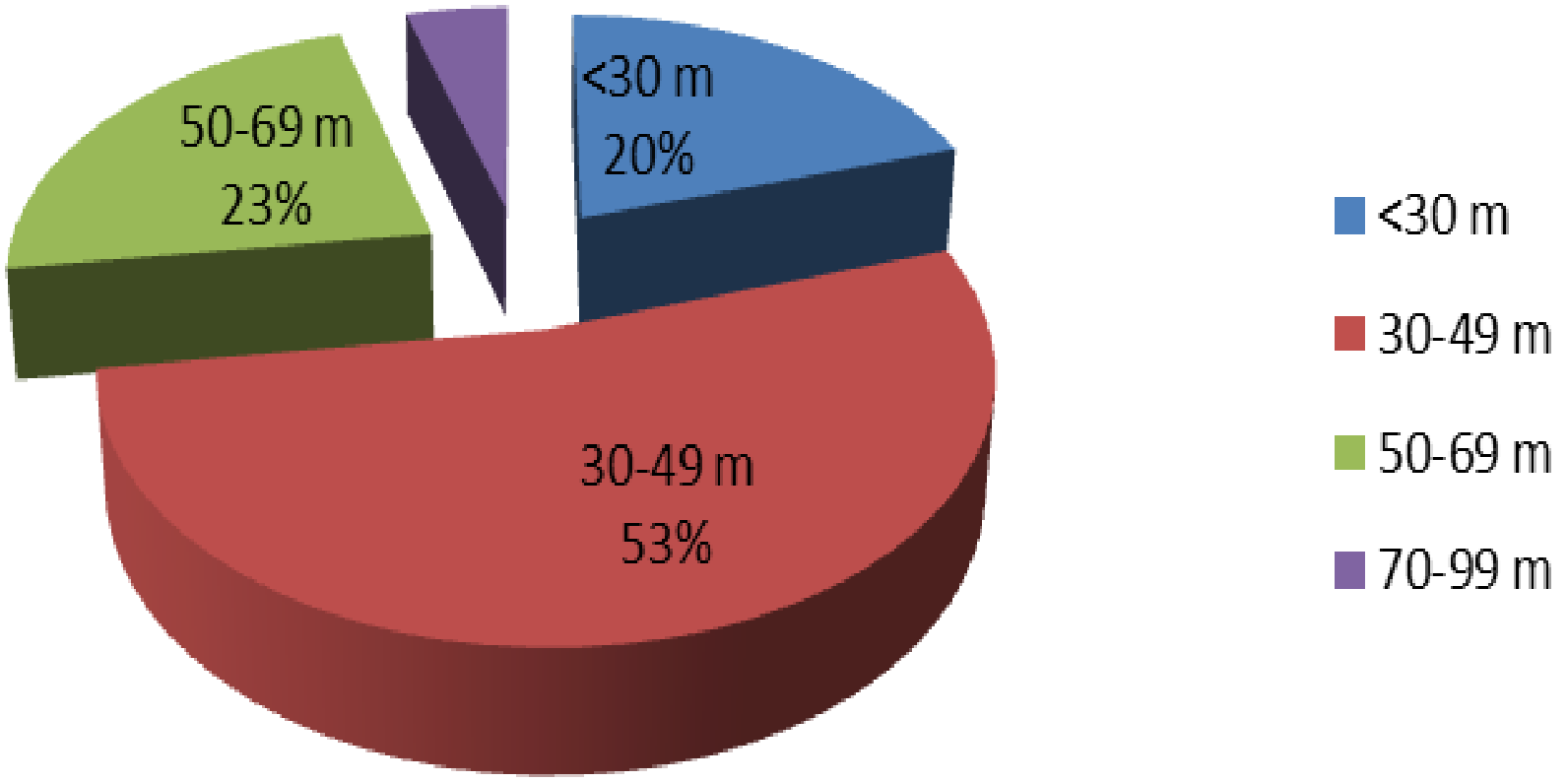
ATTEND THE MOST INNOVATIVE SUPERYACHT B2B EVENT FORMAT TO PROMOTE YOUR BUSINESS

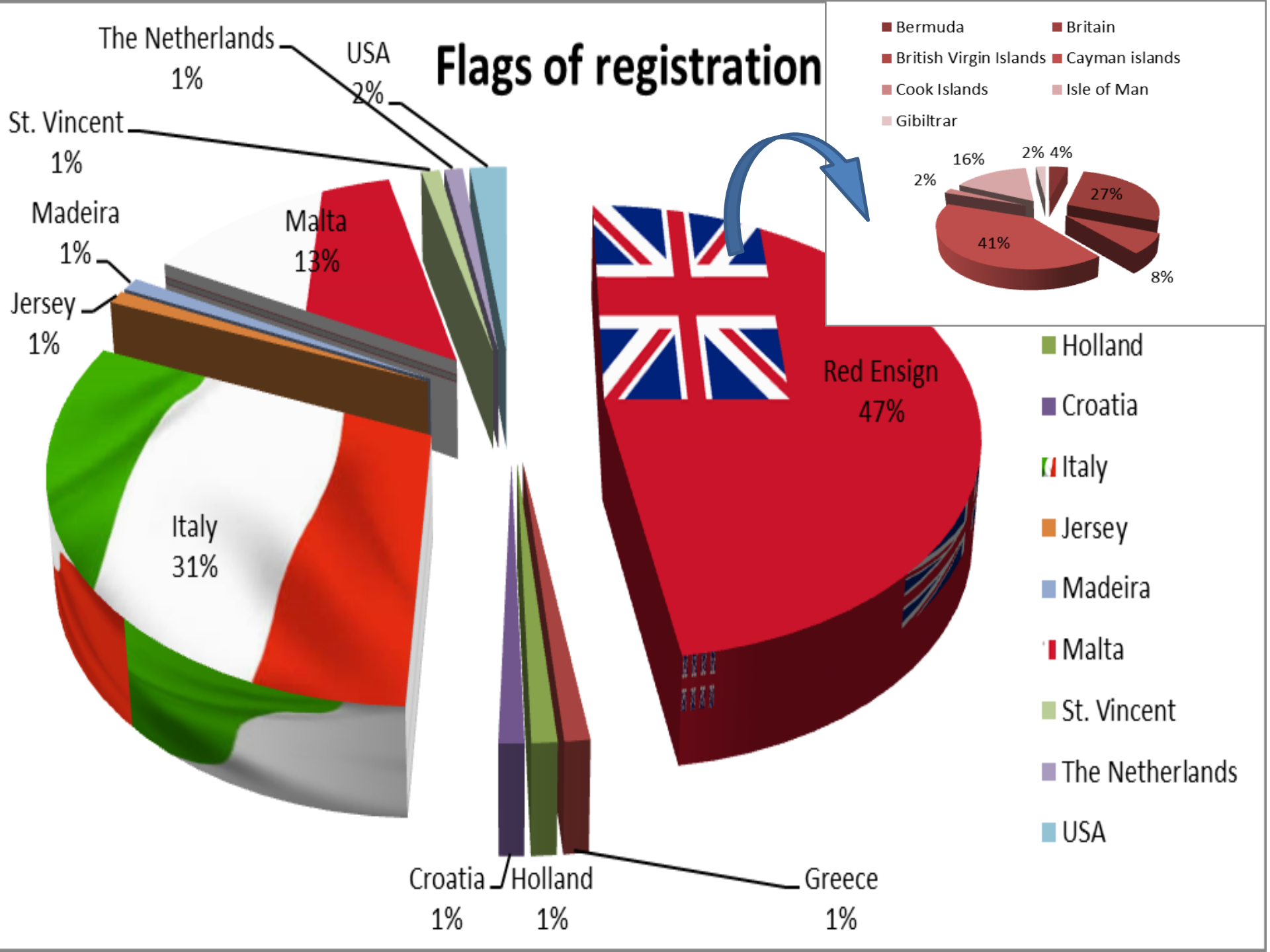
YARE - L'EVENTO

Settori Aziende

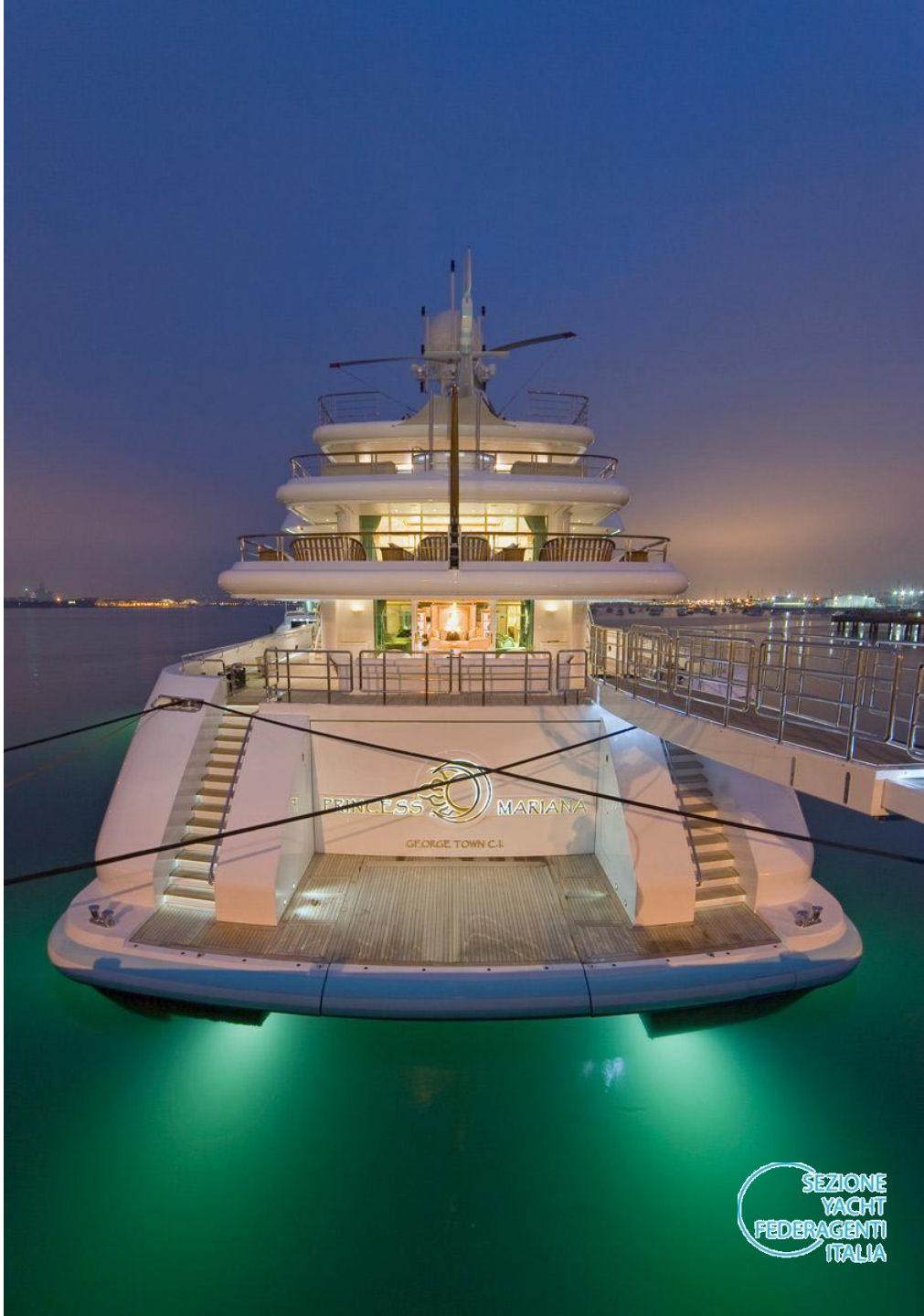


Yachts' lenght of Captains attending Yare 2014




Flags of registration
The Netherlands 1%
USA 2%
St. Vincent 1%
Madeira 1%
Jersey 1%
Malta 13%
Italy 31%
Red Ensign 47%
Croatia 1%
Holland 1%
Greece 1%
Bermuda
Britain
British Virgin Islands
Cayman islands
Cook Islands
Isle of Man
Gibiltrar
16%
2%
4%
2%
27%
41%
8%
Holland
Croatia
Italy
Jersey
Madeira
Malta
St. Vincent
The Netherlands
USA

Italy with over 8.000 kilometer of coastline, UNESCO heritage sites and a wealth of culture, art, history and some of the best beaches in the world represents the best cruising areas in the world



SEZIONE YACHT FEDERAGENTI ITALIA

JO

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SAINT NICOLAS

SAINT NICOLAS

LUNA
HAMILTON