



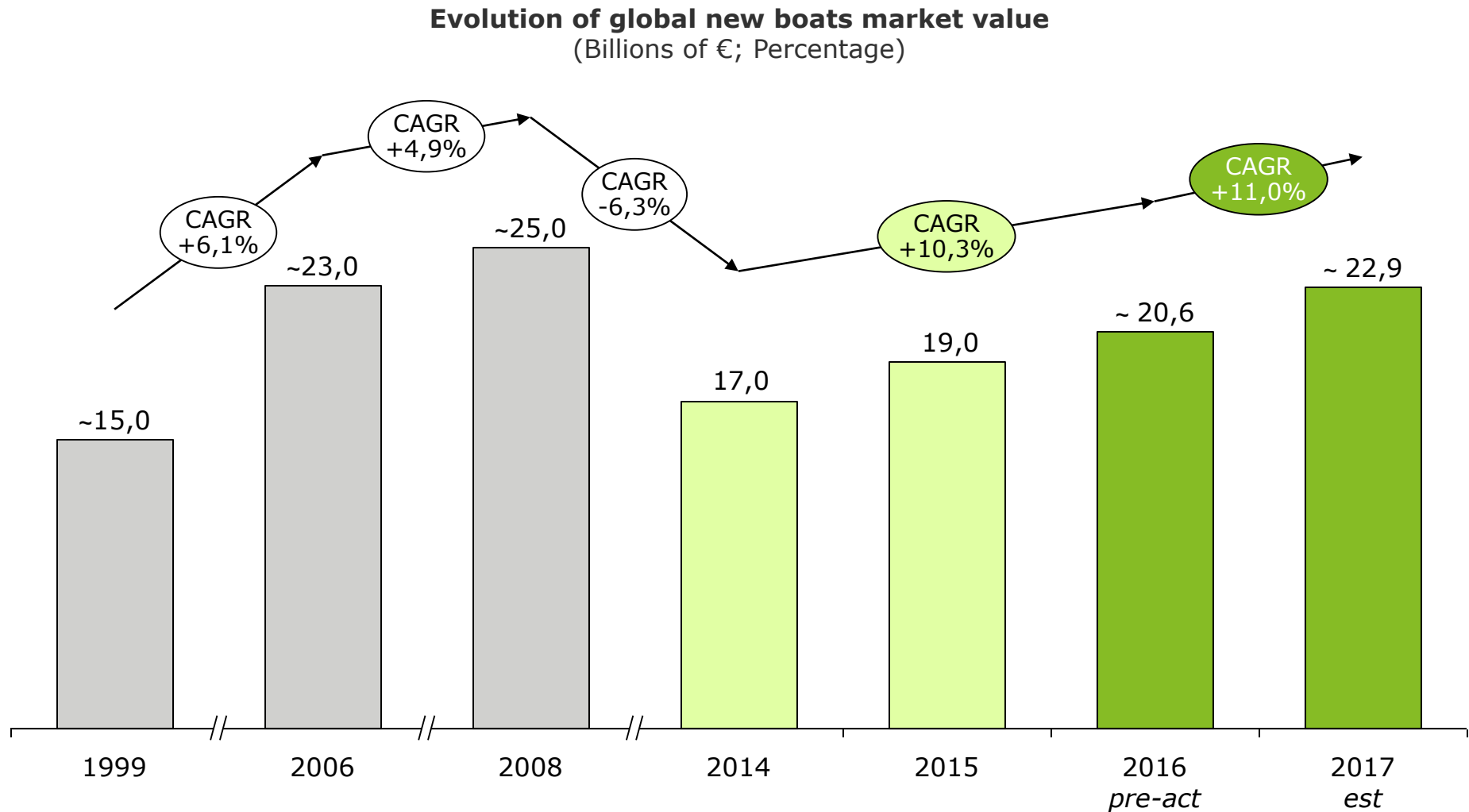
# **Marine industry market monitor Superyacht insight - Extract**

Monaco, September 27<sup>th</sup> 2017

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# Global boating market: retail value trend

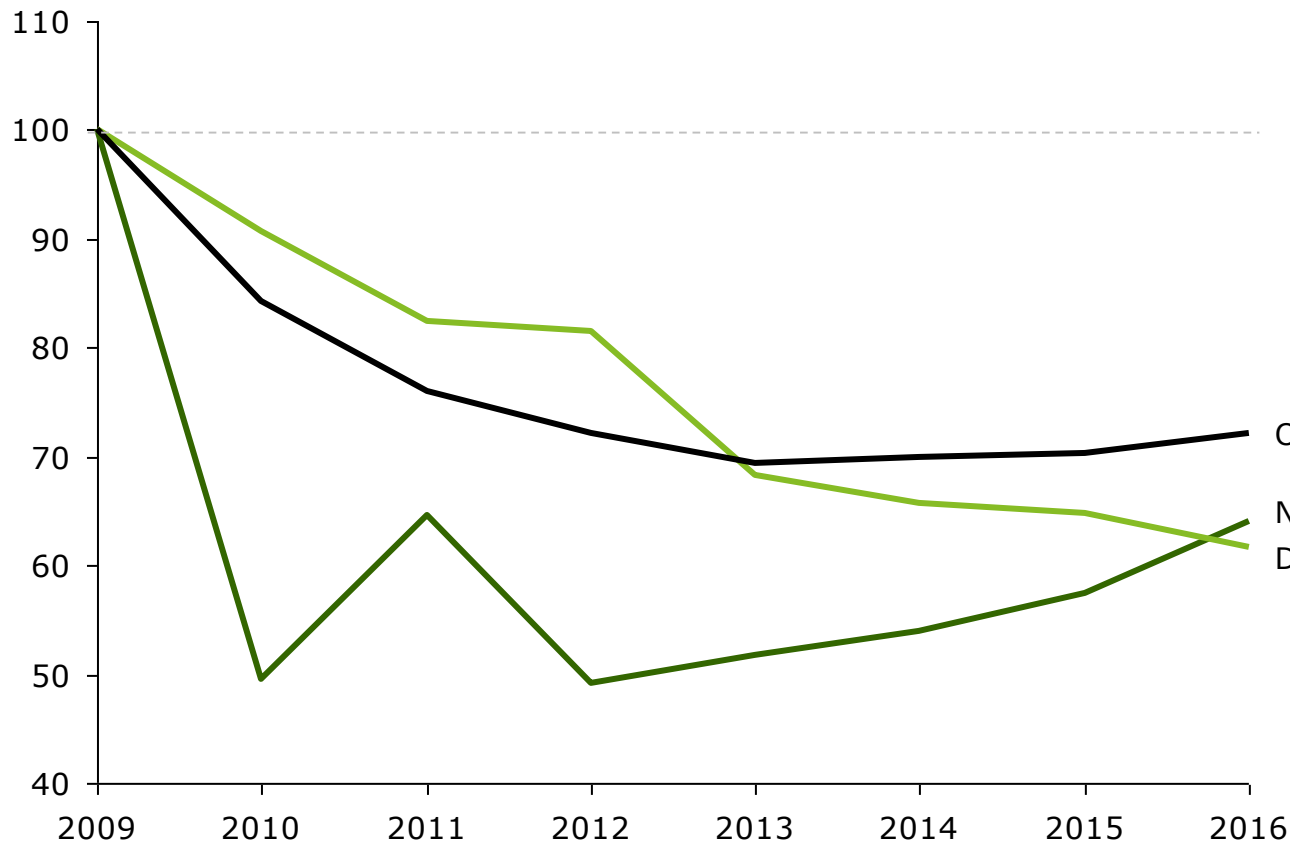


Note: The new boating market does not include the PWC and other small boats less than 2,5 meters

Source: Deloitte analysis and estimations based on countries boating associations, specialized media providers and company data and interviews with global operators

# Superyachts market: retail sales trends

**Evolution of superyachts sales market 2009-16**  
(Number of boats ; 2009=100 Index)



	<u>Volume 2016</u>	<u>YoY 15-16</u>
Order book	295	2,7%
New orders	145	11,5%
Deliveries	140	-4,8%

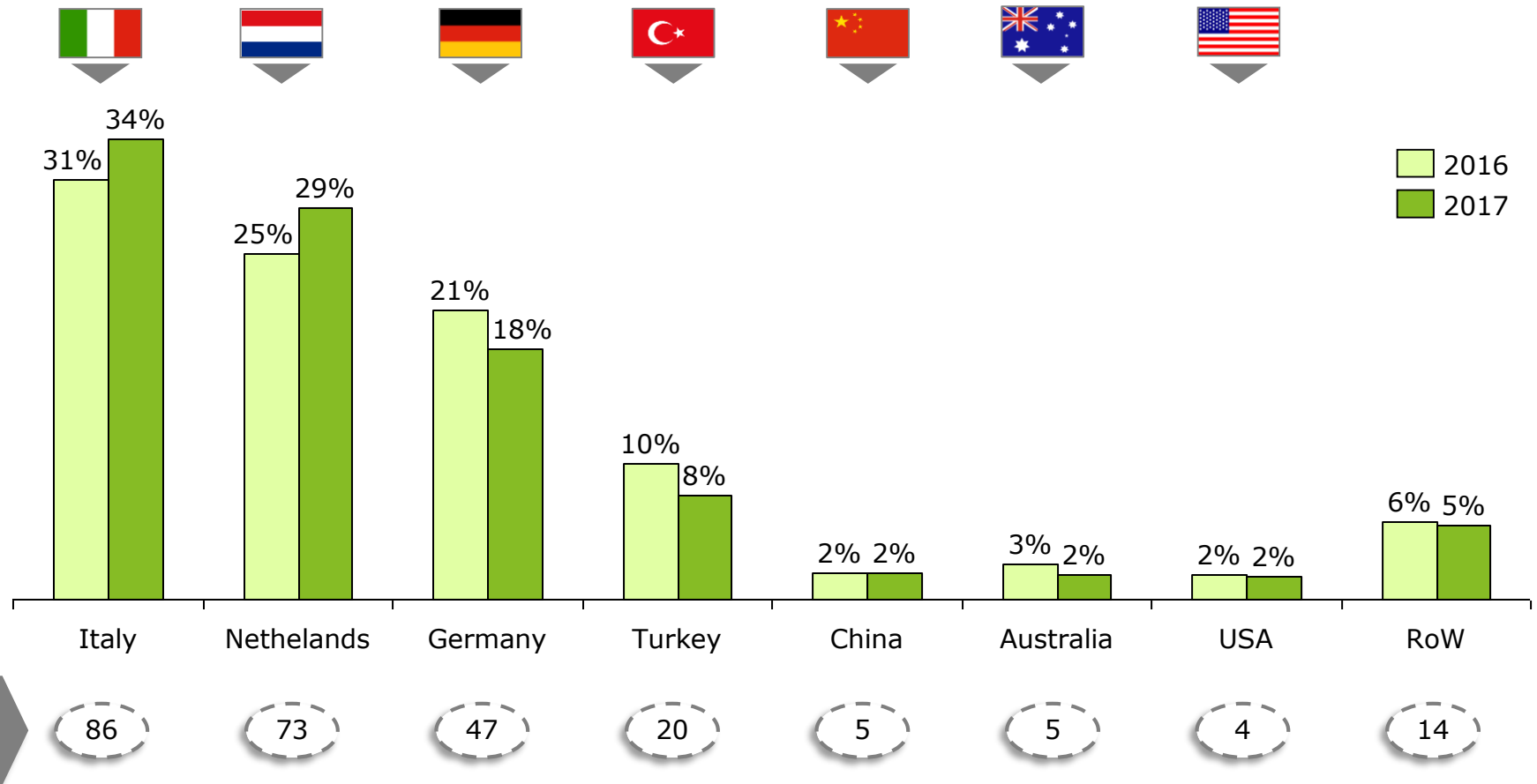
Italy OB units share	2009	2010	2011	2012	2013	2014	2015	2016
	55%	52%	46%	50%	46%	42%	42%	49%



**In 2017 the Global Order Book has reached 314 units (+6,4% vs 2016)**

# Motor superyachts order book: countries' gross tons share

**Main countries share 2017**  
(% ; Gross tonnage)



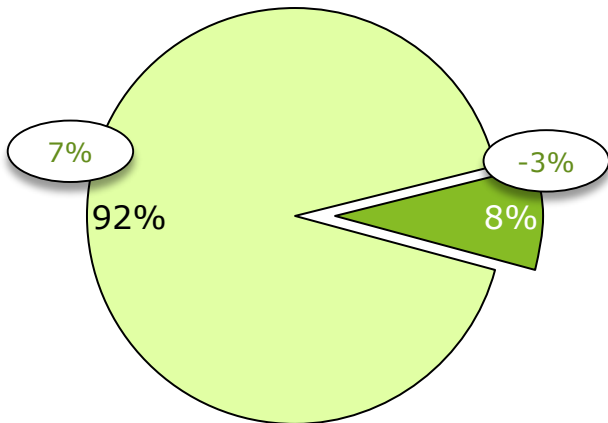
*In build  
2017  
(K tons)*

# Superyachts pre-owned market 2016

## Superyachts pre-owned market 2016 by boat type

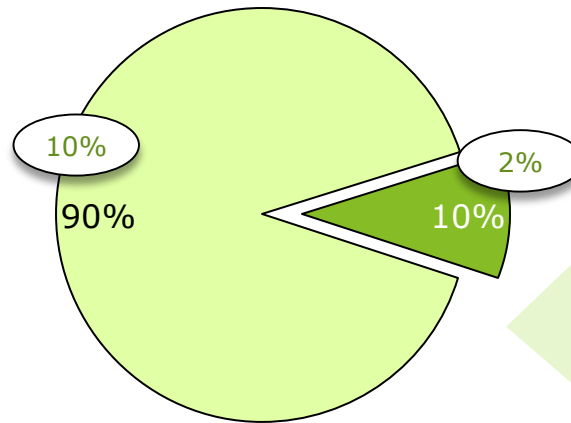
Value share

2,1B€



Units share

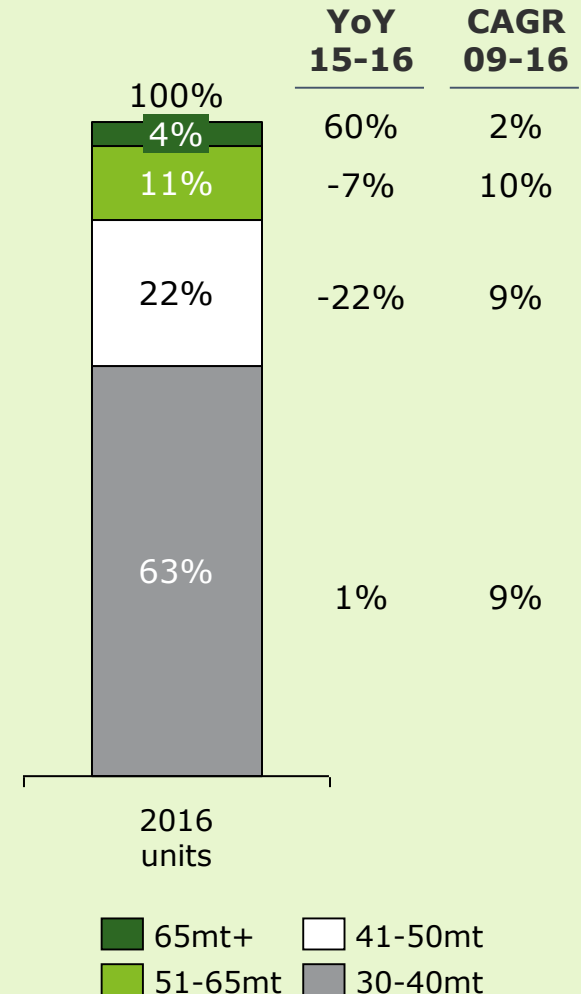
227 boats



■ Sailboats 
 ■ Motoryachts

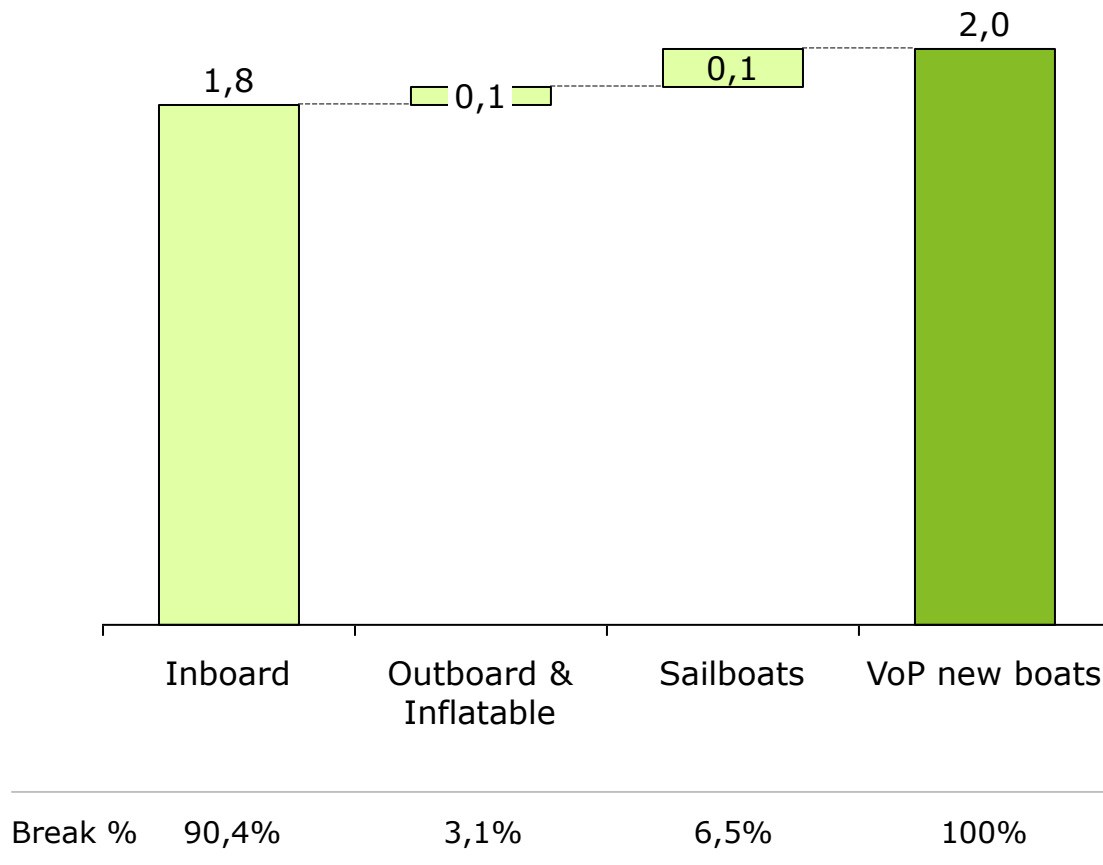
○ CAGR % 09-16

## Units break by boat length



# Italian shipyards value of new boats production 2016

**New boats Value of Production by shipyard 2016**  
(Billions of €; Percentage)



## Key insights on Italian Shipyards

### Inboard

- Inboard market growth is driven by the segments **20-30 meter composite and gigayachts over 70 meters** through a significant recovery of the European market

### Outboard & Inflatables

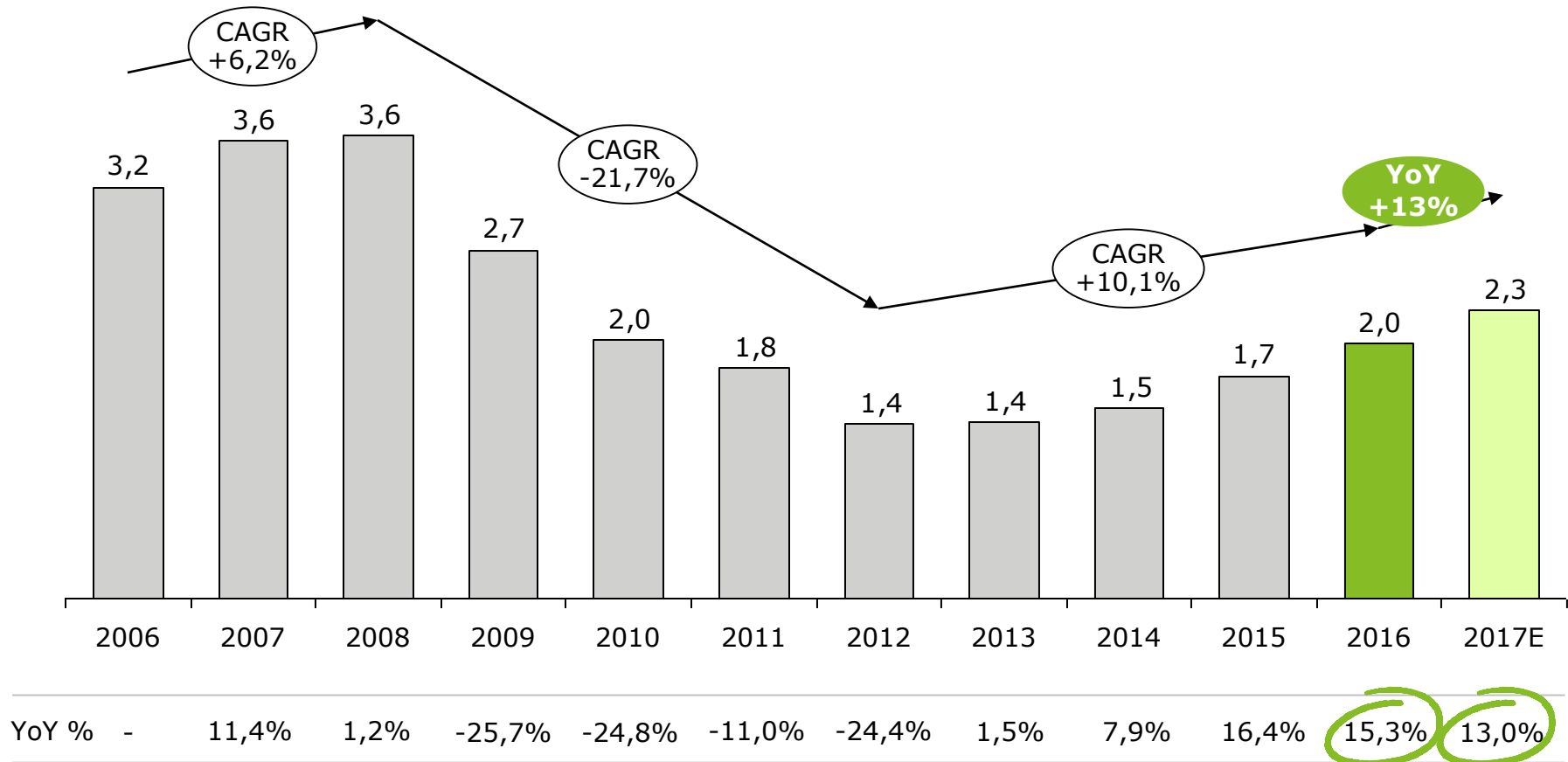
- The **boom of inflatables** drives the development of the outboard segment, which in best cases grows at a rate 20% higher than the past years, favored by a demand increase in the Southern European area

### Sailboats

- Sailboats present a positive trend driven by a **strong positioning of Italian shipyard in the custom segment** (medium and large size) which are perceived as premium vs foreign competitors

# Italian shipyards value of production evolution

**Value of production 2006-17E**  
(Billions of €; Percentage)







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