



# **Market insight sull'industria della nautica da diporto internazionale - Estratto**

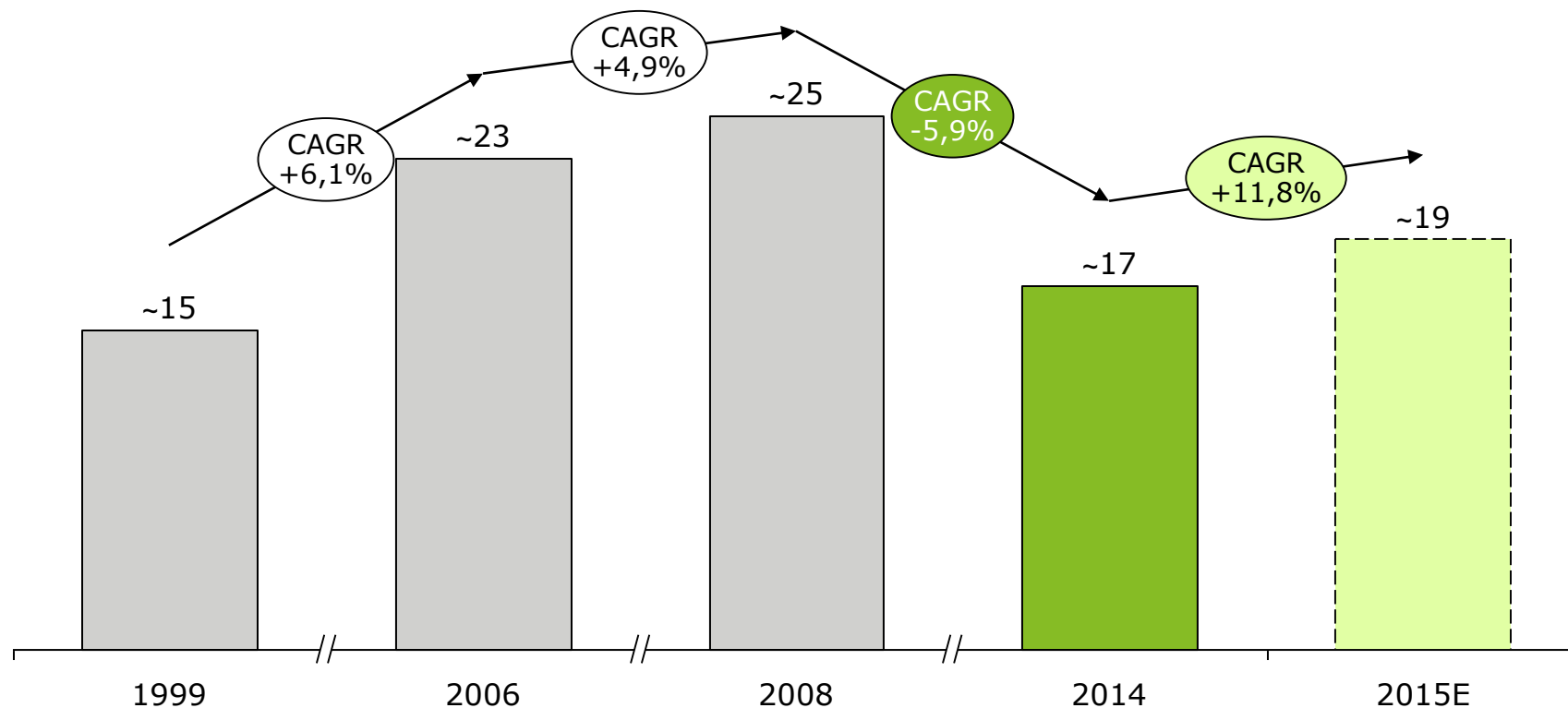
Cannes, 7 Settembre 2016

# Prefazione

- Lo studio “Market Insight sull’industria della nautica da diporto internazionale”, condotto da Deloitte Financial Advisory in collaborazione con Fondazione Altagamma, analizza il mercato della nautica da diporto su scala globale, classificato per settore verticale e segmento di business
- Lo studio “versione zero” è stato predisposto da Deloitte e Fondazione Altagamma per i board di Fondazione Altagamma e di Nautica Italiana. Il report fornisce un approfondimento sul mercato della nautica da diporto globale e i principali trend che impattano sullo stato dell’arte nell’industry
- Questa “versione zero” dello studio ha le seguenti caratteristiche:
  - Un approccio metodologico solido basato su un’ampia copertura di dati secondari (Icomia, NMMA, Superyachtintelligence.com, Capgemini-RBC, Forbes), confrontati con i dati primari sul settore, i company annual reports e le interviste con i principali attori della value chain
  - Le imbarcazioni nuove e usate, sono classificate per lunghezza, segmento di prodotto e le principali aree geografiche di produzione e vendita
  - Stima della dimensione e dei trends del mercato nautico ancillare, rappresentato principalmente da superyachts charter e refit & repairs
  - Analisi della domanda potenziale di imbarcazioni e della penetrazione attuale del mercato dei superyachts

# Mercato nautico globale: stima Deloitte 2015

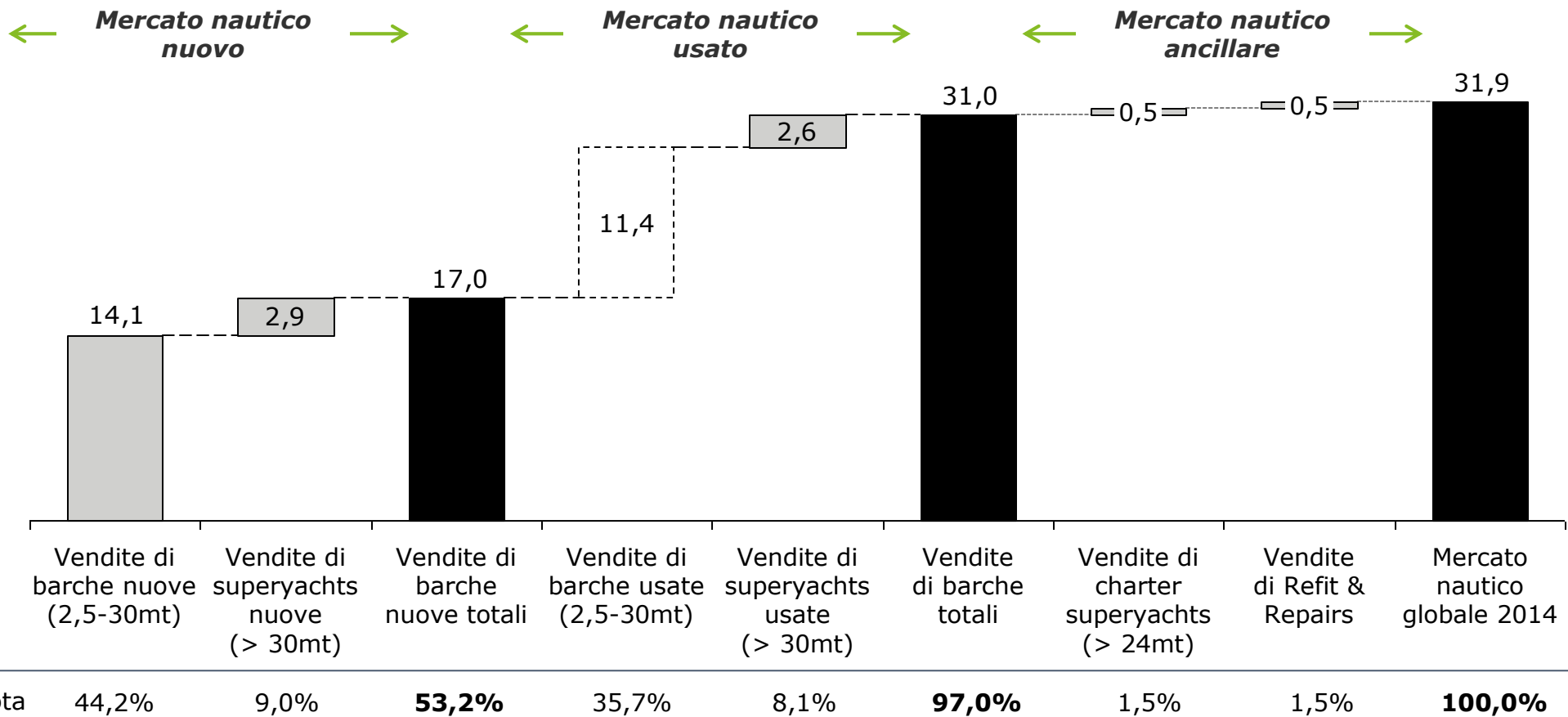
**Evoluzione delle vendite globali di barche nuove**  
(Miliardi of €; Milioni di barche)



Periodo	Variazione (Miliardi of €)	CAGR
1999 - 2006	n.a.	+9,5%
2006 - 2008	~1,0 → ~1,2	+9,5%
2008 - 2014	~1,2 → ~0,7	-8,6%
2014 - 2015E	~0,7 → ~0,8	+14,3%

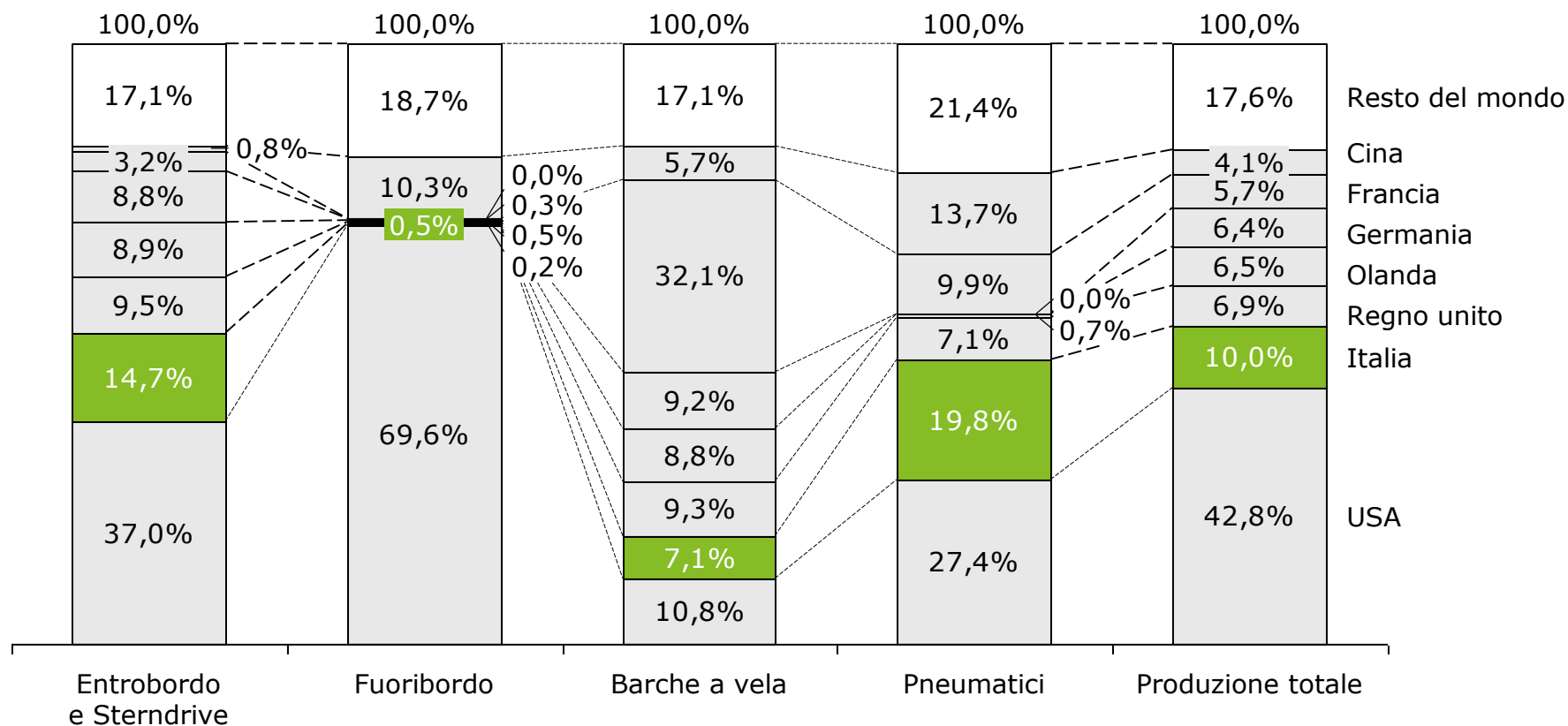
# Mercato nautico globale: valore complessivo

**Mercato nautico globale 2014**  
(Miliardi di €; Percentuali)



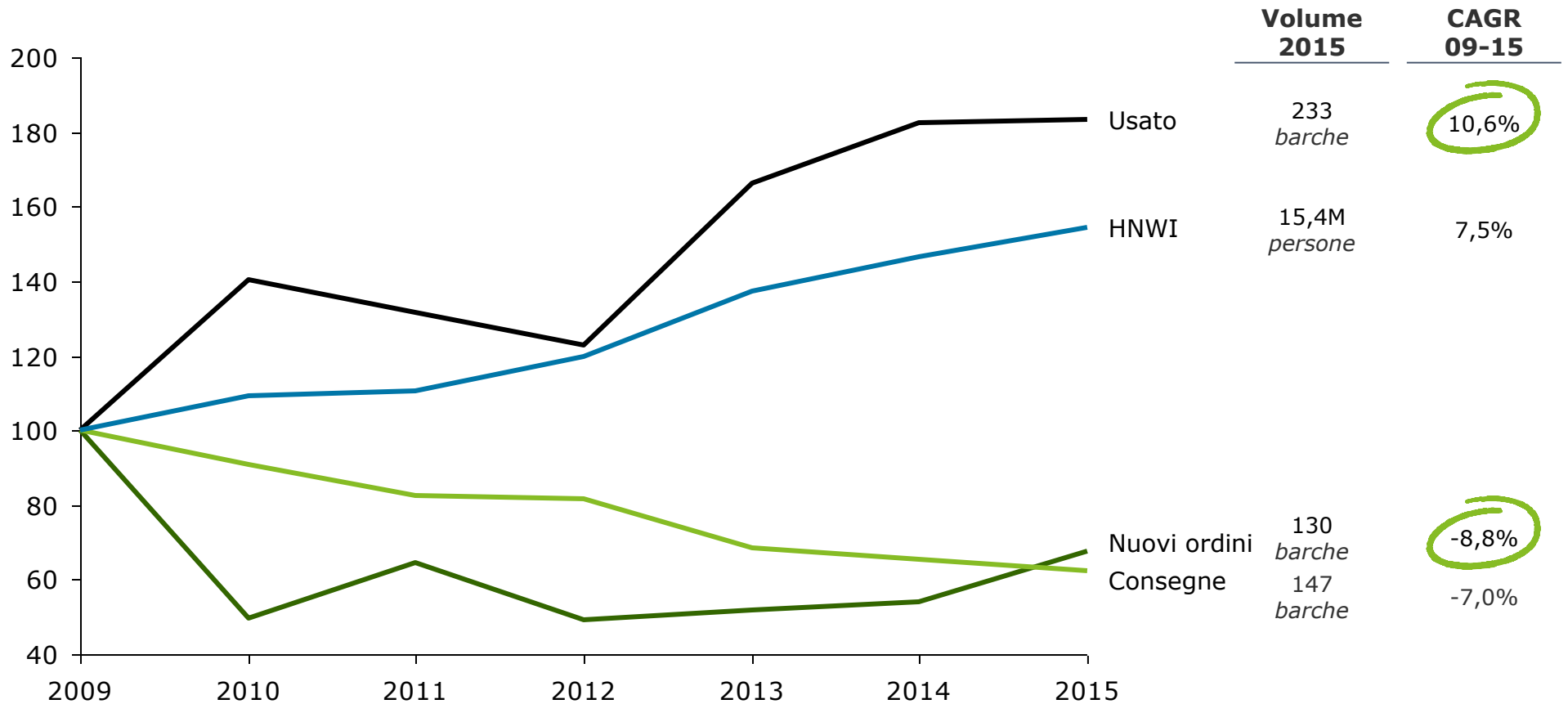
# Produzione nautica globale: analisi quote principali Paesi

**Analisi delle quote di produzione per Paese e segmento di prodotto nel 2014**  
(Percentuali; Miliardi di €)



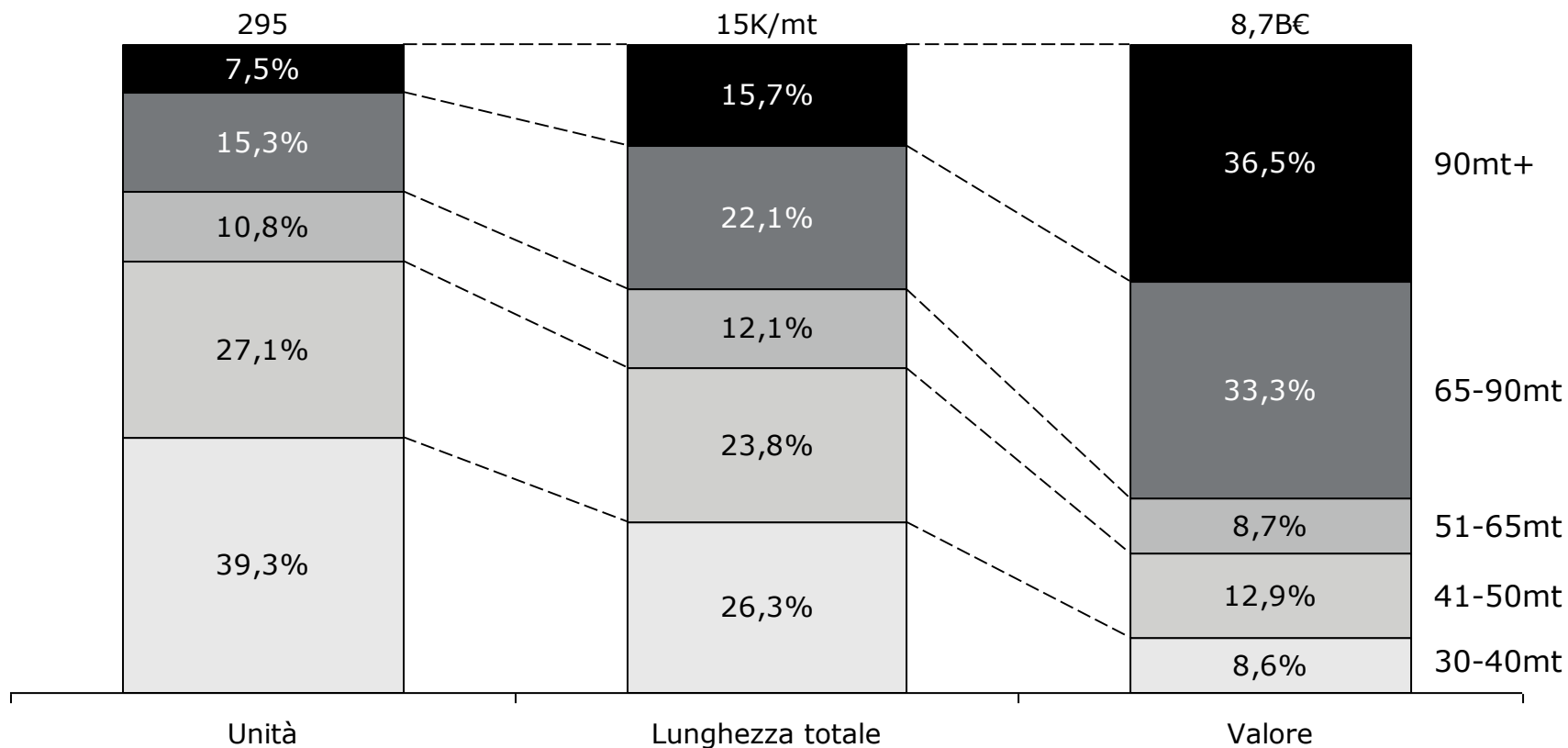
# Mercato superyachts: trend delle vendite

**Evoluzione delle vendite nel mercato superyachts 2009-15**  
(Numero di barche; 2009=100 Index)



# Superyachts global order book: stima Deloitte 2016

**Global order book 2016 – stima Deloitte**  
(Percentuali)



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- **Deloitte Yachting practice** has a deep and relevant international experience within of the nautical value chain (components, shipbuilding, service, marine, etc.), from strategy to marketing, operational and finance advisory, with a strong point of view about the change over and industry evolution.
- Deloitte has a strong vertical knowledge on the yachting industry with 60 projects around the world concerning a wide range of business, finance and accounting topics, serving both global and national clients.
- For any questions or further discussion, please contact



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Altagamma is unique for its cross-sectorial approach, as its members operate in multiple fields among which fashion, design, jewellery, food&beverages, hospitality, automotive, yachts and wellness.

The **mission** is to increase the competitiveness of the High-End industry, contributing to Italy's economic and social growth.



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- **Altagamma's Knowledge Center** is a global benchmark in the analysis of the luxury industry. Every year the Foundation carries out 10 research reports together with the most qualified international partners. Also including high-profile panel sessions, the study presentations have become highly-anticipated events among the media and the business community. The luxury industry is analyzed both on supply and demand side.
- Altagamma annual reports:
  - ALTAGAMMA WORLDWIDE MARKET MONITOR
  - ALTAGAMMA HIGH END DESIGN MONITOR
  - TRUE GLOBAL LUXURY CONSUMER INSIGHT
  - DIGITAL LUXURY EXPERIENCE
  - FASHION & LUXURY INSIGHT
  - FOOD & HOSPITALITY INSIGHT
  - ALTAGAMMA RETAIL EVOLUTION
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  - ALTAGAMMA CONSENSUS FORECAST
  - MARKET INSIGHT OF THE INTERNATIONAL RECREATIONAL BOATING INDUSTRY

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