

# The Tuscan Yachting District and NAVIGO

THE ROLE OF DISTRICT FOR  
BUSINESS AND  
COMPETITIVENESS

Francesco Lemmi  
R&D & Strategic Projects Manager

# The Tuscan Yachting District and NAVIGO

- ▶ NAVIGO is a service center coordinating **Penta – District of Nautical Companies and Marinas of Tuscany Region**, involved in the local development of the luxury yachting industry.

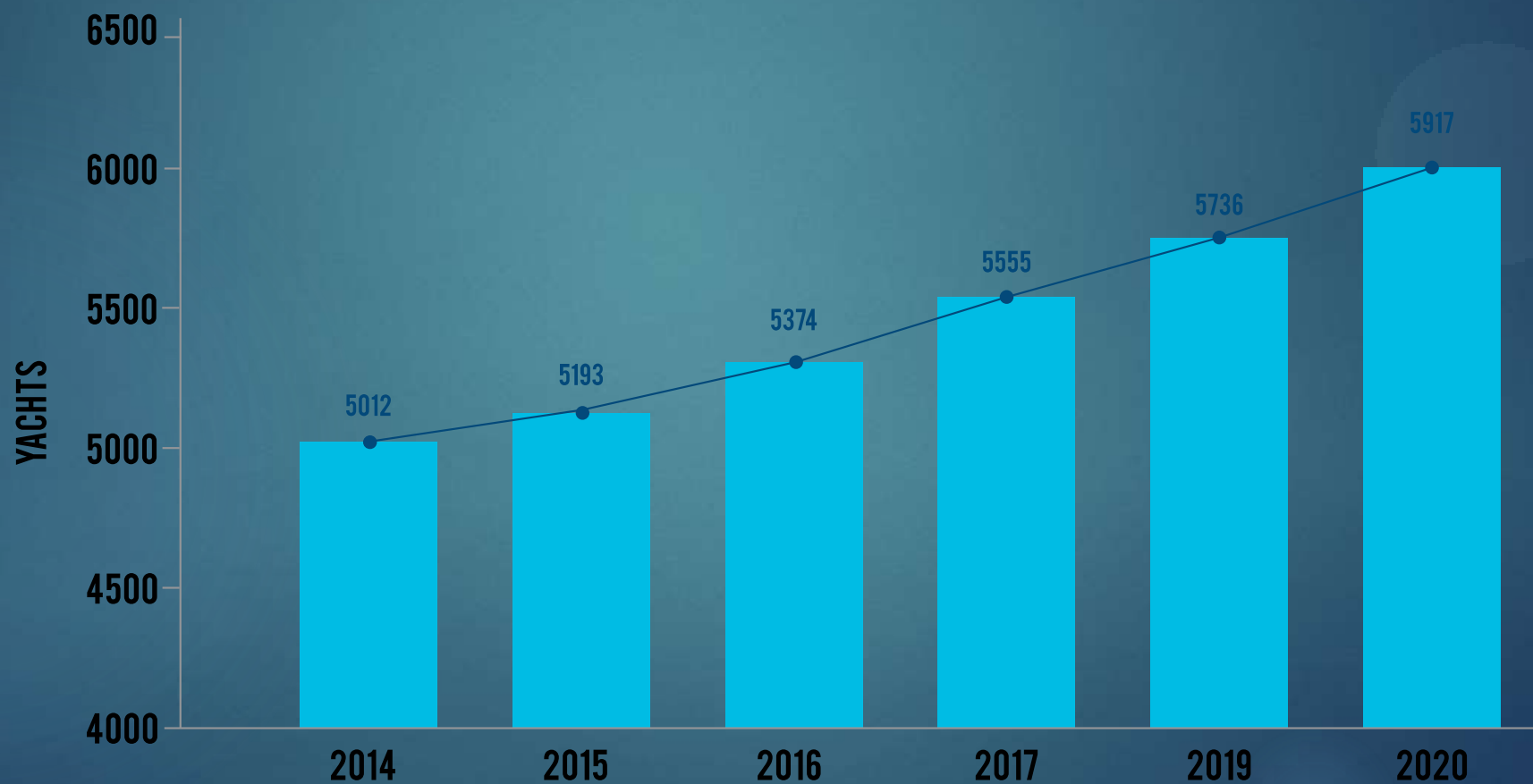




International context

# Predicted fleet growth over 24 mt

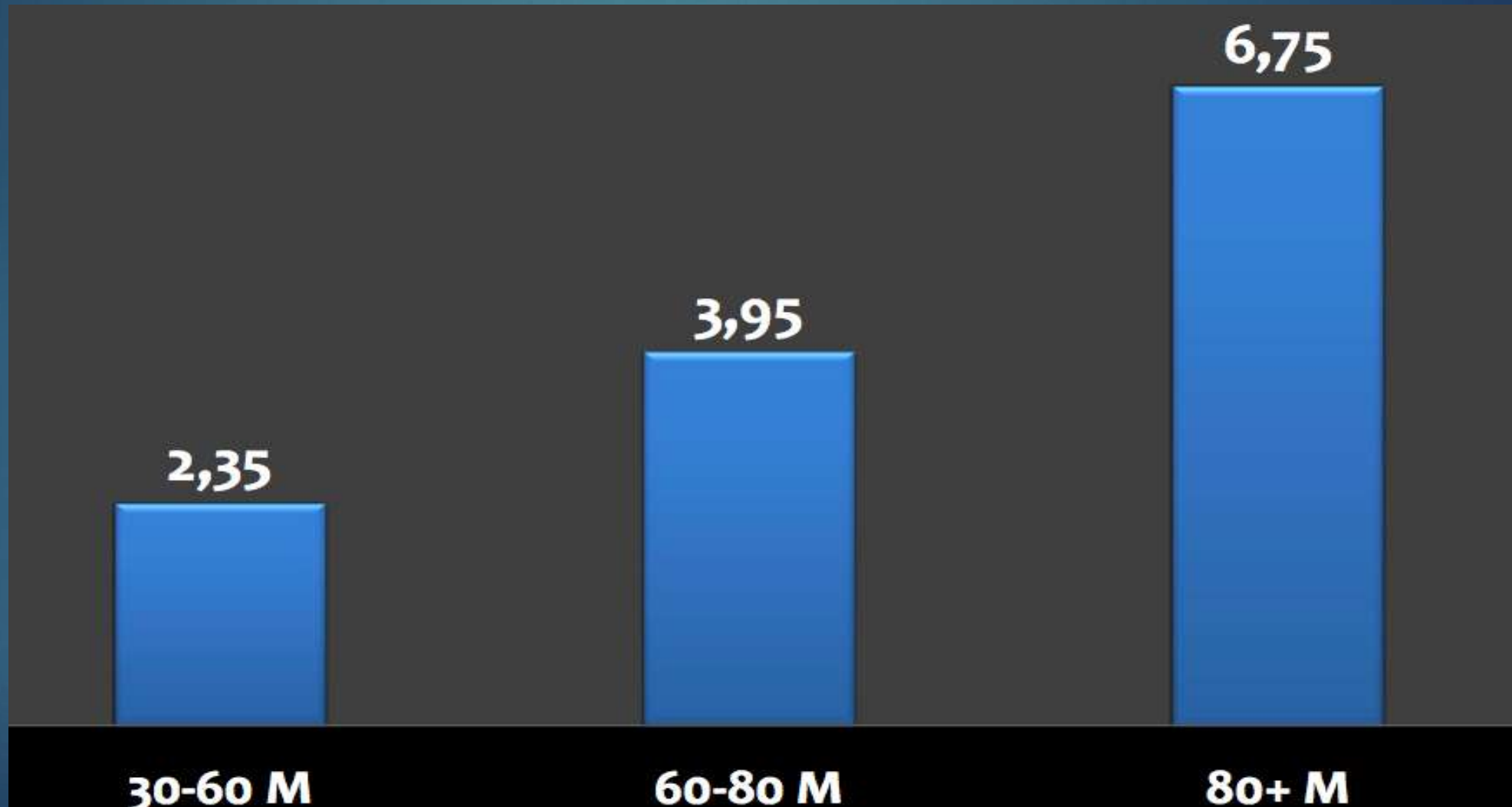
## PREDICTED FLEET GROWTH



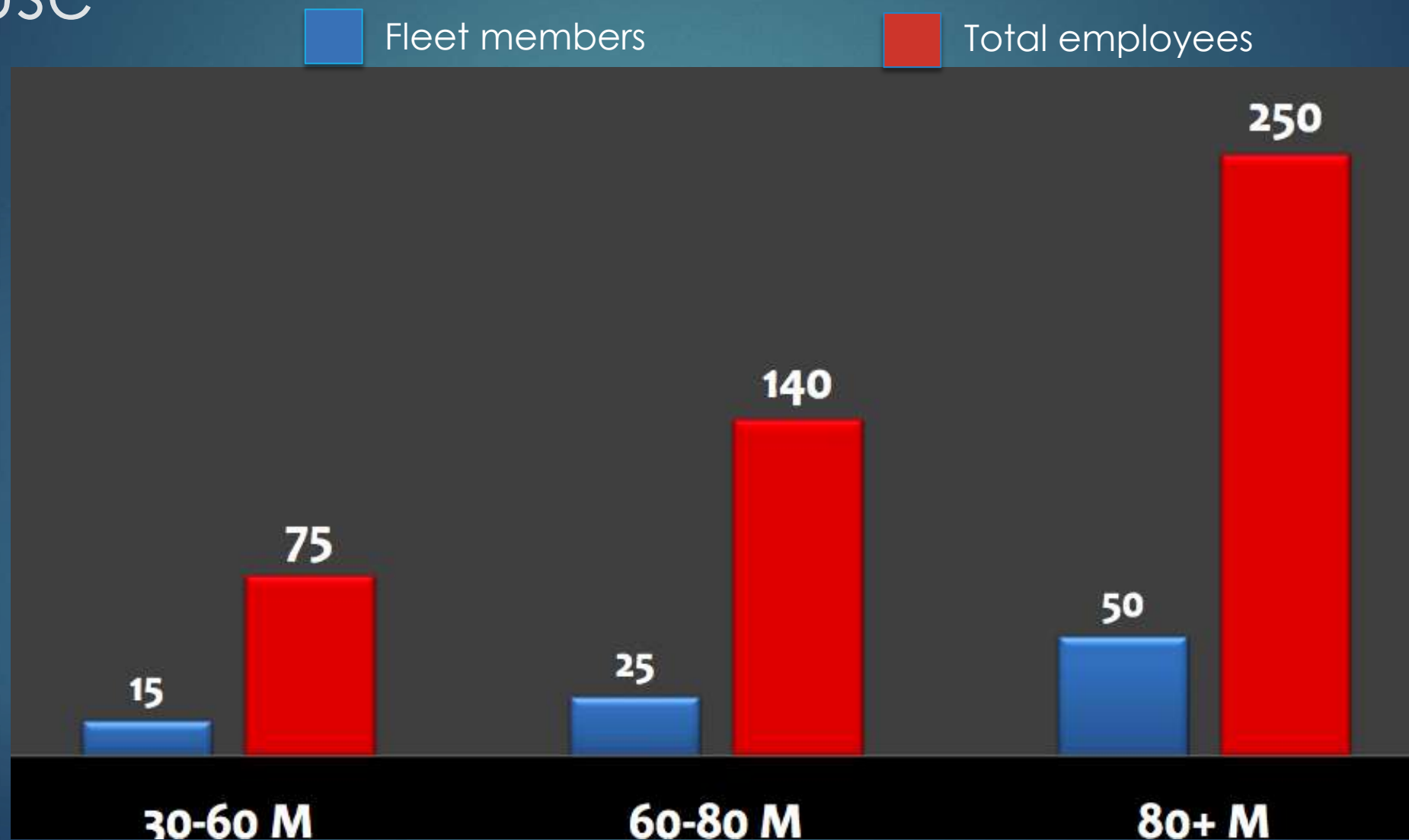
# TOP 10 builder nations (in mt.)



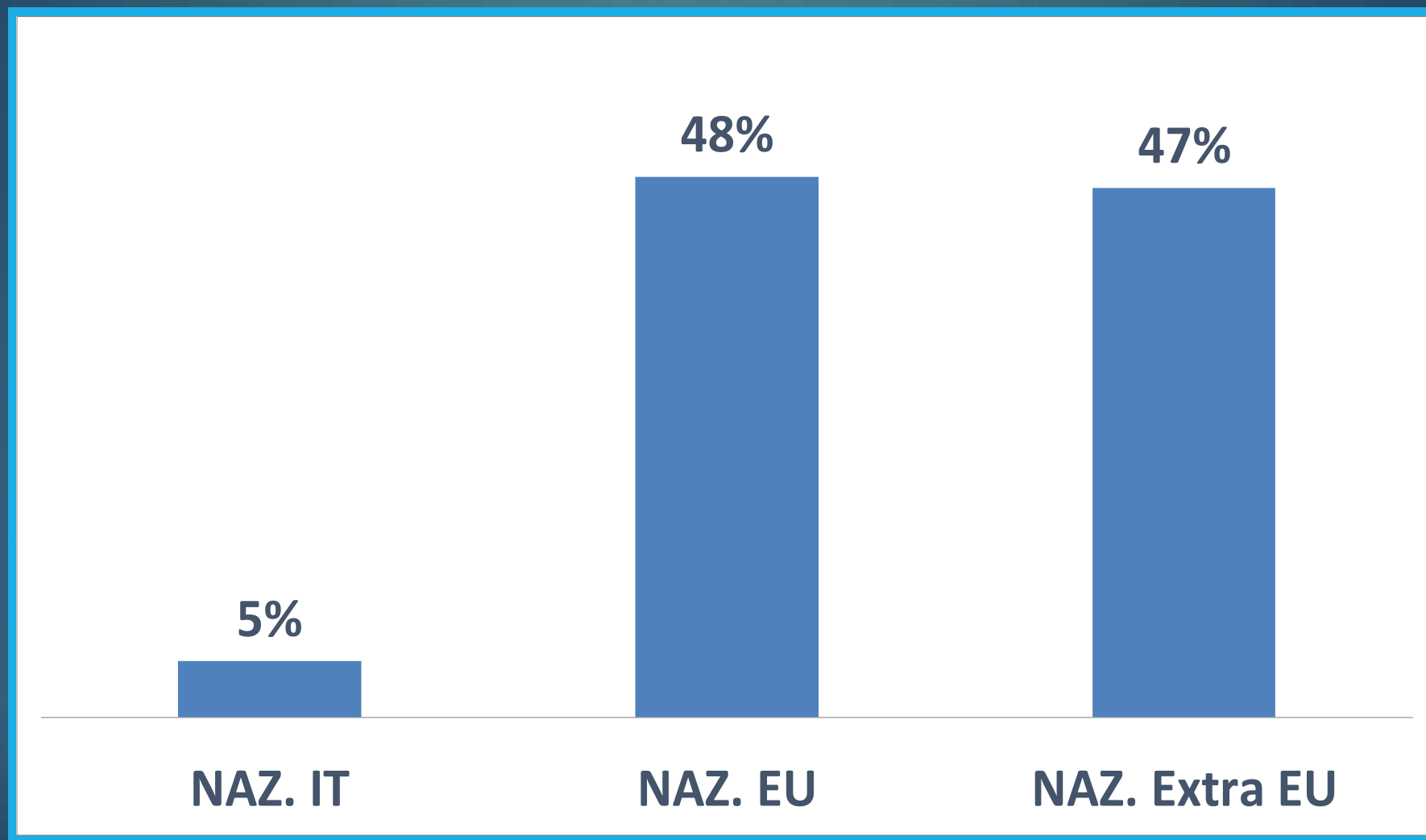
# Annual yacht spending budget (mln €)



# Employment generated by a large yacht in use

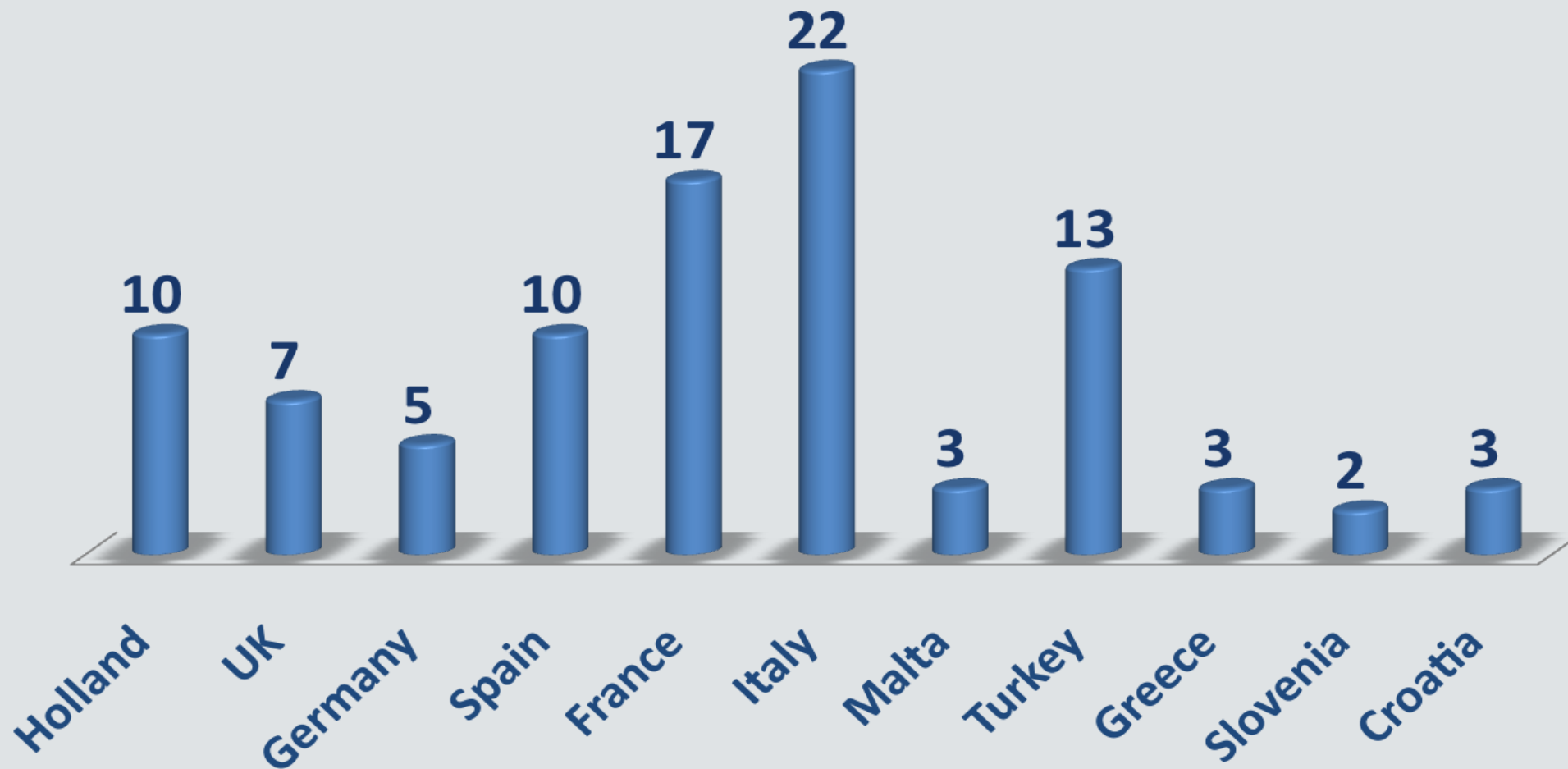


# Crew nationality



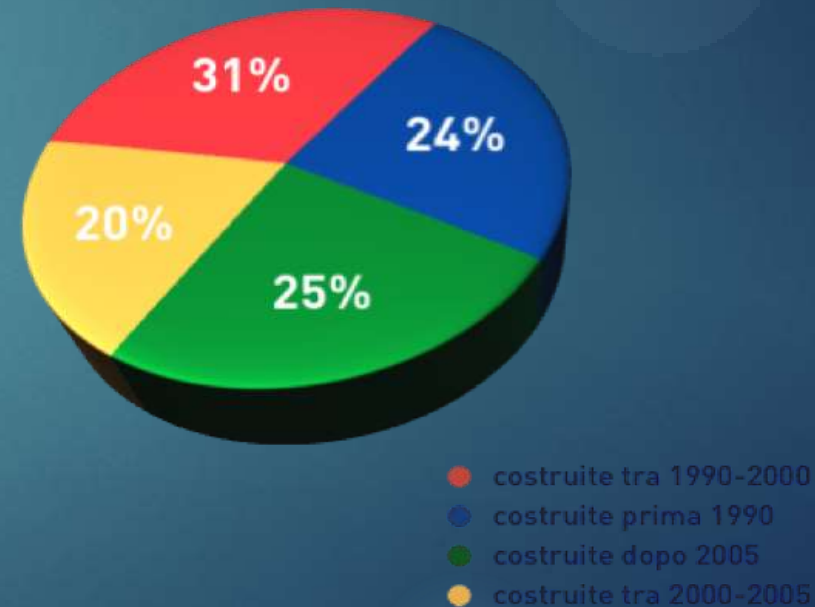
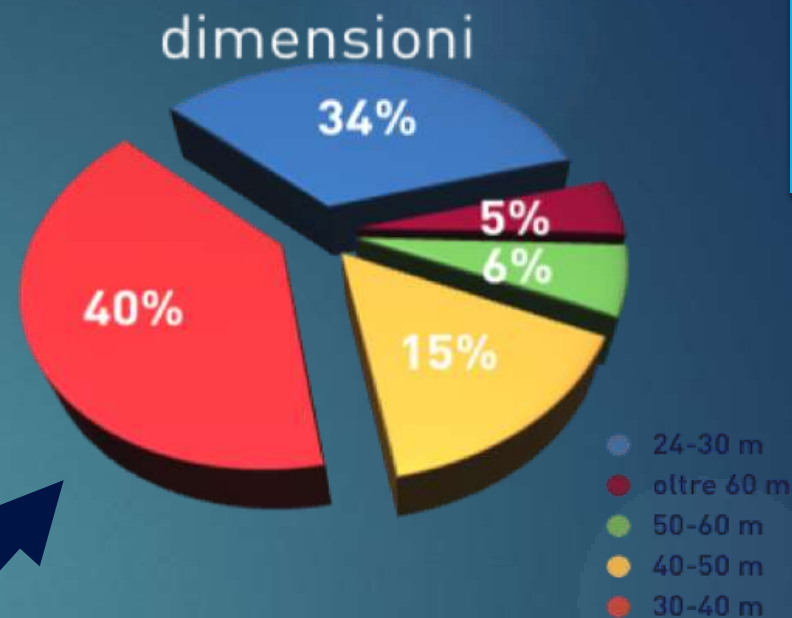


# Refit & Repair shipyards



# Refit characteristics

A growing number of yachts > increase in the refit business





«Tuscanity» in yachting

# «Tuscany» in yachting

The yacht market shows an undisputed Italian record, with Tuscany holding a leading role of excellence with its industrial craft innovation, service and welcoming skills.

An impressive growing fleet, an interesting market for New building, Refit & Repair / After market Superyacht industry.



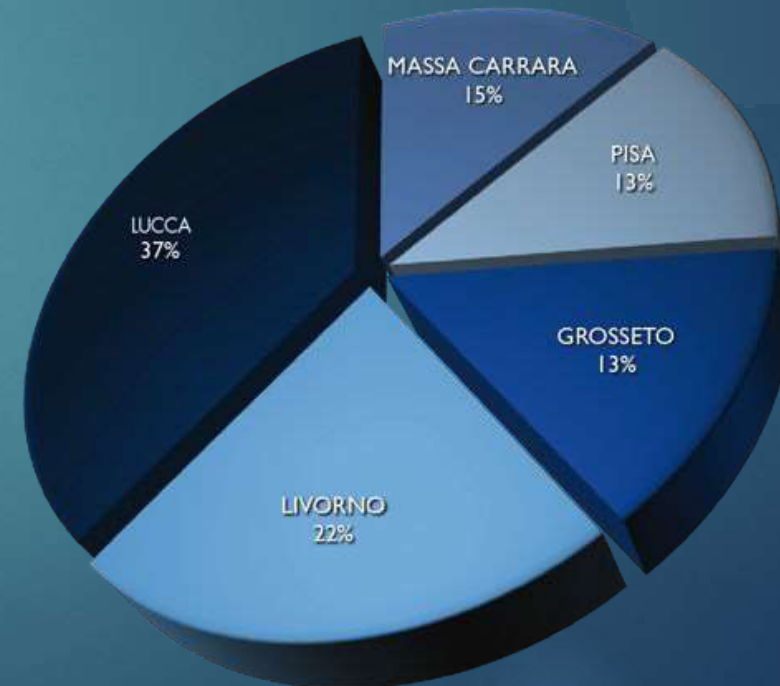
# A leading district

- ▶ **2.900** direct companies
- ▶ **4.000** companies involved in the entire production process
- ▶ **15.000** employees
- ▶ **5,6** employees per company
- ▶ **1,53 billion euros** turnover (45% of the total Italian)
- ▶ **58** ports/marinas and coastal infrastructures
- ▶ **28,000** estimated yacht berths from La Spezia to Grosseto, with an irregular distribution
- ▶ **70** different activities



# «Tuscany» in yachting

The economic sector related to yachting encompasses a huge variety of activities, professions and trades involving more than 70 different kinds of profiles from industry to tourism.



# TUSCANY: A 360° PRODUCTION CHAIN

## PRODUCTION

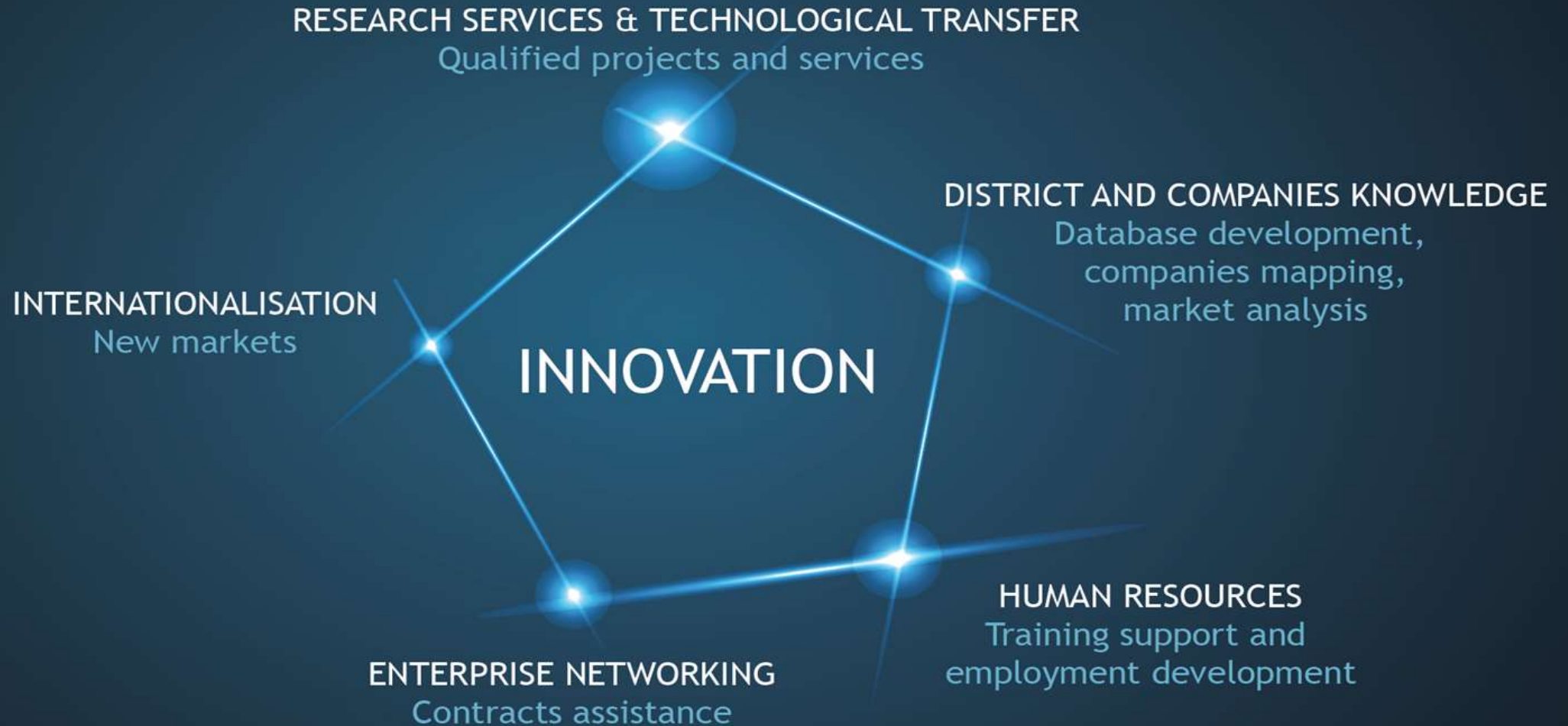
- ▶ Engineering
- ▶ Suppliers working on engines, wooden elements, fibreglass components, carpenter, plants and accessories.
- ▶ Suppliers dealing with raw wooden poles, virgin fibreglass, hardware for carpenter, and chemical components for the assembling phase.

## AFTERMARKET

- ▶ Aftermarket services.
  - Brokers
  - Ship chandlers
  - Yacht managers
  - Classification services
- ▶ Marinas services and Coastal tourism.
- ▶ End of life and dismantling.



# 5 STRATEGIC LEVERS





# Viareggio: features of the yachting industry

- 25% of the yachts produced in the world > 30 meters are made in Viareggio; 40% are made in Italy
- 10 billion: the international sales in megayacht, 3 in Italy, 2 in Tuscany
  - 40% Viareggio
  - 40% Tuscan Companies (about 1,400 companies)
- 10 International Super Brands (Azimut, Benetti, Perini Navi, Overmarine / Mangusta, Sanlorenzo, Codecasa, Rossinavi, Vismara, Fipa / Maiora, VSY)
- + 6% Market trend > 50 meters (focusing on the district production site)

# The role of the District for Companies

- **Coordination** of all coastal services centers
- **Gathers over 500 companies**
- **Network** and b2b services
- **Market analyst**
- UE, national and regional **project manager** (cross-border, EU, national research)



# The role of the District for Companies

- Leading/coordinating partner of **R&D/Innovation Projects**
- **Training center** for professionals and companies (ISYL Foundation, Erasmus etc)
- Yachting **events** organizer
- **Relation mediator** with
  - companies-universities
  - public administration for technical instance

# Companies' advantages

- B2B & network (territorial & extra territorial: Tuscany, Sardinia, Malta, MED)
- Events
- Territorial marketing
- Strategy and Vision think tank
- Aggregation of companies
- Win-win opportunities
- EU Projects



# Projects

R&D, EUROPEAN, REGIONAL, NATIONAL

# PROT-ONE

PROgetto TOscano per la Navigazione    Eco-compatibile  
*Financed by MIUR, MISE and Tuscany Region within FAR-FAS  
2007-2013 funding*

Developing eco-compatible a system of power/propulsion for small ferries used for coastal navigation and on internal waterways, both for public transport and tourism.

The project is thus focusing on the study of technological solutions for making modular and flexible power systems, suitable for use on different kinds and sizes of vessels.

The development of the project also makes it possible to create synergies with other research areas, such as the study and development of new configurations of vessels optimised for exploiting hybrid/full electric propulsion, which also includes studies and new applications for advanced materials





# SymbloTe

## Symbiosis of smart objects across IoT environments

*Financed by EU within Horizon 2020*



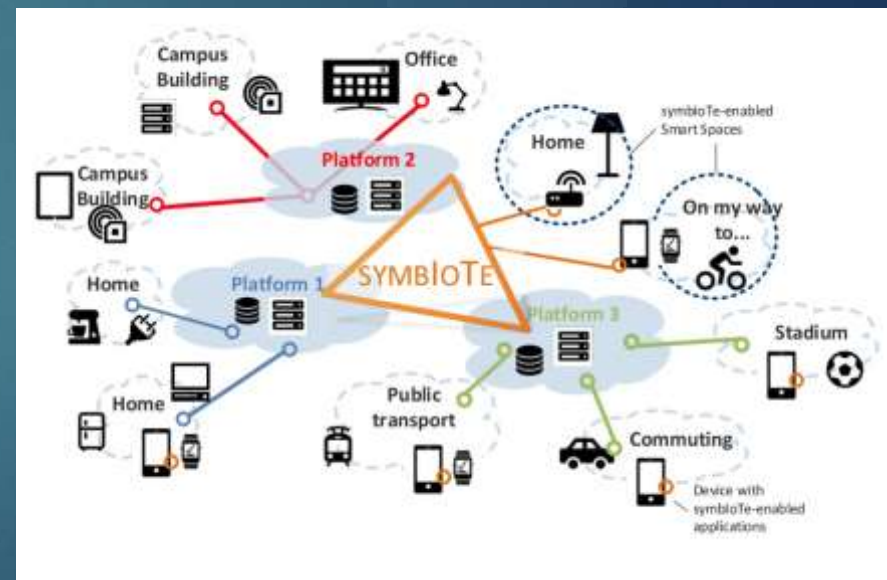
### IoT (Internet of Things) Solutions

#### Main goals:

Bettering the smart communication between all the devices used within coastal areas, above all boat and port

In a world of smart networked devices, wearables, sensors and actuators, transparent and secure access to and usage of the available resources across various IoT domains is crucial to satisfy the needs of an increasingly connected society.

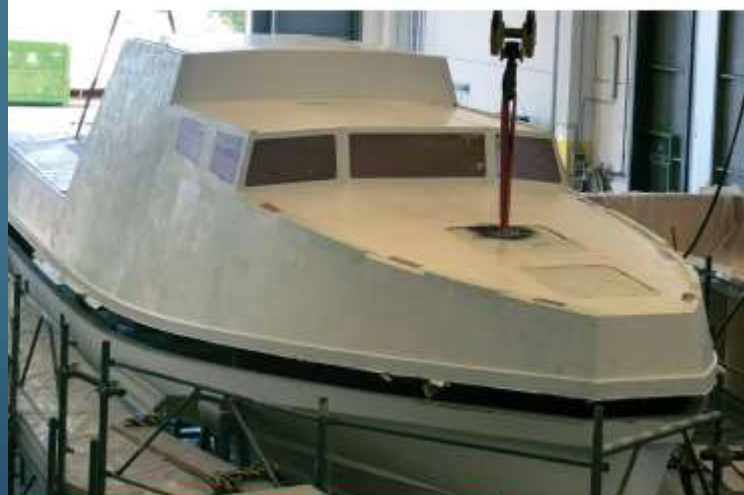
The current IoT ecosystem is however fragmented: **symbloTe** comes to remedy this fragmented environment by providing an *abstraction layer* for a “unified view” on various platforms and their resources



# SAND

## SAND - SURFACE ADVANCED NAVAL DRONE

A common multirole platform for environment monitoring,  
SAR and special operations



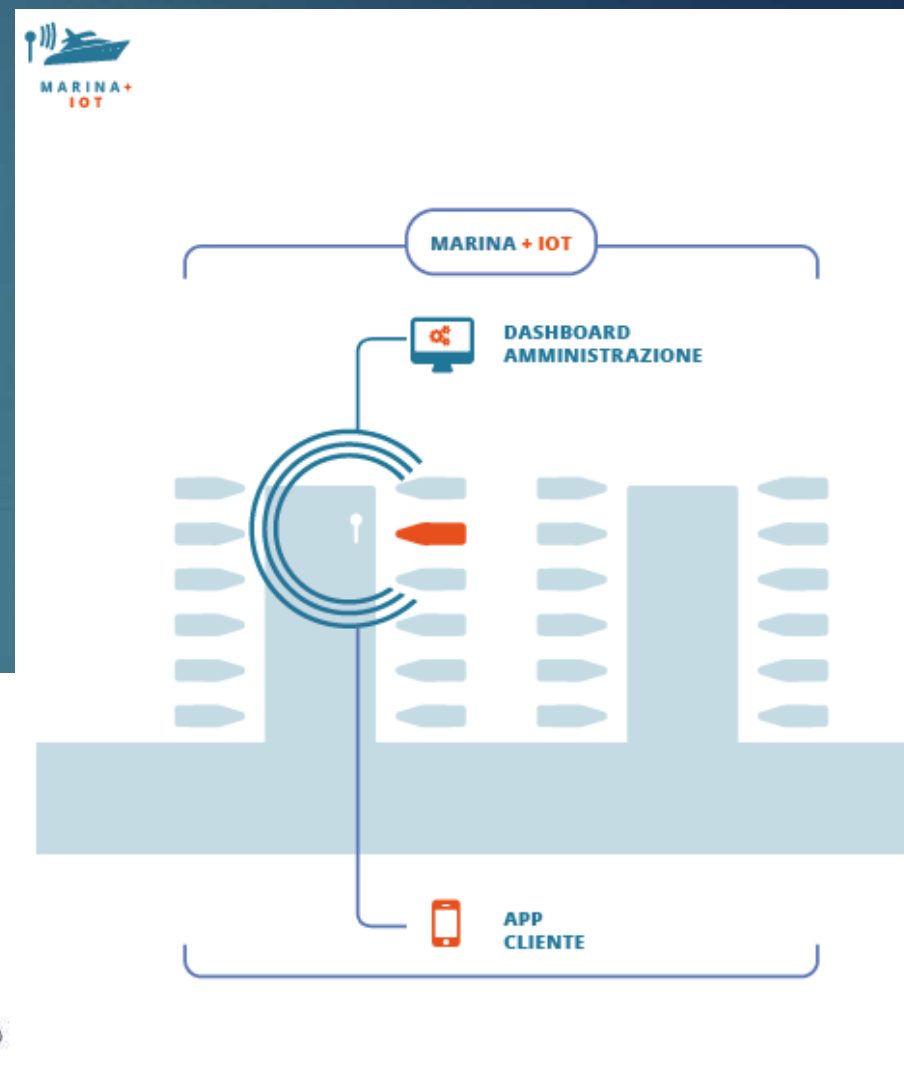
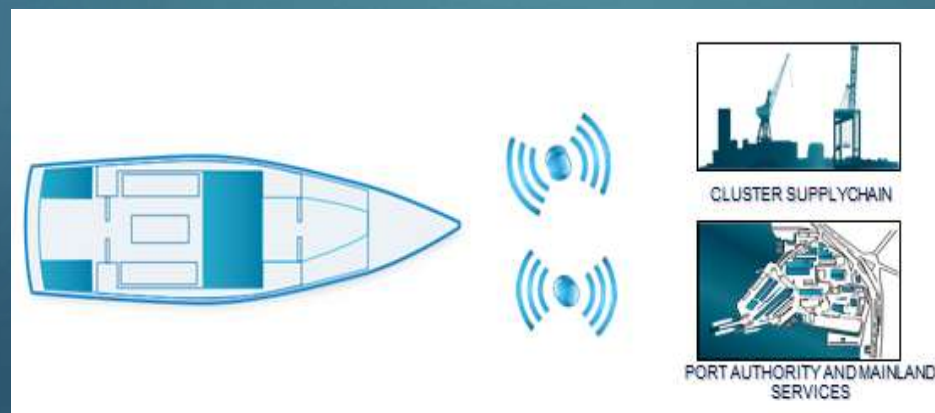


# Marina +

## Services and solutions for marinas

- Digitalising documents
  - CRM platform
- IoT instruments for making processes smarter

Bettering the smart communication between all the devices used within coastal areas, above all boat and port



# REVYTA

## REcupero Vetroresina Yacht Treni CAmper

Dismantling, disposal and recycling of the fiberglass used in the nautical sector for the construction of boats, but also in the automotive sector for campers and transport, such as railway carriages.

The project proposes an industrial and sustainable model for the fiberglass recycling environment, which is still non-existent in Europe.



# Finance & Innovation to Business

## 12 November 2018 *(2° edition)*





# Training



# ISYL – Italian Superyacht Life

Training school dedicated to selected young students (18-29 y), wishing to be:

- Superyacht Captains
- Logistic Managers
- Experts in coastal and yachting tourism

- 90 STUDENTS  
IN TRAINING
- 85%  
OCCUPIED  
AFTER THE  
COURSE





# Events

YARE – YACHTING AFTERSALES AND REFIT EXPERIENCE

VERSILIA YACHTING RENDEZ VOUS

THE WORLD SUPERYACHT AWARDS

B&ST – BROKERS AND SHIPYARDS TRADING

# YARE – YACHTING AFTERSALES AND REFIT EXPERIENCE | 20-23 MARCH 2019 (9<sup>o</sup> edition)



B2B business event for Captains

## Captains

- **110** INTERNATIONAL CAPTAINS
- **25** REPRESENTED NATIONALITIES
- **40-60 METERS** AVERAGE YACHT LENGTH REPRESENTED FROM CAPTAINS

## Companies

- **100** INTERNATIONAL COMPANIES
- **67** SHIPYARDS REPRESENTED BY CAPTAINS
- **26** REPRESENTED SECTORS



[www.yarenetworking.com](http://www.yarenetworking.com)



# VERSILIA YACHTING RENDEZ-VOUS |

## 9-12 MAY 2019 *(3° edition)*



- **200** COMPANIES INVOLVED
- **80** YACHTS
- **22.000** VISITORS (9% EU – 3% EXTRA EU)
- **3** INVOLVED TERRITORIES



[www.versiliayachtingrendezvous.it](http://www.versiliayachtingrendezvous.it)



# B&ST – Broker and Shipyard Trading

## 10 MAY 2019 (2° edition)



- 70 BROKERS
- 15 SHIPYARDS AND COMPANIES

