STATE OF THE INDUSTRY

# Global Economic Impact of the Superyacht Industry

SUPERYACHTLIFE

SUPERYACHT BUILDERS ASSOCIATION

# RESEARCH PARTNERS

Commissioned by Superyacht Builders Association and Superyacht Life Foundation conducted by Deloitte and VU University **based on 2022 data of 30+meters superyachts.**

# DATA SOURCES

Key datasets and references informing the economic impact study

### 1
### Industry Surveys

- Shipyard survey (SYBAss)
- Yacht management survey

### 2
### Charter & Usage Data

- Charter data (MYBA)
- Superyacht AIS data

### 3
### Market & Fleet Intelligence

- SuperYacht Times fleet data
- Boat International brokerage data

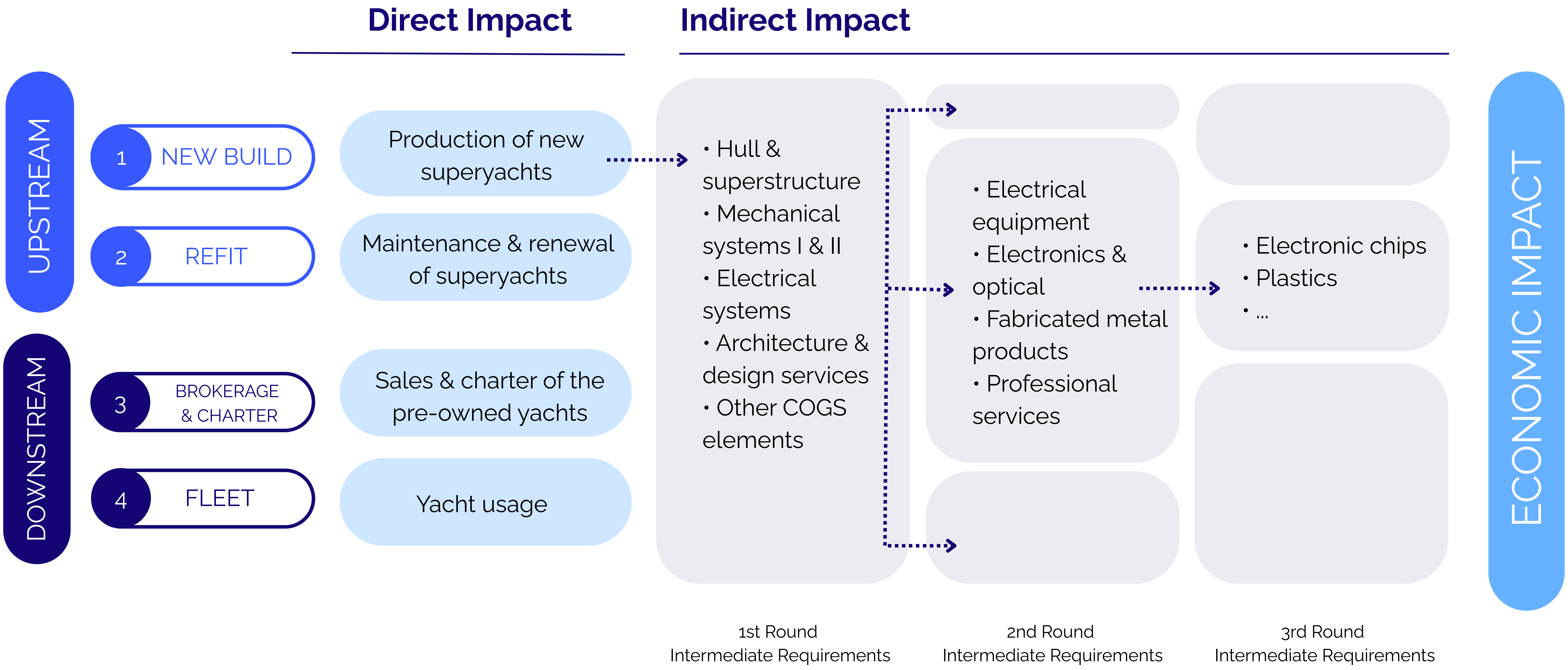
### 4
### Financial & Company Reporting

- 100+ company annual financial accounts (validated with Deloitte)

### 5
### Economic Models & Expert Input

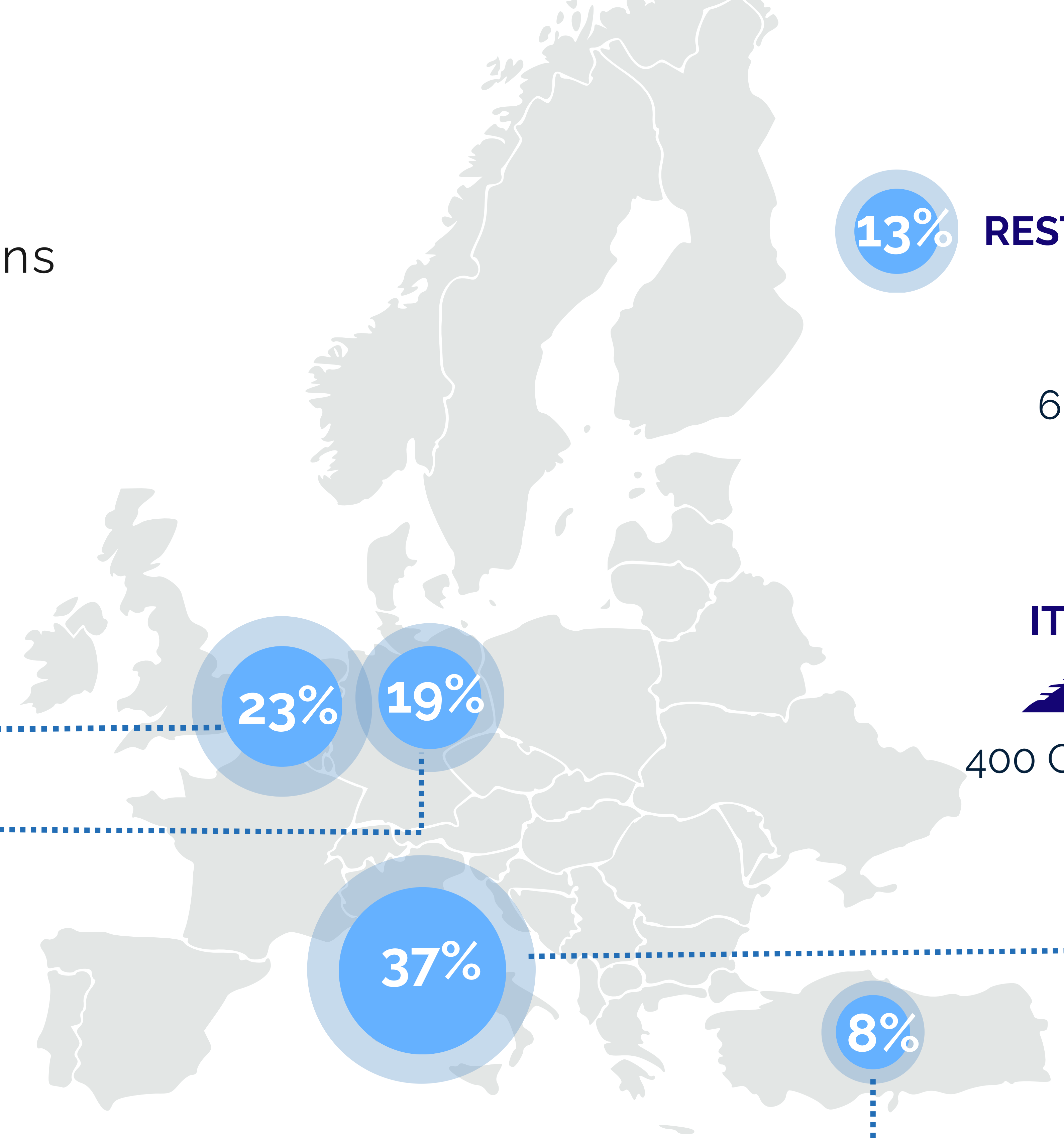
- Previous Deloitte studies
- FIGARO input–output tables
- 50+ expert interviews

# SUPERYACHT VALUE CHAIN



# NEW BUILD

Market share based on regions




**NETHERLANDS**

1500 GT - 64m

**GERMANY**

5500 GT - 109m

**REST OF THE MARKET**

600 GT - 42m

**ITALY**

400 GT - 41m

**TURKEY**

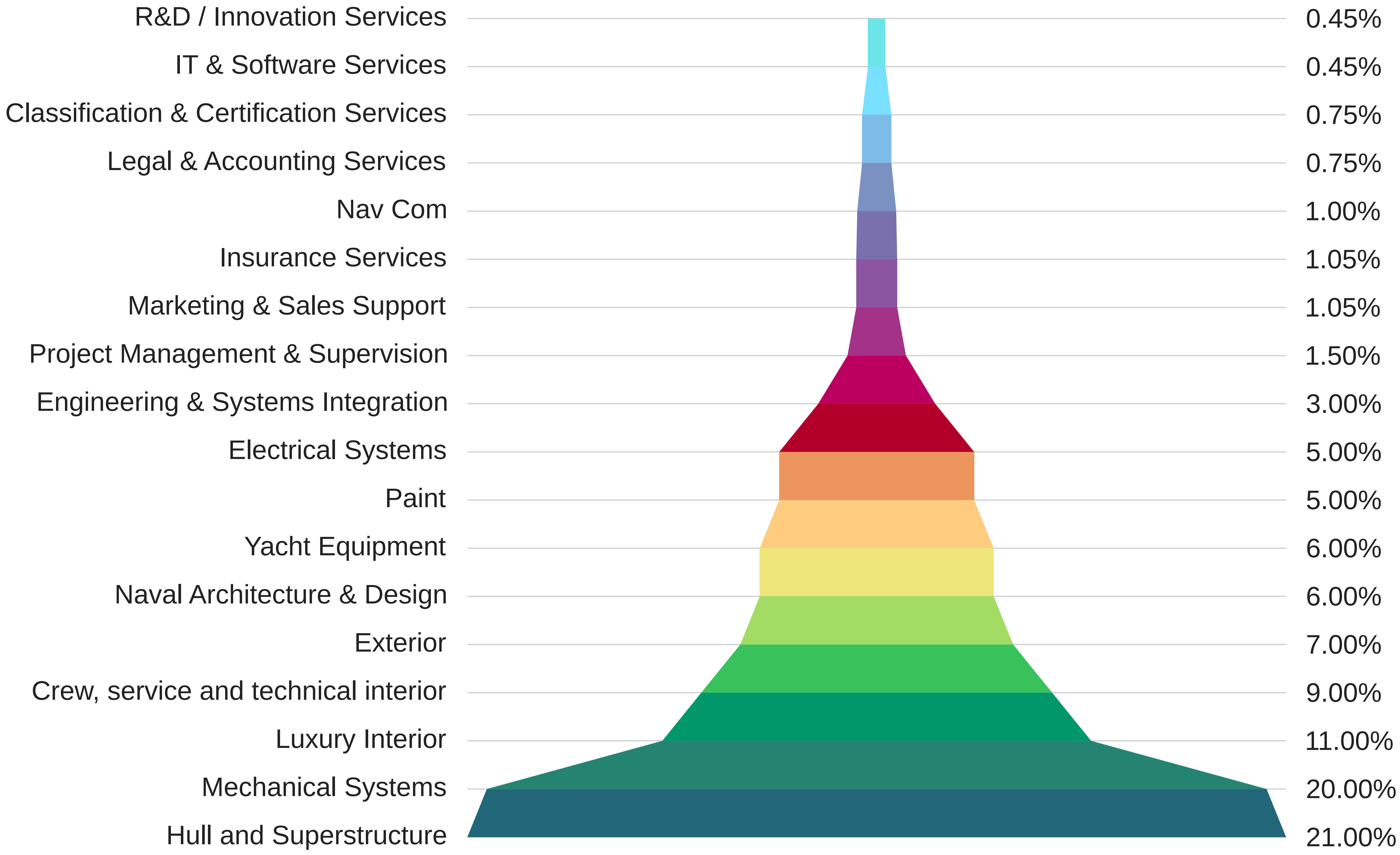
650 GT - 48m

**135**
ACTIVE SHIPYARD

Top 3 European countries hold almost 80% of the entire industry production

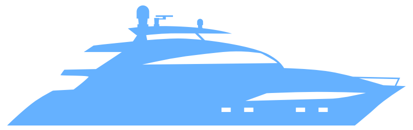
# NEW BUILD

## New Build Direct Impact Breakdown



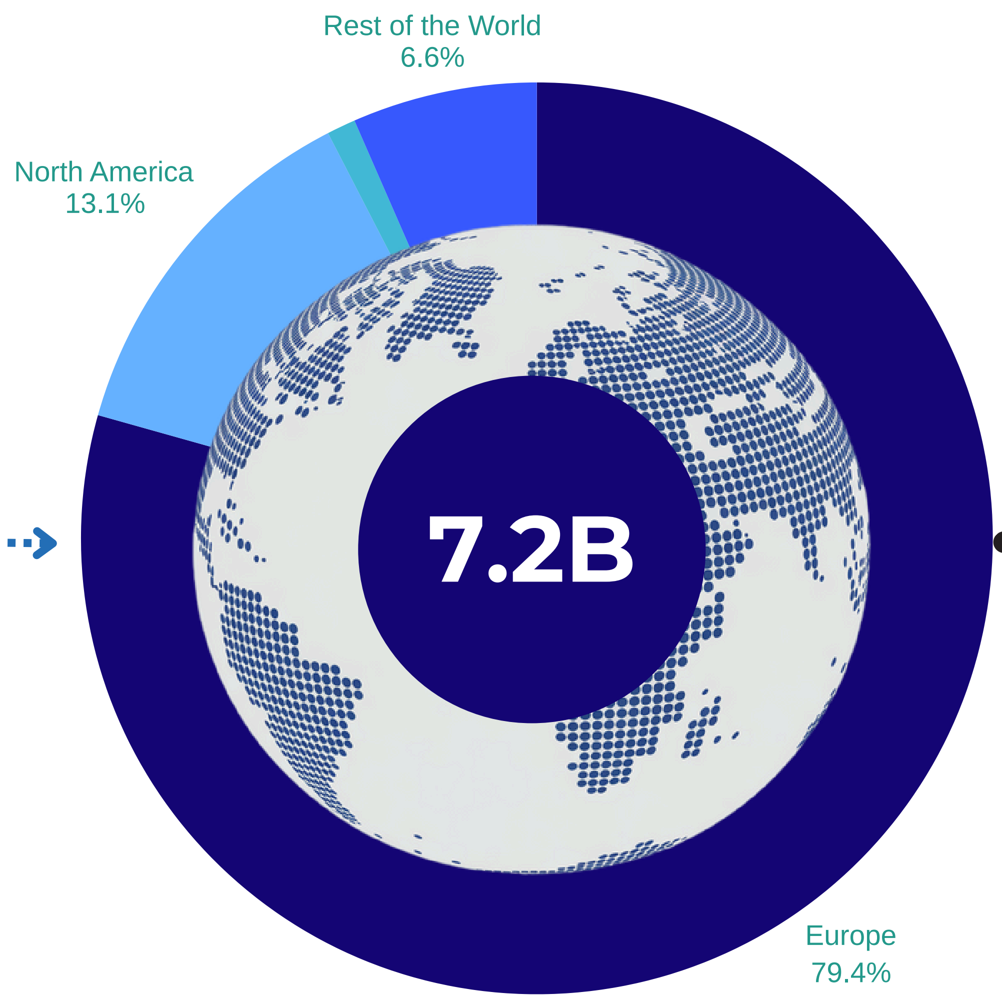
# NEW BUILD

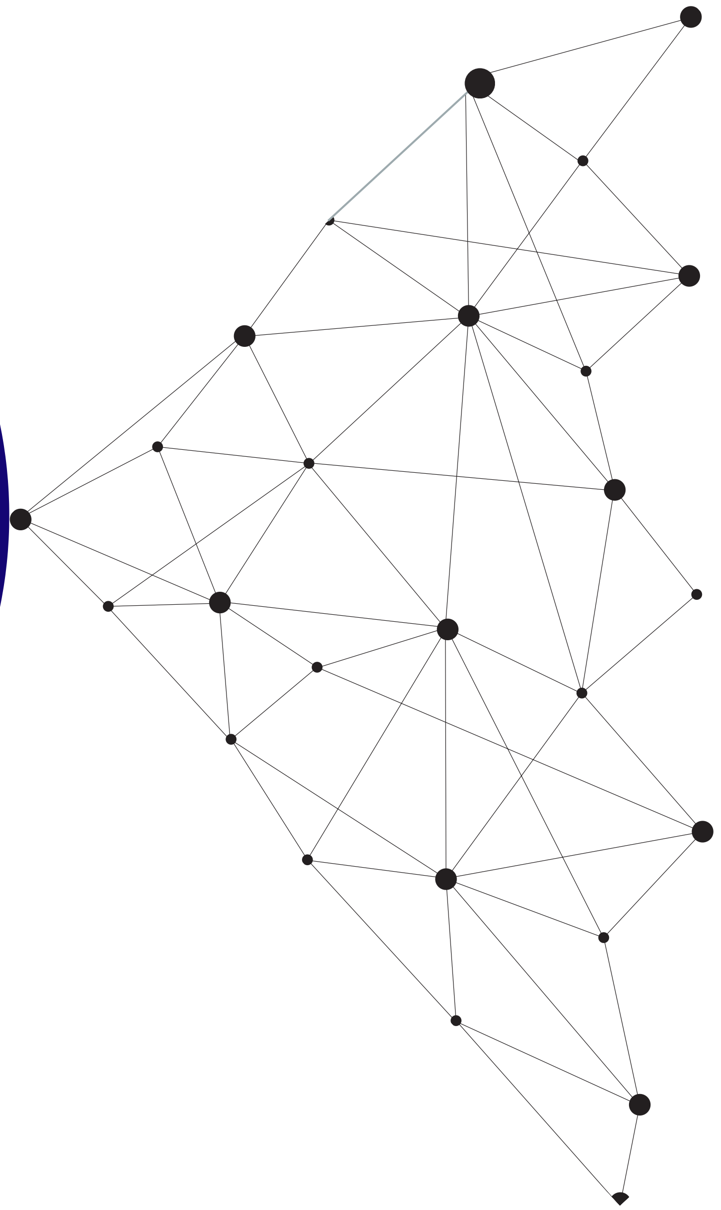
Economic impact of new build superyachts (€)



**221**

Delivered Superyachts



**20B**

Economic impact

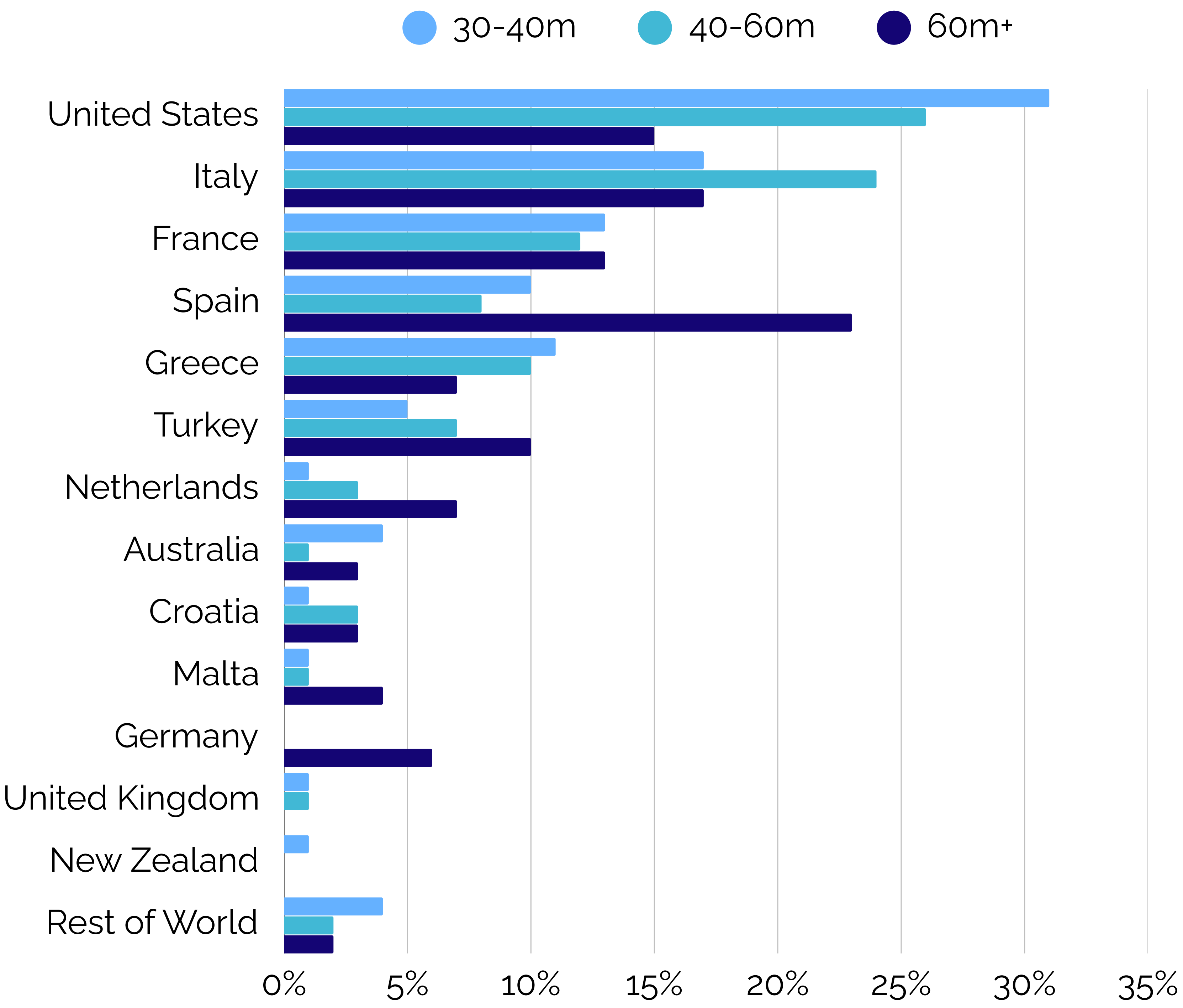
Production of superyachts create a powerful knock-on effect across the wider economy

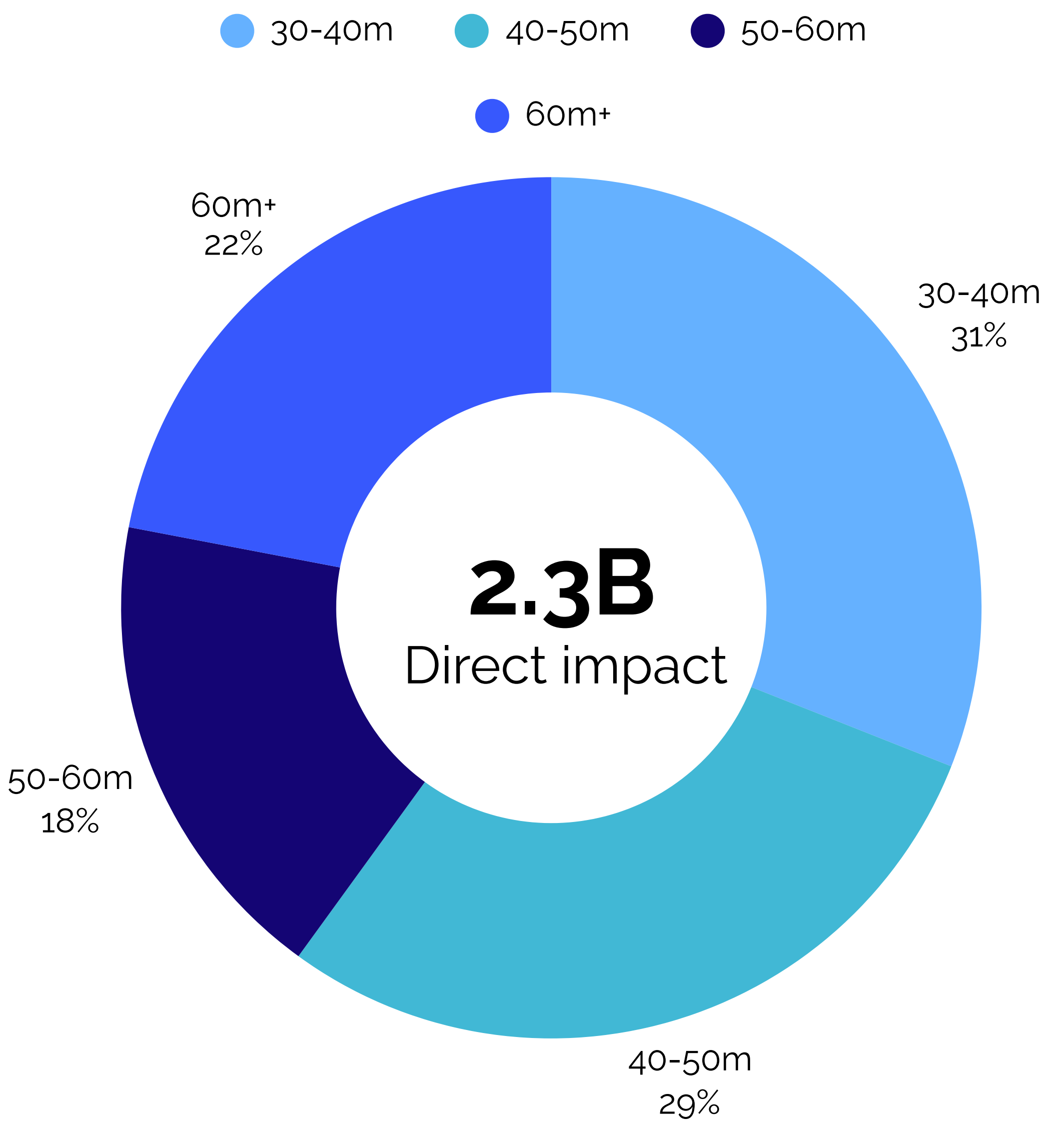
Countries generating the most economic impact of the New Build sector in 2022

- Italy
- Netherlands
- Germany
- Turkey

# REFIT

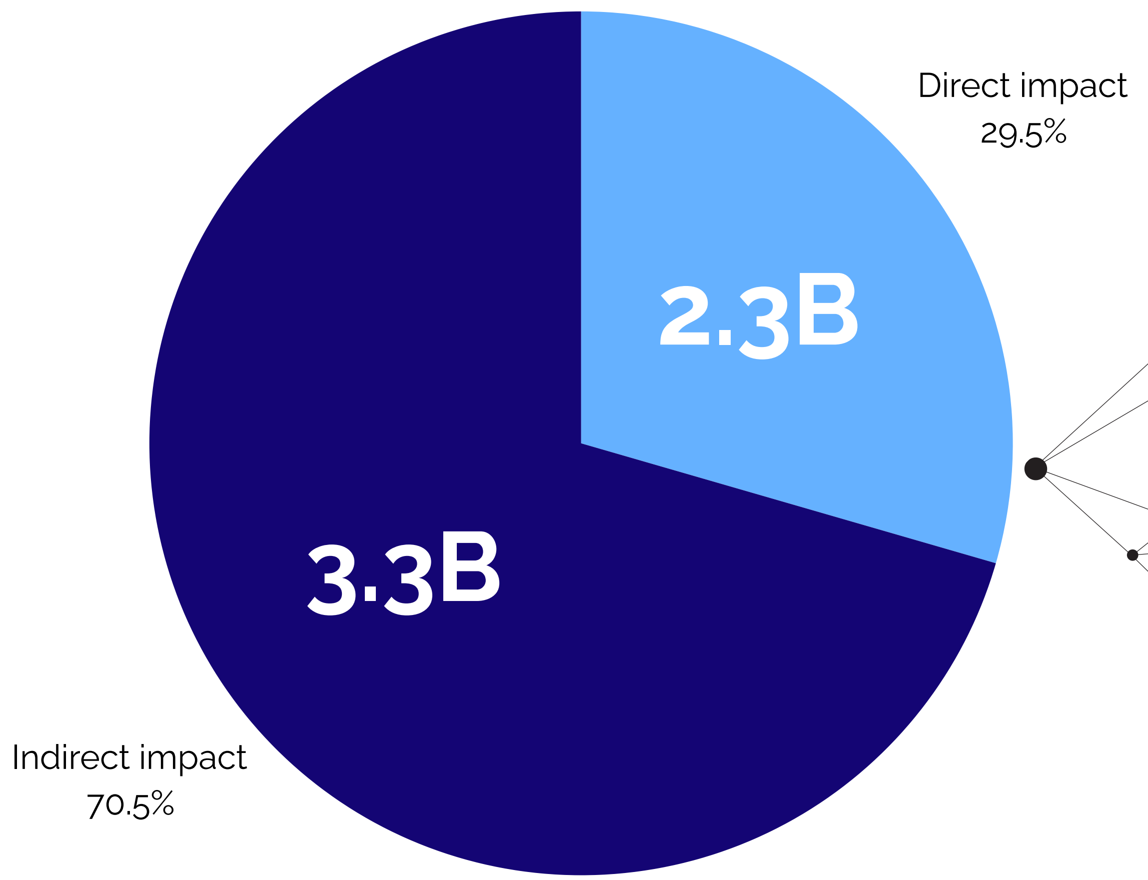
Superyacht refit visits based on LOA and refit market direct impact

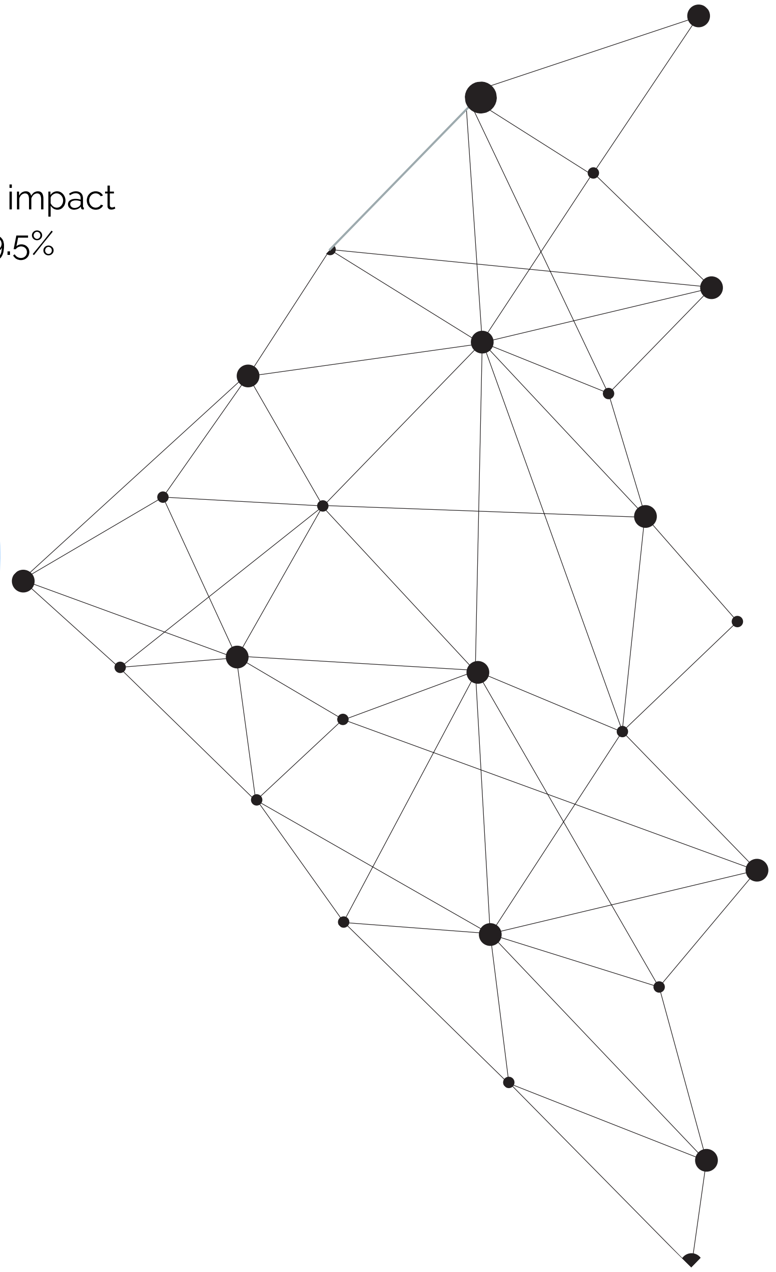



# REFIT

Economic impact based on regions



**5.6B**

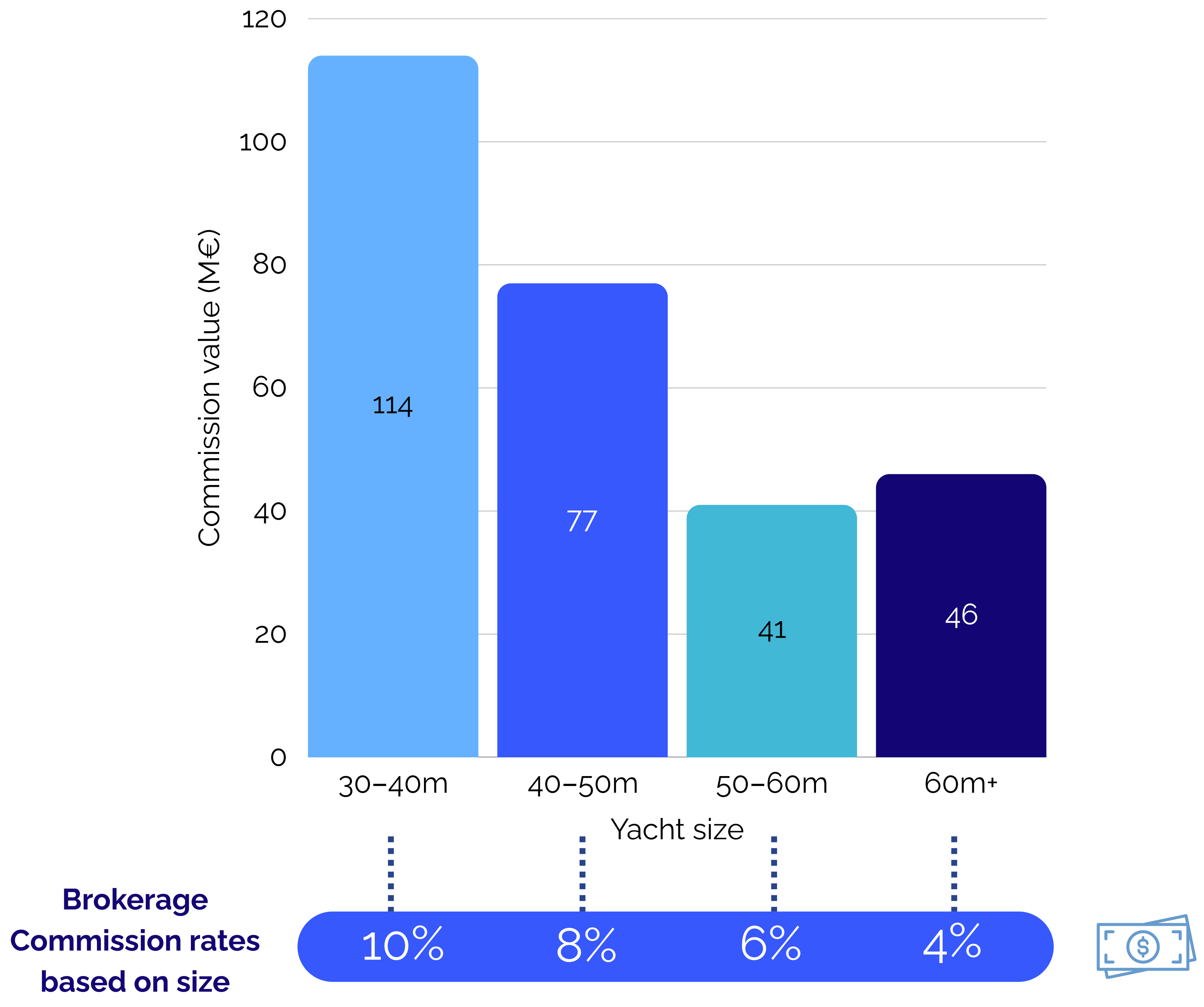
Economic impact

Countries generating the most economic impact of the Refit sector in 2022

- United States
- Italy
- Netherlands
- Turkey
- France

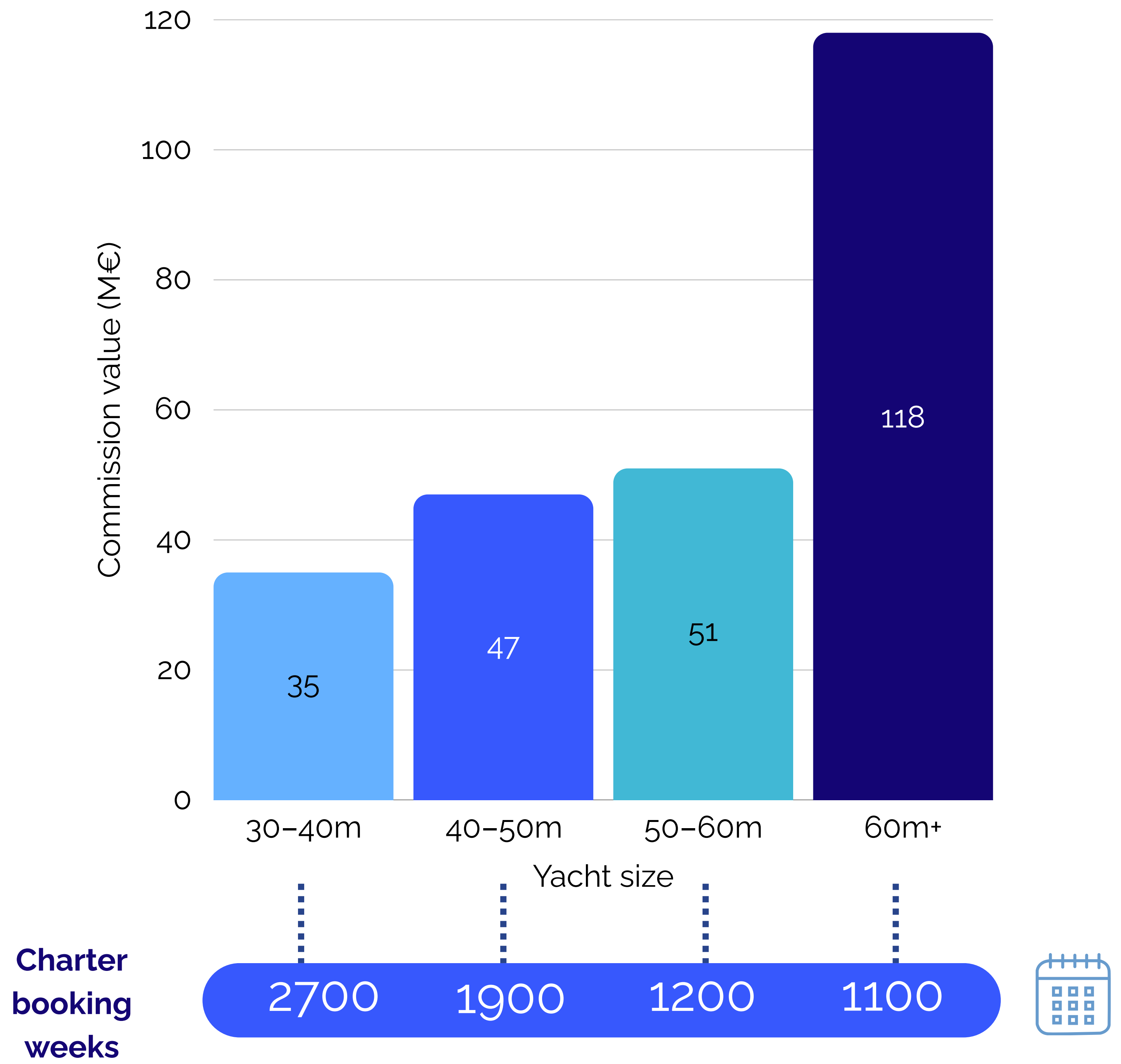
# BROKERAGE & CHARTER

Brokerage & Charter commissions based on LOA




Brokerage commissions impact

**278 M**

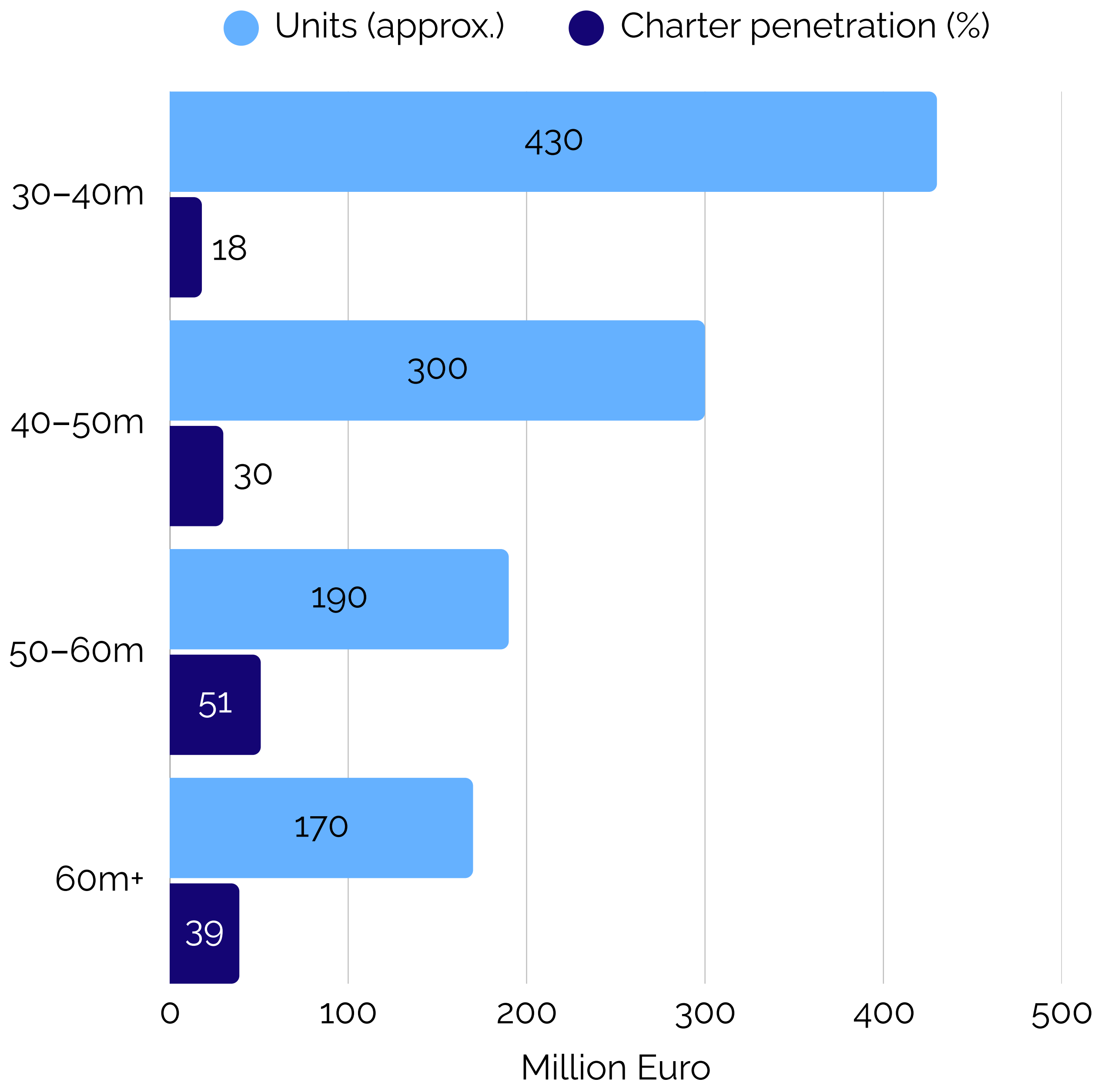


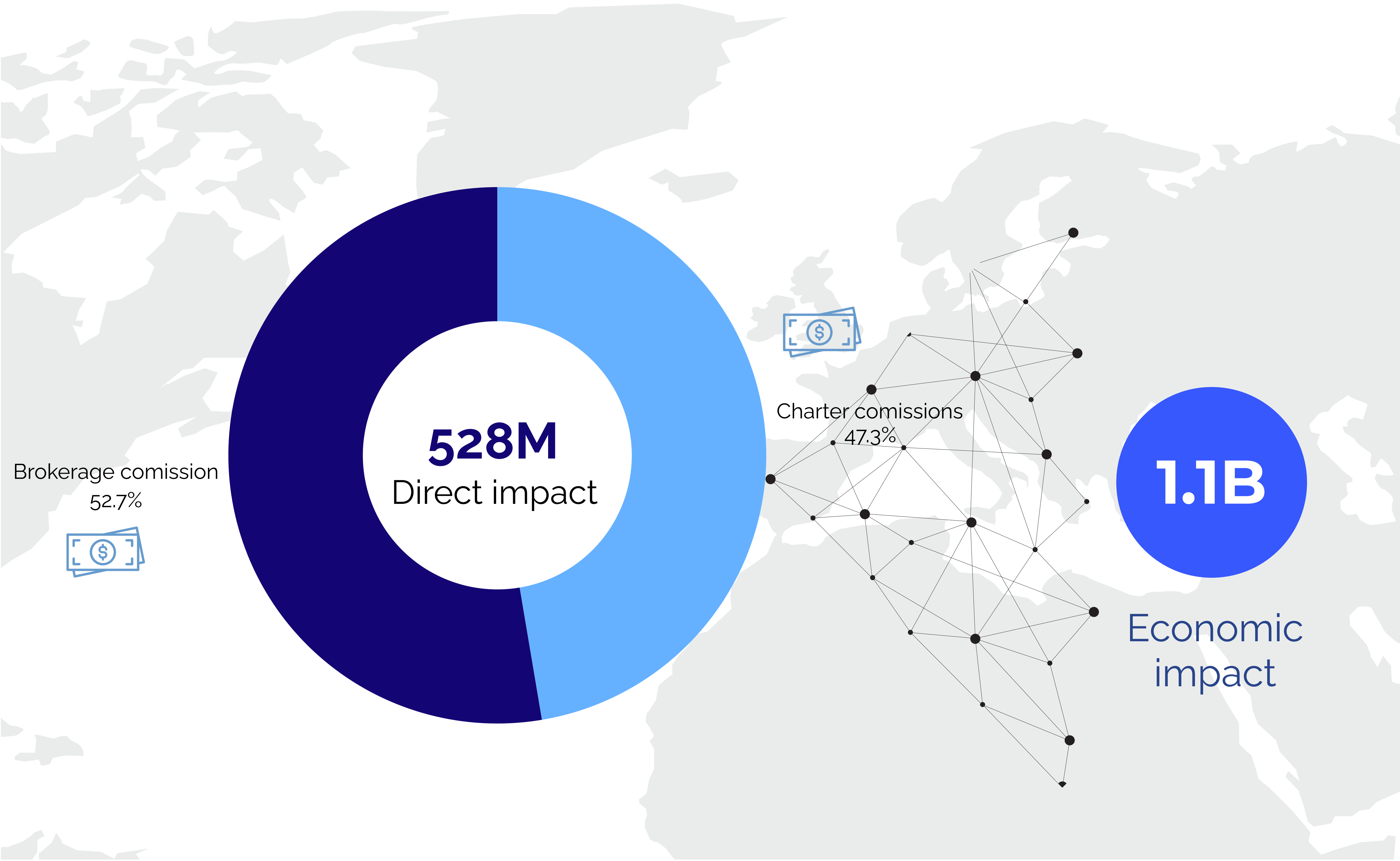

Charter commissions impact

**250 M**

# BROKERAGE & CHARTER

Global fleet and charter penetration

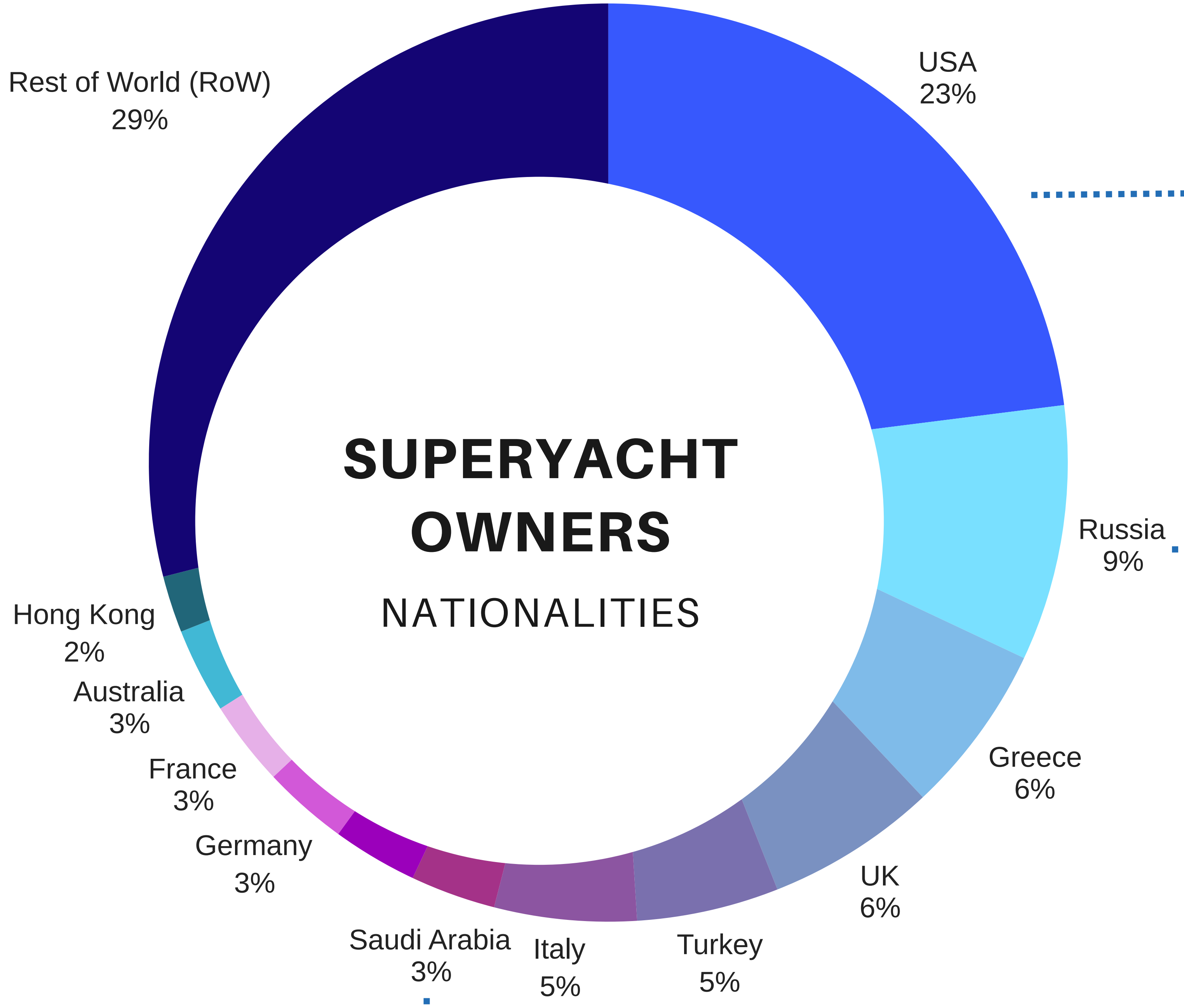


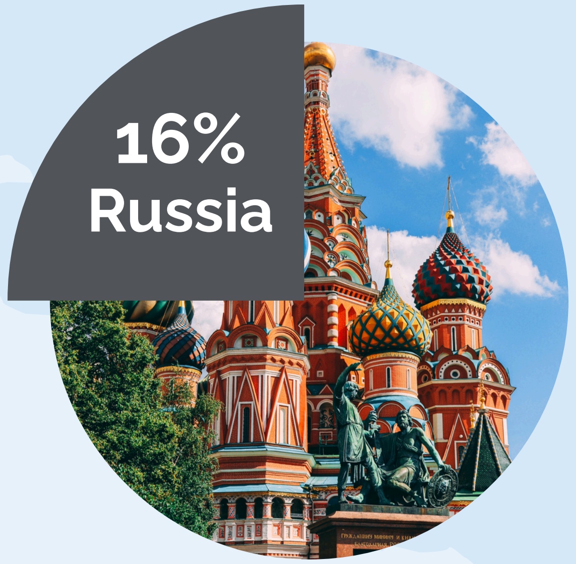
# FLEET OPERATION

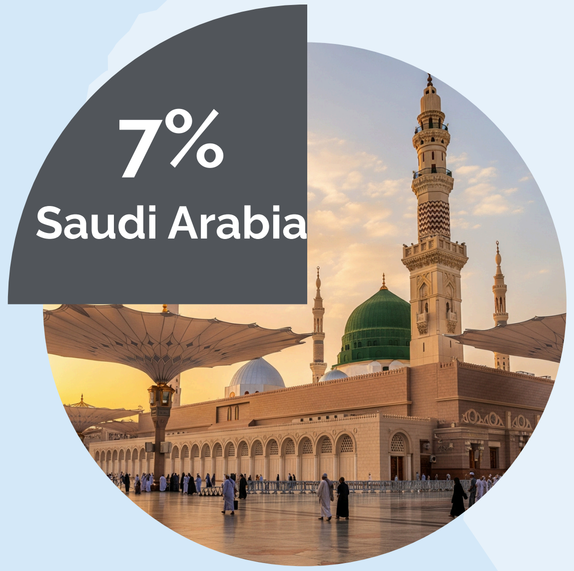
## Superyacht ownership

### Top 5 countries accounting for 50% of total owners



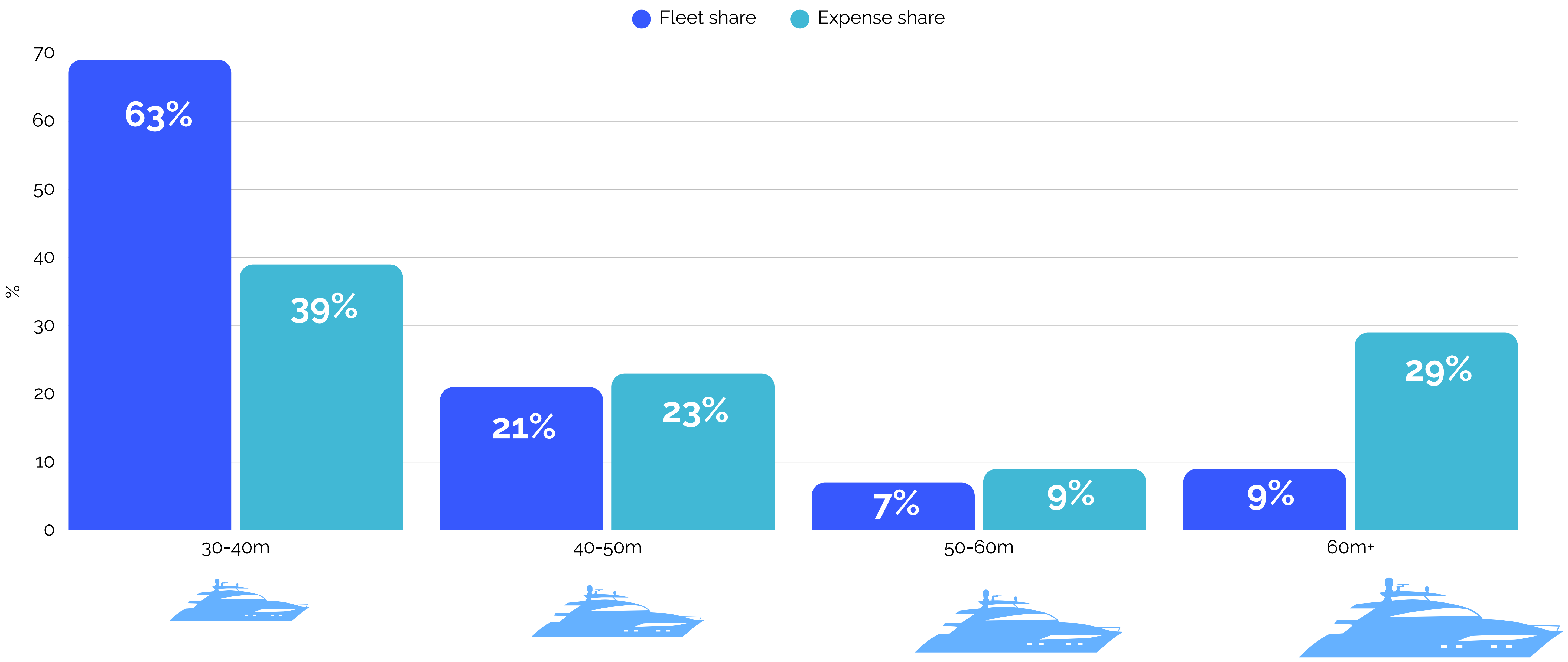

### Top 3 owner nationalities based on LOA

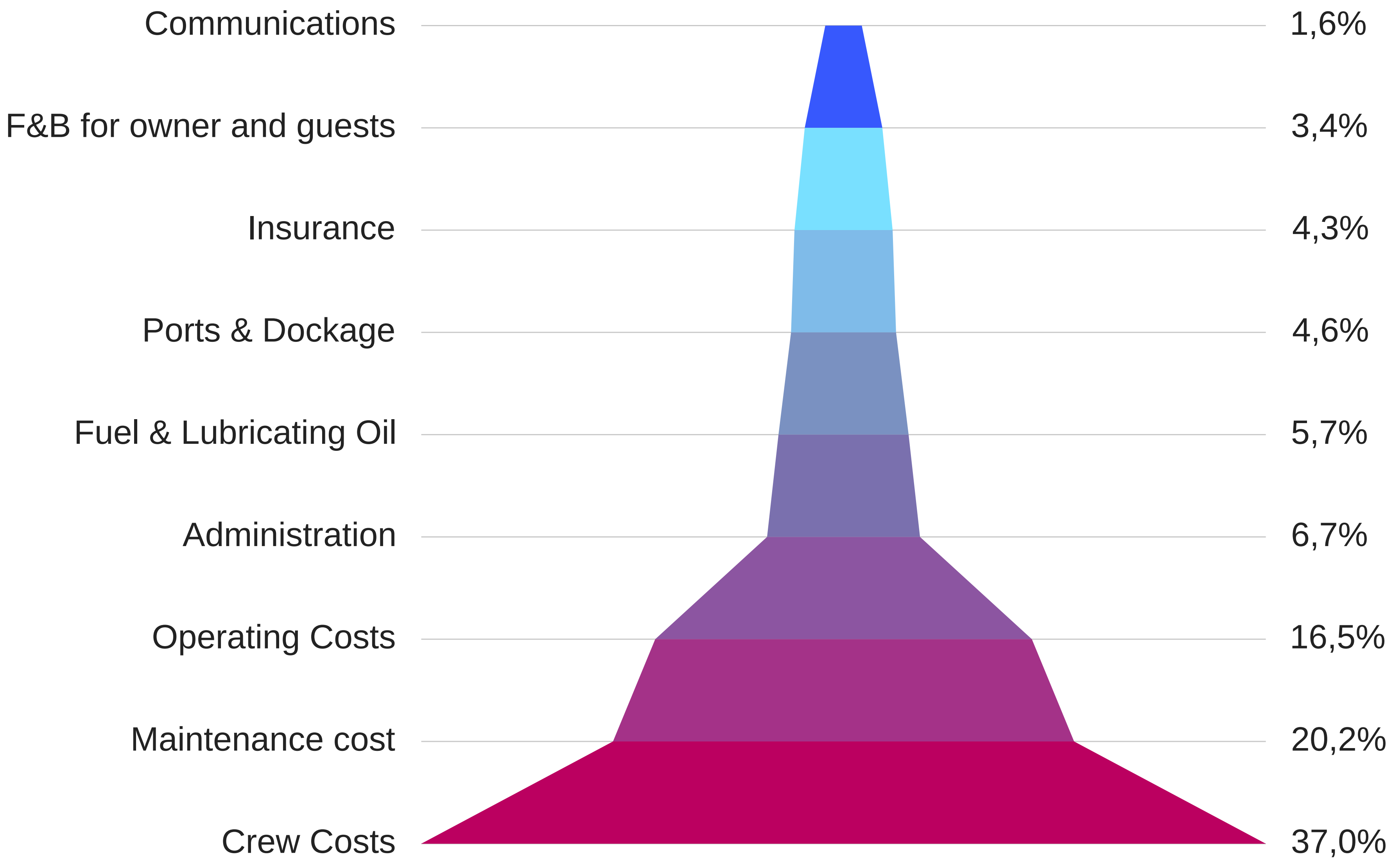
# FLEET OPERATION

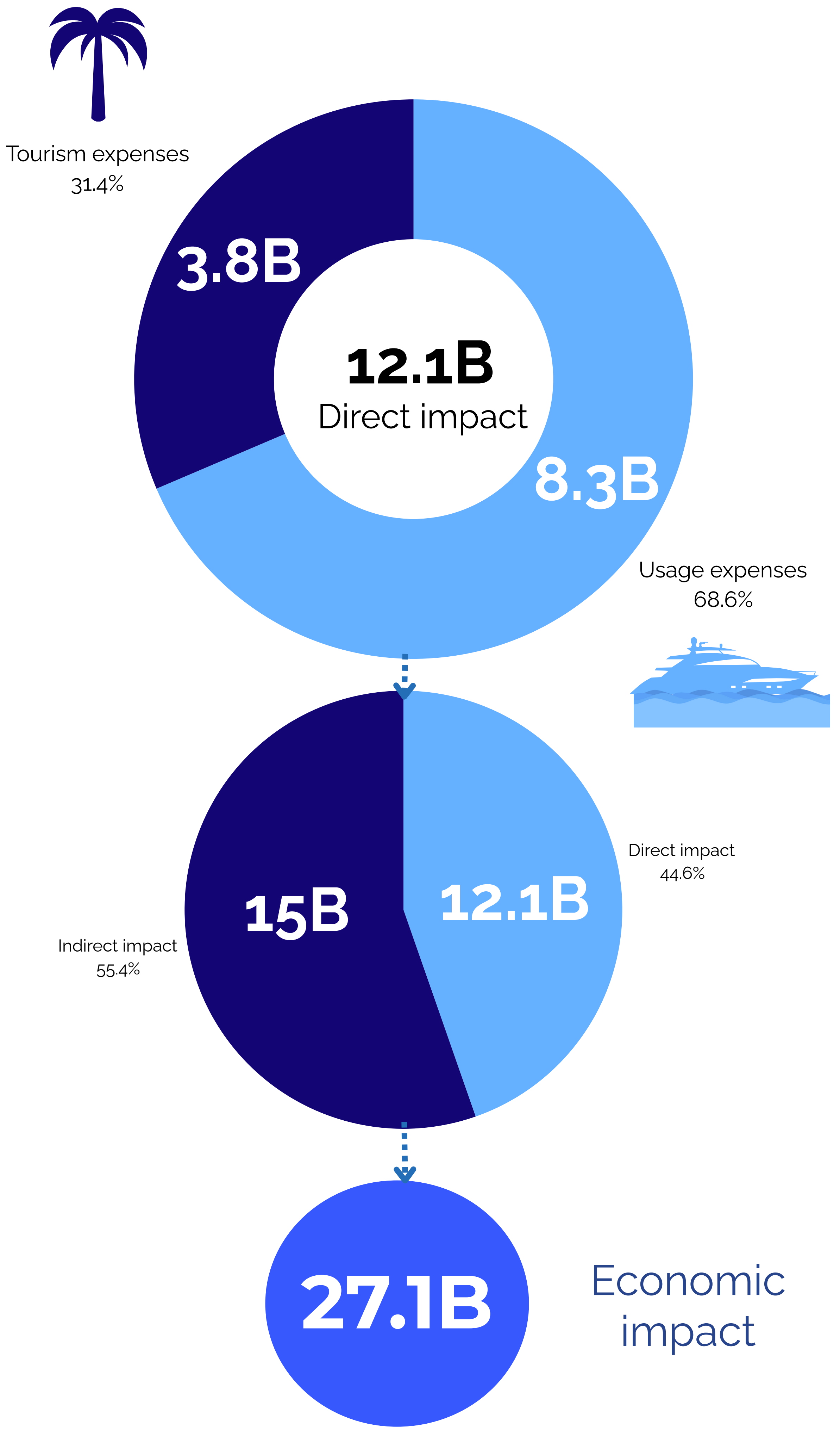
Fleet share and expense share based on LOA



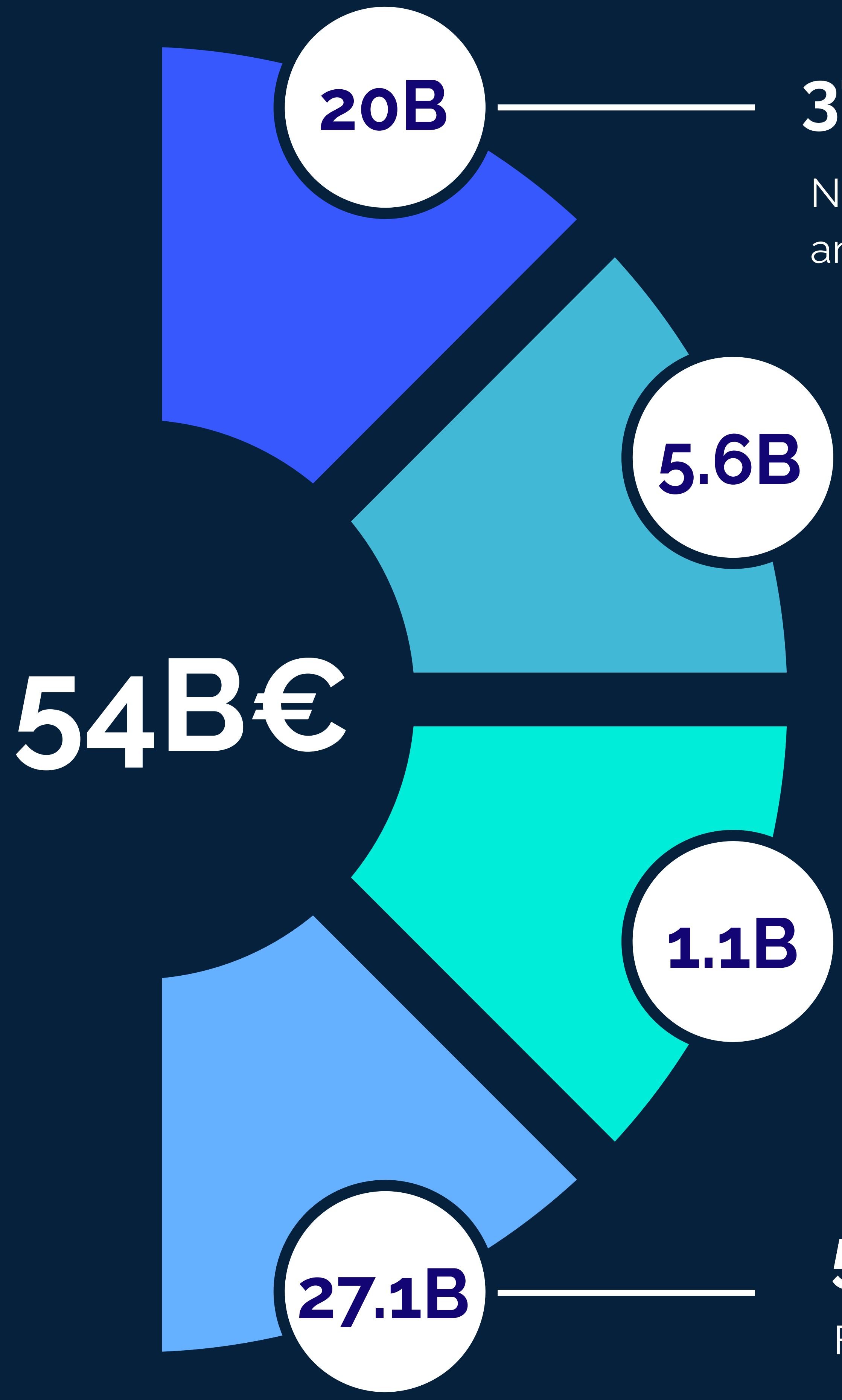
# FLEET OPERATION

Fleet operations direct impact breakdown and total impact



# Key Takeaways




**37% NEW BUILD**

New Build market amplifies the impact of all other sectors and it is a powerful engine of overall industry growth.

**11% REFIT**

Refit market holds the strongest growth opportunity as the superyacht fleet ages.

**2% BROKERAGE & CHARTER**

The brokerage and charter market calculations exclude €5.2 billion value in transactions.

**50% FLEET USAGE**

Fleet usage is the primary sources of our economic impact.

Economic Impact of the Superyacht Industry

# Key Takeaways

**Each of the 6,000 superyachts contributes €9 million** to the economy every year, creating steady, high-value activity.

The **€22.2 billion in direct impact** combined with **€31.7 billion in indirect impact** shows how powerfully **UHNWI fuels a genuine trickle-down effect** across the wider economy and regions.

**€54 billion flows into the maritime ecosystem**, driving innovation, strengthening supply chains, and showcasing the power of the superyacht industry.

# Thank you.