

The AIVP Days

Le Havre, France
29-30 June 2017

COMPETING THROUGH PORT-CITY ANIMATION



Panel 3: Creating a community of Port-City interests



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THE MARINE INDUSTRY, BARCELONA'S ECONOMIC ENGINE

Le Havre, June 2017



1. THE NAUTICAL CLUSTER

- Founded in 2013 by ten organizations: Barcelona's Town Hall, Barcelona's Port, UPC, MB92, Marina Port Vell and the Fishermen's Guild, amongst others
- Currently has close to 90 members
- Goal: transform the marine industry in an economic engine for Barcelona



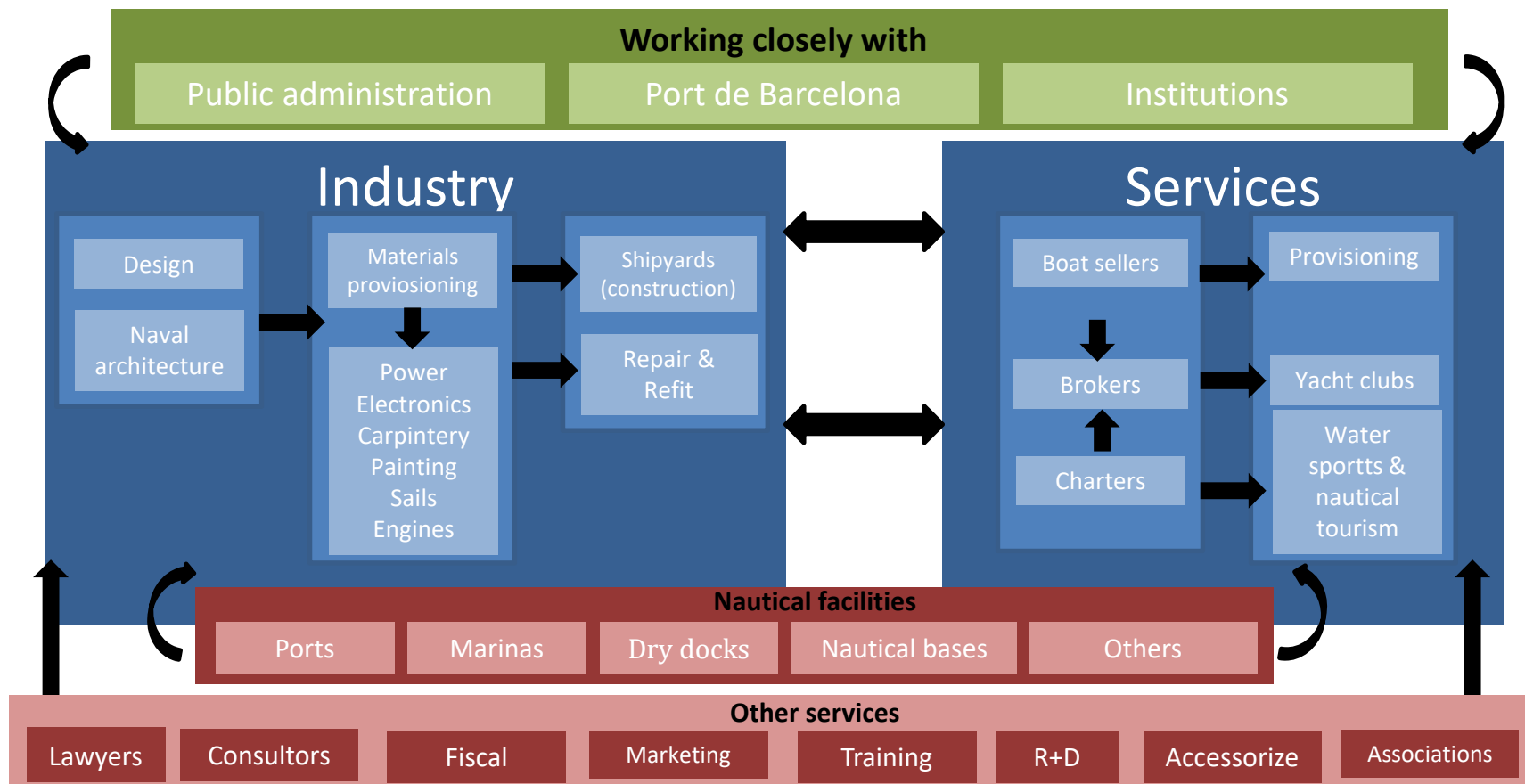
Lines of action:

- Promote Barcelona as an international nautical destination
- Promote quality training in the industry
- Develop business opportunities
- Improve the legal framework

1. THE NAUTICAL CLUSTER

Public administration + private companies

Including all the services needed by the superyacht fleet



1. THE NAUTICAL CLUSTER

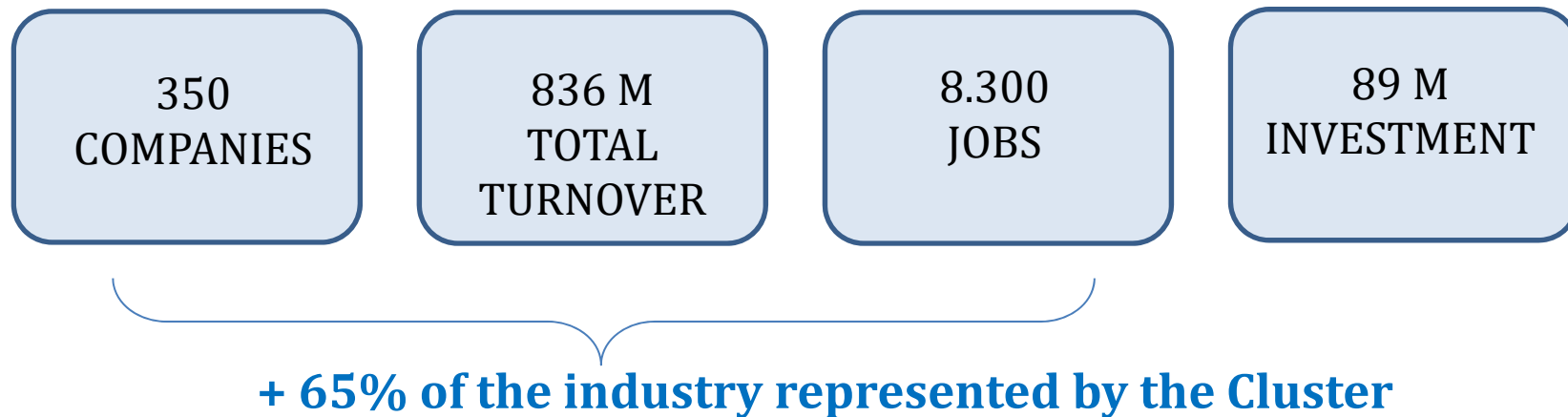
With representation of all the subsectors of the marine industry

- | | |
|---------------------------|----------------------------------|
| ● Accessories | ● Training |
| ● Others | ● Administration and consultancy |
| ● Association | ● Interior design and upholstery |
| ● Hardware | ● Legal services |
| ● Charter | ● Engines |
| ● Sports Club | ● Leisure and nautical tourism |
| ● Boat trading | ● Ports and marinas |
| ● Design and architecture | ● R+D |
| ● Rigging | ● Repairs, carpentry and paint |
| ● Electricity | ● Communication |
| ● Electronics | ● Suppliers and services |
| ● Federation | ● Sails |



2. THE FIGURES OF THE MARINE INDUSTRY IN BARCELONA

According to the study on the marine industry in Barcelona prepared by the Chamber of Commerce of Barcelona:



The objective:

Multiply by 6 the volume of the sector in the following years

3. PRINCIPLE I: YACHT CHARTER

■ In the coming years its use will be more important than boat ownership

■ Tendency to purchase boat hours, rather than rental

■ Collaborative economy: development of new options for the owner

■ Practically the only option for young people to access the industry

■ Boat charter registrations grow 13,79% (from January to September 2016)

■ The charter licenses for superyachts (+24 meters length) in Spain have increased by 50% in the past year— partly due to the greater security of the Western Mediterranean -

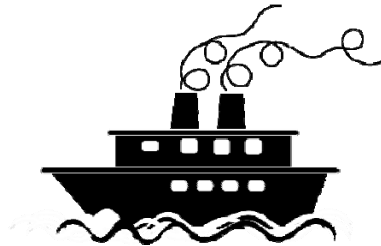
Challenges:

- **Remove the registration tax of 12%**
- **Harmonize and clarify the interpretation of laws in terms of procedures and customs (Shengen visa)**

4. PRINCIPLE II: SUPERYACHTS

Challenge:

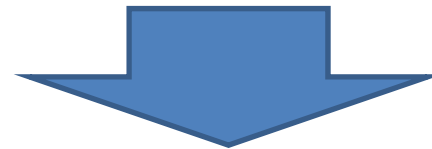
- To attract the super yacht fleet to Barcelona, as big thrust force of the whole marine industry:



**Over 5.000 superyachts
in the world**



**350 berths in Barcelona for
superyachts**

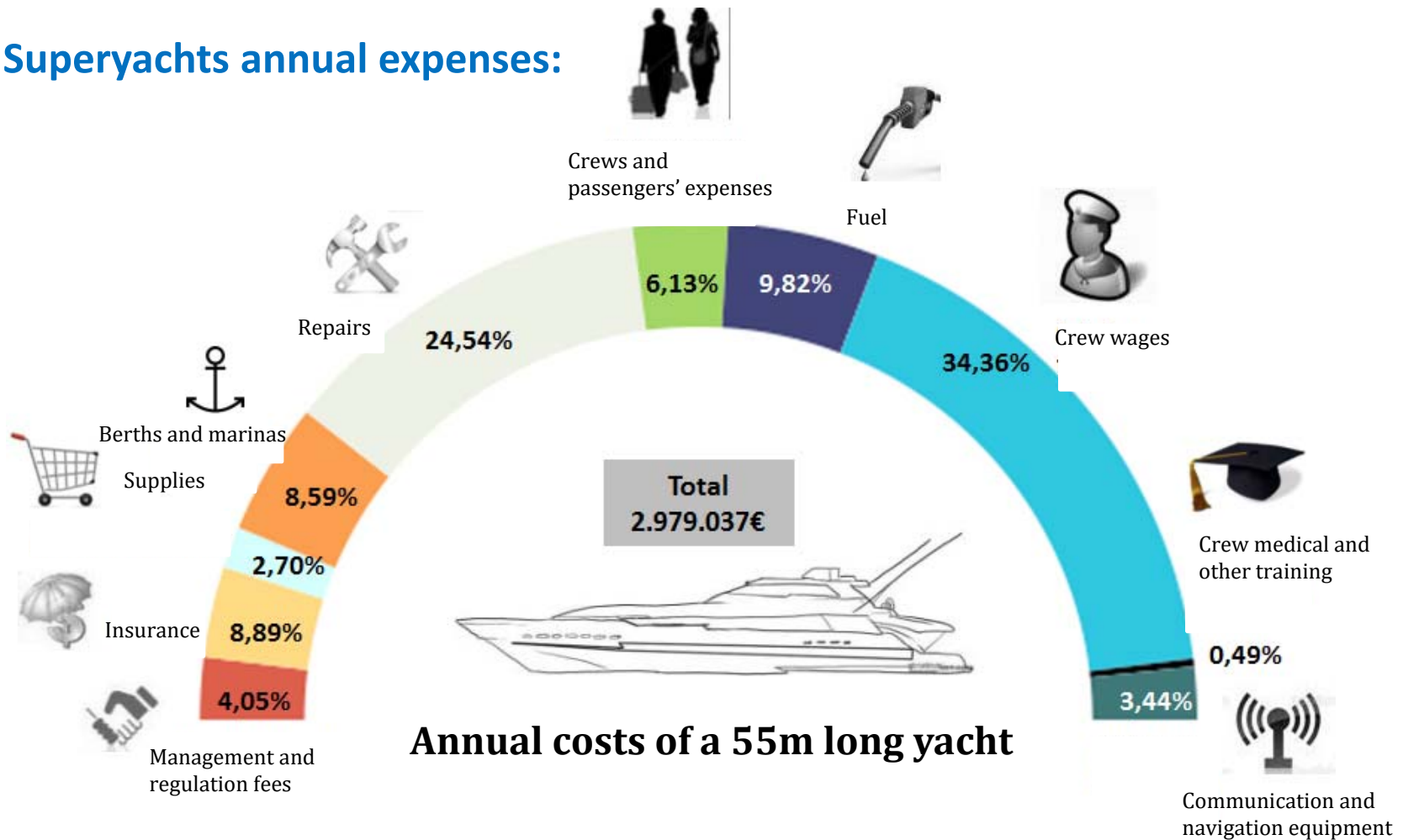


EVERY SUPERYACHT REPRESENTS:

- 9 jobs
- 1 million euros for the city where is moored
- Economic force for the entire marine industry: marinas, maintenance and refit, yacht services, consultancies, etc.

4. PRINCIPLE II: SUPERYACHTS

Superyachts annual expenses:



Annual costs of a 55m long yacht

It is estimated that 1/3 stays in the host city
(Study of the United States Superyacht Association)

5. PRINCIPLE III: NAUTICAL TOURISM

- Nautical activities and nautical tourism generate about 320 million euros per year in Catalonia, and 38 in Barcelona
- Promotion of the industry through the Barcelona Mar program, with Barcelona Turisme and Barcelona Sports
- Support to the large regattas that Barcelona hosts, and which are estimated to generate, each, between 2 and 3 million euros

Challenges:

- **Boost the industry of nautical activities by the hand of the superyachts sector**
- **Consolidate the image of Barcelona as organizer of great races**



6. WHY BARCELONA?

- A cosmopolitan and modern city, international capital of tourism, (leader in cruise ships), with great investments and business appeal
- With state-of-the-art marinas for superyachts, such as OneOcean Port Vell, the new Marina Vela (in the W Hotel area), Mataró Marina Barcelona and Vilanova Grand Marina
- Here is the base of the world's leading company in superyachts' maintenance and refit: Marina Barcelona 92 (recent investment of 45M)
- Strategic position at the entrance of the Mediterranean, halfway between the summer season (Mediterranean) and the winter one (Caribbean), and with international airport.



7. BARCELONA, CAPITAL OF NAUTICAL EVENTS

Events that confirm Barcelona as nautical destination at international level:

■ OneOcean Port Vell will host the MYBA Charter Show from 2017 to 2020, each spring. Is the most important fair of superyachts charter, with over a thousand visitors, 80 exhibitors and 60 superyachts

■ Regattas such as the Conde de Godó Sailing Trophy, the Puig Vela Clàssica and the Barcelona World Race

■ Congresses on nautical taxation and superyachts: Superyacht Group's Fiscal Forum and Quaynote's The future of chartering



8. MORE INFORMATION

Barcelona Clúster Nàutic

www.barcelonaclusternautic.com



Thank you very much



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