BOATING IN FIGURES
Market analysis for the year 2005

Carried out by UCINA in association with
the University of Genoa, Department of Economics and Quantitative Methods

Extract for journalists
For information:
Fede Gardella +39 335 8308666

Genoa 29 September 2006

BOATING IN FIGURES – market analysis for the year 2005
Introduction

“Boating in figures” is the report containing the market analysis relating to the 2005 financial year, and this year the layout, methodology and part of the contents have been renewed.

As from this year, Ucina – aware of the huge value that this study represents for the boating industry – has started up an association with the University of Genoa, in particular the Section of Economic Geography and Economics of Transport within the Department of Economics and Quantitative Methods, with the objective (by next year) of restructuring both the methodology and contents of the statistics of “Boating in figures” in order to make it an increasingly effective work tool and reference for the trade.

Some changes and updates have been made to this edition of Boating in Numbers compared to previous years, both in terms of graphic-formal aspect and contents.

Indeed, this report strays from the studies carried out over the past few years as regards the analysis of the economic results that, for this report, are necessarily analysed irrespective of the way they were processed in the past. In this financial year, the sample of companies interviewed has been expanded to include the whole sector; for this reason, the collected data cannot be directly compared with those contained in the report presented last October.

In order to show the results relating to the financial year 2005, the methods and general lines of the new publication, UCINA and the University of Genoa - Department of Economics and Quantitative Methods of the faculty of Economics - have decided to present the new “Boating in figures - market analysis for the year 2005”

Monday 9 October, at 10.30 am
Press room – Hall C
46th International Boat Show
Genoa

Here it will be possible to get a more thorough knowledge of the methodology and the composition of the world involved by UCINA, as well as to comment upon the results of the boating market study, which is even greater evidence of the value and evolution of the sector.

In the following, for journalistic purposes only, a summary of the data relative to the pleasure boating industry, structured into the various divisions, and some outlines of the marine tourism in Italy will be reported. For a complete, in-depth information, we suggest to refer to the final version of the report **(available at our offices and on the website www.ucina.net).**

BOATING IN FIGURES – market analysis for the year 2005
The boating industry in Italy: the pleasure boating sector and its divisions

The overall production of pleasure boats:
The analysis of the results of the study carried out by Ucina, in association with the University of Genoa, has led to the overall identification of the influence exerted by the boatbuilding industry in the Italian background.
The aggregate figure relating to the turnover of the production of pleasure boats in 2005 amounts to 2886 million euro (see table below).
It is possible to break down this figure as follows: 2521 million euro relating to national production (further broken down into 1346 million euro for exports and 1175 million euro for the domestic market), and about 365 million euro referring to imports.
In terms of export, assessed on the whole at 1346 million euro (1340 deriving from production carried out in Italy for the foreign market, and about 6 million euro from the export of imported boats), it is possible to break down this figure into 713 million euro from exports to EU countries and 633 million euro to non-EU countries.
Thanks to the study carried out we can obtain a reference figure regarding direct employment in the boatbuilding area; to the 9025 workers employed in the companies contacted via questionnaire, another 1155 workers have to be added, resulting from a statistical sampling of small businesses in this sector, adding up to a total of 10180 workers.

The overall Italian boatbuilding industry, millions of Euro (2005)

NATIONAL PRODUCTION	**2521**
for the domestic market (A)	1175
for subsequent export (B)	-
for export (C)	1346
- to EU countries	*713*
- to non-EU countries	*633*
IMPORTS	**365**
for the Italian market (D)	359
for subsequent export (E)	6
OVERALL REVENUE	**2886**
final destination abroad (B+C+E)	1352
final destination Italy (A+D)	1534
WORKERS	**10180**

The boatbuilding industry is the constituent and fundamental part of domestic production in the boating sector; in turn, this industry is divided into sub-sectors according to product specialisation.
The detailed study of these divisions makes it possible to identify what types of boats are more remunerative or demanded by the market.
The distinctions according to boat type regard: inboard or in-outboard craft, outboard motorboats, sailboats, inflatable vessels and small row boats.
The table below shows the trends of the different boating sub-sectors, providing the figures in absolute terms for each production area for 2005.

Composition of the Italian boatbuilding industry, millions of Euro (2005)

	National production for the domestic market (A)	National production for exports (B)	National production (A+B)	Imports (C)	Domestic market (A+C)	Overall revenues (A+B+C)
Inboard or in-outboard craft	934	1.214	2.148	248	1.182	2.396
Outboard motorboats	42	56	98	19	61	117
Sailboats	108	36	144	90	198	234
Inflatable vessels	83	40	123	8	91	131
Small rowboats	8	-	8	-	8	8
Total	**1175**	**1346**	**2521**	**365**	**1540**	**2886**

Analysing the composition of the overall turnover, 83% (2396 million euro out of 2886) of the revenue from the production of pleasure boats is represented by inboard or in-outboard craft, and 4% (117 million euro out of 2886) by outboard motorboats. The sectors of sailboats and inflatable vessels production account for 8% and 5% respectively. Small rowboats are barely significant in absolute terms.

As we can see, the sector exerting most influence is the production of inboard and in-outboard craft, which also holds first place as far as export is concerned, while, as regards import, sailboats are quite significant, with almost 25% of import on the whole.

The individual divisions: inboard and in-outboard craft.
The production of inboard and in-outboard craft has confirmed its top place in terms of overall revenue, constantly increasing compared to previous years.
National production of this craft is 2148 million euro, made up of **934 million euro from national production for the domestic market**, and **of an higher value from production for export**, **amounting to 1214 million euro**. This export figure highlights the development provided by a successful marketing strategy carried out both on the domestic territory, and, mainly, towards the world market.

The overall revenue of 2396 million euro is only to a small extent influenced by the value of import, which in this production sector represents only 10,4% of the final value, while export is much more relevant, recording 50,7%. Production destined to the domestic market sits at around the 39% mark.

The importance of the exports in relation to the production of inboard and in-outboard craft confirms the trend of the last few years, where this sector has recorded the highest growth, particularly abroad.

In terms of exports, based on figures supplied by Istat (national institute of statistics), through the customary study of in- and outbound flows, we can observe that the export destinations of inboard and in-outboard craft are basically Europe and America, both recording about 41%, and, within Europe, in particular France, recording 13%, and the United Kingdom accounting for 14%, followed by the Cayman Islands and the USA. The main import countries are France, with a percentage growth of 22,50%, the United Kingdom and the United States, with about 14,30% and 9,50% respectively, followed by the Cayman Islands with 12,90% of the import value.

The individual divisions: Outboard motorboats.
Outboard motorboats show a rather moderate growth level in relation to the overall revenue and to the national production.
The composition of the outboard motorboat sector in relation to boating production highlights that **national production of these boats amounts to 98 million euro**, out of which **42 million euro from national production destined to the domestic market**. Also in this case, the **export figure exceeds**, though not to a great extent, the value of production for the domestic market, accounting for **56 million euro**.

The overall revenue of this division, valued at **117 million euro**, is made up of 35,9% from the value of production for the domestic market, 47,9% from export, and, to a smaller extent, equal to 16,2%, from import.

As far as Istat figures are concerned, there is a certain trend towards importing, mainly from the United Kingdom, at 24,99%, from the United States, at 24,74%, and from France accounting for 17%. The USA and France are also the main destination countries, indeed, according to Istat; the export values are 16,83% and 9,97% respectively on the whole export of outboard motorboats. We can also note that part of export (3,59%) goes to Spain.

The individual divisions: Sailboats.
Sailboat production is the second sub-division of the boatbuilding industry in terms of production and revenue; although still a long way from reaching the performance of the production of inboard motorboats, **revenues from sailboats add up to 234 million euro.**
The most significant part of this revenue is the **production for the domestic market, at 108 million euro, followed by imports at 90 million euro**, whereas the export trend of sailboats is not as much developed, with **exports equalling 36 million euro.**

National production, worth 144 million euro, is made up of the sum of the production for the domestic market, **108 million euro**, and the export value of **36 million euro.**

If we take a closer look at the percentage composition of the nautical revenue from sailboats, we can see how the most significant area is represented by the production for the domestic market, accounting for more than 45%, while import, with almost 40%, are very significant within the division percentage-wise.

Analysing the Istat figures, we can see that France is the first country as to both import and export flows: the percentage of import is 35,23%, while export accounts for 22,56%. The other main countries that sailboats are imported from are the Cayman Islands, 16,30%, Germany, 9,76% and the United Kingdom, with 5,43% of imports.

On the other hand, Italy mainly exports to European Union countries and to America; in fact, the percentage of exports to Spain is 8,96%, while the figure rises to 9,86% for the USA and to 18,54% for the Cayman islands.

The individual divisions: Inflatable vessels.

As regards **the value of national production in the sector of inflatable vessels, it amounts to 123 million euro, which can be broken down into 82 million euro for the production that remains in the domestic market, and 40 million euro for export.**

The boating revenue from the inflatable vessel production division **amounts to 131 million euro**; out of which 90 million euro come from the domestic market, and another 40 million euro is derived from export, which makes up 30,5% of the boating revenue. Imports take up the remaining 6,1%.

Analysing the Istat figures, we can see that imports and exports are basically concentrated in European countries. As regards the import figures, the countries with the largest greatest exchange with Italy are France (25,90%), Spain (17,08%) and the United Kingdom (11,83%); export flows see once again the predominance of France, with 37,93%, Spain (13,35%) and Germany (2,84%).

BOATING IN FIGURES – market analysis for the year 2005
The boating industry in Italy: the pleasure boating sector and its divisions

The parts sector

Although the boating parts sector is basically represented by small and medium sized enterprises, it plays a fundamental role as to the boating production and turnover, characterising the Italian product in terms of quality and high technology adopted. The concept of boating accessory itself raises considerable problems in defining what could be considered an essentially boating accessory and what, although not directly connected to the boating industry, can in any case be considered an added element, worth for the purposes of correctly calculating production or revenue.
In terms of parts production for the boating market, **we can estimate a total revenue of 1243 million euro for the parts sector.** We can break down the total revenue from this sector into **925 million euro representing the national production** (of which 268 million euro destined to export and 657 million euro to the domestic market), **and about 319 million euro ascribable to imports.** 29% of national production (268 million euro) is destined to direct export and this percentage rises to 67% (623 million euro) if we consider subsequent export after installation on boats put on the foreign market.
In terms of exports, evaluated overall as 268 million euro, we can break down this figure into 195 million euro deriving from exports to EU countries and 73 million euro to non-community countries. **A large share of imports (46%)** is destined to subsequent export, together with boats the product is installed on, and the remaining 54%, or 172 million euro, remains in the Italian market. Thanks to the study carried out, it is possible to obtain a reference figure concerning **direct employment, which is about 7000 workers for the parts sector.**

The parts sector, million euro (2005)

NATIONAL PRODUCTION	**925**
for the domestic market (A)	302
for subsequent export (B)	355
for export (C)	268
- to EU countries	*195*
- to non-EU countries	*73*
IMPORTS	**318**
for the Italian market (D)	172
for subsequent export (E)	146
OVERALL REVENUE	**1243**
final destination abroad (B+C+E)	769
final destination Italy (A+D)	474
WORKERS	**7000**

From the table we can clearly see **the impact exerted by the national production for the domestic market and by the production for subsequent export,** that on their own make up half the revenue in this sector (654 million euro) against 318 million euro in import and 268 million euro in export.

BOATING IN NUMBERS – market analysis for the year 2005
The boating industry in Italy: the pleasure boating sector and its divisions

The engines sector
With reference to the production of engines, on the basis of the study the **total value of the boating turnover is estimated at 440 million euro (see table).**
We can break down this amount into **99 million euro, which represents the national production** (out of which 41 million euro destined to export and 58 million euro to the domestic market), **and about 341 million euro ascribable to imports.**
41% of national production (41 million euro) is destined to direct export and this percentage rises to 73% (72 million euro) if we consider subsequent export after installation on boats put on the foreign market.
In terms of exports, overall evaluated at 41 million euro, we can break down this figure into 22 million euro deriving from export to EU countries and 19 million euro to non-community countries. A large share of import (44%) is destined to subsequent export, together with boats the product is installed on, and the remaining 56%, i.e. 191 million euro, is for the Italian market. As a result of the study, it is possible to obtain a reference figure concerning direct employment, which is about 912 workers for the engines sector.

The engines sector, million euro (2005)

NATIONAL PRODUCTION	**99**
for the domestic market (A)	27
for subsequent export (B)	31
for export (C)	41
- to EU countries	*22*
- to non-EU countries	*19*
IMPORTS	**341**
for the Italian market (D)	191
for subsequent export (E)	150
OVERALL REVENUE	**440**
final destination abroad (B+C+E)	222
final destination Italy (A+D)	218
WORKERS	912

The table shows **the structure of the national production of 99 million euro,** composed of **58 million euro for the domestic market and 41 million euro for subsequent export.** These amounts make up 13,2% and 9,3% respectively of the overall turnover of 440 million euro.

About 78% of the whole amount is made up of the value provided by import flows, i.e. 341 million euro, playing a major role in the division of marine engines production. The significance of imports is certainly of utmost importance in terms of engines production, and over the years a constant growth has taken place, reaching almost 80% of the turnover value in this division in 2005.

In the engines sector there is a prevalence of import over export flows, resulting in a definitely unfavourable balance of payments. Still, we must stress that most of the engines imported are subsequently exported after being installed on boats produced in Italy, redressing the balance of payments in the boating sector as a whole.

BOATING IN FIGURES – market analysis for the year 2005
The boating industry in Italy: the pleasure boating sector and its divisions

Total production
On the basis of what already observed, it is possible to outline a comprehensive estimate of the Italian boating market, split into the sub-divisions of pleasure craft, parts and engines, as shown in the table below.

Total production of the boating sector in million euro (2005)

Divisions	Boatbuilding (I)	Parts (II)	Engines (III)	(II + III)	(I + II + III)
NATIONAL PRODUCTION	**2521**	**925**	**99**	**1024**	**3545**
for the domestic market (A)	1175	302	27	329	1504
for subsequent export (B)	-	355	31	386	386
for export (C)	1346	268	41	309	1655
- to EU countries	*713*	*195*	*22*	217	930
- to non-EU countries	*633*	*73*	*19*	92	725
IMPORTS	365	**318**	**341**	**659**	**1024**
for the Italian market (D)	359	172	191	363	722
for subsequent export (E)	6	146	150	296	302
OVERALL REVENUE	**2886**	**1243**	**440**	**1683**	**4569**
final destination abroad (B+C+E)	1352	769	222	991	2343
final destination Italy (A+D)	1534	474	218	692	2226
WORKERS	**10180**	**7000**	**912**	**7912**	**18092**

Against a revenue of more than 4.5 billion euro and a national production of 3545 million euro (46% directly destined to export), **the boating market employs a total of more than 18.000 workers**, to which the workers employed by sub-contractors should be added, contributing to production in terms of the turnover reported in the analysis but not directly obtainable..

BOATING IN FIGURES – market analysis for the year 2005

The boating industry in Italy: the pleasure boating sector and its divisions

The contribution of the boating industry to the gross domestic product

In calculating a correct computation of the impact of the pleasure boating sector on the national gross domestic product, we must take into consideration that **it is not possible to consider the impact of the engines sector, the parts sector and the boatbuilding production jointly. Indeed, a percentage of parts and engines are imported into Italy in order to be installed on boats produced in Italy. In calculating the impact exerted by the analysed sectors on the GDP, we need to avoid the double computation of parts and engines, with the objective of identifying the added value to the end client.**

On the basis of these considerations, UCINA has calculated the **national contribution of the boating sector to the GDP, which in 2005 accounts for more than 2800 million euro**, showing a steady growth both in the boatbuilding industry and for engines and parts.

This figure is extremely different from last year's 2242 million euro, because the 2005 survey, particularly as to the measurement of production of boatbuilding companies, has led to an increase in the evaluation with respect to previous years' esteems.

Still, the increase in boating activities overall is confirmed, driven by both the success of the Italian product on the foreign markets and the growth of the domestic market.

We can estimate about **18 thousand** workers employed in direct production, **10000 of which working in the boatbuilding industry, and about 8000 workers in the parts and engines sectors**, although this figure suffers from a not yet quantifiable underrating due to the workers employed by subcontractors, that, although contributing to production in terms of turnover, are not directly measurable through the study.

If we consider boating-related industries, the total economic and employment figures increase considerably. **Indeed, boats are the starting point for a series of activities connected to trade, charter, port services, repairs and maintenance, restaurants and hotels, insurance and banking and to many other activities not directly referable to the boating industry**.

In the aforementioned "Report on the economics of the sea" by CENSIS, downstream related industries to the boating industry for the year 2004 were worth 4600 million euro, with an employment of more than 72.744 workers. On the other hand, 8114 upstream workers were estimated. This figure is in line with Ucina's estimates, but should not be considered identical, because Ucina considers a broader range of activities connected to pleasure boating compared to CENSIS, as set out above.

Updating the aforementioned figures, also in the light of the CENSIS evaluation, we can estimate the related industries as **4750 million euro, to which we can correlate a number of about 76.000 downstream and 6800 upstream workers (slightly increasing pro-capita productivity).** In view of these considerations, we can summarise in the table below the overall estimate of the contribution of the Italian boating activity to the domestic economy.

Pleasure boating in Italy: contribution to the Italian GDP and employment

Contribution to the Italian GDP	2000	2001	2002	2003	2004	2005	million €
Direct production	1498	1777	1953	2085	2240	2858,2	million €
Related	4132	4103	4300	4450	4600	4750	million €
Total	5629	5880	6253	6535	6640	7608,2	million €
Employment	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	
Direct	10000	11000	11500	11800	12000	18000	Workers
Upstream activities	5900	6000	6000	6000	6500	6800	Workers
Downstream activities (marine tourism)	75000	76000	76000	76000	76000	76000	Workers
Total	90900	93000	93500	93800	94500	100800	Workers

BOATING IN FIGURES – market analysis for the year 2005

Marine tourism in Italy

A whole series of factors, from upstream supply right down to nautical clothing, revolve around the "boat" concept, characterising the boating environment and contributing to the creation of value not only within the sector but also in the national economy as a whole.
Boats can be used for many functions, difering both in terms of use and destination of the craft. Among the many ways boats can be used, marine tourism and pleasure boating are developing at increasing speed.

The activities and services connected to pleasure boating are one of the factors exerting the greatest impact on income production, counted among the related activities that create the most added value to the sector.
In fact, the recent "report on the economy of the Sea" by Censis highlights the relevance of the implications at the economic level and in terms of wealth produced by the upstream and downstream activities in boat production, also due to close connections to marine and non-marine tourism.
There is no doubt that some relations exist, not only of a strictly commercial nature, which trigger multiple processes connected both to income and employment; with these terms we refer to the impact exerted by an increase by 1 euro in the demand of goods at the level of income and employment.

To assess the degree of upstream and downstream integration of considered activities, the intermediate costs and import flows have been taken into account, while for the assessment of the downstream impact the distribution margins has been allowed for. If we consider the income multiplier for industrial maritime activities and services for the year 2004, we can see that the increase of 1 euro on the demand side generates 2,317 €, i.e. 0,89 cents for the main and direct activities, 1,18 € for upstream activities and 24 cents was for downstream activities. **Pleasure boating without marine tourism has a multiplier of 2,17, increasing to 4.55 if we also consider the tourism contribution.**

In terms of the employment multiplier, we can follow the same line of reasoning, realising that **the increase of one worker in the maritime sectors produces an overall increase in the employment in the national economic system to 2.726 workers, i.e. 1 direct worker, 0,874 upstream and 0,852 downstream workers**.

Referring to the **employment multiplier in the pleasure boating industry, the figure without the tourism contribution is 2,04 workers, rising to 7,90 if we include that contribution**. From the comparison with other sectors in the maritime cluster we can see how the boating sector is the area with the greatest upstream and downstream impact.

The Censis figure indicates that the activities relating to marine tourism are estimated at 4600 million €, while, according to Ucina, the figure amounts to 4750 million euro; as already mentioned, the value of the related activities calculated by UCINA differs from the figure provided by Censis as a consequence of the different calculation method used as to the activities classified as related, both upstream and downstream. The same applies to the workers employed in upstream activities, 72.744 according to Censis and 76.000 as per Ucina, and to the upstream activities, which, although to a lesser extent, provide work to 8114 people according to Censis, and to 6800 as stated by Ucina.

BOATING IN FIGURES – market analysis for the year 2005
Marine tourism in Italy: the Italian registered nautical fleet

The number of registered boats in Italy increased by 2297 units during 2005. The Italian registered nautical fleet has therefore grown from 69166 registered boats in 1999, 69596 units in 2000 and 69505 units in 2001, to 70248 units in 2002, 70743 in 2003, and 71014 units in 2004, **finally consolidating at the current figure of 73311 in 2005**.

Pleasure boats as at 31 December 2005 divided into type of craft and length

TYPE OF PLEASURE CRAFT	up to 10 m	from 10.01 to 12 m	from 12.01 to 18 m	from 18.01 to 24 m	over 24 m	TOTAL
sailboats (with or without auxiliary engine)	2.854	7.021	4.452	517		14.844
motorboats	36.389	11.229	9.248	1.428		58.294
ships					173	173
TOTAL						73.311

Source: Statistics office – Ministry of Infrastructure and Transport

The adoption of tax concession measures in Italy, similar to the French ones, adopted from June 2002 with the so-called **Italian leasing**, which has spurred the domestic market and led to an increase in imports of pleasure craft, as well as the entry into force of law n° 172 of 8 July 2003, extending the limiting length of small craft and allowing the cancellation of former registered units, thus causing a variation in the number of registered craft, **have both affected these results**.

As a matter of fact, changes in the total national fleet are due to cancellations and new entries in the Pleasure Boats Registers. A comparison between the data of the registered fleet at the end of 2004 and at the end of 2005 shows that the cancellation of motorboats up to 10 metres (the small craft length according to law n° 172/2003) is smaller compared to the figures recorded in the previous year (3283 during 2004, 1077 in 2005).

This figure confirms the consolidated tendency to cancel units, according to the provisions included in law n° 172, 08/07/03. This law introduced a new classification of pleasure craft according to the following definitions:

- Small craft: Motorboats or sailboats with length overall up to 10 m
- Boats: Motorboats or sailboats with length overall between 10 m and 24 m.
- Ships: Vessels with length overall of more than 24 m.

The registered nautical fleet, on 31/12/2005, shows significant increases in the number of registered units in the range between 10 and 12 metres (+1188 units), in the range between 12 and 18 metres (+1942 units), and in the range between 18 and 24 metres (+255 units). The number of pleasure ships registered in Italian registers also underwent a slight expansion, growing from 148 units in 2004 to 173 in 2005, with an increase of 25 units.

Pleasure craft registered in the maritime offices, 31 December 2005
(regionally divided by type and length)

		sail (with or without ancillary engine)					motor					ships	
N.	REGION	up to 10 m	from 10.01 to12 m	from 12.01 to 18 m	from 18.01 to 24 m	TOTAL	up to 10 m	from 10.01 to 12 m	from 12.01 to 18 m	from 18.01 to 24 m	TOTAL	(over 24 m)	TOTAL
1	LIGURIA	703	1,961	1,373	341	4,378	7,770	3,292	3,220	533	14,815	61	19,254
2	TUSCANY	363	926	735	54	2,078	4,236	1,387	1,304	334	7,261	50	9,389
3	LAZIO	464	744	402	18	1,628	3,853	1,192	1,106	203	6,354	26	8,008
4	CAMPANIA	92	196	131	5	424	5,858	1,625	944	69	8,496	11	8,931
5	CALABRIA	16	25	18	1	60	917	97	51	7	1,072	-	1,132
6	PUGLIA	87	103	65	4	259	1,956	262	139	8	2,365	-	2,624
7	MOLISE	1	-	1	-	2	18	6	6	1	31	-	33
8	ABRUZZO	43	57	47	4	151	391	69	37	8	505	1	657
9	MARCHE	131	254	129	9	523	1,387	587	579	54	2,607	7	3,137
10	EMILIA ROMAGNA	296	956	532	21	1,805	1,455	691	414	48	2,608	2	4,415
11	VENETO	231	639	337	10	1,217	2,112	698	530	29	3,369	7	4,593
12	FRIULI VENEZIA GIULIA	175	751	377	23	1,326	1,154	446	332	36	1,968	2	3,296
13	SARDINIA	104	222	159	13	498	1,870	487	356	49	2,762	3	3,263
14	SICILY	148	187	146	14	495	3,412	390	230	49	4,081	3	4,579
	TOTAL	2,854	7,021	4,452	517	14,844	36,389	11,229	9,248	1,428	58,294	173	73,311

Source: Statistics Office – Ministry of Infrastructure and Transport

UCINA, thanks to the active **collaboration with the Harbour Offices General Headquarters, has collected information regarding craft registered for the first time in the Pleasure Boat Register.** The figures collected and processed concern a total of 3539 units registered during 2005, this number being in line with the official figure supplied by the Statistics office of the Ministry of Infrastructure and Transport.

Unregistered nautical fleet in Italy

The latest estimate available (evaluation also carried out by the Ministry of Transport and Shipping and published in "Il diporto nautico in Italia" (Pleasure boating in Italy), year 1996, Rome, 1997, pg. 5, and also quoted by the,Harbour Offices General Headquarters by R. Ferraro, in the "Vademecum del diportista", 1997, pg. 1) shows an unregistered marine fleet in Italy of 320000 small craft and 400000 canoes, kayaks, boards, small keels, etc. We do not believe that the total number of pleasure craft on the national territory is subject to significant changes, in spite of the domestic market’s growth trend, because the new market issues compensate for the pleasure craft that are no longer part of the active marine fleet due to age, obsolescence, wear and tear, subsequent export, etc… Assuming an average life period of an equipped boat of 25 years, the natural replacement due to obsolescence would be 4% per annum.

Marinas in Italy

According to the figures of the Ministry of Transport and Shipping, at the end of 2005, 130696 mooring berths were available in Italy, with a 2,1% increase compared to 2004, i.e. 2654 mooring berths. This increase can be observed both in some regions in the north and in the south of Italy, namely Liguria, Campania and Sicily. There were 22337 mooring berths available in Liguria in 2004, while at the end of 2005 there were 23718, with a 6% increase. The mooring berths in the Sicilian structures increased in one year by 2%, from 10487 in 2004 to 10685 in 2005. In Campania, the available mooring berths increased by 749 during the considered period, showing a 5% increase. The number of mooring berths also increased in Molise, Tuscany, Lazio, Veneto.
In the other coastal regions, the number of mooring berths remained unchanged or decreased slightly.

The positive growth in the number of mooring berths compared to 1999 is almost entirely concentrated in the tourist marinas, where over the last four years the number of mooring berths has been increasing from 44144 in 1999 to 53244 in 2004, reaching 53,975 in 2005. The tendency toward investments growth in these structures, lasting from year to year, is due to the legal simplification of the procedures for the construction of tourist marinas, enforced with Presidential Decree 509/1997, to which UCINA provided its own contribution and support.

NUMBER OF MOORING BERTHS BY REGION, TYPE OF STRUCTURE AND LENGTH, 31/12/2005									
Region	**Type of structure**			**Length classes**					**Total**
	Tourist marina	**Tourist harbour**	**Mooring berth**	**up to 10.50 m or not specified**	**from 10.01 to 12 m**	**from 12.01 to 18 m**	**from 18.01 to 24 m**	**over 24 m**	**mooring berths**
Liguria	8,186	7,307	8,225	1,917	1,912	1,559	486	244	23,718
Tuscany	5,353	8,184	2,325	14.937	467	337	81	40	15,862
Lazio	3,129	2,279	1,314	4,972	656	786	73	235	6,722
Campania	5,385	5,509	4,165	10,241	2,498	1.335	590	395	15,059
Calabria	1,105	538	407	1,134	149	167	588	12	2,050
Puglia	3,715	2,779	2,183	7,128	860	543	104	42	8,677
Molise	132	172	-	269	32	2	1	-	304
Abruzzo	1.407	510	145	1,380	362	270	48	2	2,062
Marche	2,416	1,787	772	3,231	1,051	485	179	29	4,975
Emilia-Romagna	3,831	537	377	2,705	1,210	681	94	55	4,745
Veneto	3,540	2,053	106	4,071	856	486	150	136	5,699
Friuli-Venezia Giulia	2,803	5,583	1,775	7,500	1,536	936	155	34	10,161
Sardinia	8,858	4,939	6,180	10,765	2,932	2,758	498	3,024	19,977
Sicily	4,115	2,123	4,447	8,165	1,575	832	69	44	10,685
Total	**53,975**	**44,300**	**32,421**	**96,015**	**16,096**	**11,177**	**3,116**	**4,292**	**130,696**

Source: Statistics office – Ministry of Transport