



THE ECONOMY OF COMPETITIVE SAILING INDUSTRY IN BRITTANY

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Industries, trades and services / 2016 DATA

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growing sector

A Complete and
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A diverse
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with a Significant
Economic Impact

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growth and
innovation

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INTRODUCTION

A true innovation lab and a driver of development for embedded cutting-edge technologies, competitive sailing unites many firms in Brittany. The excellence of the Sailing Valley© players and their ability to innovate from the boat design to its construction, is a source of inspiration across the industry including yachting, aeronautics and marine renewables.

I thank all the actors who contributed to the realization of this study, for the quality of the work done, under the management of Bretagne Développement Innovation and the cluster Eurolarge Innovation.

Hugues MEILI
President of Bretagne
Développement Innovation

From boat design to welcoming the best sailors and organizing great races, Brittany offers a range of unique know-how and cutting edge technologies. Historically centered in Brittany, this Sailing Valley® is a pole of technical excellence, singular and unique in the world.

The results of this study show how much the competitive sailing sector creates wealth, jobs, and innovation. This vision of its economy contributes to renewing the regional policy for the maritime economy and to better respond to the challenges of the industry.

A driver of development and attractiveness, Brittany strongly supports this sector notably through the actions of the cluster Eurolarge Innovation.

Loïc CHESNAIS-GIRARD
President of Regional
Council of Brittany



CONTEXT AND METHODOLOGY OF THE STUDY

This study was conducted by Eurolarge Innovation, a programme supporting competitive sailing technology in Brittany, piloted and managed by Bretagne Développement Innovation, the regional economic development agency.

The purpose of the study was to estimate the economic weight of competitive sailing integrating significant changes in the market: new races, new boats, new technologies, new navigation classes.

The study also shed light on stakeholders' needs and constraints and revealed the challenges and levers for development in the sector.

It was conducted on two different but complementary population samples:

- Industries, trade and services (direct benefits)
- Teams and sporting projects (budget excluding boat cost)

The measure followed a study conducted in 2016 on the economic benefits of the boating industry in Brittany by Bretagne Développement Innovation and the support structures for boating in Brittany⁽¹⁾.

¹ Thanks to the partnership between the French Fédération des Industries Nautiques and the Regional Council of Brittany.

Scope of the Study

Industries, trade and services: the sector includes all stakeholders on the market for boats and light water-going craft, registered in a federal navigation programme or reserved for professionals, equipped with a sail or a wing. It also includes the associated equipment and services contributing to boat and/or crew performance.

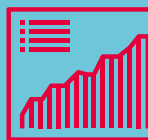
Teams and sporting projects: the sporting sector includes all ongoing sporting projects with a boat located in Brittany. It includes race teams and skippers, professional or otherwise, participating in a federal navigation programme or reserved for professionals. 7 sailing classes were studied: Ultim 32/23 and other Ultims, Imoca, Figaro, Class40, Multi 50 and Mini 6.50.

PART I

Industries, trades and services

2016 Key Figures

A DYNAMIC AND GROWING SECTOR



SALES

€ 205 M

including € 56 M

COMPETITIVE SAILING



DIRECT JOBS

1536

**including
711**

IN THE BUSINESS OF

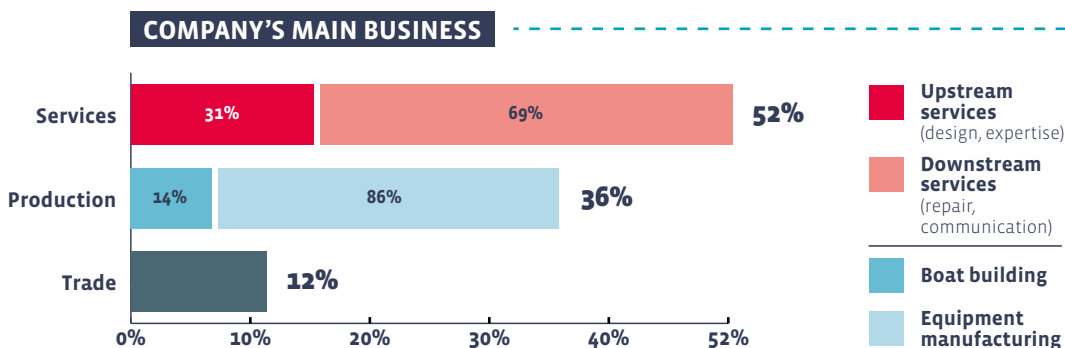
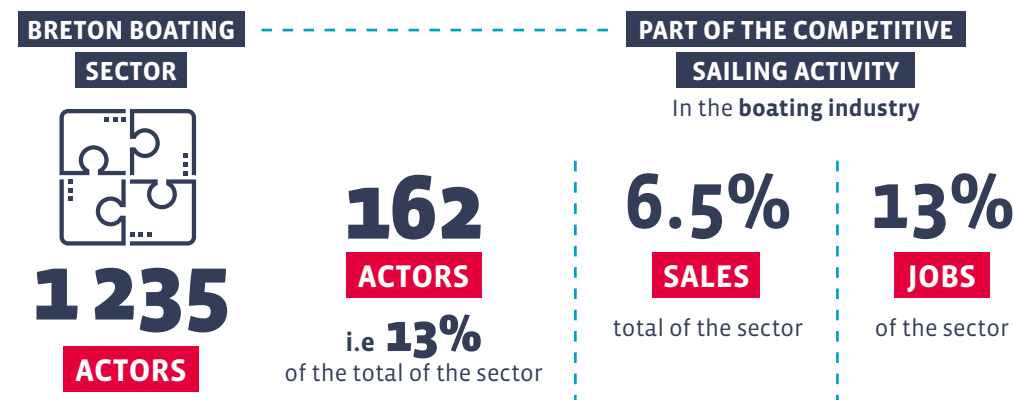
COMPETITIVE SAILING



BUSINESSES

162

A Complete and Integrated Sector





SALES

€ 205 M

including **28%**
in competitive sailing

€ 56 M

+ 9%
compared
to 2015



Juillet 2017
Sources : Enquête auprès des acteurs
de la voile de compétition (juin 2017)
IGN - GEOFLA® ET RGE®

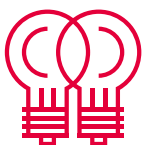
© Bretagne Développement Innovation

A Strong Potential for Innovation

In 2016

FOR COMPETITIVE
SAILING ACTIVITY

RESEARCH
AND DEVELOPMENT
BUDGET



€ 5.5 M HT



10% **TURNOVER**

This share is higher
in service companies,
working in **design**

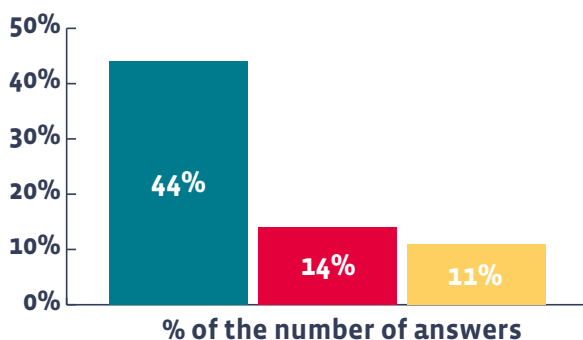
25%
Average
turnover

1
COMPANY
out of **4**

has already **collaborated**
with **Breton research laboratories**
on projects related
to competitive sailing

Navigation supports
and practices, technologies
and innovations:

WHAT EVOLUTIONS
OVER THE COMING 10 YEARS ?



Generalisation
of foils and flying
boats

Innovation
and optimization
of materials performance

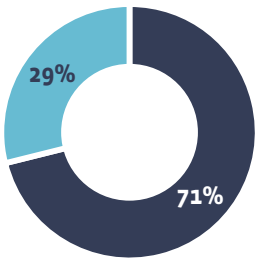
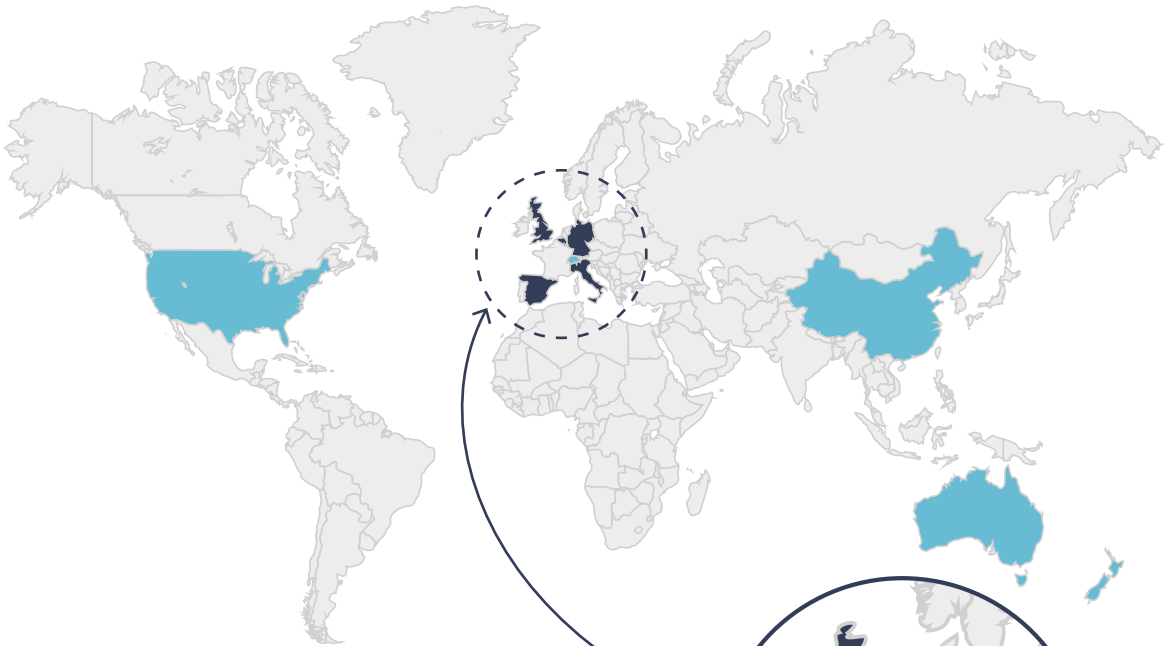
Electronics
and digital more
and more present

Internationalization of the Sector

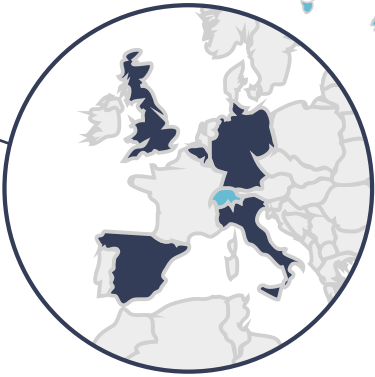
93 
COMPANIES
market
internationally

57%
of the actors
in the sector

80%
for design
and **building**
companies



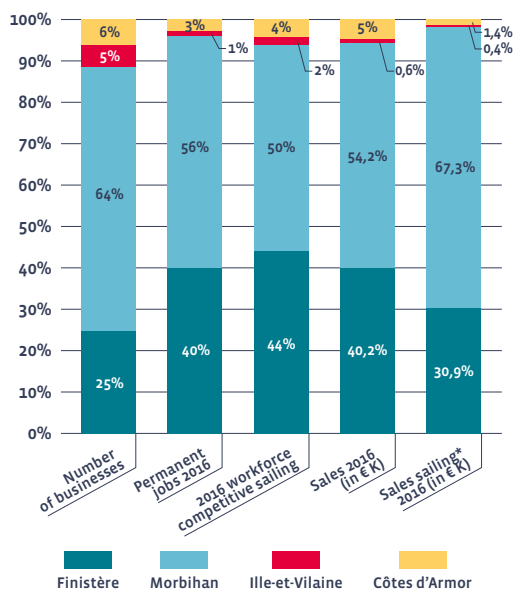
Main geographical origins
of international customers
(93 answers)



ZOOM ON...

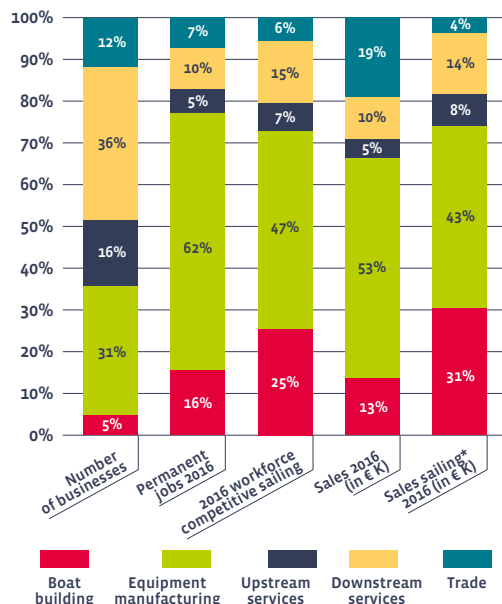


WEIGHT OF DEPARTMENTS ON VARIOUS ECONOMIC CRITERIA



*Competitive sailing

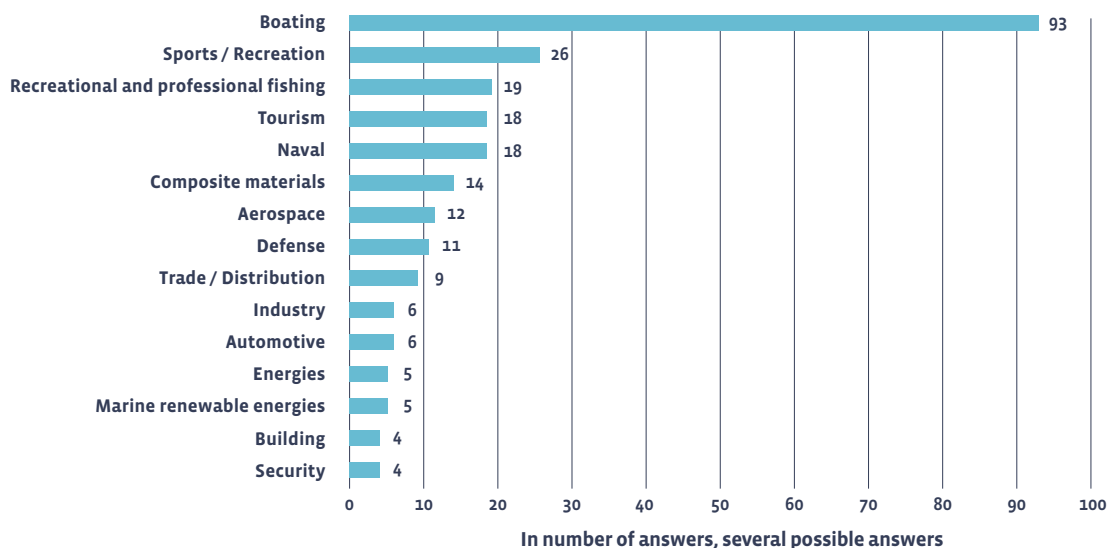
COMPARATIVE WEIGHT OF ACTIVITIES



*Competitive sailing

DIVERSIFICATION :

TOP 15 DIFFERENT MARKETS ON WHICH THE 162 COMPANIES ARE POSITIONED



PART II

Race Teams and Sporting Projects

Key Figures 2017

A POOL OF PROJECTS GENERATING
ECONOMIC GROWTH



ANNUAL BUDGET

€ 58 M

EXCLUDING BOAT COSTS



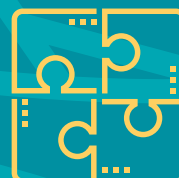
JOB

+ 320
JOBS*

including
118

TEMPORARY JOBS

* EXCLUDING EXTERNAL PROVIDERS



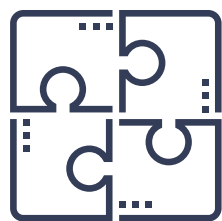
201

TEAMS AND ONGOING
SPORTING PROJECTS

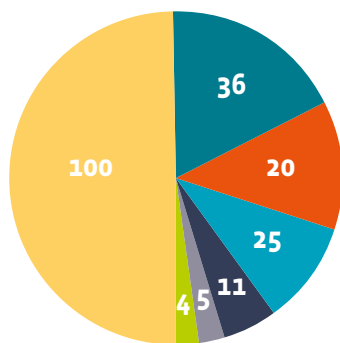
ESTIMATIONS

A Diverse Sporting Sector...

TEAMS AND ONGOING PROJECTS BY CLASS



201



MINI 6.50

FIGARO

IMOCA

CLASS40

ULTIM
(OTHER THAN 32/23)

ULTIM
32/23

MULTI 50

ESTIMATED JOBS



+ **320**
JOBS*

Including
118
TEMPORARY JOBS

* EXCLUDING EXTERNAL PROVIDERS

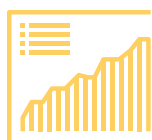
MOST COMMON PROFESSIONS IN THE TEAMS

(Imoca and Ultim 32/23)

- 1 COMPETITIVE SAILING **87%**
- 2 PROJECT ENGINEERING (TECHNICAL AND R&D) **73%**
- 3 PROJECT ENGINEERING (FINANCIAL) **67%**
- 4 PARTS MANUFACTURING **56%**

...with a Significant Economic Impact

ANNUAL ESTIMATED BUDGET



€ 58 M

EXCLUDING
BOAT COSTS

* VARIABLE IF
PROFESSIONAL
SKIPPER OR NOT



ULTIM 32/23

€ 3 200 K



IMOCA

€ 1 400 K



MULTI 50

€ 410 K



CLASS40

€ 50 à 250 K*



FIGARO

€ 141 K

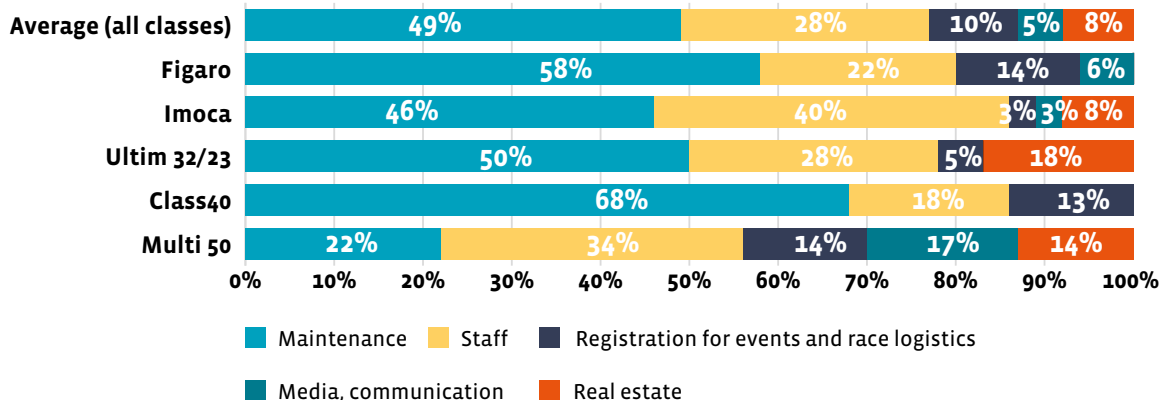


MINI 6.50

€ 30 à 100 K*

BUDGET BREAKDOWN

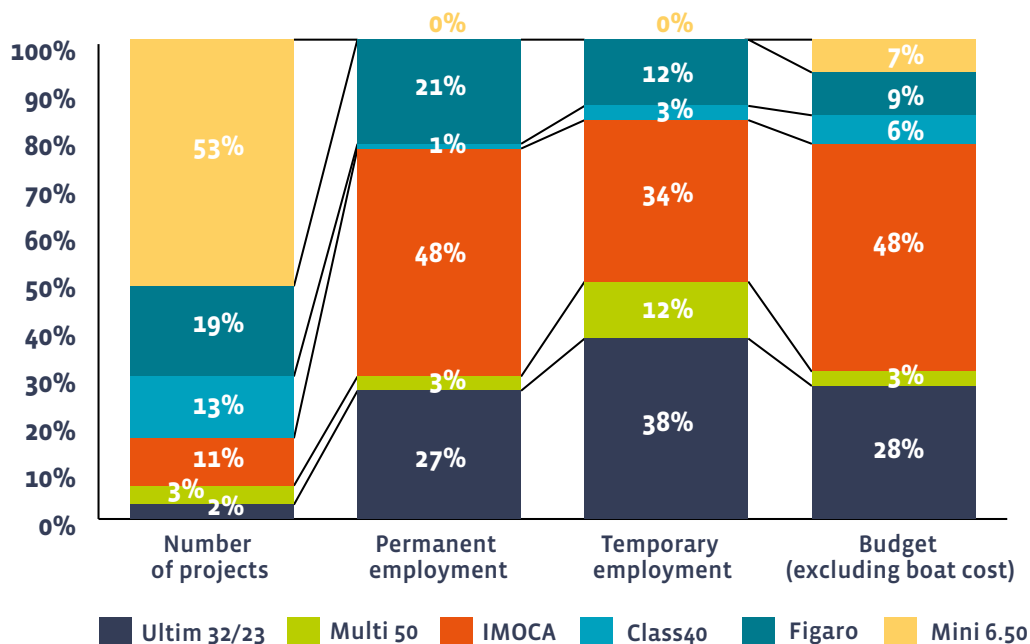
EXCLUDING THE COST OF THE BOAT



ZOOM ON...



CLASS WEIGHT COMPARISON (IN %)



85%

OF PURCHASING

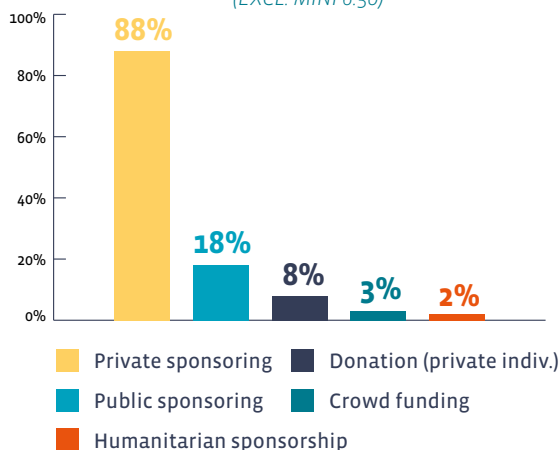
MADE IN BRITTANY*

(pre-race services, boat and equipment construction)

*Figaro, Imoca, Multi 50 and Ultim 32/23

SOURCES OF FUNDING USED

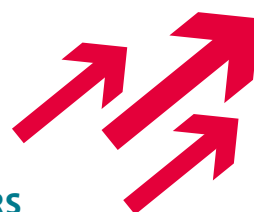
(EXCL. MINI 6.50)



A Driver for Growth and Innovation

86%

OF RESPONDENTS
ANTICIPATE DEVELOPMENT
OVER THE COMING 10 YEARS



NAVIGATION SUPPORTS AND PRACTICES, TECHNOLOGIES AND INNOVATIONS:

WHAT EVOLUTIONS OVER THE COMING 10 YEARS

(IN % OF ANSWERS)

72%

Generalisation
of foils and
flying boats

14%

Other innovations
(composites, design,
safety, digital...)

14%

Evolution of team
member profiles
(women, young talents,
engineers, top athletes)

A VARIETY OF DEVELOPMENT LEVRS

	NOT VERY SIGNIFICANT	MINOR	MODERATE	MAJOR
Budgetary sufficiency				X
Sustained funding				X
A budget for technological innovations		X		
Port infrastructure		X		
Real estate infrastructure to host the project			X	
Media support			X	
Sports coaching		X		

THIS STUDY WAS FUNDED BY



LORIENT
AGGLOMÉRATION

AND ACHIEVED WITH THE SUPPORT OF



LE DÉVELOPPEMENT
PAR L'INNOVATION



FINISTÈRE
Tourisme, Nautisme
& Territoires 360°



Pôle
FINISTÈRE
COURSE AU LARGE

LORIENT GRAND LARGE
pôle course & événements

This summary
is available for download
on www.eurolarge.fr

NOVEMBER 2017 - UPDATED SEPTEMBER 2018

Thanks for their contributions:
Class40, Figaro, Imoca, Multi 50, Mini, Ultim

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