

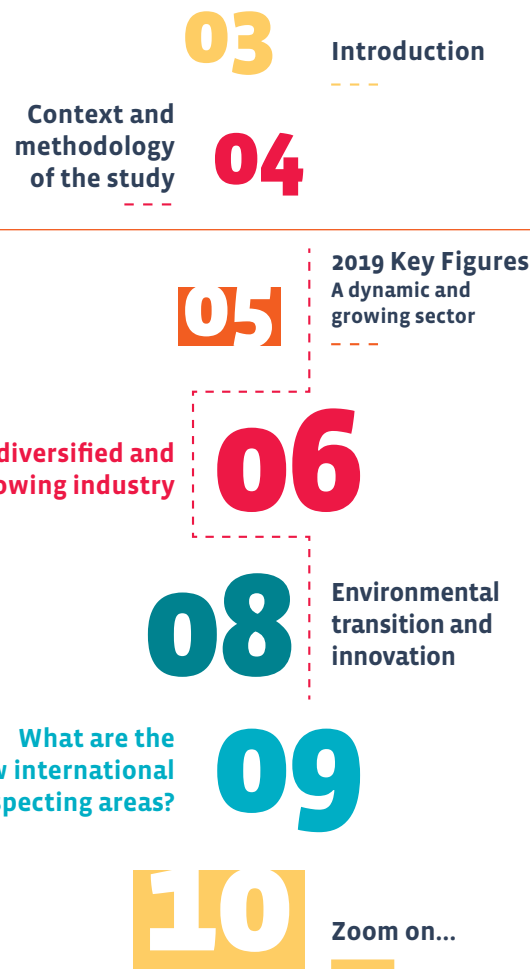
THE ECONOMY OF COMPETITIVE SAILING INDUSTRY IN BRITTANY

Summary - 2020 Edition

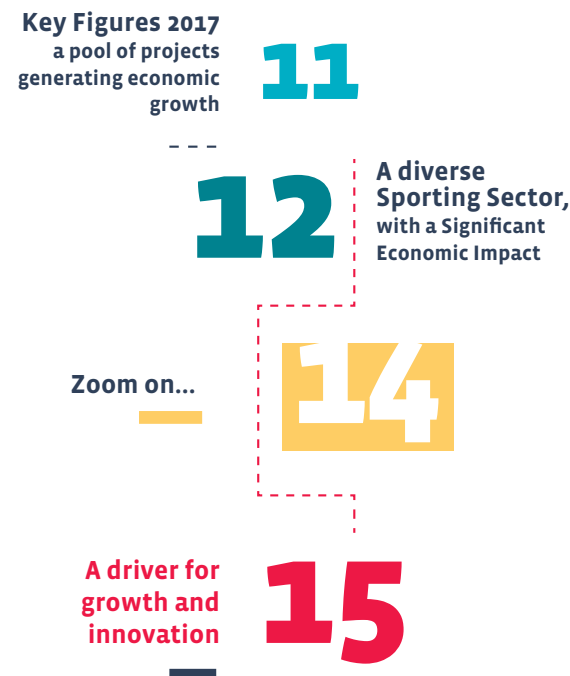
Industries, trades and services / 2019 DATA

Race teams and sporting projects / 2017 DATA

PART I Industries, trades and services



PART II Race Teams and Sporting Projects



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.

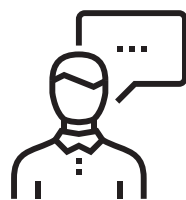
Hugues MEILI
President of Bretagne
Développement Innovation

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.

Loïg 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 action follows an initial study conducted in 2017 on the economy of competitive sailing in Brittany (Industry Trade and Service) by Bretagne Développement Innovation and the support structures related to boating in Brittany⁽¹⁾.

¹ Conseil Régional de Bretagne, Lorient Agglomération, Lorient Technopôle, Conseil Départemental du Morbihan, Finistère 360, Quimper Cornouaille Développement, Nautisme en Bretagne, Pôle Finistère Course au Large, Lorient Grand Large.

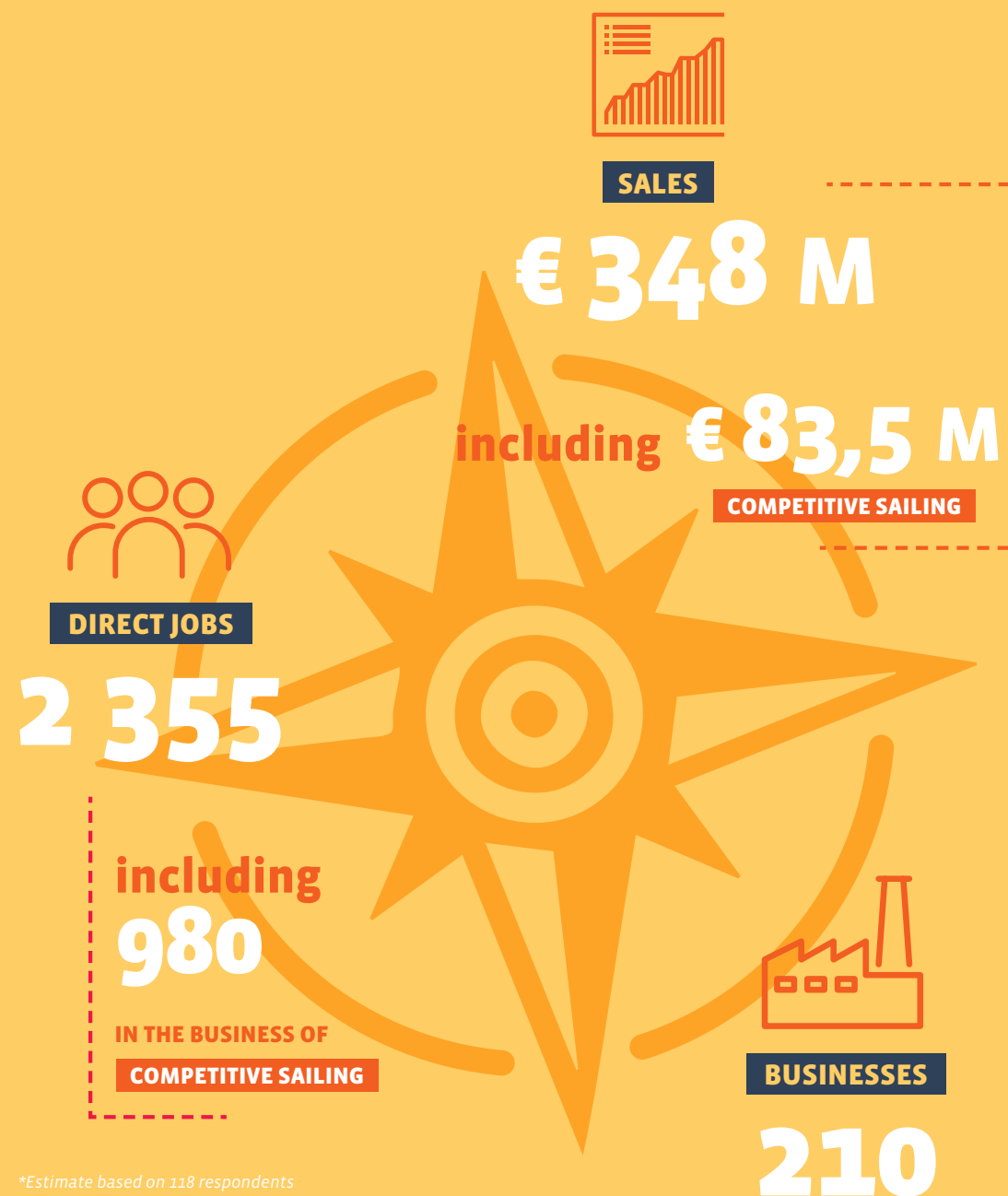
Scope of the Study

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

2019 Key Figures* A DYNAMIC AND GROWING SECTOR



A diversified and growing industry



SALES

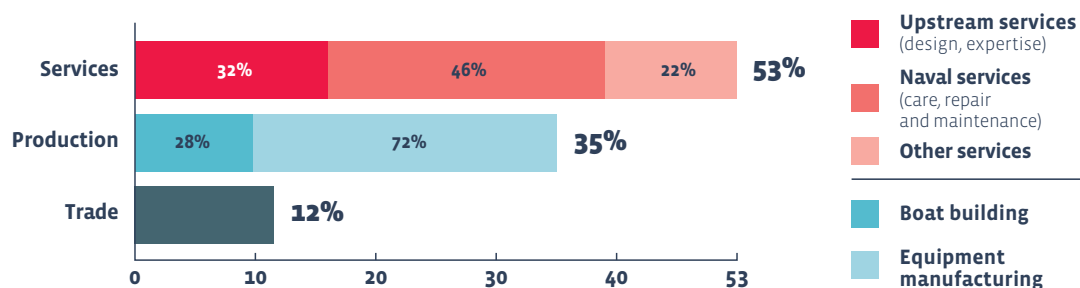
€ 348 M

including 24%
in competitive sailing

€ 83,5 M

+16%
growth
compared
to 2018

COMPANY'S MAIN BUSINESS



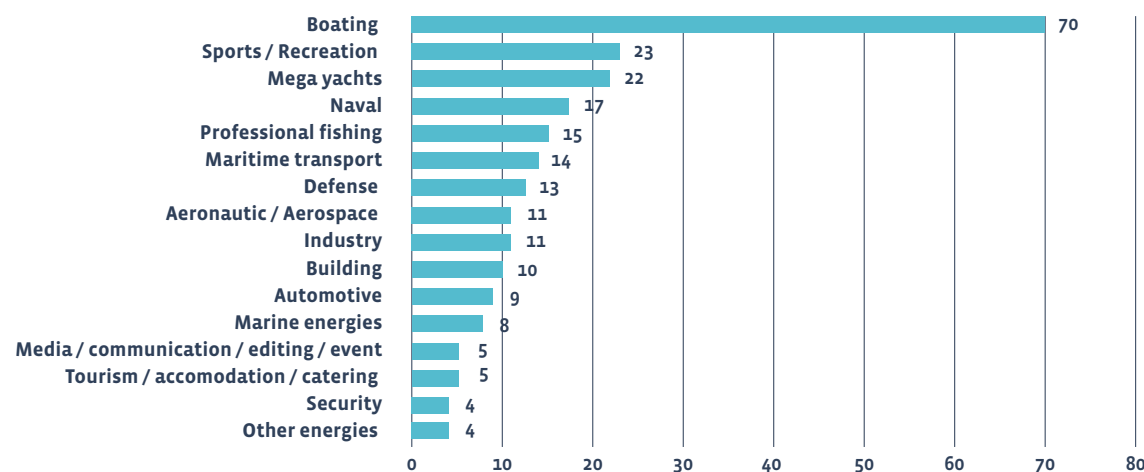
28 ACTIVITIES

COMPETITIVE SAILING

present in Brittany

HARDWARE	COMMUNICATION / PHOTOGRAPHER	BOAT RENTAL / BOAT LICENCE	COMPUTING	COMPOSITE PARTS
PROFESSIONAL EQUIPMENT	DINGHIES	MISCELLANEOUS SERVICES	MARINE MECHANICS	WOOD / JOINERY
BOAT CONSTRUCTION	NAVAL ARCHITECTURE / ENGINEERING / R & D	RUDDERS AND FOILS	SALE OF ACCESSORIES	MAINTENANCE / REPAIR / WINTERING
ELECTRICITY / ELECTRONICS	PREPARER	CONVEYING	RIGGING	SADDLERY
SAILCLOTH	SAFETY EQUIPMENT	PAINT / SURFACE TREATMENT	TRAINING	MARITIME WORKS
MARITIME EXPERTISE			HANDLING / LIFTING	

A DIVERSIFIED INDUSTRY: TOP 16 DIFFERENT MARKETS ON WHICH THE 118 COMPANIES ARE POSITIONED



DISTRIBUTION OF ACTORS IN THE BRETAGNE SAILING VALLEY©

NUMBER OF ECONOMIC ACTORS



**STRONG DENSITY OF ACTORS
IN SOUTH BRITTANY**

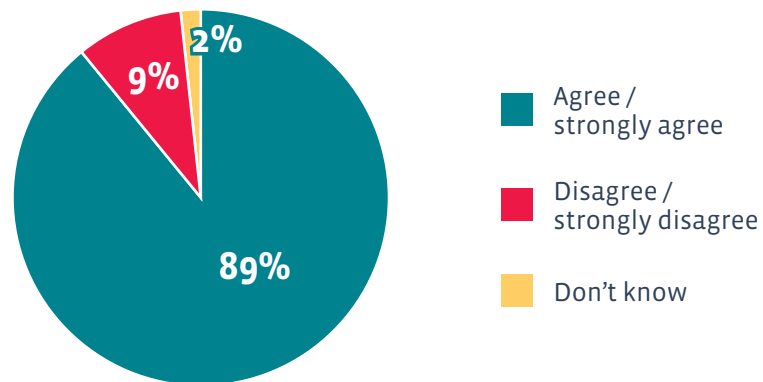
Novembre 2020
Sources : Enquête auprès des acteurs de la voile de compétition (juillet 2020)
IGN - GEOFLA® et GSE®
© Bretagne Développement Innovation

Environmental transition and innovation

On 118 respondents

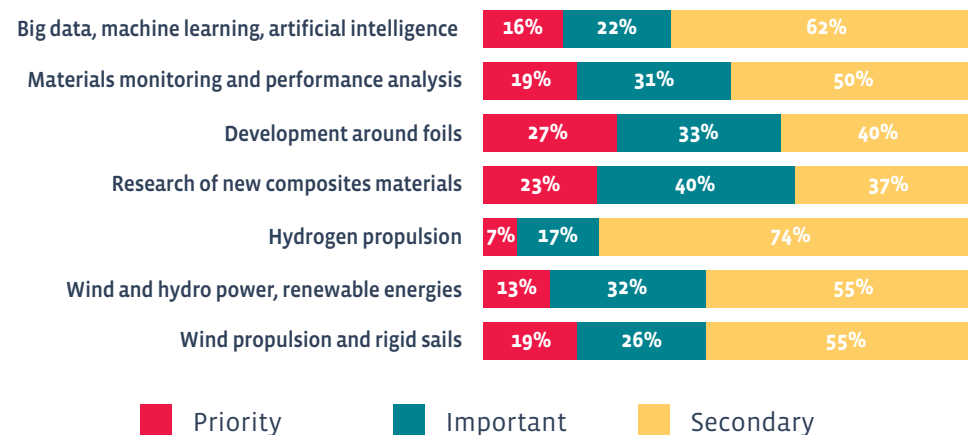
A MATURE INDUSTRY TO COMMIT TO THE ENVIRONMENTAL TRANSITION

Is the commitment into the environmental transition, an attractive factor for the competitive sailing industry?



DEVELOPMENT AND INNOVATION LEVERS

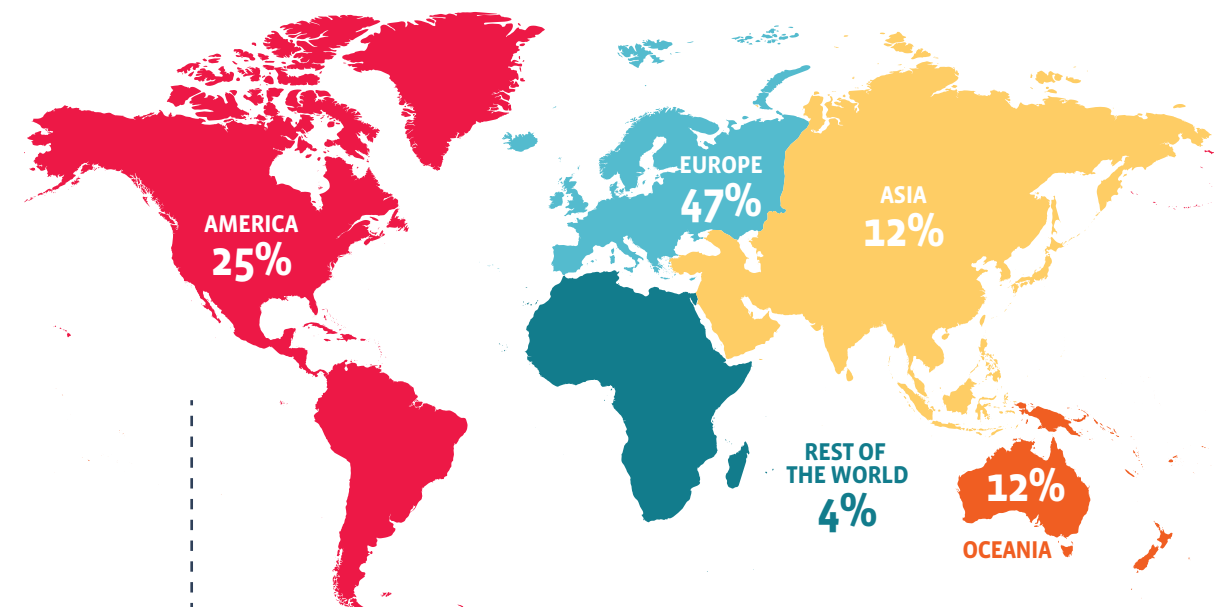
To develop your business, what is your interest in the following topics?



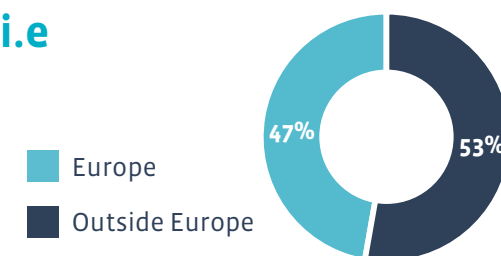
What are the new international prospecting areas?

32 
COMPANIES
on 118 respondents

are looking for new opportunities in the following areas:



i.e

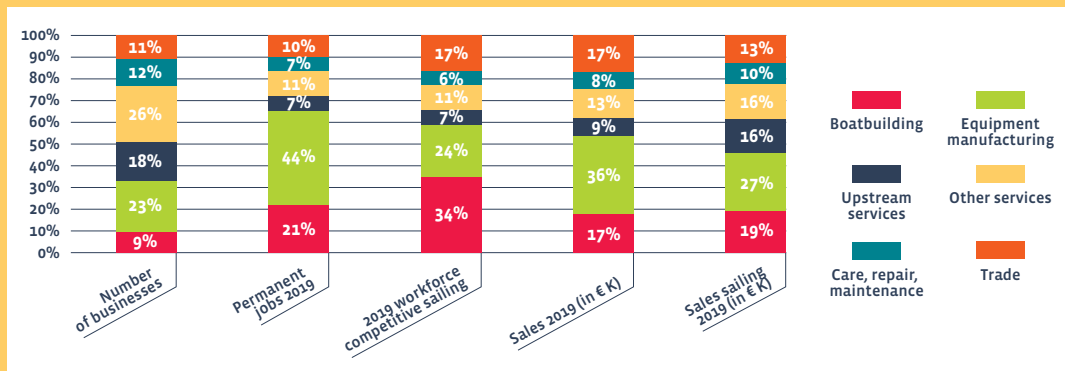


ZOOM ON...



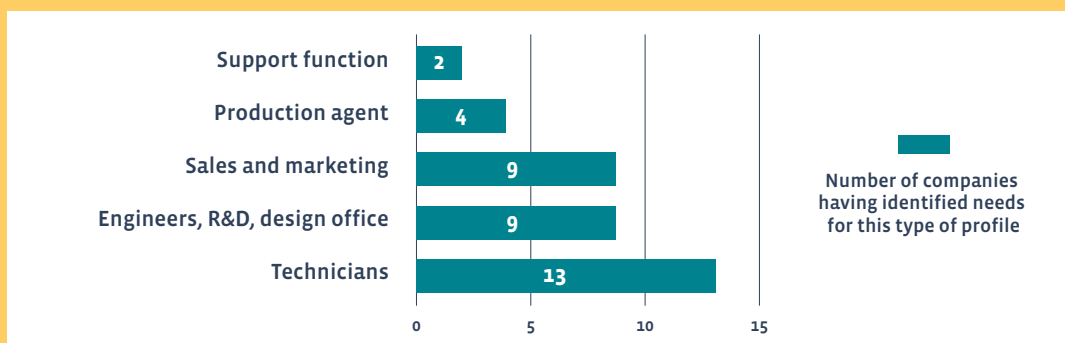
Repartition based on 118 respondents

COMPARATIVE WEIGHT OF ACTIVITIES

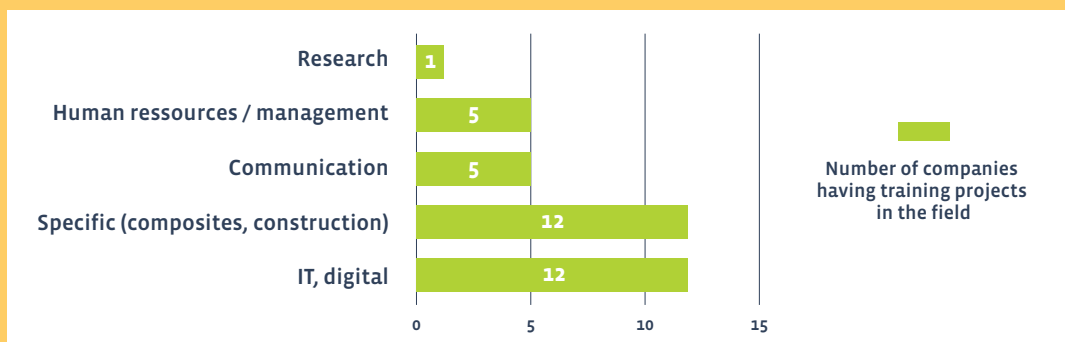


RECRUITMENT AND TRAINING, 26 % OF 118 RESPONDENTS EXPRESS NEEDS

37 positions identified for mainly technical profiles (based on 31 answers)



34 companies have formation projects

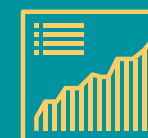


PART II

Race Teams and Sporting Projects

Key Figures 2017

A POOL OF PROJECTS GENERATING ECONOMIC GROWTH



ANNUAL BUDGET

€ 58 M

EXCLUDING BOAT COSTS



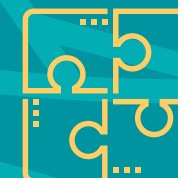
JOBS

+ 320 JOBS*

including 118

TEMPORARY JOBS

* EXCLUDING EXTERNAL PROVIDERS



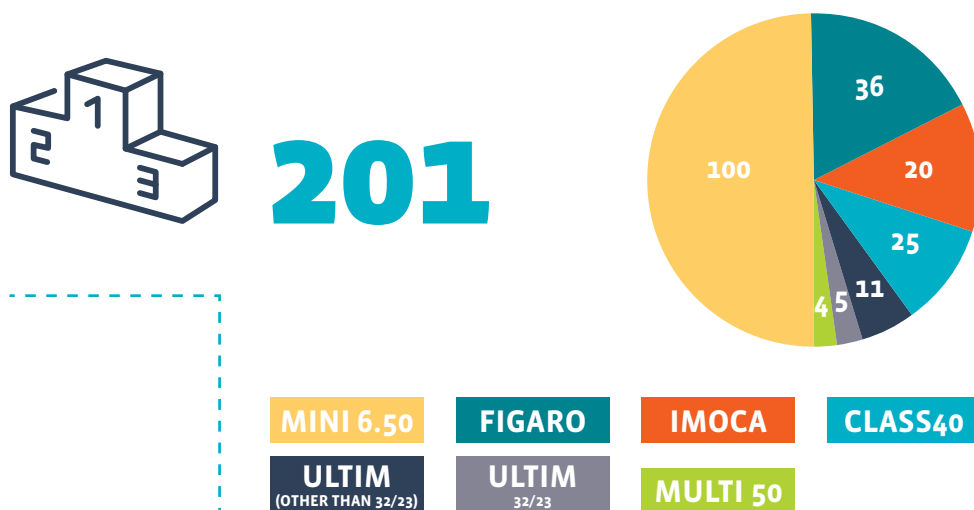
201

TEAMS AND ONGOING SPORTING PROJECTS

ESTIMATIONS

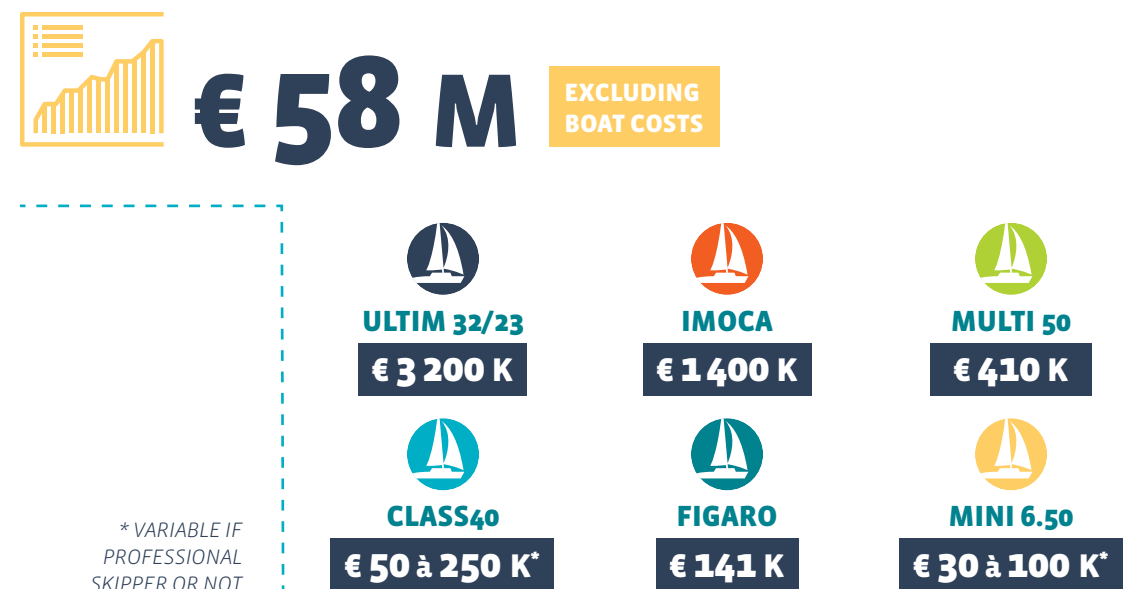
A Diverse Sporting Sector...

TEAMS AND ONGOING PROJECTS BY CLASS

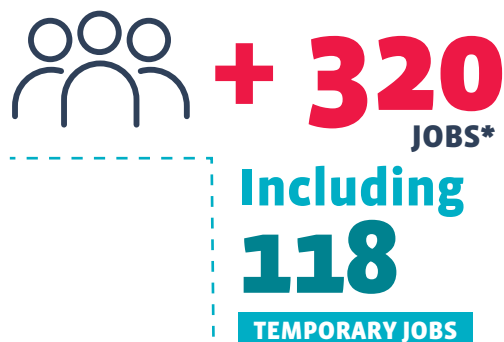


...with a Significant Economic Impact

ANNUAL ESTIMATED BUDGET



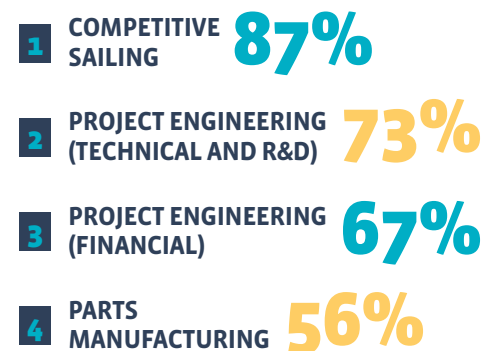
ESTIMATED JOBS



* EXCLUDING EXTERNAL PROVIDERS

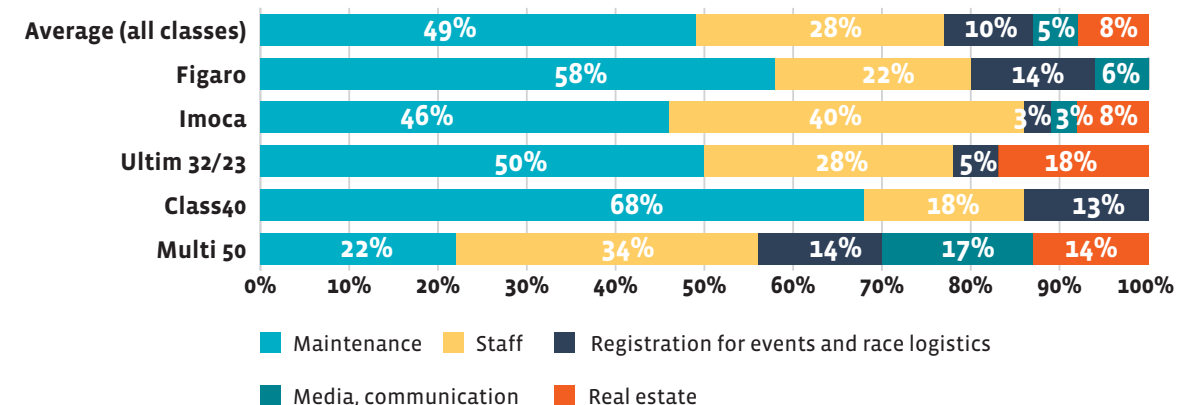
MOST COMMON PROFESSIONS IN THE TEAMS

(Imoca and Ultim 32/23)



BUDGET BREAKDOWN

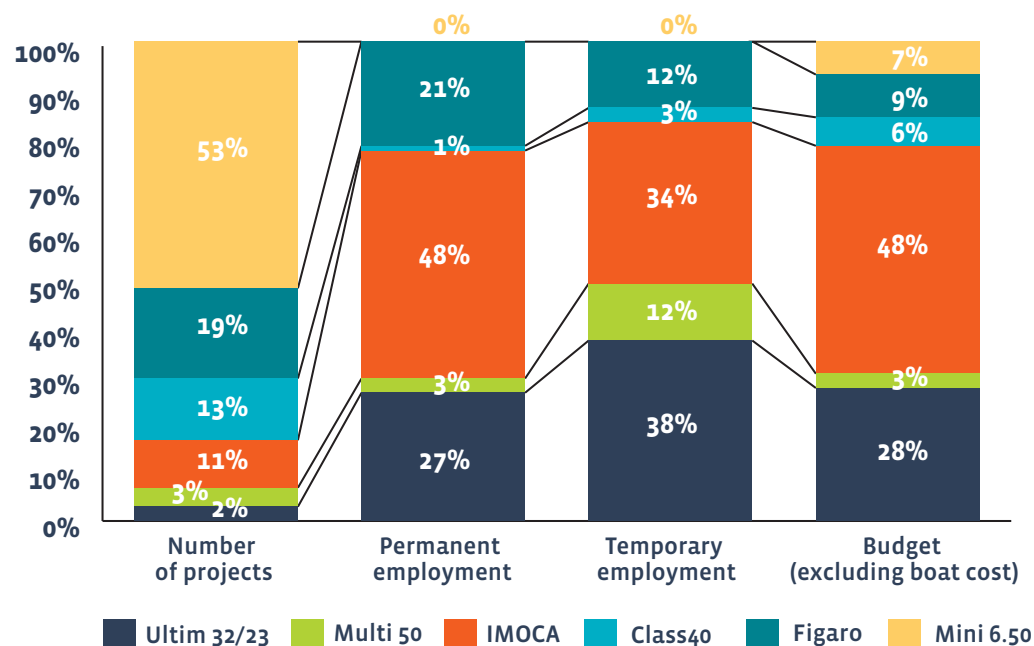
EXCLUDING THE COST OF THE BOAT



ZOOM ON...



CLASS WEIGHT COMPARISON (IN %)



85%

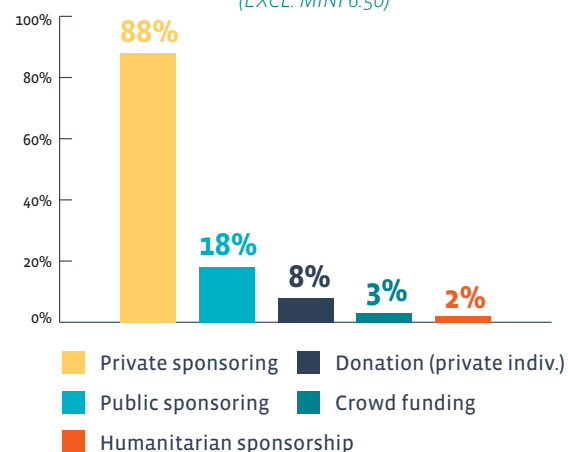
OF PURCHASING MADE IN BRITTANY*

(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 LEVERS

	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
AGGLOMERATION

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.bdi.fr

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

Contact sector

Carole Bourlon
c.bourlon@bdi.fr
T. +33 (0)2 97 88 23 23

Contact study

Nicolas de Montfumat
n.demontfumat@bdi.fr
T. +33 (0)2 99 84 85 39

BRETAGNE
DÉVELOPPEMENT
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eurolarg
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Bâtiment La Colloc • 42 avenue de La Perrière • 56100 Lorient • France
www.bdi.fr

