

THE MARCHE REGION NAUTICAL SECTOR

Towards a sustainable nautical cluster



**CLUSTER
CLUB**



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Introduction

Relaunching the Marche region nautical sector by supporting a sustainable clustering process for the supply chain: this is the attempt that the Ancona Chamber of Commerce intends to make with the pilot action within the “Adriatic Economic Cluster Club” project (cod. 189/2009), which has been co-financed by the European Commission with the IPA - Adriatic Cross-border Cooperation Programme. A number of promotional and supporting activities for the nautical sector of the Marche region have been implemented in the last two years within this project, whereby this publication is one of their results expressing the will to side with the businesses and the public and private bodies supporting this sector in order to relaunch their competitiveness in the national and international scenario. This commitment stems from the awareness that in the national and the wider macroregional Adriatic-Ionian context leisure boating is one of the driving sectors of the so-called “Blue economy” or sea economy and shows a high propensity to establish connections between people, ideas, competences and territories. All the above is to be framed within a wide range of services and products concerning transports and logistics, ports and shipbuilding, research and development, vocational training, fisheries and aquaculture, coastal tourism, as well as tourism developing from the coasts and able to promote typical productions, including the agrofood, handicraft and trade products of the entire area. The Marche regional territory, which is the subject of this publication, needs a reference multiannual structural plan to support the nautical sector and above a real “sea cluster” today more than ever: this issue has often been raised and discussed, yet it has never been fully addressed. The pressing need is felt to act as a single system and strengthen the experience and know-how matured in a region, which boasts historical trading areas that are still active (Ancona), a strong propensity to marine activities (San Benedetto del Tronto), as well as enterprises able to seize the opportunities offered by the innovations made in building materials (Fano), several port and marine structures and, more generally, flexible and eclectic crafts micro-enterprises. This contribution by the Ancona Chamber of Commerce intends to serve as a support to said process of growth, thereby aiming at and betting on a supply chain capable of promoting this large variety of products and services that range from shipbuilding and leisure boating to the hospitality offered to boat users. This is a supply chain made up of small and medium-sized enterprises, craftsmen and professionals who, in spite of the recent crisis, have held on and tried to remain on the market in spite of takeovers by foreign companies, mobility, redundancy fund and the shutdown of business activities. Against this background, the leisure boating and shipbuilding sector of the Marche region have acted between 2012 and 2013, with glimmers of hope only for luxury vessels and megayachts, which are now looking also to Far Eastern markets. This is the kind of effort made by the various players in the sector, which has had to focus not only on the traditional quality design and personnel skills of the Marche region (whereby said aspects are now no longer enough to make the difference), but also on

environmental and social sustainability and internationalization actions on new markets as the new driving engines to boost new competitiveness. Shipbuilding, components and services for the nautical sector must necessarily focus on a more sustainable approach to maintain their international leading position and favour a strategic market repositioning that enables the supply chain to manufacture and sell not only a product, but above all a complete service, from product conception to product disposal. New organizational models, investments in human capital in terms of professional skills, search for process, product and materials innovations, increase in the quality and quantity of the services provided by the network of tourist ports, development of ICT platforms for a better integrated management of commercial, productive and service relations linked to leisure boating: all this is to be viewed within the framework of a nautical “cluster” that has represented the ultimate goal of all the activities of this project, thereby enabling local pilot actions that are fully and consistently expressed with this contribution. The result obtained, which is certainly not to be considered complete and final, provides an overview of the current situation within the region that should serve as a starting by targeting especially to the new geo-political context of the newly established Adriatic-Ionian Macroregion, which has been rooted in the blue growth and blue economy themselves, first with the European Commission Communication “Blue Growth - Opportunities for marine and maritime sustainable growth” of 13th September 2012 COM(2012) 494 final and then with the European Commission Communication entitled “A Maritime Strategy for the Adriatic and Ionian Seas” of 3rd December 2012 COM(2012) 713 final. It is not by chance that the future Action Plan that the future Macroregion will be established on in the course of the second half of 2014 during the Italian Presidency of the European Union is based on a number of pillars, one of which is devoted to the “blue economy” and entitled “Guiding maritime and marine innovative growth”, within which the relaunch of the leisure boating sector acquires strategic importance. It is exactly in this wider context that the nautical sector of the Marche region is called upon to find new momentum and prospects. This can be achieved mainly by focusing on the new frontiers of environmental and social sustainability that can connote the supply chain and promote it as a real territorial system capable of standing out in the Adriatic and Mediterranean basins and face the international competition, also thanks to a new territorial identification brand that is well representative of the entire area (“Blue Marche”).

“Blue Marche” might be the occasion to start synergies between various local players involving universities, research centres and shipyards for the creation of a scientific-technological pole carrying out research on materials, productive processes and on-board equipment to promote occupational health and safety and favour integration with other sectors, like tourism and trade: in other words, this might be a real possibility to relaunch the sector and the wider and multifaceted supply chain characterising it and ultimately favour a more competitive and sustainable repositioning of the same sector on the market.

Rodolfo Giampieri *Presidente della Camera di Commercio di Ancona*

Preamble

The following paragraphs present companies, service centres, professional firms and bodies that are directly and/or indirectly connected to the leisure boating sector of the Marche region. The illustration starts from a definition of the European sector of sea technologies that comprises all the companies active in the design, building, maintenance and repair of all types of ships and corresponding sea structures, including the entire supply chain of systems, equipment and services. In the light of said supply chain, the following segmentation of the naval industry and human equipment has been used as a starting point:

- ship building and repair: shipyards represented, for the most part, by small and medium-sized enterprises (i.e. for ships between 60 and 150 meters long), with almost the entire portfolio destined to foreign markets;
- ship equipment production: companies producing propulsion, cargo handling, automation and integrated systems, etc., in this case too mainly small and medium-sized enterprises, with exports making up for two thirds of their production.

The following paragraph analyses the features of the national supply chain, which is characterized by the presence of a core of enterprises (i.e. shipyards) dealing with the most important stages of shipbuilding (i.e. concept, design and assembly) and peripheral enterprises in charge with the manufacturing of the components (accessories, structural and motor components that are then assembled by shipyards on the vessels and of the components mounted on the ships in case of failure or worn out pieces (i.e., so-called “refitting”). In most cases these enterprises are small and medium-sized firms, which are very dynamic and capable of excellent productions in terms of quality and technological content and whose core business is very often not their leisure boating.

The division into the broad categories of “shipbuilding”, “components” and “services” aims at depicting an additional level of detail, which has not always been easy to illustrate with reference to the manufacturing and provision of additional services for the manufacturing process in the Marche region nautical sector.

Some stages in the production and service provision stages are completely missing in the Marche region. Within the general framework of manufacturing activities, for example, the production of motors and propulsion systems is not carried out in the regional territory and, if it is, it is of minor importance, as enterprises only carry out the assembly and repair of motors and vessels. As a consequence, there is a very limited number of firms dealing with ship transport and renting.

At the core of the supply chain only few leading companies are to be found. These are large companies that normally own the brand with which the final product is identified on the market. Said companies coordinate and control all the activities necessary for the creation of the product, thereby entrusting sub-suppliers with the production of all components and their final assembly. Component sub-suppliers

have established trust relations with the leading companies. Thanks to their level of professionalism they do not act as the mere performers of the construction job orders assigned to them, but they rather serve as know-how providers who are capable of deeply impacting on the definition of product features and process organization.

SHIPBUILDING

This sub-sector includes the most important production activities linked to the real manufacturing of ships and is characterized by the presence of a number of large companies, which are profoundly integrated and active in the sector (i.e. Ferretti Group, Azimut-Benetti, Isa, etc.). These economic players are well structured from any point of view and represent a driving engine, which has so served as a decisive reference point for the several suppliers of the area.

Shipbuilding includes the working and production of metal and fibreglass structures, as well as the assembly of the same vessels. The nautical cluster in the Marche region is indeed characterized by the fact that most of the enterprises carry out both ship design and shipbuilding, as well as brokerage activities (order procurement and management, order job acquisition, events, meetings, trade fairs, etc.) at the same time, so that all of these stages are often to be found within one business player.

COMPONENTS

This group features all manufacturing companies dealing with installations, including the design and installation of electrical, hydraulic, thermohydraulic, air conditioning, entertainment, generally domotics and navigation installations, among others, as well as design and engineering, i.e. all producers and distributors of sea motors, propulsion systems, sails, masts and related equipment.

The furniture and furnishings areas should also be included to the above mentioned sectors, i.e. both manufacturing companies and enterprises in charge of the installation of furniture on board of vessels.

SERVICES

Services that are supplementary to the leisure boating manufacturing sector include the following: maintenance and repair of ships carried out in the shipyards and crafts enterprises; wintering services performed both by enterprises in charge of the maintenance of indoor furnishings, and by firms providing dockyard services; transport and land maintenance of ships.

This category includes also ship rental firms, though it should be pointed out that there is a rather limited number of enterprises providing such a service within the region, while there are more firms offering maintenance and repair services.

The service group also comprises companies and professional firms offering structural design and architectural services.

Shipbuilding

3B CRAFT S.R.L.



All leisure boats of the range produced by the 3B CRAFT S.R.L. shipyard feature interiors and fittings for cruising, but they are especially characterized by the powerful fisherman aspect, as well as by marine and sports features. The following elements help 3B CRAFT stand out: details of fiberglass manufacturing, solid structures, high-quality materials and installed accessories, careful attention to details and indoor and outdoor finishes, well-designed furnishings and valid practical solutions.

3B CRAFT S.R.L.

Via G. Toniolo, 22/a - 61032 Bellocchi di Fano (PU)
Tel. +39 0721 855933 - Fax +39 0721 855933 - Mob. +39 333 1850370
www.3bcraftsrl.com - 3bsrl2012@gmail.com

AMORUSO MICHELE S.R.L.

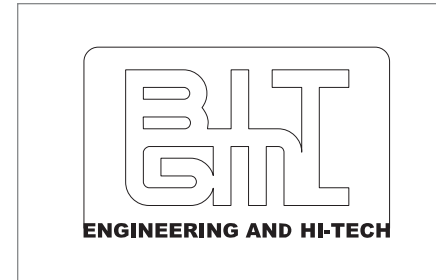


Michele Amoruso SRL was founded from decades of experience of Michele Amoruso in the nautical sector. Our specializations lie in the manufacturing and repairation of boats, including works on the boat body, resin finishing, assembling, fairing, building of models, moulds, painting (with gelcoat, glazes and metallic products), works on carbon fibre, PIMUS authorizations for the assembly of scaffolding.

AMORUSO MICHELE S.R.L.

Via Norma Cossetto, 2/b - 61032 Fano (PU)
Mob. +39 348 3819116
mikeamoruso@libero.it

BIT & GML S.R.L.



Production of prototypes, models and moulds in various materials and with different technologies, particularly in the use of CNC machines characterized by the application of CAD / CAM software. The naval, automotive, home furniture and rail sectors are the main areas of activity.

Internationalization (% of sales on total exports):

20 - 25% (mainly European market).

BIT & GML S.R.L.

Via Dell'Impresa, 19 - 62014 Corridonia (MC)
Tel. +39 0733 280070/280188 - Fax +39 0733 287222
www.bitgml.it - info@bitgml.it

CIENNEBI S.R.L.



Ciennebi s.r.l. Shipyards has been active for over twenty years in the field of shipbuilding and offers a line of working vessels ranging from 5.35 to 21 meters long.

Our models of leisure boats or fishing vessels can meet the various needs of all those wishing to go by sea in full freedom and safety. These ships are entirely built in fiber glass with the best raw materials and accurate finishes. Besides a complete range of vessels, Ciennebi s.r.l. Shipyards offers a series of services, including storage, manufacturing of resin products, modernization works.

CIENNEBI S.R.L.

Via Vittorio Alfieri s.n. - 61039 San Costanzo (PU)
Tel. +39 0721 1798123
www.ciennebi.it - info@ciennebi.it

C.N.N.T. Costruzioni Nautiche di Novelli Teodorico



We have been manufacturing and selling sailing vessels from 20 to 47 feet in our 2000 sqm. Shipyard for more than 30 years. To this purpose, we have recently introduced a 37 foot lobster powerboat.

Our focus is on boats obtained from mould, yet which can be extensively customized thanks to our direct work that ranges from fibreglass composite lamination to the assembly and final test of the boat.

We offer a large variety of other services, such as boat fitting and reparation, boat handling, boat storage, haulage and launch, rigging and accessory installation to meet the needs of yachtsmen all-round.

C.N.N.T.

Via del Vallo, 21 - 61122 Pesaro (PU)
Tel. +39 0721 201934 - Fax +39 347 5998662 - Mob. +39 328 7682381
www.cnnt.it - info@cnnt.it

FILIPPETTI YACHT



Filippetti Yacht was set up when Fausto Filippetti, i.e. the co-founder of Pershing and one of the protagonists of Italian leisure boating for over thirty years, was joined by his children Martina e Giovanni. The company headquarters are located in a futuristic building in Mondolfo, in the Province of Pesaro-Urbino and are home to a plant for the construction of motor yachts from 20 to 35 long. Only a limited and selected number of vessels are produced in the boatyard: these are unique examples, produced with craftsmanship and exclusively dedicated to sea lovers. Filippetti yachts fall into three categories: the open Daemons, the flying bridge Evo and the green yachts Navetta.

Internationalization (% of sales on total exports):

90%.

FILIPPETTI YACHT S.R.L.

Via Val Cesano, 66 - 61037 Mondolfo (Pu)
Tel. +39 0721 930262 - Fax. +39 0721 930274
www.filippettyacht.com - info@filippettyacht.com

 filippettyacht

 filippettyacht

 filippettyacht

 yachtfilippetti

GIORGI NEW S.R.L.



Storage - Renovation and repair of leisure and work boats in wood and fiberglass - Interior and exterior upholstery works- Hydraulic and electrical systems - Sheds and outdoor area activities.

Fenced in for a total of 3200 sqm. - Sheds and outdoor area located outdoors on Pesaro channel-port.

GIORGI NEW S.R.L.

Strada tra i due Porti, 63 - 61121 Pesaro (PU) - Italia
Tel. + 39 0721 25666 - Fax +39 0721 406175
www.cantieregorgi.com - giorginew@yahoo.it

NAUTICA DYNAMIC S.R.L.



From a small shed to a major company, from an innovative idea to excellence products, from subcontracting to the promotion of its own projects: these have been the fundamental stages in the history of this company, which with strong commitment and dedication has managed over time to earn its position among the most important shipyards in central Italy.

NAUTICA DYNAMIC S.R.L.

Via Roma, 117/d - 61032 Fano (PU)
Tel./Fax +39 0721 1796484 - Mob. +39 340 5184233
www.nauticadynamic.com - info@nauticadynamic.com

TECNO BUILDING S.R.L.



Tecno Building srl is a young dynamic company, which was established after years of experience in the nautical sector. Upon request, we can provide for the complete manufacturing of hulls (of any size and in any material), as well as all structural and non-structural furnishing components, e.g.: doors, air-tight doors, sliding and compartment doors, mooring areas, gangways, royal ladders, stabilizers, rudder-holes, bow thrusters, axis lines, bases for machines and cranes, garages and rescue boats, polished stainless steel works (e.g. for hawse-holes, bows, bits, fairleads, etc.).

Certifications

WPS Lloyd Register and Lloyd patented welders.

TECNO BUILDING S.R.L.

Via Caduti del Lavoro, 8 - 60131 Ancona (AN)
Tel. +39 071 2320581 - Fax +39 023 0133200 - Mob. +39 3466150162
www.tecnobuilding.freshcreator.com - info@tecnobuildingancona.it

Components

CANUCCI BONFIGLIO S.R.L. di Canducci Marco Soc. Unip.



Canducci Bonfiglio, set up back in 1941 in Pesaro as a sawmill trading in logs, later on branched out into other sectors:

Shipbuilding: the company supplies shipyards with components in okoume wood, poplar wood, plated with precious woods finish, as well as boards in teak wood, both in logs and staves, for the manufacturing of boats and yachts and for the leisure boating sector in general.

The company supplies the most important shipyards of the Adriatic coast.

Setting up of industrial vehicles: filmed panels for the flooring of trucks and semi-trailers.

Building sector: hardwood beams in pinewood, larch-wood and oak-wood, as well as lamellar beams for restructuring works.

Certifications

Sea plywood products certified by RINA (Italian Register of Shipping).

CANUCCI BONFIGLIO S.R.L. di Canducci Marco soc. unipersonale

Via del Vallo, 19 - 61122 Pesaro (PU)

Tel. +39 0721 201530 - Fax +39 0721 2012198

www.canduccibonfiglio.it - info@canduccibonfiglio.it

C.M.M. di Giacoponi Simone



C.M.M. by Giacoponi Simone has a more than twenty-year long experience in the manufacturing of sea machines and is specialized in customized design and the building of any type of sea winches, also compliant with R.I.N.A. testing or CE regulations: Two- or four-drum winches and sailing fishnets; oceanic fishing pulleys; trawling fishing pulleys; lifting winches; approaching winches and sailing anchors; directional propellers; hydraulic installations for constant laps current oscillator controlled by electronic card.

Internationalization (% of sales on total exports):

Only 3% of sales are made on foreign markets to date, specifically to Croatia, Tunisia and Algeria.

C.M.M. di Giacoponi Simone

C.da Molino, 58 - 63828 Campofilone (FM)
Tel. +39 0734 600391 - Fax +39 0734 609202 - Mob +39 348 7287110
www.cmmverricelli.it - info@cmmverricelli.it

DISTRIBUZIONE MARE



Distribuzione Mare is the result of the passion for sea of its owner.

Distribuzione Mare features a wide array of products, ranging from nautical accessories to seafaring finishing items, some of which have been designed and produced directly with its own labels.

Furthermore, the company has the exclusivity for the distribution of several carefully selected international brands, which stand out for the trustworthiness of their company, their unique products and their high standards of quality.

Internationalization (% of sales on total exports):

10%.

DISTRIBUZIONE MARE

Via Romeo Gennari, 22 - 61121 Pesaro (PU)
Tel. +39 0721 407420 - Fax +39 0721 407420
www.dime-italy.com - commerciale@dime-italy.com



F.C.T. ARREDI S.R.L. UNINOMINALE



We are specialized in the development of customized projects for the production of wooden furniture. Thanks to the expertise made gained in decades of work in the fields of naval, contract and residential furniture, we can provide our customers with a complete service, which includes technical drawings, transporting and on-the-spot assembling of finished products. Our premises stretch over an area of 3000 sqm with the most advanced equipment and machinery for woodworking and varnishing. This enables us to design and implement projects able to meet any need of our customers. Our motto is: "Satisfaction comes from quality".

Internationalization (% of sales on total exports):

22% of turnover from exports (main markets of interest: EU and Switzerland).

F.C.T. ARREDI S.R.L. UNINOMINALE

Via Ferruccio Lamborghini, 5 - 61030 Saltara Loc. Calcinelli (PU)
Tel. +39 0721 855066 - Fax +39 0721 857510 - Mob. +39 338 4660106
www.fctarredisrl.it - antofctarredisrl@libero.it - fctarredisrl@libero.it

 antonino.carpenzano1

IDROMECCANICA FORANI & PECORARI S.N.C.



The company has been working for over 40 years in the shipbuilding sector, designing and constructing bronze pumps, closed coupled electric or hydraulic motors unit, diesel or gasoline engine driven units and complementary components for onboard installations. The large variety of products can meet the needs of the most demanding customers as concerns the manufacturing of small and medium-sized leisure boats, fishing vessels and service boats. Reliability, experience and above all high quality products have enabled the company to affirm itself on European markets and outside Europe.

Internationalization (% of sales on total exports): 40%

Europe, North Africa, Asia.

Certifications

ISO 9001:2008.

IDROMECCANICA FORANI & PECORARI S.N.C.

Via Quintino Sella, 8 - 62012 Civitanova Marche (MC)
Tel. +39 0733 829586 - Fax +39 0733 829546 - Mob. +39 338/5221688
www.foraniepecorari.it - info@foraniepecorari.it

IMAR S.R.L.



IMAR is specialized in the production of metal sheets and metal furnishings. The company produces a wide range of built-in stainless steel and enamelled washbasins which can be customized according to the type of installation or usage requirements. IMAR processes all types of metal, including stainless steel, iron, aluminum, brass and copper. Thanks to the cooperation between IMAR and some of leading companies in the shipbuilding sector, IMAR has been working on and improving the production of accessories for nautical use, such as frames for portholes, bathroom washbasins, customized shower trays for small rooms, handles and other specific metal furniture.

Internationalization (% of sales on total exports):

35% and main markets of interest.

IMAR S.R.L.

Via del Lavoro, 10 - 61029 Canavaccio Di Urbino (PU)
Tel. 0722 354036 - Fax +39 0722 354029
www.imarsrl.com - info@imarsrl.com

INOX BULLONERIA S.R.L.



Our company is a modern and well-established industrial pole, which thanks to its subsidiaries is able to offer its customers countless combinations, in both quantitative and qualitative terms, of nuts, bolts and screws, both standard and special.

We can supply the above products on order or set up storage sites close to your establishments with immediately available material, which is managed by means of a portable barcode in compliance with the UNI, DIN and ISO norms and with attached certification upon request.

As for stainless steel Aisi 304-316 screws, we guarantee excellent quality, immediate availability and competitive prices, as we are able to select the best products thanks to the experience we have matured over the years in the Italian shipbuilding sector.

Certifications

ISO 9001:2008.

INOX BULLONERIA S.R.L.

Via G. Perini, 2/a - Ostra Vetere (AN)
Tel. +39 071 964444 - Fax +39 071 965301 - Mob. +39 335 1282537
www.inoxbulloneria.it - com1@italviti-inox.com

KEOPE MARINE S.A.S.



Keope Marine was set up in 2004 as a specialized nautical company at the service of the shipyards of their respective industrial cluster. Its activity is mainly focussed on onboard installations, mechanical installations, components, technical assistance and manufacturing of exhaust gas systems (the company owns an exclusive industrial patent registered at the Macerata Chamber of Commerce). The skills so developed and the experience made have contributed to a clear affirmation of the company in the nautical sector and led it to establish several partnerships with leading companies in the field in the entire Italian territory.

KEOPE MARINE S.A.S

Via Salvador Allende, 14 - 61040 Castelvecchio di Monteporzio (PU)
Tel. +39 0721 959479 - Fax +39 0721 936546 - Mob. +39 347-2973101
www.keopemarine.it - info@keopemarine.it

L'EBANISTA S.R.L.



L'Ebanista is an Italian manufacturer of customized furniture. We offer solutions for the interior furnishing of yachts and the residential field, but also for the contract sector, the furnishing of stores, etc. We supply one of the most important yacht builder worldwide and our mission consists in achieving excellence. We provide consultancy (with on-site inspections, if needed), design and turn-key supplies. The experience and skills of our wood craftsmen allow us to work in the field of furniture restoration, as well.

L'EBANISTA S.R.L.

Via dell'Artigianato, 1 - 61030 Lucrezia di Cartoceto (PU)
Tel. +39 0721 876112 - Fax +39 0721 875196
www.lebanista.com - info@lebanista.com

 L'Ebanista Srl - Interior Yachts design

 [lebanista_srl](https://twitter.com/lebanista_srl)

LPL S.N.C. di Galli Paolo e Lorenzo



LPL impianti is a leading company in the design and manufacturing of electric plants and control panels: it designs and manufactures synoptic panels, fascia panels and control boards. Automation and safety systems, standard panels for motor yachts and super yachts are best integrated in the works carried out by the company. Lpl impianti is known and established all over the world for its high-technology products.

LPL S.N.C. di Galli Paolo e Lorenzo

Via Ugo La Malfa, 12 - 61032 Bellocchi di Fano (PU)
Tel. +39 0721 855034 - Fax +39 0721 857854 - Mob. +39 347 1832894
amministrazione@lplgalli.it - info@lplgalli.it

MAK2 S.R.L.



For over twenty years our company has been dealing with automation systems for naval, civil and industrial use.

Our staff is specialized in the design and manufacturing of new components, which are customized and produced entirely by ourselves.

We also have our own line of standard products, which we customize to meet specific requirements.

We work both on the Italian and on the international market and work for prestigious customers, which we have been serving for several years.

Internationalization (% of sales on total exports):

5%.

Certifications

CE.

MAK2 S.R.L.

Via Tevere, 7/f - 61121 Pesaro (PU)
Tel. +39 0721 279956 - Fax +39 0721 270649 - Mob. +39 335 463737
www.mak2.it - info@mak2.it

 mak2automazioni

 mak2automazioni

P & B LINE S.A.S.



Supply, repair and maintenance of equipment for the Catering, Food & Bar sector, also with turn key solutions on board of vessels.

Distributor for the Italian market of the FOSTER REFRIGERATOR, HOBART, HOSHIZAKI, TRAUlsen, VULCAN, MANITOWOC-GARLAND, AMERICAN RANGE, TRUE, MKN brands, as well as other globally renowned companies, with a specific line for the naval sector.


Traditional supplier of major Italian shipyards: We provided catering-bar equipment to the SERENE C6154 Mega Yacht by FINCANTIERI, the VICTORY C6218 MegaYacht by FINCANTIERI, which is currently being built, the P 430 MegaYacht, Privilege Yard, as well as to C.R.N. Ferretti Group, ISA Group Yachts, etc.

Certifications

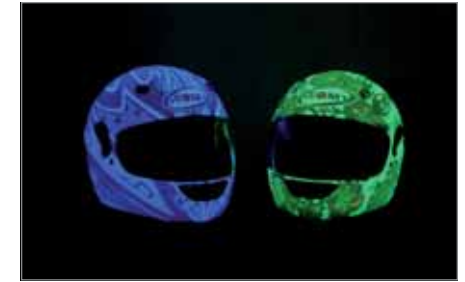
ISO9001 quality management system.

P. & B. LINE S.A.S.

Via Luigi Einaudi, 108 - int. 27 - 62012 Civitanova Marche (MC)
Tel. +39 0733 812709 - Fax +39 0733 776042 - Mob. +39 335 5988866
www.pblines.eu - info@pblines.eu

 P & B Line

QUANTUM NRJ S.R.L.



Quantum NRJ develops innovative materials, such as photo-curable resins and structural adhesives, rigid structural foams and photoluminescent coating. It develops specific equipment and proprietary systems covered by relevant patents. The company acts as a qualified important partner, in contrast with the status-quo of the market, which has so far been characterized by commercial distributors of standard products.

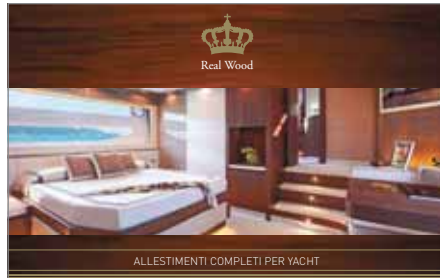
The development of direct and continuous systems with a high degree of innovation and dedicated products, combined with the ability to provide quick answers and flexibility, are the distinguishing feature of the company.

QUANTUM NRJ S.R.L.

Via Mantegna, 20 - 61037 Mondolfo (PU)
Tel. +39 0721 969988 - Mob. +39 335 6293962
www.quantumnrj.com - tecnico@light-inside.com

 Coating fotoluminescenti Light-Inside

REAL WOOD S.R.L.



Real Wood is a name in the field of shipbuilding. The company provides turn-key solutions for the manufacturing and setting up of leisure boats. This includes the manufacturing of the interiors, components, propulsion elements, as well as other technical areas and auxiliary systems.

REAL WOOD S.R.L.

Via Mura Malatestiane, 1/a - 61032 Fano (PU)
Tel./Fax +39 0721 829922 - Mob. +39 338 3615912
enzobuccellato@live.it

ROMAGNOLI OFFICINA MECCANICA S.R.L.



Romagnoli Officina Meccanica is an Italian company, which designs, manufactures, markets and does maintenance of any kind of winches and deck machinery for industrial and marine applications. The company was founded in 1892 specializing in the fishing vessel industry. We were the first company introducing hydraulic winches in Italy for marine application in 1948. Since then, our work has been carried out in many sectors, although marine systems have always remained the core business of our production. With its product range, the company is today oriented towards internationalization and is specifically active in Europe, Asia, Northern Africa and Russia.

Internationalization (% of sales on total exports):

70% (Main markets of interest: Europe, Asia, Northern Africa and Russia).

Certifications

ISO 9001 Certification.

ROMAGNOLI OFFICINA MECCANICA S.R.L.

Via Maestri del Lavoro, 1 - Zona ind.le A - 62012 Civitanova Marche (MC)
Tel. +39 0733 898471 - Fax +39 0733 897404
www.romagnoliom.com - romagnoliom@romagnoliom.com

TEAM ITALIA



TEAM Italia is an international leader in the electronics marine sector for mega and maxi yachts. The company is specialized in the optimization and functional integration of user-friendly navigation, telecommunications, safety and data transmission devices with the main aim of simplifying their on-board use. With its i-Bridge® product, TEAM Italia has conceived a specific solution for the integration of various systems, which have now become essential on-board and are both user-friendly and fast, thus increasing safety levels at sea.

Internationalization (% of sales on total exports):

7% (Russia and Eastern Europe).

TEAM ITALIA

Via L. Einaudi, 114/b - 61032 Fano (PU)
Tel. +39 0721 855234
www.team-italia.it - info@team-italia.it

TEKNOWOOL ADRIATICO S.R.L.



Set up in Milan to operate in the industrial sector, Teknowool is proud to have acquired major competences in the naval field as well, where it today plays an undiscussed leading role at a national level.

Teknowool provides a wide and complete range of products for the onboard insulation of ships and offshore platforms.

Certifications

Rina certificates, Iso9001.

TEKNOWOOL ADRIATICO S.R.L.

Via S. Giuseppe, 12 - 60020 Camerata Picena (AN)
Tel. +39 071 9161809 - Fax +39 071 9156832
www.teknowool.com - www.teknowoolnanotecnologie.com - infoadria@teknowool.com

VELERIA CHALLENGER SAILS



Challenger Sails has been active since 1978. It produces sails and boat upholstery in its 1,000 sqm plant. The company features CAD-CAM production equipment, employs twelve people and is present on European Union markets, specifically in France, Spain, Greece and Norway.

Internationalization (% of sales on total exports):
30%.

VELERIA CHALLENGER SAILS

Via Fattori, 12 - 60019 Senigallia (AN)

Tel./Fax +39 071 6609558

www.challengersails.com - info@challengersails.com

 [challengersails](https://www.facebook.com/challengersails)

Services



ANK'S MARINA C/O ISA YACHTS



Ank's Marina accommodates at the mooring up to N° 15 hulls up to 100 meters in length and offers the possibility of berthing, hauling and launching vessels in transit and thanks to the highly specialized ISA Yachts After Sales & Refit Division which takes advantage of the know-how of ISA Yachts engineers provides emergency and maintenance services, winterising and any type of refit project including structural modifications to hull and superstructure, interior layout modifications, interior decoration re-styling, full painting jobs in temperature controlled sheds. A travel lift of 420 tons can lift any type of hull.

Internationalization (% of sales on total exports):

100%

Certifications

OHSAS 18001.

ISA GROUP S.R.L.

Via Mattei, 14 - 60125 Ancona (AN)
Tel. +39 071 502191 - Fax +39 071 50219210
www.isayachts.com - info@isayachts.com

 ISA Yachts

 ISAYACHTS

 @ISAYACHTS

BRAGAGNA & LONGHINI di Longhini Lucia, Kacani Gylden & C. S.A.S.



Bragagna & Longhini has been active in the field of professional and leisure boating for over 30 years. The activities carried out by the company include maintenance, repair works on boats, installation of propulsion and transmission systems. Clients are supported from the planning stage to the after-sales service, such as technical assistance and the sale of spare parts. Bragagna & Longhini is the official distributor of marine inboard engines brands, like Doosan, Hyundai Seasall, Craftsman Marine and, since 2013, Suzuki point, too.

BRAGAGNA & LONGHINI di Longhini Lucia, Kacani Gylden & C. SAS

Via Lungomare Mediterraneo, 8 - 61032 Fano (PU)
Tel./Fax: +39 0721 803931
www.bragagnaelonghini.com - info@bragagnaelonghini.com

CMM YACHT SERVICE



CMM Yacht Service was founded in Senigallia in 2004 and is now well-known for its after sales services at both national and international level. Over the years, the company has grown exponentially thanks to the fast, professional assistance it offers, which has been rewarded with the acknowledgement as a Master Service Point for the Ferretti Group (Pershing, Itama, Riva, Mochi Craft, Custom Line). The 12000 sqm covered facility, 500 sqm of which is office space and showrooms, and the highly qualified staff provide not only for the perfect storage of yachts, but also for the carrying out of important refitting work, such as restoration of furniture, maintenance of both systems and engines, on-board electronics testing, and painting work, whereby the latter is carried out using a special structure that can hold yachts up to 115 feet long. CMM Yacht Service also offers highly professional assistance through its mobile workshops and can operate both in the mooring marinas and in the various holiday destinations of the ship owner, providing for immediate service and solving any problem that may arise during the cruising period.

CMM Yacht Service S.R.L.

Strada della Bruciata, 4 - 60019 Senigallia (AN)

Tel./Fax +39 071 668202

www.cmmyachtservice.com - info@cmmyachtservice.com

 CmmYachtService

 CmmYachtService

 CmmYachtService

 CmmYachtService

CNR - ISTITUTO DI SCIENZE MARINE



The Ancona office of the Institute for Marine Sciences (Istituto di Scienze Marine, ISMAR) was set up in 1968 as Sea Fisheries Research Institute (Istituto di Ricerca sulla Pesca Marittima, IRPEM) with scientific competences mainly concerning Adriatic fisheries. Over the years and following the merging between ISMAR and other six Institutes of the Italian Research Centre CNR in 2003, the Ancona office considerably extended its skills and research activities. It currently employs 56 people, comprising permanently employed members of the staff (41 people) and 15 non permanent resources (including research grant holders, people with contracts for freelance work coordinated by ISMAR/leased staff), as well as about 25 PhD students, university students and trainees.

CNR-ISMAR

Largo Fiera della Pesca, 2 - 60125 Ancona (AN)

Tel. +39 071 207881- Fax +39 071 55313

www.ismar.cnr.it - segreteria@an.ismar.cnr.it

 ISMAR CNR

CONSORZIO TECNOLOGICO DELL'ADRIATICO



The consortium coordinates and organizes the activity of small sub-supplying companies in the nautical sector, specifically active in the following fields: woodworking, cabinet making, production of models, VRT lamination and vacuum working, nautical body work, electrical and hydraulic installations, engine installation, stainless steel and teak covers, refitting.

Internationalization (% of sales on total exports):
15%.

Certifications

Ove richieste su lavori di competenza.

CONSORZIO TECNOLOGICO DELL'ADRIATICO

Via Togliatti, 6 - 61032 Fano (PU)
Tel. +39 0721 897165 - Fax +39 0721 876724 - Mob. +39 327 8573510
www.ctadriatico.it - info@ctadriatico.it

COSMOB S.P.A. Centro Tecnologico per il Settore Legno-Arredo




COSMOB is a technological centre for the wood and furniture sector and supports companies in increasing the technical value and performances of their products. Support is planned around the needs of each company through our Technological Laboratory for Quality, whose aim is to provide a number of different services, including staff technical training, definition of technical specifications, product design and prototyping, production and suppliers control, certification of materials, products and processes, as well as technical communication to highlight the product quality and added value.

Certifications

ISO/IEC 17025, Accreditation to carry out tests for the issue of the ecolabel.
ACCREDIA Accreditation.

COSMOB S.P.A.

Via della Produzione, 61 - 61025 Montelabbate (PU)
Tel. 0721 481269 - Fax +39 0721 482512
www.cosmob.it - cosmob@cosmob.it

 [Cosmob-spa](https://www.facebook.com/Cosmob-spa)

 [@COSMOBspa](https://twitter.com/COSMOBspa)

ELETTRO BM S.N.C.



We deal with new installations, as well as with extraordinary and ordinary maintenance of electrical installations. Our readiness and competence in supporting customers are guaranteed by a fleet of motor vehicles for immediate service, a large warehouse for the quick supply of current works, modernly equipped workbenches for technologically advanced installations that meet the most modern building criteria, management offices and meeting rooms for meetings with expert personnel, thus ensuring our staff's professional growth and our company's technological skills.

ELETTRO BM S.N.C.

Sede Legale: Via Pizzecolli, 66 - 60121 Ancona (AN)

Sede Operativa: Via Fiorini, 56 - 60121 Ancona (AN)

Tel. +39 071 41712 - Fax +39 071 2147273 - elettrobmsnc@katamail.com

ELETTROMECCANICA BATTOCCOLI S.R.L.



The company is active in the electromechanical sector and deals with the installation and maintenance of civil electrical installations, transformation industrial installations, medium- and low-voltage power lines and public lighting. We deal with the design, installation and maintenance of electrical installations and ship automation, the building of electrical panels, communication and signalling installations and fire detection systems for ships engaged in the recovery of oil spills.

Certifications

ISO 9001:2008

SOA CAT. OG10 IV - OG11 III - OS30 IV

ELETTROMECCANICA BATTOCCOLI S.R.L.

Via A. Vespucci, 14 - 63074 San Benedetto del Tronto (AP)

Tel. +39 0735 592772/575119 - Fax +39 0735 593400

info@battoccoli.it

ENAVE - ENTE NAVALE EUROPEO S.R.L.



Enave ENTE NAVALE EUROPEO is a service company specialized in naval engineering. As a notified body to the European Community is authorized to carry out examinations for the issue, renewal and validation of the safety certificate and other certificates prescribed by the Italian Nautical Code, CE marking for leisure boating vessels, CE marking for postconstruction and CE marking of components. Tests on gas and noise emissions from marine engines. Engineering and experimental testing of materials and components. Insights on new regulations on leisure boating, construction techniques and design tips.

ENAVE - ENTE NAVALE EUROPEO S.R.L.

Sede legale: via dell'Abbazia, 7 - 61032 Fano (PU)
Tel. +39 0532 763460 - Fax. +39 0532 1920265
www.enave.it - info@enave.it

 EnteNavaleEuropeo

FURLANETTO INTERNATIONAL S.R.L.



“FURLANETTO INTERNATIONAL SRL” is active in the Industrial/Engineering sector and is specialized in the design and installation of turn-key electrical plants for the naval sector, monitoring and automation systems, the construction of electrical switch-boards, as well as industrial electrical plants and refrigerating plants, etc. The company has been active in the naval sector for over forty years, working on ships for the Navy, the Customs Authorities and Finance Police, the Merchant Service, fishing boats, M/N passenger transport, as well as a large number of medium-sized and big M/Yachts and M/Sailers in steel, aluminum, fiberglass and carbon.

Internationalization (% of sales on total exports):

0.57% (France and Germany).

Certifications

We carry out internal testing on any vessel coming from our workshops and specific testing required by the various naval institutions, when requested.

FURLANETTO INTERNATIONAL S.R.L.

Via Sisto V, 60/62 - 63074 San Benedetto del Tronto (AP)
Tel. +39 0735 583455 - Fax +39 0735 595508
www.furlanettointernational.it - furlanetto@furlanettointernational.it

GIRAMONDO NAUTICA S.R.L.



We have been active in the nautical sector since 1982. We deal with the sale of new and used boats and any type of nautical accessories. We provide assistance during boat launch, haulage, maintenance, varnishing, interior finishing and winter storage. We have two property sheds, one of which also serves as a retail store, display area and annexed workshop.

GIRAMONDO NAUTICA S.R.L. Unipersonale Socio Unico Battistoni Angelo
Via Dell'Artigianato, 44 - 61011 Gabicce Mare (PU)
Tel. +39 0541 950468/830952 - Fax +39 0541 839343
www.giramondonautica.com - info@giramondonautica.com

LINSET S.R.L.



Linset Srl is the most advanced design, prototyping, testing and research centre for the boating industry in the Adriatic Sea.

Established in 2001 as a R&D center of Azimut-Benetti SpA (i.e. the shipyard, which is world leader in the construction of yachts and mega yachts of high-tech composite materials, steel and aluminum), in 2010 Linset Srl became an independent company and inherited all the know-how from the research, development and prototyping activities developed in the previous 10 years.

Linset Srl continues to do research, design and innovation in the field of composites and more specifically in the marine/naval sector not only for manufacturers but also for leading raw materials producers.

Certifications

"Certificate of assessment of testing laboratory" n°2010 CS01 2710 released by RINA for the performance of 35 tests.

LINSET S.R.L.

Via Turati, 12/A - 61032 Fano (PU)
Tel. +39 0721 1797790 - Fax +39 0721 1797792
www.linset.it - linset@linset.it



MARELIFT S.R.L.



Marelift carries out specific work on both leisure and fishing boats and offers a cutting-edge logistics service thanks to a facility of over 13,000 sqm, which includes 4 warehouses, uncovered garaging, wharfs, large sheets of water and slipways.

MARELIFT S.R.L.

Via Lungomare Mediterraneo, 2 - 61032 Fano (PU)
Tel. +39 0721 827781 - Fax +39 0721 804615 - Mob. +39 335 7528106
www.marelift.it - info@marelift.com

MARIVER CHARTER



Mariver is a tour operator specialized in the organization of sailing cruises and a charter agency for the hire of sailing boats, motor boats and catamarans in the entire Mediterranean. Offered solutions include bareboating, with skipper, and cabin chartering, i.e. the hiring of a single cabin shared with other participants.

As a tour operator, Mariver organizes sailing cruises in Italy (Tuscany, Apulia, Sicily, Marche) proposing the cabin charter and as charter agency it rents sailing yachts, motor boats and catamarans all over the Mediterranean from local ship-owners with bareboat or crewed formula.

Internationalization (% of sales on total exports):

10% (main markets of interest: Croatia, Russia, Germany).

MARIVER S.R.L.

Via G. Mascino, 7/c - Porto Turistico Marina Dorica - 60125 Ancona (AN)
Tel: +39 071 2804528 - Fax +39 071 2504871 - Mob. +39 3292162109
www.marivercharter.it - info@mariver.net



MECCANO S.C.P.A.



Meccano is a non-profit high-tech innovation centre founded in November 1988 with the aim of providing strategic services for innovation & development. Meccano is a consortium with a 56% public shareholding and a 44% share owned by private companies, most of which are small or medium-sized enterprises (the corporate capital also comprises 3 banks and 4 business associations). The centre has kept on investing for over twenty years, earning itself a growing number of clients, focussing on ever-increasing activities and registering an increasing turnover. Meccano focuses on the following topics:

- high-tech services & advanced technology transfer;
- R&D services on strategic topics;
- highly specialized training;
- laboratory testing for improving quality standards of products and processes;
- technological internationalization.

MECCANO SCPA

Via Ceresani, 1 - Loc. Campo dell'Olmo - 60044 Fabriano (AN)
Tel. +39 0732 626511 - Fax 0732 626939
www.meccano.it - servizi2@meccano.it

MIG MARINE INTEGRATOR GROUP



The MIG consortium is founded on the expertise of Team Italia and Videoworks, i.e. two Italian leading companies in the yacht sector.

We deal with the design, manufacturing, supply and installation of integrated systems of nav-com and audio-video solutions onboard of megayachts. Our competences range from domotics to monitoring and automation, CCTV and security systems, navigation, public address and general alarm, audio-video and entertainment system, telephony and the internet.

We offer an innovative and complete service, also concerning co-engineering and project management, with the final goal of a real turnkey supply from the pre-sale to the after-sale stage.

MIG MARINE INTEGRATOR GROUP CONSORTIUM S.R.L.

Via L. Einaudi, 114/b - 61032 Fano (PU)
Tel. +39 0721 855398 - Fax +39 0721 857588
www.marineintegrator.com - info@marineintegrator.com

migmarine

MIG Marine Integrator Group

MONALDI PROFESSIONAL TEAM S.R.L.



Monaldi is specialized in the production of painting and drying equipment in the industrial and handicraft fields. After establishing its position at a national level, Monaldi is now working abroad as well. Our leading product for the marine sector is a lamp, exclusively designed and produced specifically for the “post curing” and drying of primers and paints on fiberglass and iron surfaces.

Internationalization (% of sales on total exports):
27%.

MONALDI PROFESSIONAL TEAM S.R.L.

Via Lazio, 9 - 61122 Pesaro (PU)
Tel. +39 0721 418810 - Fax +39 0721 455556
www.monaldi.com - info@monaldi.com

PFA STUDIO PIERLUIGI FLORIS ARCHITETTO



PFA studio, based in Fano, was founded in 1995 by architects Pierluigi Floris and Mariangela Giommi. PFA studio stands out for its numerous fields of activity: yacht design, industrial design, architecture. The firm has developed a partnership with Cantiere delle Marche (Ancona), within which the last three vessels of the Darwin series have interiors designed by PFA studio. Since 2011 we have been working as interior yacht designers in China and are currently providing consultancy to three major shipyards, designing the interiors of four vessels owned by three ship-owners (Taicang Jinyang Treasure Boat Build Shipyard Ltd, Jiangxi Royaler Yacht Ind co.,Ltd, Suzhou Sease Yacht Co., Ltd.).

Internationalization (% of sales on total exports):
30% (main markets of interest: China - Europe).

PFA STUDIO PIERLUIGI FLORIS ARCHITETTO

Via A. Apolloni, 29 - 61032 Fano (PU)
Tel. +39 0721 806762 - Fax. +39 0721 806762 - Mob. +39 328 2930715
www.pfadesign.it - pierluigi.floris@pfadesign.it

TECNOMARCHE - Parco Scientifico e Tecnologico delle Marche



TecnoMarche is the Science and Technology Park of the Marche Region (PST Marche). The Park's mission consists in providing services to the productive system and in supporting research and innovation in the main regional manufacturing sector by investing in human resources and research structures. Our main activities consist in: implementation of R&D projects and project management; fund-raising for industrial research project development; innovation and technology transfer services; training. Our target sectors are: manufacturing industry; ICT industry (building automation, automatic identification); energy & environmental services; start-ups and creative industries.

Internationalization (% of sales on total exports):

Europe, Northern Africa.

TECNOMARCHE - Parco Scientifico e Tecnologico delle Marche

Zona Servizi Collettivi - Marino del Tronto, 63100 (AP)

Tel. +39 0736 343644 - Fax. +39 0736 338238

www.pstmarche.it - pstmarche@pstmarche.it

 TecnoMarche-Parco-Scientifico-e-Tecnologico-delle-Marche

TIMONE YACHTS S.R.L.



Yachts sales on the Italian and international markets.
Refitting of motor vessels up to 24 mt.
International brokerage.

Internationalization (% of sales on total exports):

50% (Northern Europe, Turkey, Russia).

TIMONE YACHTS S.R.L.

Via Testaferrata, 4/6 - 60019 Senigallia (AN)

Tel. +39 071 60905 - Fax +39 071 64836 - Mob. +39 335 218438

www.timoneyachts.it - info@timoneyachts.it

VERNICIATURE TIEMME di Ridolfi Mauro & C. S.A.S



The company was established in 1973 and has since then worked in the field of furniture varnishing. This activity is carried out with modern installations, pressurized cabins and spraying carousels. We have been working for twenty years in the nautical sector, specifically for the Ferretti Yachts group and other minor shipyards. For this sector, we perform the varnishing of interior and exterior furnishing items: water varnish on veneered material, polyester transparent glossy finish, direct glossy or matt lacquered finish, varnishing of elements with outdoor finish. Our company is also active in the fields of bar furnishing, store furnishing and customized furnishing in general.

VERNICIATURE TIEMME DI RIDOLFI MAURO & C. S.A.S.

Via del Lavoro, 9 - 61020 Montecchio (PU)
Tel. +39 0721 497449 - Fax +39 0721 499554
www.vernicaturetiemme.com - info@vernicaturetiemme.eu

VIDEOWORKS S.P.A.



Established in 1998 by Mauro Pellegrini, Videoworks S.p.A. boasts over 20 years experience in the design, construction and installation of innovative audio/video, communication, home automation and entertainment systems dedicated to the most exclusive clients. The reliability and quality of its products have enabled Videoworks to partner with the the most important Italian shipyards.

Internationalization (% of sales on total exports):

In 2012: 15% (Markets Of Interest: Russia - China - Turkey - Usa).

Certifications

Iso 9001:2008 - SOA Certification (OS 19 CAT. IV).

VIDEOWORKS SPA - HEADQUARTERS

Via Albertini 36 E 13 - 60131 Ancona (AN)
Tel. +39 071 2868170 - Fax +39 071 2868124
www.videoworks.it - videoworks@videoworks.it

 Videoworks SpA

 TheVWKSSPA

VOLPINI S.N.C.



Nautica Volpini has a store for the sale of a wide range of nautical accessories and a shipyard for vessel maintenance. The company boasts a very long tradition, as it was established back in 1899 as a mechanical workshop. The collaboration with expert personnel enables us to provide highly qualified services.

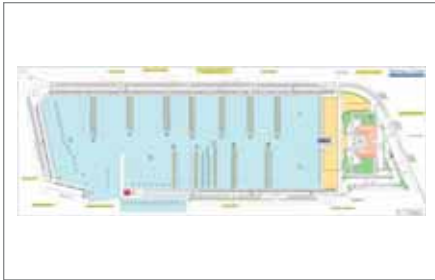
VOLPINI S.N.C.

Strada tra i due porti, 55/57 - 61121 Pesaro (PU)
Tel. +39 0721 2566170 - Fax +39 0721 400235
www.volpini.net - info@volpini.net

Tourist ports and Marinas



1) MARINA DEI CESARI



Geographical coordinates: 43°51',30 N ; 13°00',97 E

Category: 1

Mooring places: 420 mooring places for vessels up to 40 meters

Depth of waters: mt. 3,00

Access: access to the marina is possible from the only opening looking to the North. The course is facilitated during both day and night time by heading towards the lighthouse standing on the way to the opening 350 meters south of the quay of the canal.

Services: assistance during mooring operations; water and electricity on all wharfs; divers; fire prevention system; night-watchman service 24/7; Video-surveillance system; petrol station; WC/shower services; free wi-fi; baggage trolleys; golf cars; courtesy bikes; bar and restaurant; 75 ton travel lift; open storage; shipyard for vessel repair and cleaning; mooring places for vessels on transit; weather forecasts; waste collection; taxi service.

MARINA DEI CESARI S.P.A.

Lungomare Mediterraneo, 26 - 61032 Fano (PU)

Tel. +39 0721 800279 - Fax +39 0721 813854

www.marinadeicesari.it - info@marinadeicesari.it



Marina dei Cesari, Fano Porto Turistico



Marina dei Cesari

2) PORTO DELLA ROVERE



Geographical coordinates: 43° 43', 35 N - 13° 13', 45 E

Category: Tourist, fishing and commercial port

Mooring places: About 260 fixed mooring places

Depth of waters: mt. 2,00 - muddy and sandy floor

Access: New entrance on the Northern side of the outer port.

Services: assistance during mooring operations with seamen and means by Gestiport SpA, drinking water and industrial water for clearing purposes, electricity, slipway, 25 quintal jib crane, 40 ton Travel Lift, sanitary facilities with showers, toilets and toilets for disabled, fire prevention system, engine repair workshops, electrical repair workshops, weather station, petrol station, bar and restaurant, municipal wi-fi, free bike rent for leisure boat tourists and transit vessel owners.

GESTIPORT S.P.A.

Via della Darsena snc - 60019 Senigallia (AN)

Tel. +39 071 7929669 - Fax +39 071 79296696 - Mob. +39 331 2594065

www.gestiport.it - info@gestiport.it

3) LA MARINA DORICA S.P.A.



Geographical coordinates: 43° 36,65 N ; 13° 28,91 E

Category: tourist port

Mooring places: 1.313

Depth of waters: mt. 3,00 / 5,50

Access: coming from south or the northern quarters, always keep the outer dam and the buoys before the commercial port on the left heading towards the land and the antennas of the montagnolo hill.

Services: water and energy on the quay - petrol station - weather station - fire prevention system - wc / shower services - waste collection - separation and recycling area for special waste - parking places - night-watchman service - bar - restaurants - travelift 65 t - mechanical service - nautical clubs - conference room.
Blue flag awarded since 2010.

LA MARINA DORICA S.P.A.

Via G. Mascino, 5/l - 60125 Ancona (An)
Tel. +39 071 54800 - Fax +39 071 54801
www.marinadorica.it - info@marinadorica.it

 [marinadorica.ancona](https://www.facebook.com/marinadorica.ancona)

4) MARINA DI PORTO SAN GIORGIO S.P.A.



Geographical coordinates: 43° 09' 48" N ; 13° 49' 48" E

Category: tourist port

Mooring places: 850

Depth of waters: mt. 3,50 max

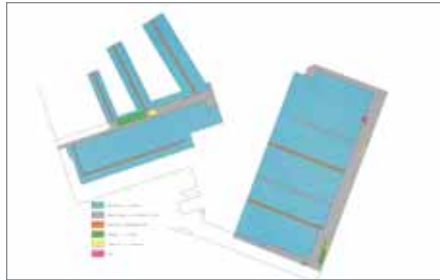
Access: the layout of the port and the position of its opening (North/North-West) provide for the entrance and exit of vessels with any conditions of the sea.

Services: VHF channel 14 24/7; petrol station open 24/7; general fire prevention system; drinking water and electricity pumps; assistance during mooring operations; diving service; access control 24/7; sanitary fittings complete with shower; waste collection and disposal with dedicated separation and recycling area; Avis car rent; free wi-fi; bar and restaurant; nautical and sports associations; shipyard.

MARINA DI PORTO SAN GIORGIO S.P.A.

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Tel. +39 0734 675263 - Fax +39 0734 675263
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5) CIRCOLO NAUTICO SAMBENEDETTESE AS.D



Geographical coordinates: 42°57',56 N ; 13° 53',69 E

Category: 1

Mooring places: 500

Depth of waters: mt. 2,80 / 5,00

Access: wet dock on the left-hand side of port entrance.

Services: 2007 blue flag - 580 mooring places for ships between 8 and 24 mt. - water and lighting on all piers - wc and showers - fuel available 24/7 - assistance during mooring operations - night-watchman service 24/7 - divers - parking places - bar/restaurant - video room - newsagent's - land-storage for vessels - fire prevention service - separate waste collection - school for the issue of ship's passports - sailing school for children and adults - shpyard and mechanical workshops outside the club.

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 Circolo Nautico Sambenedettese

TOURIST PORTS IN THE MARCHE REGION, DEVELOPMENT OPPORTUNITIES IN YEARS OF CRISIS.

By Ida Simonella (Linkconsulting - Consulenza di direzione e formazione)

1) INTRODUCTION AND OBJECTIVES

Tourist ports in Italy are currently going through very tough times, as they are severely hit by the effects of the economic downturn affecting the country. Yet, the difficult general situation might pave the way for good opportunities for the ports of the Marche Region thanks to their structural features, system of fares and quality of services, which can be rewarding in the currently evolving scenario.

The offer for nautical tourism is the result of three elements of attractiveness combined together : the places of sailing, specifically the sea (or internal waters), the places of stopping and staying, i.e. ports and marinas, and the places of discovering and land visits. This paper will be limited to analysing the competitive positioning of Marche ports and regions, though there is awareness of the fact that the link with other elements is of decisive importance to rethink the overall offer system.

Fig.1 - Tourist ports in the Marche Region



2) ECONOMIC CRISIS, DEMAND FOR NAUTICAL TOURISM AND SENSITIVITY TOWARDS THE PRICE VARIABLE

The economic crisis of the countries of the European Union, specifically of Italy, has significantly hit the nautical supply chain, which has been one of the leading sectors of national production for years. According to data by the Italian Ministry for transports and infrastructures, registrations of leisure boats dropped by 61% in the 2007-2011 period. The overall turnover of the Italian production sector basically halved in just three years from 3.8 billion euros in 2008 to about 2 billion euros in 2011. This data is even more striking if one refers to the Italian market, where turnover went from 1.9 billion euros to only 487 million euros in the same reference period. Several companies in the sector have had to deal with a severe crisis, only the ones with a strong presence on foreign markets have been able to survive.

Data on available facilities shows an inversion of the trend. In 2012, 546 nautical tourism infrastructures and over 156,000 mooring places for ships were registered in Italy. In the five years concerned an increase of 9% and 15% respectively was registered thanks to the finalization of projects referring to previous programming periods. The demand for nautical tourism in terms of transit traffic and permanent moorings at tourist ports has literally collapsed. In Italy, transit traffics fell from 34% in 2012 alone, with peaks of 36% in the Upper Tyrrhenian Sea. Permanent moorings, instead, fell by 25%, with the worst performance registered at the ports of the Upper Adriatic Sea (- 30%).

The extent of this phenomenon has been worsened by the regulatory and fiscal system introduced over the last few years. The main reason for this was the application of a mooring tax, which was introduced with the «Salva Italia» («Save Italy») decree and consisted in a daily mooring tax applied to leisure boats navigating in all Italian territorial seas.

In the following decree on liberalisations the tax was turned into an annual ownership tax applied to Italian residents (or permanent organizations of non-resident individuals in Italy) only, who were owners of leisure boats. Several mechanisms were introduced to reduce the amount of the tax, yet its effect was equally devastating: 45 days after the approval of the decree 27,000 contracts concerning the reservation of mooring sites not being honoured were cancelled as against the corresponding data of 2011. Taxation, or rather the announcement of taxation, led to a real escape abroad of Italian and foreign leisure boat owners. This phenomenon highlighted the high sensitivity of demand towards price and changed the perception of this market, which had up to that moment been considered an elite sector, insensitive towards any variation of the rates system.

Tax revenues from this tax, furthermore, were just 15% higher than expected. As a consequence, the recent «Decreto del fare» decree (i.e. «Urgent measures to stimulate the [Italian] economy») cancelled for good the tax on vessels up to 14 meters length and halved the tax rates for vessels between 14 and 20 meters. The tax for big vessels is still applied.

These circumstances together eventually radically modified also the consumption profile, i.e. the way leisure boat owners navigate, with the latter paying much more attention to limit expenditure. Today, leisure boat owners tend to limit their radius of navigation outside the mooring ports, sail for a shorter number of days during the year, reduce the duration of their transit, save on boat- and territory-related expenses, possibly buy smaller vessels or even sell their vessels.

3) THE TOURIST PORTS OF THE MARCHE REGION: COMPETITIVE POSITIONING

There are twelve infrastructures devoted to nautical tourism in the Marche Region: three marinas, i.e. facilities entirely dedicated to leisure boating, and the remaining infrastructures being multifunctional facilities. No mooring sites are to be found, based on commonly used classifications. Infrastructures - There are about 6,000 mooring places for ships, 37% of which is within the marinas. This is a very high percentage, if one compares the same indicator with the corresponding value for the overall number of ports in the Upper Adriatic Sea (35%), Upper Tyrrhenian Sea (27%), Central Tyrrhenian Sea (28%) and Southern Italy (18%).

Fig. 2 - Distribution of infrastructures and mooring places for ships by type of infrastructure (2012)

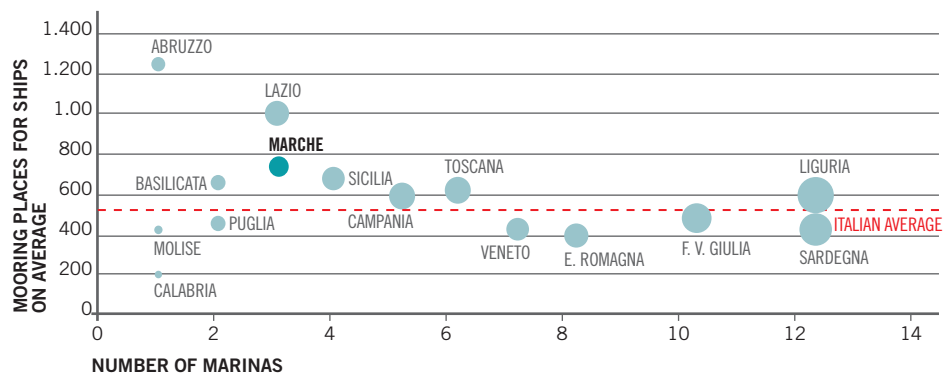
	Marinas %	Multifunc. ports %	Mooring sites %	Total %	Tot. mooring places
Marche	37	63	-	100	6.027
Upper Adriatic	35	53	13	100	37.934
Upper Tyrrhenian	27	65	8	100	59.522
South	18	64	18	100	38.131
Central Tyrrhenian	28	67	6	100	21.019
Italy	27	62	11	100	156.606

	Marinas %	Multifunc. ports %	Mooring sites %	Total %	Tot. Infrastructures
Marche	25	75	-	100	12
Upper Adriatic	22	63	14	100	125
Upper Tyrrhenian	17	62	21	100	176
South	7	63	31	100	166
Central Tyrrhenian	10	76	14	100	79
Italia	14	64	21	100	546

Source: our processing of data from the Nautical Market Observatory (2013 Report)

The average regional size of marinas features 737 mooring places for ships, i.e. the highest value after Abruzzo and Lazio and generally a much higher figure compared to the national average (543). This data is clearly influenced by an arithmetical issue. Regions like Liguria and Sardinia, which register the largest number of marinas, tend to converge to the national average.

Fig. 3 - Regional positioning by number of marinas and average size expressed in mooring places for ships



Source: our processing of data from the Nautical Market Observatory (2013 Report)

Reference market – Marche tourist ports normally welcome local customers. 89% of Marche residents, 25% of Umbria residents and just 1% of residents from Emilia Romagna, Latium and Lombardy take advantage of the regional offer, hence the ability to attract users from outside the region is extremely limited.

This feature is common to all Italian ports. For the vast majority of leisure boat owners, home port is in their region - this applies to nearly 100% of Southern regions. Leisure boat owners from Lombardy, who have their vessels in 13 different regions, and Piedmont mainly use ports in Tuscany and Liguria, instead, and to a limited extent foreign ports. Rates – In order to better understand the positioning of the offer by the Marche tourist ports in terms of prices, the annual mooring rates (including VAT) of the Marina Dorica in Ancona and the Porto San Giorgio marina have been compared with the corresponding rates of three big reference territorial aggregates, i.e. the system of the Adriatic (with 28 ports), the Tyrrhenian (with 10 ports), Croatia (in particular, with the 18 ports belonging to the ACI circuit– Adriatic Croatia International Club).

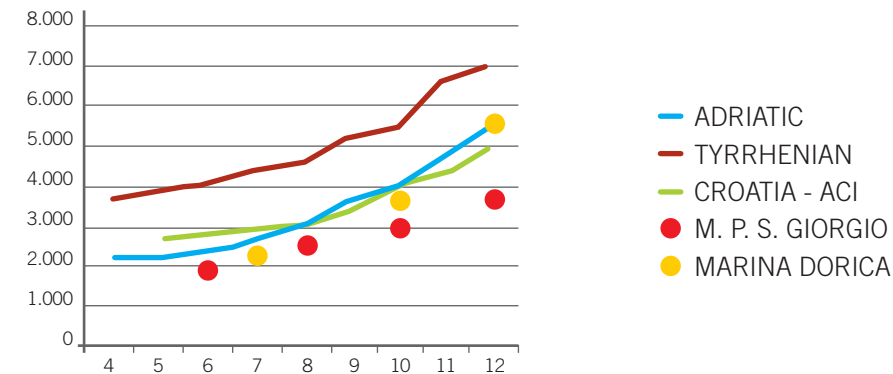
For the first two aggregates, reference has been made to Assomarinas data, while for Croatia data were directly detected by the price lists of the circuit. It is worth remembering that the 2012 rates applied by Tyrrhenian ports suffered a sharp decline due to the need to recover the market after the first effects on the demand caused by the mooring/ownership tax. Tyrrhenian ports, instead, showed better resistance.

As seen from the data, the Adriatic has shown its competitive edge especially in the

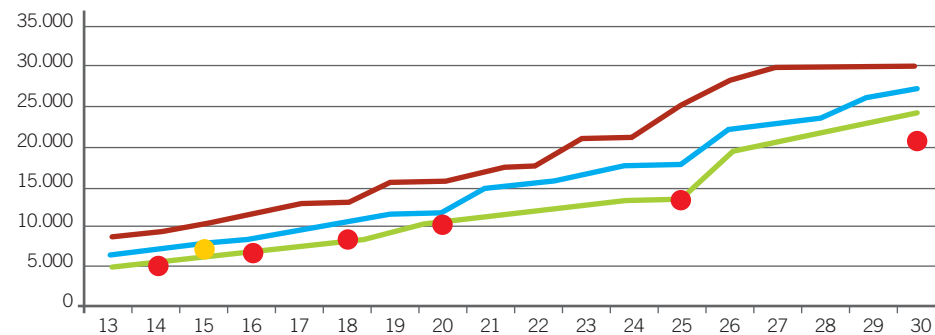
class of smaller vessels (especially boats up to 9 meters long), thanks to rates that are on average lower than the average rates of other aggregates. The position of Marina Dorica and the Porto San Giorgio marina is even better. Starting from 13 meters values appears to be in line with the ones of the ACI circuit ports and in any case extremely competitive compared to all other aggregates.

Fig. 4 – Positioning compared to the price of some Italian aggregates

Price list fares for vessels up to 12 metres



Price list fares for vessels from 13 to 30 metres



Source: our processing of data from the Nautical Market Observatory (2013 Report)

This result is confirmed by the comparison between the values of the Italian marinas with similar structural characteristics on 12 meter vessels, i.e. on the most largely demanded ones, for which Marche marinas appear to show the best positioning in terms of annual mooring rate. Services – The evaluation is based on an index drawn up by the National Nautical Observatory and based on a set of 12 services selected by the Blue Pages and targeted to vessels and leisure boat tourists. This data is then weighted by the number of mooring places for ships served and the maximum value that can be achieved is 12. Though the data is of “quantitative” nature, the position

of Marche ports appears to be very positive and largely depends on the fact that dedicated infrastructures (marinas) are prevailing within the global offer system.

Fig. 5 - Index of services offered by tourist ports by region

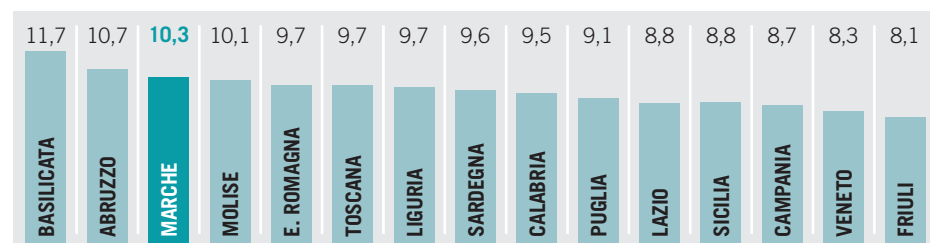


Fig. 5 – Index of services offered by tourist ports by region

This position is recognized also by the Nautical Quality Index, which places the provinces of the Marche Region (out of the 62 equipped with tourist ports) in the best Italian positions by quality of port services offered and availability of mooring places for ships. Marche provinces appear to be more deficient in terms of environmental and tourist quality and infrastructural accessibility.

4) CONSIDERATIONS SYNTHESIS

The economic crisis has partially changed, or at least helped to emerge, the weight of the factors of attractiveness of nautical tourism, in particular in Italy. The strong sensitivity towards the “price” variable makes the tourist ports of the Marche Region particularly competitive in the Italian scenario, specifically in the Adriatic one. This adds on to a high level of services offered to vessels and leisure boat tourists, originating from a highly professional context given the widespread diffusion of the shipbuilding sector and its related activities in the territory. These assets represent the basis to consolidate the competitive ability of the territory and make these ports more attractive towards leisure boat tourists, including international ones, who have up to now expressed their demand elsewhere. Yet another lever to consolidate is the system represented by the “inland” tourist offer, which in the general perception has enormous potential, yet which is not adequately supported by a system of communication and services able to integrate it to the services offered by marinas. There are also excellencies like the Conero Riviera, although also on this front the position of Croatian ports appears to be unassailable. After all, our ports also have to come to terms with the sandy beds and the need of continuous dredging activities to guarantee their operation. The annual expenditure borne by leisure boat tourists for their vessels and home ports (for the management and maintenance of their vessels and mooring place for the ship, besides for fuel) and expenses on the territory (i.e. transports, catering, shopping, entertainment and culture) oscillates between the 7,000 euros for small vessels and the 100,000 euros of big ships. Any policy going in this direction will largely pay back.

Conclusions

The nautical leisure boating supply chain is one of the leading segments of the Adriatic-Ionian entrepreneurial system. It is a complex system where big companies, which are already competing at an international level, are surrounded by smaller and less structured shipyards and an extensive network of sub-suppliers. This productive supply chain includes fishing fleets, as well as leisure boats and megayachts and related wintering, mooring and maintenance services.

Though this sector has been deeply impacted by the serious financial crisis, some signs of recovery have been registered especially thanks to the traditional and well-established high-quality positioning of its products on international markets.

The crisis has led to a reorganization of the nautical sector both in terms of production (with the design of models that are increasingly in line with changed market needs and innovative and distinctive solutions) and approach the market.

The Adriatic and Ionian Area has great potential both as regards the ship industry for passenger and cargo transport, and leisure boating, as well as their respective supply chains for production and service provision, including marinas and tourist ports.

The task now is to make the entire leisure boating and shipbuilding supply chain more competitive through system-based and clustering approaches, also at a macroregional level (production shipyards, refitting shipyards, sub-supplying of personnel and accessories, land services and port services) and by promoting interconnections between sea districts and blue economy research and innovation poles.

This is the position indicated also by the new LeaderSHIP 2020 strategy, which was presented in 2013 by the European Commission together with SEA Europe (i.e. the Ships and Maritime Equipment Association), which aims at enhancing the competitiveness of European maritime technologies.

The strategy highlights the need to give new momentum to shipbuilding and the production of maritime equipment, with special attention paid to innovation, ecology, the application of new technologies and diversification on new emerging markets. Specifically, the need is felt for the sustainable growth of the sector with a special focus on four main areas: employment and skills; improving market access and equal opportunities; access to financing; research, development and innovation.

In particular, the LeaderSHIP 2020 strategy suggests that industry develops a roadmap for a “Public Private Partnership - PPP” at EU level (also considering new European programmes like Horizon 2020, for example, or EIB financing opportunities) to focus maritime research on zero emission and energy efficient vessels and towards zero technical accident vessels as well as emerging market opportunities. The possibility of allocating structural funds 2014-2020 for the diversification of the maritime technology industry into new market sectors should

be explored by Member States and coastal regions, especially in the context of regional strategies for smart specialisation.

From this viewpoint, the Italian system of chambers of commerce is currently active on many fronts: developing measures for the quality, social and environmental certification of the supply chain; promoting research on topics, like the recovery and treatment of materials resulting from the transformation of naval, port and nautical processes, thereby favouring the application of greening technologies and solutions; encouraging energy efficiency for propulsion systems, auxiliary systems, shipyards and port infrastructures; promoting a “clustering” of the needs of nautical companies, with special emphasis on the need for skills and corresponding personnel retraining measures (for employees and mobility workers); supporting the growth and innovation of services for the nautical sector, with special reference to marinas and tourist ports.

This emerged from the summoning of the first States-General devoted to the sea economy in April 2013, which was promoted by the Italian system of chambers of commerce with the aim of implementing a series of policies, actions and tools to identify a common strategic policy in terms of sustainability and innovation, whereby said sustainability is to be intended not only in economic terms but above in terms of its social and environmental impacts.

The same nautical sector has now fully acknowledged the inevitable relation between innovation and ecological efficiency in ship production, wintering and port management, thereby contributing to the limitation of the environmental impact of said activities with all available equipment (waste reduction, reuse of materials, and increase of the energy produced by renewable sources, up to environmental certifications).

Promoting the sea economy requires to take into serious account the interaction between socio-economic and environmental factors. In terms of sustainability and competitiveness, improving the performance of productive processes, products and services brings about socio-economic advantages associated to cost reductions for enterprises, the opening of new markets, job creation, a potential reduction of dependence on raw materials and correct waste management.

The shipbuilding and maritime equipment sector has traditionally maintained an exceptional ability to design, produce and build a wide range of ships, including highly technological ones, and of maritime structures meeting the needs of ever stricter norms in the fields of ecology and safety. It is necessary to value again the know-how acquired over the years, which has played a decisive role for the creation and development of the nautical pole at a national level. The human capital gained over the years through learning by doing and learning by interacting processes, also in small areas, is a unique asset that is difficult to transfer as the acquired knowledge is, to a very large extent, tacit and merged in the productive processes of several small firms working within the circle of large local groups: this very factor and such know-how are exactly the elements to focus on immediately to trigger a final and mindful relaunch of the sector.

Acknowledgements

The concept and initial stage of this publication were possible thanks to the collaboration with Consorzio Navale Marchigiano.

Printed in January 2014



The project is co-funded by the European
Union, Instrument for Pre-Accession Assistance

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