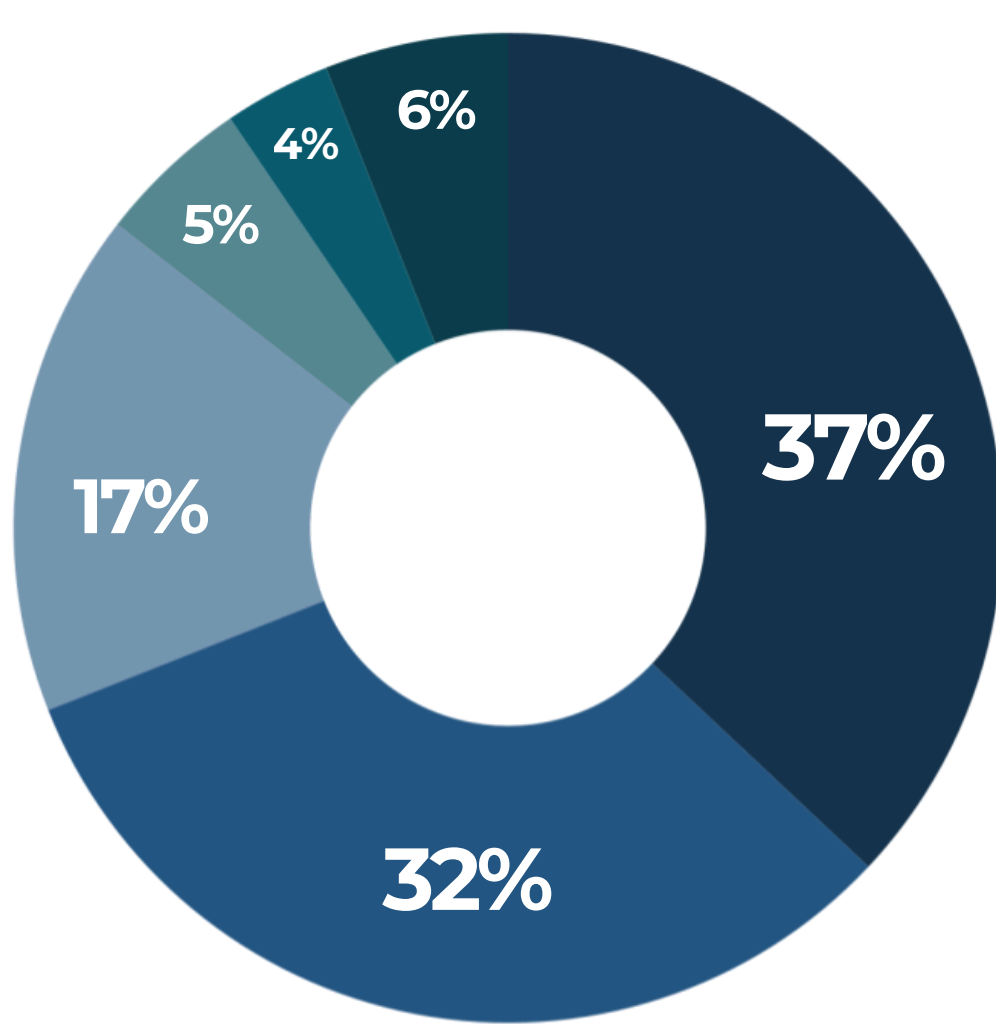


Key Challenges and Priorities for the Mediterranean Superyacht Industry

Based on insights collected from professionals across the superyacht value chain during the Monaco Yacht Show, this report outlines the key challenges the Med faces — limited capacity, talent shortages, bureaucracy, and fragmented coordination — and the opportunities to strengthen its global leadership.

Refit

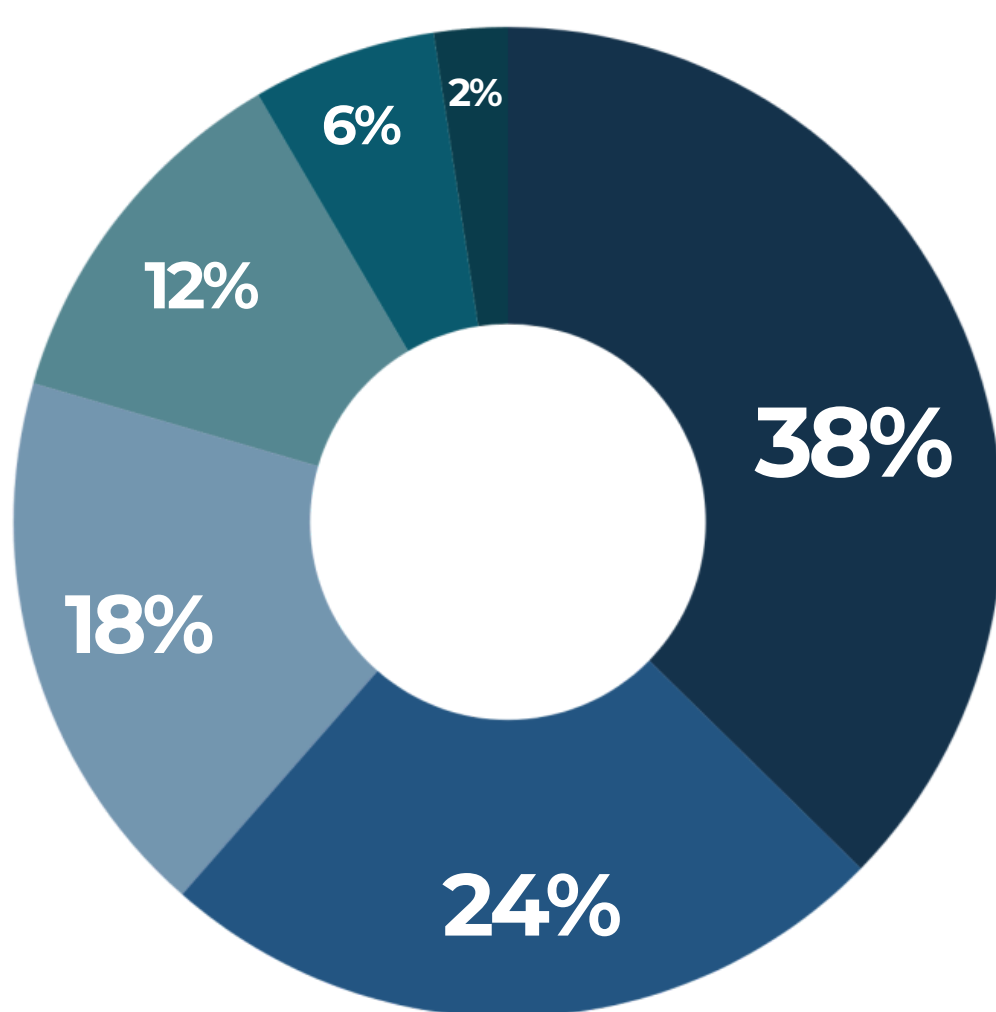


What are the main current challenges for refit shipyards in the Mediterranean?

- Limited capacity compared to growing demand
- Lack of skilled workforce
- Difficulty coordinating subcontractors and suppliers
- Uncompetitive delivery times
- Lack of international certifications
- Other / Not sure / No problem

As the Med remains the global hub for superyacht refit, the question is clear: What can the industry do to expand its capacity and attract the talent it needs before the bottleneck slows it down?

Marinas

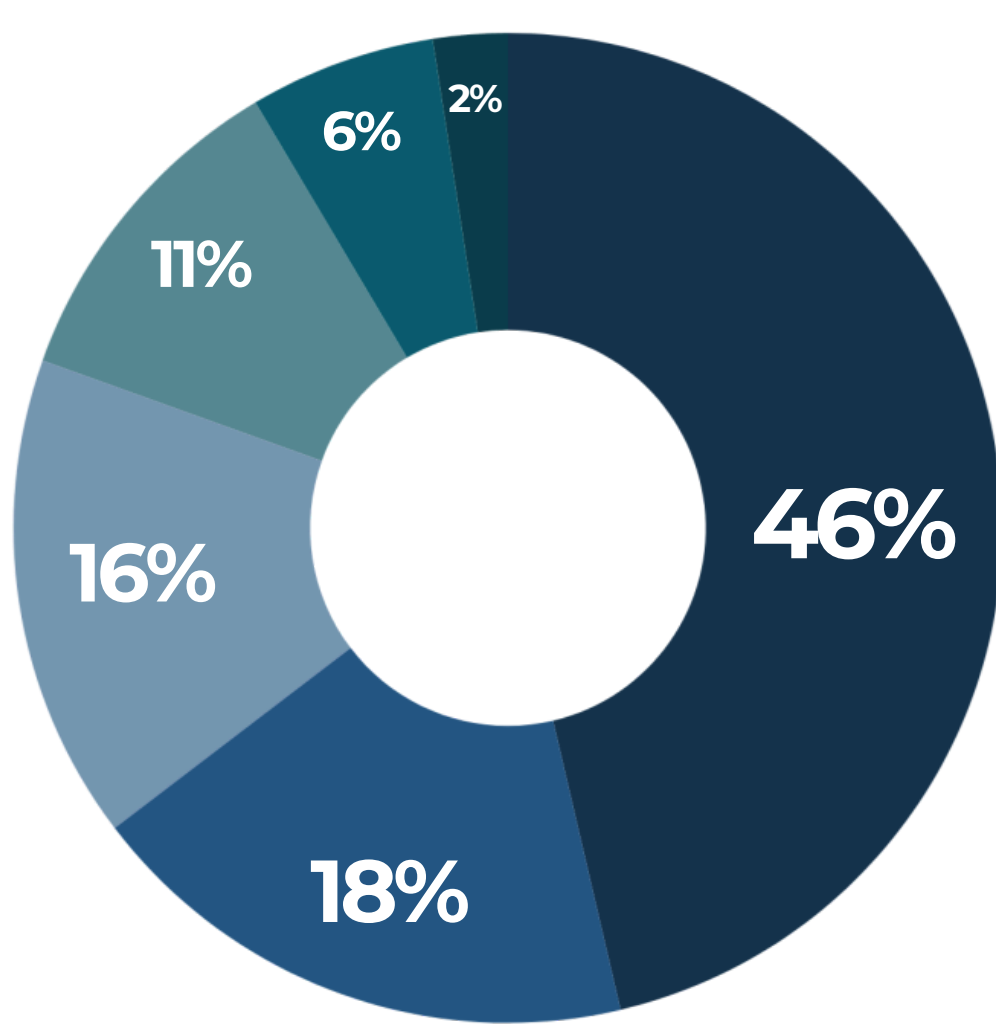


Which factors are considered most decisive for a Med marina to be chosen as a year-round base?

- High-quality technical infrastructure and services
- Competitive costs and berth availability
- Proximity to refit shipyards and suppliers
- Attractiveness of surroundings and complementary offer
- Security and privacy for crew and owners
- Good air connections and international logistics

With the Mediterranean at the heart of global yachting, we now ask: How can its marinas enhance their quality and value to become true year-round bases for superyachts?

Operations

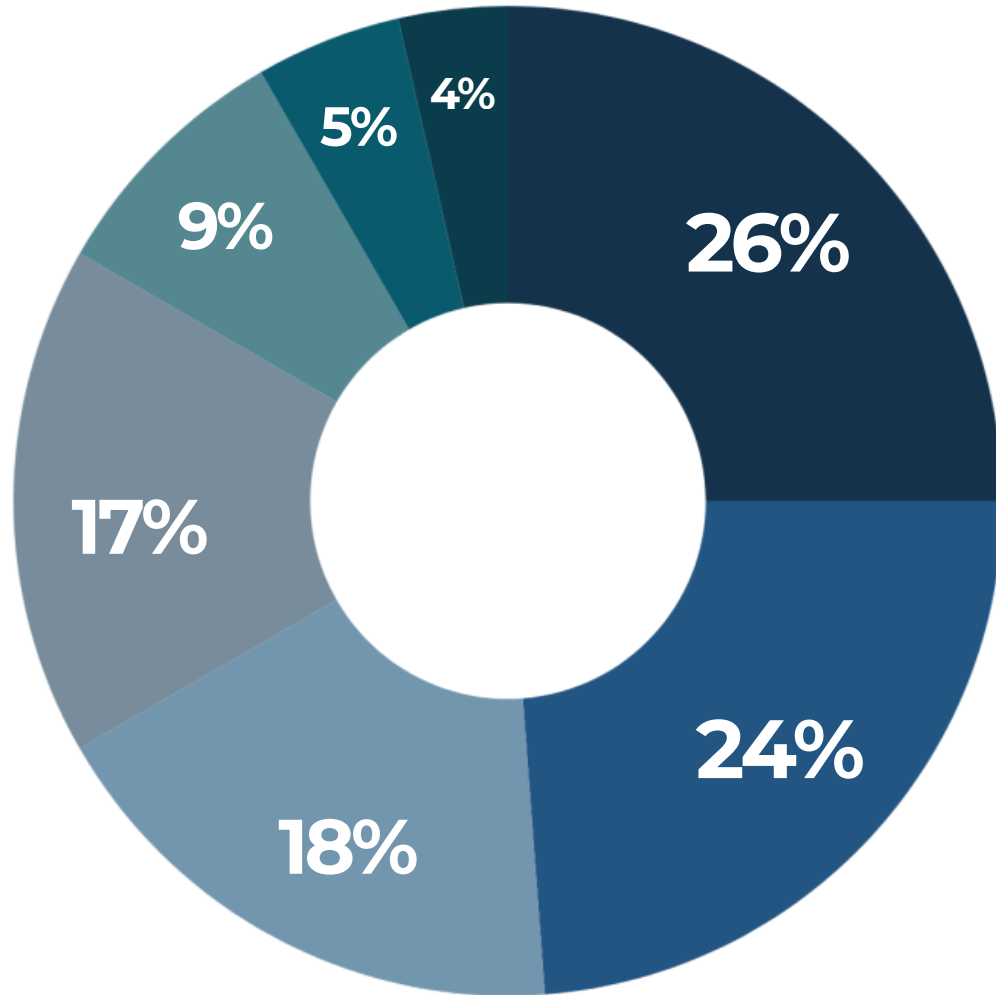


Which aspects most affect the efficiency of a superyacht's daily operations in the Mediterranean?

- Port and customs bureaucracy
- Slow response from local technical services
- Difficulty finding supplies or spare parts
- Lack of skilled local personnel
- Poor coordination among suppliers
- Language or cultural barriers

The key question now is: How can the Mediterranean streamline its operations and service responsiveness to meet the standards expected by a global superyacht fleet?

Cross-Industry Vision



Which factors are key for the Mediterranean to strengthen its global leadership in superyacht operations and maintenance?

- Greater investment in infrastructure and technology
- Tax incentives and harmonized regulation
- Coordination between ports, marinas, and shipyards
- Improvement of professional skills in the region
- Stronger global promotion as a strategic destination
- Attraction of talent and crew services
- Environmental sustainability and waste management

As the Mediterranean looks to strengthen its leadership, we ask: How can the region better align investment, regulation, and human capital to remain the world's superyacht hub?