INTERNATIONAL TRADE SOLUTIONS

ITS GLOBAL HUB · MARINE INTELLIGENCE

The Global Superyacht Economy

A concise briefing on the scale, structure and geography of the superyacht industry — and what it means for the UAE and the Gulf.

Edition: **October 2026** · Figures: 2022 base year
Data synthesised from the Deloitte / VU Amsterdam study for SYBAss & Superyacht Life

Prepared by International Trade Solutions FZ-LLC · RAKEZ, UAE · itsglobalhub.com · internationaltsolutions.com

SECTION 1

1. The Economy in Numbers

The global superyacht industry (vessels over 30 m LOA) is a high-value maritime ecosystem that bridges advanced industrial manufacturing with ultra-high-end services — and a meaningful driver of coastal and national economies.

€54 bn
Total global economic output (2022) — €22 bn direct + €32 bn indirect

2.4×
Economic multiplier — every €1 of direct turnover adds €1.40 across the wider economy

€9 m
Average economic contribution per yacht, per year

~5,600
Vessels in the global fleet (≈4,100 active in a year)

42%
Share of the fleet the Mediterranean hosts in a single season

29%
Share of fleet spend from the 60 m+ segment (≈10% of the fleet)

WHY IT MATTERS FOR THE UAE

The UAE already holds the region's deepest large-yacht berthing capacity (see the companion ITS report, *Marine Infrastructure & Yachting Capacity 2026*). As the superyacht fleet grows and itineraries diversify beyond the Mediterranean, the Gulf is positioned to capture a growing share of fleet-usage, refit and tourism spending — the largest parts of this economy.

SECTION 2

2. Structure of the Industry

Figure 1 · Total economic output — direct vs. indirect

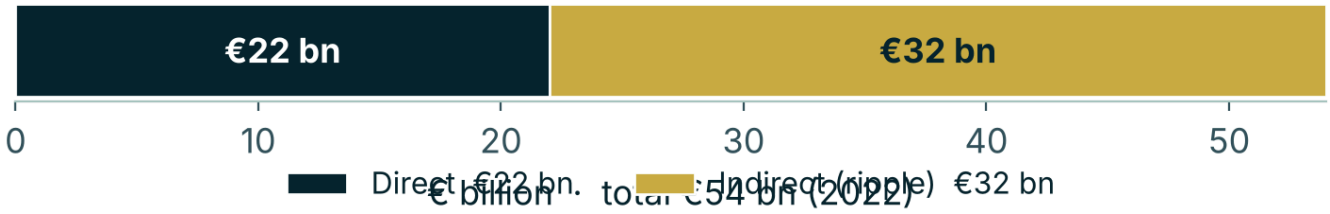


Figure 1 · Total output of €54 bn: €22 bn direct spending plus €32 bn of indirect "ripple" activity across global supply chains and tourism.

Figure 2 · Where the economic footprint comes from

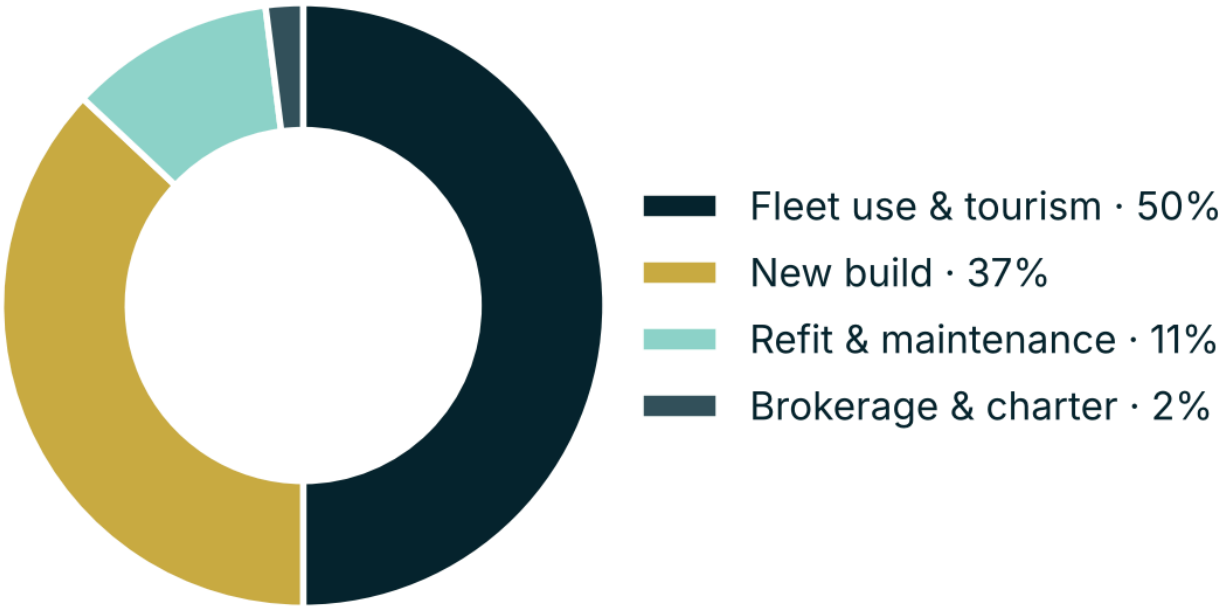


Figure 2 · The footprint is led by fleet use & tourism (50%), then new build (37%), refit & maintenance (11%) and brokerage & charter (2%).

UPSTREAM VS. DOWNSTREAM

Upstream (new build €7.2 bn + refit €2.3 bn) is the industrial core — capital-intensive, highly skilled, concentrated in Europe. **Downstream** (fleet operations, brokerage, charter, tourism — over €28 bn) is the recurring, destination-level economy that continues across a vessel's 30–40-year life, and is where destinations like the UAE compete.

SECTION 3

3. Geography of Value

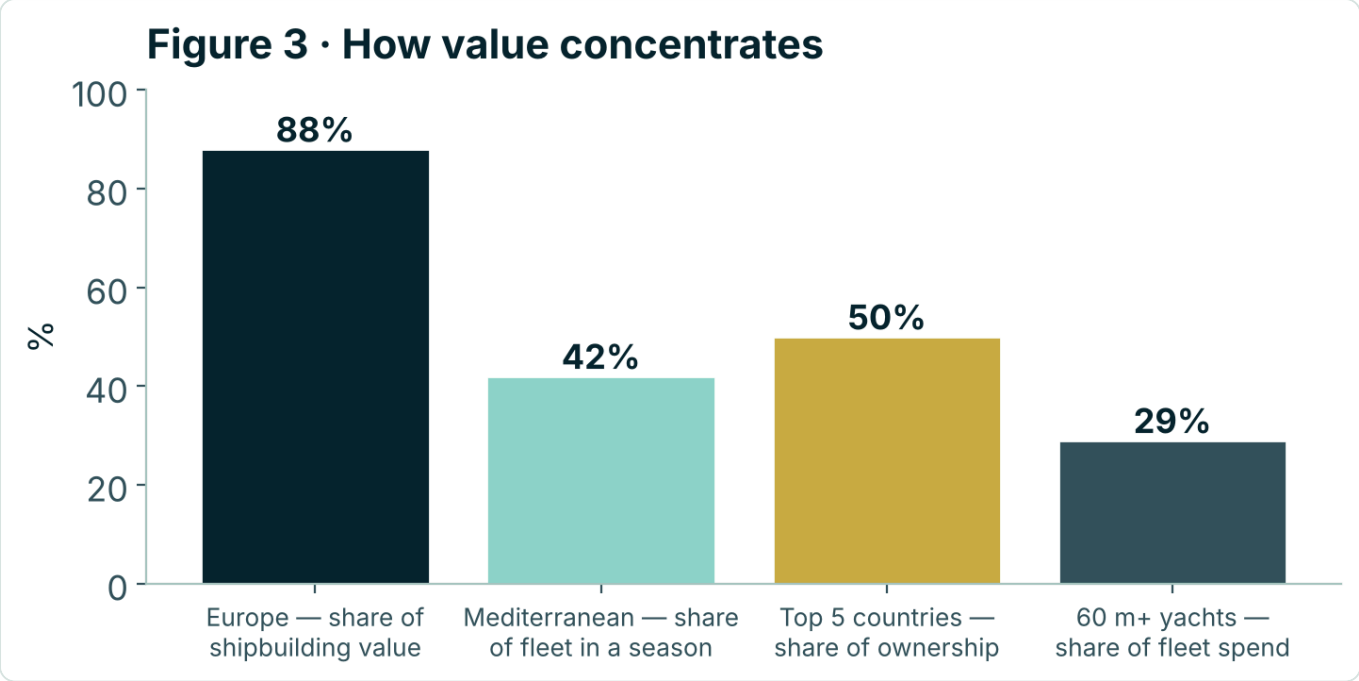


Figure 3 · Value is highly concentrated — in European shipbuilding, in the Mediterranean cruising season, in a handful of ownership countries, and in the largest vessels.

- **Shipbuilding:** Europe holds ~85% of market volume and ~90% of market value; Italy, the Netherlands and Germany lead, from series yachts to 100 m+ bespoke builds.
- **Refit:** Europe ~73% of global volume and ~68% of value, with the Mediterranean the primary hub; the US follows.
- **Operations & destinations:** direct fleet impact ~€12.4 bn — €8.3 bn operating expenses + €3.8 bn tourism; concentrated in the US, France, Italy and Spain today.
- **Concentration:** the 60 m+ segment is ~10% of the fleet but ~29% of total fleet expenditure — a small number of vessels carry outsized economic weight.

THE GULF OPPORTUNITY

Downstream value follows where yachts actually spend time — on berthing, fuel, crew, refit and shore-side tourism. With world-class marinas, year-round season and growing refit capability, the UAE and wider Gulf are the clearest emerging alternative to the Mediterranean's dominance in the downstream economy.

SECTION 4

4. Sources & Notes

This ITS briefing synthesises publicly reported figures from the following studies and industry bodies. It is an independent summary prepared by International Trade Solutions; it is not affiliated with, or endorsed by, the organisations cited.

- **Global Economic Impact of the Superyacht Industry** — commissioned by Superyacht Life Foundation & SYBAss (Superyacht Builders Association); conducted by Deloitte with VU Amsterdam (FIGARO input-output analysis). Base year 2022.
- Industry intelligence: SuperYacht Times, Boat International, MYBA.
- Companion ITS report: **Marine Infrastructure & Yachting Capacity 2026** (ITS Global Hub).

DATA-LIMITATIONS NOTE

Figures are 2022-base estimates synthesised from public sources; the superyacht industry is private and some values rely on modelling (input-output multipliers) rather than exhaustive reporting. Figures are indicative and intended for orientation, not transaction. Confirm specifics with primary sources before relying on them commercially.

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