

Sector Report

Marine Industries

France

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OVERVIEW

The French leisure boat market is the largest in Europe and the second largest in the world after the USA. In spite of difficulties at the retail end of the market for boat and equipment retailers, business is still relatively prosperous and indeed this has been the case for the last ten years.

Although there was a generally low growth rate in the national economy in 2006, turnover for the marine sector increased by 7% to 4.6 billion euros. French exporters continue to benefit from a buoyant world market for both sailboats and powerboats. The industry is performing particularly well at the top-end of the market, with the larger companies taking the lion's share. Exports account for 60% of production in the leisure boat industry.

The average size of the boats being built in France is becoming bigger each year, although they are still only in 10th position in the league table for luxury yacht building. However, France has captured a large share of the refit market along with Italy. Boat construction is mainly concentrated on the Atlantic coast, although there is a cluster of refitting activities around Marseilles.

Lack of space in French leisure ports is a major problem for the industry. This shortage definitely restricts industry growth in the domestic market. Despite having the longest coastlines in Europe (5,500km), the country's 470 leisure ports are close to saturation. The French Marine Trade Federation (Fédération des Industries Nautiques) estimates that over 50,000 berths are currently needed. There are 4 million leisure boat users in France, and 800,000 boats of all types. There is a problem with turnover of old or disused boats and the trade bodies and authorities have launched several operations to address this. There are over 250 projects underway for expanding or rebuilding leisure ports in France.

The environment is another big issue. There are increasingly strict environment regulations and a concerted effort to meet European standards both for manufacturing processes, and waste water treatment.

OPPORTUNITIES

The current prosperity and the very size of the French market means there are opportunities for business with the boat builders, the ship chandler chains, and with marine equipment distributors alike. There are the leading boat builders and refit yards for OE, and a number of relatively well organised retail chains and distributors for accessories.

The UK is France's second largest source of supply (after Italy) for marine goods but this still amounts only to 9% of market share. A number of UK companies already have well-established subsidiaries in France and many others are active in the market. This is nevertheless the largest market in Europe and should be a prime target for the UK marine industry. Innovation and design excellence are key selling points both with the OEM's and for the smaller companies in the sector. The UK has a good reputation in this field and has earned respect from recent high profile successes in yacht racing.

The problems of lack of mooring space in the ports, and serious environment challenges may throw up opportunities for UK companies with innovative solutions or products to offer.

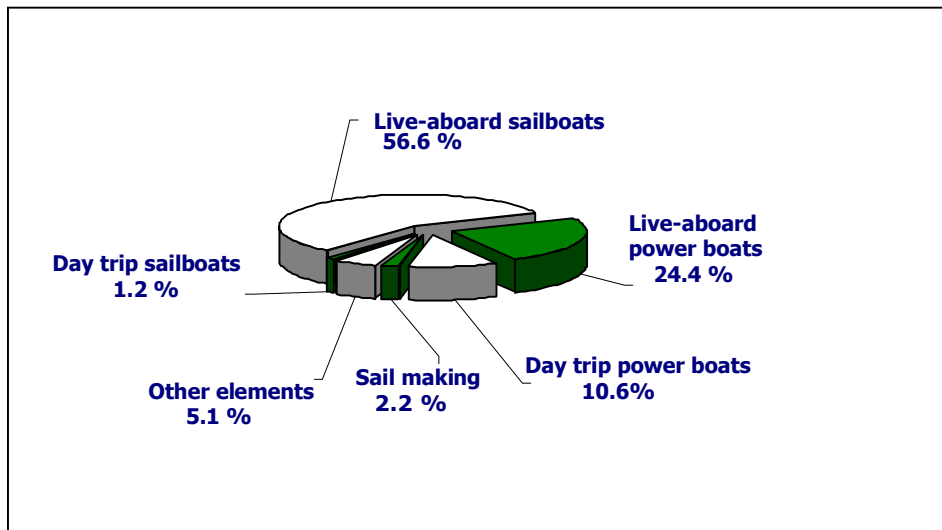
UKTI publishes international [business opportunities](#) gathered by our network of British Embassies, High Commissions and Consulates worldwide. These opportunities appear in the Opportunities portlet on the relevant sector and country pages on the UKTI website. By setting

up a profile you can be alerted by email when relevant new opportunities are published. New or updated **alert profiles** can be set in My Account on the website.

CHARACTERISTICS OF MARKET

The Marine sector in France is made up of 4,800 companies with a total of 44,000 employees and a global turnover of 4.6 billion Euros. 1.3 € billion of this turnover comes from boat manufacturing. Figures for 2006 confirm an upward trend with an increase of 7%. France is the world leader for exports of sailboats (37.1% market share) and inflatables (29% market share).

The breakdown of manufacturing in France is shown in the following table:



Bénéteau is the leading boat manufacturer in France, both for sailboats and for motor boats. They have around 20% of the global sailboat market and have pursued a strategy to increase their share of the powerboat market, investing heavily to extend capacity and introducing over 20 new models per year. The company is still 57% family-owned with a number of other big names in their brand portfolio such as Jeanneau, CNB, Lagoon, or Wauquiez. They also have subsidiary activities in mobile homes and micro cars.

The other major manufacturers include Dufour, Fontaine Pajot, Guy Couach, Catana, Hamel and the Poncin group.

An analysis of France's boat owners suggests that 42.3% are privately owned companies, retired individuals and senior managers. The past ten years has seen a steady increase in the number of licence registrations with 2004 recording a significant increase of +4.9% on the previous year. The estimation of sailing licences in France today is over 860,000.

KEY METHODS OF DOING BUSINESS

OEMs: their procurement is negotiated directly with suppliers from all over the world. The market is highly competitive, and business is particularly difficult for euro-zone suppliers if there is competition from countries using a weaker currency.

Wholesalers and distributors: often a sensible option to cover the sheer number of boatyards and retail outlets spread over a large geographical area. These distributors will naturally demand a hefty discount to provide their sales service.

Retail chains: there are a number of retail chains with their own central procurement offices selecting suppliers and negotiating prices on behalf of their members. They often produce catalogues and ask suppliers to participate in the costs.

The buying season is traditionally in the early summer so that new models can be ready for the December/January Boat Shows. Nevertheless, this is no longer a strict pattern as sales develop to markets all round the world.

Other background information on doing business in France can be found on UKTI's website. Simply go to the France country page where you will find information on:

- Economic background and geography
- Customs & regulations
- Selling & communications
- Contacts & setting up
- Visiting and social hints and tips

MORE DETAILED SECTOR REPORTS

Research is critical when considering new markets. UKTI provides [market research](#) services which can help UK companies doing business overseas including:

- **Overseas Market Introduction Service (OMIS).** Bespoke research into potential markets, and support during your visits overseas
- **Export Marketing Research Scheme.** In-depth and subsidised service administered by the British chambers of Commerce on behalf of UKTI

Contact your local [International Trade Advisor](#) if you are interested in accessing these services or for general advice in developing your export strategy.

The French Marine Trade Federation publishes an annual report showing key figures for the sector. This document is published every year around the time of the Paris Boat Show (December) and available from:

FÉDÉRATION DES INDUSTRIES NAUTIQUES (FIN)

Port de Javel Haut

75015 PARIS

Tel: 01 44 37 04 00

Fax: 01 45 77 21 88

www.industriesnautiques.fr

When considering doing business in France, it may be necessary to obtain legal, financial and taxation advice. For further details on how to find professional help, please contact:

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Commercial Officer
British Consulate
353, Boulevard du President Wilson
33073 BORDEAUX

Tel: +33 557 222110
Fax: +33 556 083312
Email: Alastair.roberts@fco.gov.uk
Website: www.amb-grandebretagne.fr

PUBLICATIONS

BATEAUX

www.emapmedia.com

Leisure boat magazine: events, reviews of boats and equipment.

CHASSE MAREE

www.chasse-maree.com

Classical and traditional boats and craft. Wooden boatbuilding, model ships, maritime history.

FLUVIAL

www.fluvialnet.com

Magazine on inland waterways, narrowboats, motor cruisers, barges.

L'ARGUS DU BATEAU

www.editions-la-riviere.fr

Magazine for the second-hand market (covering sail and power boats). Editorial material, prices and quotations for second hand boats.

LE MARIN

www.infomer.fr

For professional fishermen

LOISIRS NAUTIQUES

www.loisirsnautiques.com

Magazine focussing on boatyards, classical and latest designs, renovation, navigation techniques.

MER & BATEAUX

72 rue du Faubourg St Honoré

75008 PARIS

Tel: 01 40 07 80 06

Magazine concentrating largely on the luxury end of the leisure marine sector.

MOTEUR BOAT MAGAZINE

www.editions-la-riviere.fr

Magazine covering the motor boat sector.

MULTICOQUES MAG

www.multicoques-mag.com

Magazine for beach catamarans and cruising multihulls, charter, reviews and used boats section.

MULTIHULLS WORLD

www.multihulls-world.com

Magazine on multihulls (beach catamarans and cruising multihulls), charter, boats, classified advertisements and reviews. Published in English.

NEPTUNE YACHTING MOTEUR

www.editions-la-riviere.fr

Magazine for motor boats and associated activities.

PECHE-EN-MER

www.editions-la-riviere.fr

Largest circulation French fishing boat magazine.

PNEUMATIQUE MAGAZINE

www.pneumag.com

The only magazine specialising in inflatable boats in France.

VOILES MAGAZINE

www.editions-la-riviere.fr

Magazine covering predominantly sailing yachts

VOILES ET VOILIERS

www.voilesetvoiliers.com

Magazine for sailing yachts and associated activities.

VOTRE LIVRE DE BORD

www.blocmarine.com

Published as Mediterranean & Mer du Nord/Manche/Atlantique almanacs. This magazine covers maritime regulations, safety and security, navigation information, log book, tides, weather, ports, maps, berthing charges etc.

ANNONCES DU BATEAU

www.annoncesbateau.com / www.euroboats.com

New and second hand boats for sale. Private and display adverts for dealers.

RIVIERA REPORTER

www.riviera-reporter.com

Popular English language magazine published on the Riviera containing articles and information relating to activities and news in the Côte d'Azur. A good advertising medium for targeting the Expat Community.

YACHT CLUB DE FRANCE

www.ycf-club.fr

Directory listing the 34 French and 13 foreign yacht clubs; information on security regulations, international signalling codes, and sailing etiquette.

THE INTERNATIONAL MARINE DIRECTORY

http://marinedirectory.ybw.com/Marine_Directory/home.jsp

ANNUAIRE DU NAUTISME

www.nautisme.com

Comprehensive directory of all companies in the French Marine Sector

www.nauticexpo.com

“The Virtual Boat Show”. This website has numerous useful links to a wide range of marine categories including items of marine equipment, international press releases and trade shows and relevant companies and organisations. It is aimed equally at yachtsmen and also professionals in the boat trade.

www.nauti-links.com

“The best nautical directory on the Internet”. This website also has a wealth of information covering a variety of topics including the above mentioned categories along with repair and maintenance and other websites and Internet links.

EVENTS

FESTIVAL INTERNATIONAL DE LA PLAISANCE

CANNES

September

Organisers:

Reed Exhibitions Sepa

11 rue du Colonel Pierre Avia

BP 571

75726 Paris Cedex 15

Tel: 01 41 90 47 47

Fax: 01 41 90 47 00

www.salonnautiquecannes.com

MONACO YACHT SHOW

MONACO

September

Organisers:

IIR Méditerranée

57 rue Grimaldi

Le Panorama

98000 Monaco

Tel: 00 377 93 10 41 70

Fax: 00 377 93 10 41 71

www.monacoyachtshow.com

GRAND PAVOIS LA ROCHELLE

Port des Minimes, La Rochelle

September

Organisers:

Grand Pavois Organisation

Port des Minimes

17000 La Rochelle

France

Tel: 05 46 44 46 39

Fax: 05 46 45 32 24

www.grand-pavois.com

PARIS INTERNATIONAL BOAT SHOW

Paris Expo, Porte de Versailles
December

Organisers:

Reed Exhibitions Sepa
11 rue du Colonel Pierre Avia
BP 571
75726 Paris Cedex 15
Tel: 01 41 90 47 47
Fax: 01 41 90 47 00

www.salonnautiqueparis.com

UK Trade & Investment's [Tradeshaw Access Programme](#) (TAP) can help eligible UK businesses take part in overseas exhibitions. Attendance at TAP events offers significant benefits:

- possibilities for business opportunities both at the show and in the future
- a chance to assess new markets and develop useful contacts
- grants are available if you meet the criteria
- UKTI staff overseas will be available to assist delegates

Find out if you are eligible to apply to attend this event, and more about the support UKTI can offer, on the UKTI [Market Entry](#) web page.

Details of TAP events can be found in the **Events** portlet on the France page.

Other **Market Visit Support** may be available via your local International Trade Advisor.

CONTACT LISTS

FÉDÉRATION DES INDUSTRIES NAUTIQUES (FIN)

Port de Javel Haut
75015 PARIS
Tel: 01 44 37 04 00
Fax: 01 45 77 21 88

www.industriesnautiques.fr

Official trade body for the French Marine Industry. They have regional representatives around France. Also official partner with Reed Midem for the Cannes Boat Show.

FÉDÉRATION FRANÇAISE DES PORTS DE PLAISANCE

17 rue Henri Bocquillon
75015 PARIS
Tel: 01 43 35 26 26
Fax: 01 43 35 26 27

www.ffports-plaisance.com

Federation created in 1979 representing most of the maritime, inland waterway, and lake pleasure boat ports in France.

V.N.F. (VOIES NAVIGABLES DE FRANCE)

175 rue Ludovic Boutleux
BP 820
62408 BETHUNE Cedex
Tel: 03 21 63 24 38
Fax: 03 21 63 24 42
Website: www.vnf.fr
Email: webmestre@vnf.fr

A public body in charge of managing the network of French inland waterways, including canals, navigable rivers, dams, and locks (under the supervision of the Ministère des Transports de l'Équipement du Tourisme et de la Mer).

EUROPEAN COMMITTEE FOR PROFESSIONAL YACHTING (ECPY)

Quai Amiral Infernet
06300 NICE
Tel: 04 92 00 56 40
Fax: 04 92 00 56 41
Email: ecpy@wanadoo.fr

An organisation representing the interests of the yachting industry particularly in the areas of tax, crew issues, technical regulations.

GROUPEMENT DES EQUIPAGES PROFESSIONNELS DU YACHTING (GEPY)

Quai Amiral Infernet
06300 NICE
Tel: 04 92 00 43 78
Fax: 04 92 00 56 41
Email: gepy.association@wanadoo.fr
Infoadhesion@gepy.fr
Internet: www.geby.fr

GEPY represents the interests of Officers and Crew members working in the yachting industry. Membership is open to holders of French or foreign STCW certification, whatever their role on board.

RIVIERA YACHTING NETWORK (RYN)

IPFM 750 Boulevard Toussaint Merle
83500 LA SEYNE SUR MER
Tel: 04 94 24 21 93
Fax: 04 94 93 45 75
Email: contact@rynetwork.com
Website: www.technicmarine.com

A relatively new network established to bring together the main actors in the Superyacht industry in the Provence-Alpes Cote d'Azur region where the aim is to encourage the development of the growing cluster of marine activity in the region.

MINISTERE DES TRANSPORTS DE L'EQUIPEMENT DU TOURISME ET DE LA MER

(French Ministry for Transport, Equipment, Tourism and Maritime affairs)

3 place de Fontenoy

75700 Paris 07 SP

Website: www.mer.gouv.fr

The Authority in charge of French marine policy. The Ministry oversees the development of ports, maritime transport and the organisation and development of French waterways.

UKTI's **International Trade Advisers** can provide you with essential and impartial advice on all aspects of international trade. Every UK region also has dedicated sector specialists who can provide advice tailored to your industry. You can trace your nearest advisor by entering your postcode into the [Local Office Database](#) on the homepage of our website.

For new and inexperienced exporters, our [Passport to Export](#) process will take you through the mechanics of exporting. An International Trade Adviser will provide professional advice on a range of services, including financial subsidies, export documentation, contacts in overseas markets, overseas visits, translating marketing material, e-commerce, subsidised export training and market research.