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INTERNATIONAL BOAT INDUSTRY

The business of boating

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The greatest impact will undoubtedly be on the supply chain

Ed Slack | Editor | IBI

COULD THE POSTPONEMENT of Hong Kong, Korea and Singapore boat shows and a question mark hanging over the scheduling of Japan, Taiwan and Shanghai events as *IBI* went to press, be just the tip of the iceberg when it comes to the potential impact the novel coronavirus outbreak could have on our industry? So far it appears that Stockdorf, Germany-based marine and automotive equipment manufacturer Webasto is the only Western marine firm to be directly impacted by the virus – seven of its employees (five Germans and two Chinese nationals) – had tested positive for the virus resulting in its workforce being sent home for a number of weeks, though workers have now returned. Individual cases aside, the greatest impact will undoubtedly be on the supply chain following the shutdown of manufacturing in the virus's epicentre, Wuhan and a number of key industrial hubs in China. Though the leisure marine sector's exposure to China supply chains remains relatively small compared to tech, automotive and other major industries, a failure to contain the outbreak will inevitably hit our industry's ranks of manufacturers and assemblers reliant on Chinese made components. For now the scale of that potential impact is hard to fathom – one would hope short term disruption modest, mitigated by current inventory surpluses – though in recent years many suppliers have been working hard to keep stock levels to a minimum, a strategy that may prove costly in the coming weeks. The truth is our industry is insulated somewhat from the happenings in China, given that the margins we work to allow suppliers and OEMs a reasonable level of flexibility in sourcing product elsewhere. In reality, the auto and RV sectors have little choice but to take components from China given their wafer-thin margins. If coronavirus means OEMs and suppliers soaking up a premium on specific European hardware for the short term, then so be it. If a shortage of supply ensues and demand remains stable, component prices will inevitably rise, stress testing supply contracts and possibly triggering some force majeure clauses. For now, those in the industry *IBI* has spoken to appear sanguine, noting that we've been here before with SARS. Let's hope they're right, and that suppliers in China, many of which have extended their annual New Year shutdowns into a third week, begin to get back on stream before the effect of their closures becomes critical.

“ For now the industry appears sanguine, noting that we've been here before with SARS. Let's hope they're right ”

Ed Slack



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Bavaria acquires Greenline Neo

GERMANY | Bavaria Yachtbau GmbH has announced that it will add outboard motorboats to its current line-up of sailboats, inboard motorboats and catamarans with the addition of the Greenline Neo series acquired from Slovenia's SVP Yachts. The sale will be completed in March.

With this decision, the south German shipyard has entered the fast-growing market for day cruisers powered with outboards. The announcement follows the world premieres of

Bavaria's new C42 monohull sailboat and SR41 motor-cruiser models at boot Düsseldorf – and just 16 months after the restart of the yard after it slipped into administration in April 2018.

Bavaria has contractually agreed to acquire all rights to the Neo concept, including construction rights, the moulds and production tools from SVP Yachts. The arrangement helps Bavaria meet the high expectations of the industry and its customers to present

new models only one year after the relaunch of the business.

In departing from its focus on family and charter boats, Bavaria takes over an already existing and successful series: the Greenline Neo series was one of the most recognised new boat series in 2018, being a finalist of the Best of Boats Award presented during the Berlin Boat Show.

The first model in the new line will be produced at Bavaria's shipyard in Gieselstadt from September onwards.

Brunswick details full-year performance on analyst call

USA | Brunswick Corp has reported fourth-quarter and annual financial results for 2019 that show a slight decline in sales but "strong earnings performance with solid margin growth," according to the company's report.

For the whole of 2019, Brunswick unadjusted sales were US\$4.11bn, down from the US\$4.12bn reported in 2018. US\$49.4m of sales related to Sport Yacht and Yachts were excluded from adjusted reporting.

For the quarter, Brunswick reported consolidated net sales of US\$917.6m, down from US\$961.1m in 2018. Last year's sales figure includes US\$5.4m in yacht sales for boat models no longer offered by the company. Net sales on an adjusted basis to account for non-reoccurring items, show a slight lift in year-over-year sales, due primarily to the engine business.

"Our 2019 performance demonstrated the strength and resilience of our marine-focused portfolio. We expanded gross and operating margins and

delivered a tenth consecutive year of adjusted EPS growth, despite a weaker than anticipated marine market in the first-half of the year," said Brunswick CEO David Foulkes.

Highlights from the report include a decrease in the quarter for the Marine Engine segment, "as continued strong demand for higher horsepower outboard engine categories and solid growth at Power Products was offset by forecasted reductions in outboard engines 150 horsepower and below, as well as lower sales of sterndrive engines."

Brunswick's boat segment sales were down as well in the period, which the company attributed to "continued

planned reductions in wholesale unit shipments to right-size the pipeline, particularly in aluminium and saltwater fish categories."

For the year overall, boat segment sales were down about 6% for the year, but at \$1.33bn, Brunswick is still the largest boatbuilder in the world, just ahead of Beneteau which reported boat sales for its 2019 fiscal year of €1.14bn (or approximately \$1.26bn).

"Were very pleased with 2019 not only because of our financial results but also because of what a transformational year it's been," said Foulkes. "I'm tremendously excited about our prospects for 2020. We are built to win."

Brunswick Corporation Net Sales by Segment (US\$ million)

Segment	Q4 '19	Q4 '18	% change	FY '19	FY '18	% change
Engines	335.2	351.7	-4.7%	1,479.3	1,551.6	-4.7%
Parts & Accessories	330.6	317.8	4.0%	1,594.2	1,442.0	10.6%
Boats	316.8	377.3	-16.0%	1,334.5	1,471.3	-9.3%
Marine eliminations	-65.0	-85.7	-24.2%	-298.9	-344.0	-13.1%
Total	917.6	961.1	-4.5%	4,109.1	4,120.9	-0.3%

* adjusted to exclude discontinued Sea Ray operations; Source: Brunswick Corporation

Marquis Yachts reportedly facing temporary shutdown



The M42 day boat from Marquis

USA | According to reports in local media, up to 344 employees at Pulaski, Wisconsin-based Marquis Yachts will lose their jobs in March if the company cannot secure new ownership.

Marquis is said to have provided the State of Wisconsin with formal notification of an impending workforce reduction

at its facility beginning March 1.

The company says it is looking to shore-up long-term financing to permit continued operations. As the effort to negotiate a sale of the company continues, Marquis is reported to have advised the state that it is working with limited financial resources to continue operations through March 1.

The company, which discontinued its entire product line in July 2018 in order to focus on building new models, introduced an all-new M42 day boat and a LY650 yacht created in partnership with Lexus luxury automobiles at the 2019 Fort Lauderdale Boat Show in October.

Dometic's 2019 marine sales outpace other segments

SWEDEN | Dometic has reported annual net sales growth of 1% to SEK18.50bn (€1.74bn) for the financial year ended December 31, 2019. Marine sales represented 27% of Dometic's total sales, up from 26% in 2018.

Profit (after tax) for the year was SEK1.33bn (€125m), down 16% from 2018, reflecting lower volumes and the full impact of 25% tariffs, offset by a year of efficiency improvements, capacity reduction and pricing improvements.

The marine sector was the strongest performer for

Dometic in 2019, with sales up 6% (0% in constant currency) to SEK4.96bn (€460m).

Dometic president and CEO Juan Vargues noted that marine sales started strongly in the first half of the year, but slowed in Q3 and were weaker still in Q4.

Despite the decline in boat sales in the fourth quarter, Vargues says the outlook for 2020 is still optimistic, explaining that the OEM inventory correction has already taken place in America and that Dometic's clients are positive about the current year.

Dometic Marine Sales by Region (SEK million)						
Region	Q4 '19	Q4 '18	% change	FY '19	Fy '18	% change
America	896	937	-4.4%	3,994	3,757	6.3%
EMEA	186	199	-6.5%	845	805	5.0%
APAC	29	26	11.5%	123	112	9.8%
Total Marine	1,111	1,162	-4.4%	4,962	4,674	6.2%
Total Company	3,919	4,070	-3.7%	18,503	18,274	1.3%

Source: Dometic Interim Report - Q4 2019

APPOINTMENTS

In association with



BENETEAU

Bruno Thivoyon has replaced Christophe Caudrelier as **Beneteau's new CFO**.

Thivoyon has held a number of progressively senior finance positions over his career, including senior executive roles at Valeo Visibility Business Group – most recently as VP of finance.



Bruno Thivoyon

XANTREX

Xantrex vice president and general manager **Richard Gaudet** has been promoted to president of MCE's marine power division with responsibility for the Xantrex, Newmar and ASEA brands. Gaudet is known for having led Xantrex through its acquisition by MCE from Schneider Electric in 2018.



Richard Gaudet

TORQEEDO

Torqeedo has named **Jochen Engelmann** as its VP of sales for Europe, the Middle East and Africa. He joins the German electric propulsion specialist from Volvo Penta, where he was head of sales, central Europe for the industrial engine division.



Jochen Engelmann

SUNSEEKER

Francesco Frediani joins **Sunseeker**

International as director of superyachts & dealer network. Frediani's most recent role was as commercial director at Overmarine Group, where he was VP of sales and marketing of Mangusta Yachts. Before that, he spent seven years at Riva Yachts where he had a pivotal role in achieving highly successful sales results.

LIPPERT COMPONENTS

US-based parts and equipment manufacturer **Lippert Components Inc (LCI)** has named **Mark Boessler** as its senior vice president of aftermarket. Boessler, who joined LCI in January 2016, assumes responsibility for all aspects of the company's marine and RV aftermarket operations.

INMARSAT

Australian sailor and adventurer **Nick Moloney** is **Inmarsat's** new Yachting Ambassador. The elite yachtsman and windsurfer will draw on his experience to support the company as it continues to increase awareness into the benefits of reliable, global satellite communications for all types of mariners.

MARIVENT

Mallorca-based dealership **Marivent Yachts** has appointed **André Nelles** as its new managing director. Nelles has a strong background in the yachting industry with various roles such as running dealerships, working for Sealine as international sales manager developing markets, and working in direct retail sales.

MarineMax raises earnings guidance based on record Q1 results

MarineMax - 2019 Revenue Mix (US\$ million)		
New Boat Sales	\$867	70%
Used Boat Sales	\$184	15%
Service, Repairs & Storage	\$85	7%
Parts & Accessories	\$45	4%
Finance & Insurance Fees	\$32	3%
Brokerage Fees	\$24	2%
Total	\$1,237	100%

USA | MarineMax revenues increased 26% to \$304.2m for its first quarter ended December 31, 2019, up from \$241.9m in the comparable period last year. With 59 locations across the US, the national boat retailer said same-store sales were also up strongly – more than 24% during the quarter – supported “entirely by unit sales.”

Speaking on a webcast with analysts, CFO Mike McLamb said the company’s results were “meaningfully better” than the industry’s over the same period. Sales improvements were seen across most brands and categories, and a pick-up in big-boat sales seen in Q4 2019 continued.

MarineMax indicated this was the sixth consecutive year the company produced a profitable December quarter, with net income nearly doubling to \$9.1m in Q1 2020 – a record result for the period. Based on current business conditions and retail trends, the company said it was raising its fiscal year 2020 guidance for earnings per diluted share to between \$1.82 and \$1.92, up 15% from its previous guidance. If achieved, this would represent a gain of at least 12% over fiscal 2019 earnings per diluted share of \$1.63.

MarineMax CEO and president Brett McGill said: “We benefitted from

a resurgence in consumer confidence and the relatively stable economic environment.” McGill’s comments reiterated that the company’s growth outperformed the industry, while overcoming margin pressure and making significant progress to better align inventory levels after demand slowed last year and increasing market share.

“As a result of these factors, combined with our customer centric approach and optimal product mix, we drove a meaningful increase in sales and profitability,” he added.

The company also reported that store optimisation efforts undertaken in September 2019 – with the closing of eight stores – had resulted in both sales growth and reduced costs during the quarter. The implementation of new technologies in the quarter boosted sales growth as well – including proprietary and exclusive on-line selling events which McGill said had very effective.

Highfield on expansion drive

CHINA | Highfield, which lays claim to being the world’s largest manufacturer of aluminium-hull rigid inflatable boats (RIBs), is looking at aggressively expanding its presence in the global RIB market. The manufacturer, which has its sights set on being number one in the market within five years, gave *IBI* an insight into its strategy for 2020

“ This year will see attention turn to Highfield’s larger 5m-plus portfolio ”

at the Düsseldorf boat show.

While 2019 saw it focus on updating its model range below 5m, this year will see attention turn to its larger 5m-plus portfolio, which currently comprises five models. It will also look to rationalise its extensive range that presently runs to 34 vessels across eight boat types, consolidating that to four in a bid to present a simpler, more cohesive offering to both customers and dealers.

Founded just nine years ago, Highfield builds around 5,000 boats a year, but foresees the potential for more than tripling its sales in the 5m-plus segment.

Highfield operates from a state-of-the-art production facility in Weihai, China, under European management. The facility covers more than 100,000ft², employs 200 staff and has adopted the latest technologies. The manufacturer has dealers and distributors in over 40 countries.

Burgess CEO discusses outlook for 2020

MONACO | After a banner year, Jonathan Beckett, CEO of Burgess Yachts, is cautiously optimistic about the coming year, despite political uncertainties looming around China and the US presidential election. “It was a record year for us, both in terms of new construction, second-hand yacht sales and charter,” he said in a live interview on The Ticker, which is broadcast every day on website Yahoo Finance.

Beckett emphasised that America is by far the largest region for Burgess, representing

up to 35% of the superyacht market. The company also entered the Australian market with a new office in Sydney in 2019 and believes Australasia and China will be exciting markets for the company as well. Beckett said China was ‘building steadily’ while the Russians seem to have disappeared from the market for the time being.

With nearly 40 years’ experience in the business, Beckett is well-respected in the industry, and believes the last recession had lessons

which consumers – even the wealthiest – have heeded. He believes clients are less likely to be over-leveraged, but at the same time are keen to have cash on hand in a downturn to be able to take advantage of business opportunities.

Beckett said his company was lucky to have a range of activities across the superyacht sector, putting it in a better position to weather downturns. He also noted bookings for 2020 charters – which entails some 100 yachts for Burgess – have already been strong.

Johnson Outdoors posts solid Q1 results

USA | Outdoor recreation equipment manufacturer Johnson Outdoors has released its 2020 first quarter results, reporting higher sales and double-digit growth in net income.

For the quarter ended December 27, 2019, the Wisconsin, US-based manufacturer of Minn Kota electric motors, Humminbird electronics and Old Town canoes and kayaks posted net sales of US\$128.1m, representing a year-over-year increase of 23% over the \$104.4m reported for the first quarter of 2019. Operating profit of \$6.8m exceeded the \$6.0m earned in the previous first quarter, while net income grew to \$6.4m for the period, compared to \$3.5m for Q1 2019.

“We’re pleased with such a

positive start to the year,” said Johnson Outdoors chair and CEO, Helen Johnson-Leipold. “Ongoing investments in richer consumer insights, targeted innovation, and accelerated digital sophistication are essential to continue positive momentum and position our market-leading brands for success in 2020.”

The positive financial results were attributed to the delayed introduction of new fishing product from the prior year quarter, along with increases in diving equipment sales and strong sales of new products that accounted for 11% growth in watercraft sales. Fishing equipment sales for the quarter were reported as \$99.2m, a gain of 26% over the \$78.7m reported for the previous first quarter. Watercraft recreation sales of

\$4.8m marked a YOY gain of 11% over the \$4.3m reported for Q1 2019.

“First quarter results are not predictive of the full year, and we continue to expect moderate sales growth for the full fiscal year,” said chief financial officer, said David W Johnson. “As a result of recent developments in trade negotiations between the United States and China, as well as our own mitigation efforts, we now expect the impact of tariffs on Chinese goods and components to be approximately \$4m to \$5m on fiscal 2020 profits. Importantly, our strong balance sheet provides us the financial capacity and flexibility to strategically invest in growing our business while continuing to enhance long-term value for shareholders.”

Schaefer Yachts sees advances in US business



The Schaefer 510 Sport

BRAZIL | Schaefer Yachts says it is committed to continuing its efforts to develop the Schaefer line of motoryachts in the US market with a focus on styling and quality. Since 2016, Schaefer has participated in more than 10 boat shows in Florida – among them, Miami, Ft Lauderdale, Palm Beach and Ft Myers. The company has had its own sales office in Ft Lauderdale since 2017.

For the 2020 Miami Boat Show in March, Schaefer Yachts is planning to display five models – the Schaefer 303, 365, 400, 580 and the 510 Pininfarina.

All Schaefer yachts are built in accordance with the required NMMA quality and safety standards. Since the company’s entrance into the US market, it has already sold more than 15 of its 30ft and 58ft models.

The shipyard has developed two models specifically for the North American market, with an exclusive version of the Pininfarina design of the Schaefer 510 and Schaefer 510 Sport.

Schaefer Yachts has been setting the pace in yacht-building for over 27 years in the South American market, with more than 3,500 vessels delivered between 26ft and 83ft.

In 2019, the company had a 13% growth in sales and is projecting a growth, for 2020, of more than 25% due to the soon-to-be-launched Schaefer 660 and the Schaefer 770, which, according to the sales team, are already attracting a lot of attention.

The very significant devaluation of the Brazilian Real versus the US dollar over the last five years is resulting in great opportunities for Brazilian companies exporting to the US.

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Williams Jet Tenders ends 2019 on high

UK | Williams Jet Tenders ended 2019 on a high after seeing a 23% rise in Dieseljet sales versus 2018 and is projecting a further increase in 2020.

Speaking to *IBI* at the Düsseldorf boat show, company founders John and Mathew Hornsby said the builder had launched more than 100 Dieseljets last year and that the order book for that segment of its portfolio ran well through July 2020.

John Hornsby added that the Dieseljet range, for boats from 82ft (25m), had become something of a “tick box” item for many of the premium UK and Italian motoryacht builders in particular. The Dieseljet range includes four models, the 445, 505, 565 and 625, and completes an extensive range of Evo, Sport, Turbo and Mini Jet ranges for boats from 38ft to over 131ft (11m-40m).

“We enjoyed a strong year during 2019 and are delighted with our Dieseljet sales which have steadily risen year on year. We are projecting a further increase in Dieseljet sales for 2020 and are firmly focused on our product development plan, continuing to grow our dealer support network and continuing to keep apace of the jet tender market,” sales director Mathew Hornsby explained.

Though the firm says it detected a slight flattening of growth recently in the large production motoryacht sector, demand for larger semi- and custom-build projects with longer build times continues, giving the firm some confidence in decent forward-looking sales.

Turnover was up a healthy 8% for 2019, according to John Hornsby, off the production of 960-plus boats, around 100 of

which were Dieseljets.

Williams’ most recently filed accounts reveal a turnover of £22.7m for the year ended December 31, 2018, up 20% on the £18.9m in sales generated FY2017. Operating profits for the same period saw a 29.4% jump to £2.2m.

Taking pride of place on the manufacturer’s stand at the Düsseldorf show was the new EvoJet 70, Williams’ most luxurious model to-date, which takes the firm significantly into the 40m-50m superyacht tender category for the first time. The boat was launched at Monaco last year and is built on a semi-production line basis. It’s the first boat in what will become a range aimed at the top end of the market. John Hornsby confirmed that styling details on the EvoJet will be worked back through the rest of its wider range as it’s updated.

Coronavirus hits 7 Webasto employees



Webasto’s Stockdorf HQ

GERMANY | Marine and automotive equipment firm Webasto has confirmed that, as of January 31, seven of its employees – five Germans and two Chinese nationals – have tested positive for the novel coronavirus. The company announced that an employee from China who was visiting the company’s corporate head office in Stockdorf, Germany

in late January fell ill following his return to China, and subsequently tested positively for the virus. Since then five employees in Stockdorf and one more in China have also tested positively. As *IBI* went to press, 122 Webasto employees tested negatively for the virus following additional tests, while further test results on additional staff were pending.

“We are in exchange with all our affected employees,” said Holger Engelmann, chairman of the management board of the Webasto Group. “The two [latest] colleagues who have now tested positive are under inpatient treatment in clinics in the Traunstein or respectively Shanghai districts. We wish them and their families all the best and a soon recovery.”

Webasto closed its headquarters in Stockdorf on January 29 on its own initiative in order to protect its employees and prevent further spread of the virus. The facility had been scheduled to re-open on February 4, but following consultations with health care authorities the company announced the facility will remain closed until February 11 while being professionally cleaned and disinfected.

“We have... decided that the majority of our more than 1,000 employees will work at home for another nine days. That makes a total of two weeks since our closure. This is in line with the longest incubation period of 14 days assumed by experts for the virus,” said Engelmann.



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TALKING POINT

Do the currently applicable EN/ISO standards for “small craft” reflect the today’s outboard engine?



Uli Heinemann



IMCI, the leading Notified Body for CE certification under the Recreational Craft Directive, is managed by Uli Heinemann, CEO since 1999. With over two decades of experience, Uli has comprehensive knowledge of the marine industry.

On most sailing or motor boats, outboard engines, whether powered by petrol, diesel or electricity, are indispensable. Both the Recreational Craft Directive and the ISO TC 188 standards, applied in the background, certainly take this perfectly into account - within the typical parameters.

However, this is not happening to the current extent. Meanwhile we see outboards on the market up to about 470 kW (≈ 630 hp) with a respectable weight of about 500 kg, per piece!



For the stability and buoyancy assessment and categorisation of powerboats over 6m hull length (EN/ISO 12217-1) all individual weights of a craft must be added together. This of course includes the main engine(s). The engine weights, in turn, can be taken from a table in the standard, in which they are listed according to engine performance. This table indicates in its bottom-line the weight of an engine with a power of “164.2kW and more” with 312kg. If the boat manufacturer sticks to this table, he is walking into a bad trap, because his engine may be considerably heavier. Therefore, it is better not to stick to the standard for the above-mentioned top models, but to use the actual weights.

EN/ISO 12215-5 is used to determine the design pressures and stresses as well as scantlings of monohulls. This standard has among others an “informative appendix” for calculating the loads on the transom or engine mount of a boat. In the ISO world, however, “informative” means that the part so designated is not necessarily binding. This makes the expert wonder. He is even more surprised if he has to find out that a formula for determining the factor cOB given there contains some typing errors! So extreme caution is required here! It seems to me that the experience of the manufacturer, after agreement with the certifier, will lead to a better solution until the standard is corrected.

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■ IN BRIEF

SANLORENZO EXPANDS



ITALY | Sanlorenzo has opened new production facilities at its headquarters in Ameglia. Designed by Lissoni Casal Ribeiro, the new plant covers an area of 22,000m² and is divided into three units – two buildings for the production of yachts, for a total of 10,000m², and an office complex on four levels.

IBInews.com February 4

BAHAMAS TO HOST YACHT CHARTER SHOW

BAHAMAS | The Bahamas Ministry of Tourism has announced the first-ever Bahamas Charter Show, to be held from February 27 to March 1. The three-day event will be produced by Ft Lauderdale, Florida-based Worldwide Boat, a yacht charter and charter management company.

IBInews.com February 4

MARINE BUSINESS ADVISORS LAUNCH NEW SERVICE

GLOBAL | A new group called Global Marine Business Advisors (GMBA) has formed to offer advice, quality data and business management support to the world’s boating industry. GMBA currently comprises senior marine industry professionals from 12 countries and is led by former Finnboat CEO Jouko Huju, who also served two spells as president of ICOMIA.

IBInews.com February 3

CAFRAMO EUROPE OPENS IN THE NETHERLANDS

NETHERLANDS | Canada-based Caframo has launched Caframo Europe BV to better service its European marine and RV clients. Based in the Netherlands, Caframo Europe BV is now the importer of Caframo products and customers should order directly from them as a domestic business partner.

IBInews.com January 31

SAFE HARBOR BUYS SIESTA KEY MARINA

USA | Safe Harbor Marinas has purchased Siesta Key Marina, the only full-service facility in Sarasota, Florida. The purchase is the Dallas-based company’s 12th Florida property and is approaching 100 properties overall, which Safe Harbor claims makes it the largest marina owner-operator in the US.

IBInews.com January 29

MS YACHT SERVICES RESTRUCTURES

UK | MS Yacht Services, a global specialist for protective coating applications, has undergone a corporate restructure and rebrand under the name of MS Global Solutions. The move is part of the company’s growth strategy to diversify into construction, automotive, public transport, aviation and medical industries.

IBInews.com February 5

SUSTAINABILITY

IN ASSOCIATION
WITHVOLVO
PENTARenewable fuels and making
the most of the weather

Volvo Penta's test facility at Krossholmen in Gothenburg

The European Commission used this year's Boot Düsseldorf to brief the global boating industry on its strategy to make the 27-nation EU climate-neutral by 2050. Such an ambitious goal will need the boat industry to play its part and Volvo Penta is taking a lead in its drive to be a world leader in sustainable power solutions. Electromobility is one way forward and an area Volvo Penta is exploring, another is the use of renewable fuel sources.

In 2016, Volvo Penta announced the approval of HVO (hydro-treated vegetable oil) fuel – neat or blended with conventional diesel – in all engines globally. HVO is a renewable, paraffinic fuel, also known as 'synthetic diesel', which can be produced from a variety of vegetable and animal sources. It follows the preliminary CEN standard, prEN15940, for use in diesel engines. As well as reducing CO₂ emissions, it also results in a substantial reduction of soot and is sulfur free, when compared to most conventional diesel fuels.

HVO fuel cannot be produced in unlimited quantities and only a limited amount is produced in a sustainable way today, which presents an industry wide challenge. As one way to test and learn, Volvo Penta is now working to establish a long-term agreement for use of HVO fuel with its demo boats at Krossholmen, its Gothenburg-based test facility.

In a typical year, the test centre can rack up over 4,000 hours of testing time, while its demo boats will cover around 40,000 nautical miles at sea. The intention is for its demo boats to be run on HVO when taking customers out and performing certain tests – accounting for at least half of the total driving being done on HVO.

"This is a step forward for us at Volvo Penta, as we see the use of HVO fuel as a viable alternative to traditional fuels. It is very much a move to environmentally enhance our operations. We encourage more investigations like this across the boating industry in the hopes that together we can push for wider spread availability and access to renewable fuel sources like HVO," Volvo Penta told *IBI*.

Sun Concept's solar cat undergoes trials

SUN CONCEPT'S NEW CAT 12.0 Cruise has been undergoing sea trials ready for her official unveiling later this year. It marks a significant step for the Portuguese builder that was founded in 2015 by a group of investors keen to put their ecological stamp on boating. Their first launch, the SunSailer 7.0, was directed at tour operators and following its success – 20 have so far been sold – it inspired Sun Concept to develop a larger cruiser that can be used in open water. The CAT 12.0 has been designed to be as adaptable as possible – it comes in a 'Lounge' version designed for day cruising and boat trips, and this, the new 'Cruise' version which features two guest double bedrooms and a 27m² saloon making it ideal for the charter market. Both of these first 12.0 models have been sold – the Lounge version launched in June last year and is now with a tour operator, while this second Cruise is destined for a private owner.

The builder currently has capacity to build six CAT 12.0s and 10 SunSailer 7.0s a year but is looking to upgrade its facility and production capacity. A key driver for the company has been to have as efficient a serial production line as possible to enable it to bring its ecological products to market at competitive prices. For the Cat 12.0 Cruise, prices range from €420,000 for the base version, up to more than €550,000 for a version with full extras and carbonfibre. According to Sun Concept the new Cruise Cat 12.0 currently being trialled will have unlimited autonomy at low speeds (approx. 3-4kt), but at cruising speed (7kt) will be able to run for around 14 hours.



The solar-powered CAT 12.0



UK-based yacht designer Philippe Briand has unveiled his new sailing superyacht concept, the SY200. Entirely self-sufficient in terms of energy requirements, the 60m (200ft) vessel will be able to harness the equivalent power of 2,000kW in its sails in optimum wind conditions. The SY200 would capture some of this kinetic energy through the movement of underwater turbines while sailing.



ICOMIA
INTERNATIONAL COUNCIL OF
MARINE INDUSTRY ASSOCIATIONS

WATCHDOG

Why old ‘grow boating’ ideas are past their sell by date

How ICOMIA members are tackling the latest industry challenges



The industry needs to adapt fast to sell its boating message to a new generation

Changing consumer behaviour means that just selling products is not enough in order to drive the industry forward. The growth of the experience industry, continual rise of shared ownership, boat clubs and peer-to-peer platforms are putting pressure on the marine industry to adapt.

ICOMIA member British Marine conducted an analysis last year of the social, demographic and cultural trends that will most likely influence future consumers and participants buying behaviour. According to this analysis, the new generation is less interested in what they earn or own. ‘Experience’, rather than ‘ownership’ is the new status symbol. Generation Y and Z are looking for experiences that enrich lives, add convenience and create memories. They are attracted to activities that allow them to interact and spend quality time with friends, and are often spontaneous, easy to organise and accessible. This combined with the fact that the Millennials are earning less, explains why they are less likely buy an asset such as boat and use it regularly.

Boat clubs, static charter, peer-to-peer charter and shared ownership provide a hassle-free boating experience, similar to other sharing platforms such as Airbnb. Customers can book a boat to rent anywhere

“ **The new generation is less interested in what they earn or own. ‘Experience’, rather than ‘ownership’, is the new status symbol** ”

across the globe, and services also include insurance, ratings and reviews and the option to hire a captain. The industry has seen the average age of charter clients dropping every year.

All of these trends and changing consumer behaviour create new business opportunities. Consumers are looking for customised experience, hence personalisation based on behavioural and profile data is the key, as well as producing immersive experience content marketing. Knowing what the audience wants and delivering the right content for them, using live video streams, is a way to capture the audience attention, given that attention span has fallen significantly within the younger generation. And of course, the need for real stories and using advocates to promote boating.

The NMMA’s Discover Boating campaign last year reached new boaters, through digital video across hundreds of sites, search advertising and media relations, creating more than 2,500 stories. Discover Boating partnered with over 50 influencers across different social media channels, sharing first hand boating experiences and encouraging their audience to get on the water. The campaign also included producing a new step-by-step guide to help people through the process of buying their first boat. Available in digital and printed formats, the guide will be distributed at marinas, dealerships and boat shows. Discover Boating sites in the US and Canada saw nearly 4.5 million visits last year.

In 2020, Discover Boating campaign will be focused on helping the next generation of boaters, born on the cusp of Generation X and Millennials (primarily 30-45 years of age), get into boating. They are younger than the average age of a boat owner in the US but are established enough to afford their first boat. Still partnering with influencers, this year’s campaign will leverage music – with advertising taking a fun play on a well-known boating song with a modern twist. New to 2020, NMMA launched the Discover Boating Experience at six NMMA boat shows this winter, where show visitors can enjoy informative seminars and meet with experts to help identify which boat is right for

them, as well as guided tours to help newcomers get more from their boat show experience.

Another ICOMIA member, Finnboat, launched last year a new initiative to promote boating to children at school. They have partnered with a famous children’s book author and now the books are being distributed to primary schools across Finland, as well as sailing clubs.



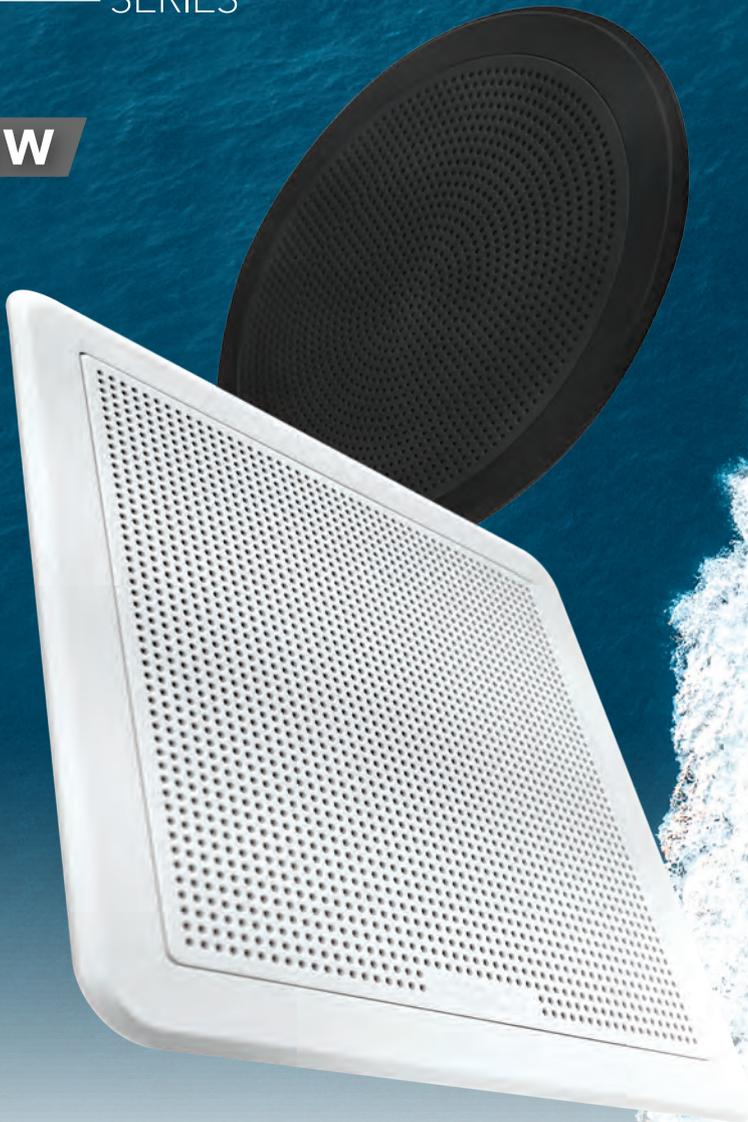
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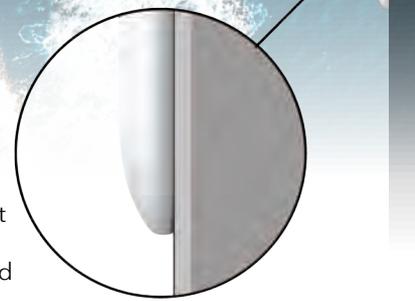


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Dutch superyacht builders vote for an upgrade

For many years they thrived in the bosom of the HISWA watersports lobby. But in 2019, Dutch superyacht builders joined Netherlands Maritime Technology, a branding powerhouse that casts its export promotion nets far

WORDS: ROBERT WIELAARD



Along with trade fairs, NMT specialises in innovation projects, market intelligence and public promotion



NMT managing director Roel de Graaf

In 2019, two dozen Dutch superyacht builders and their suppliers parted ways with the HISWA watersports association. After 50 years, HISWA was no longer deemed fit for purpose. With one eye on their booming business, Dutch builders and their suppliers wanted more. More exposure, more branding heft, and more access to maritime technology knowhow and partners.

By opting for Netherlands Maritime Technology, a Rotterdam-based trade lobby of 400-plus maritime companies, Dutch superyacht builders and suppliers gave themselves a generous upgrade. NMT has created a dedicated superyacht unit – ‘Dutch Yachting Society’ – to spread Dutch yacht-building quality worldwide.

What made HISWA unfit for purpose in many eyes was its merger with a leisure industry lobby for companies selling outdoor cookers, river cruises, bungalow weekends, tents, daysailer rentals etc.

In 2019, the HISWA superyacht unit Holland Yachting Group had 24-plus members, builders and suppliers. Tellingly, the prospect of an NMT superyacht division proved so powerful the lobby group received some 60 candidate-membership applications from the Dutch superyacht sector.

IBI spoke with NMT managing director Roel de Graaf:

Dutch superyacht builders think the world of NMT!

Yes, and frankly, we never expected so many applicants. We were totally overwhelmed. We had 14 companies join right off the bat and expect more in the year ahead.

How do you explain this rush of candidates?

The Netherlands has a significant and growing superyacht industry, and NMT has significant management experience. As a maritime technology trade association, we are the first port of call for – and primary representative of – the Dutch maritime technology sector. We serve the interests of Dutch shipyards, suppliers and service providers. We provide project support, do market research, go to bat for a worldwide level playing field for our members and stage export promotion initiatives.

With the superyacht industry on board, we now represent even more of the best that Dutch maritime manufacturing has to offer.

The superyacht sector will be tapping into new markets which is important as the size and value ➔

of Dutch superyachts continue to increase. Twenty-five superyachts were delivered in 2018 with a value of €1.5bn. The collective order book in 2018 contained 50 superyachts with a value of almost €4.1bn.

What can NMT do for the Dutch superyacht sector?

We already have had, for some years now, superyacht manufacturers in our ranks. But this influx of new superyacht industry members has made it possible for us to create a dedicated superyacht unit, called 'Dutch Yachting Society'. It has its own board and representation on NMT's general board.

Our ambition is to maintain and strengthen the leading position of the Dutch maritime manufacturing industry worldwide. Leading Dutch yacht builders are already in a top position. That's why they deserve a separate unit in our association. The activities are primarily focused on trade promotion and changing market conditions in which refits are increasingly important.

As part of NMT, the superyacht sector will continue to attend major yacht shows and have its own NMT trade promotion and branding programs. It will have access to technical business issues through the NMT Super Yacht Building Committee, and to a wealth of information about maritime laws, regulations, innovations and market data information.

What sort of activities does NMT carry out every year?

We are the world's largest member network within the maritime manufacturing industry, including superyacht construction and its supply chain. Every year, we organise an average of 10 Holland Pavilions around the world, four trade missions, more than 80 network meetings and knowledge seminars across various fields.

We are an ISO-certified sector organisation with an annual turnover of some €4.5m. We have some 30 highly educated specialists with excellent track records in lobbying, international trade fairs, innovation projects, market intelligence, public relations, maritime training and intake.

What are key maritime sector issues that trouble NMT?

High on our agenda is a worldwide level playing field. With our strategic partners – by that I mean the European Commission, SEA Europe, the Dutch Maritime Network and the Dutch government – we discuss such topics such as the Jones Act in the USA, Spanish Tax Lease, and China's local content

requirements. Other hot issues are emission regulations, the harmonisation of class rules and securing a skilled workforce across the Dutch maritime industry.

How did NMT accommodate the influx of new members?

On October 1, 2019, we created an introductory membership enabling companies active in super yacht building to join NMT free of charge. And no obligation to formally sign up. This deal expired January 31. In mid-January, we staged a meeting for all candidate members to brief them on our export promotion and branding activities, our house rules, membership costs and so on.

Are NMT membership costs higher than they were in HISWA?

No, about the same. They range from €4,500 to €12,500 a year depending on the type of member – say, a supplier, builder or partner – and the number of employees they have.

IBI attended, as an observer, that meeting for would-be Dutch Yachting Society members. Some 100 people showed up. "We are a well-oiled machine when it comes to export promotion," NMT Chairman Bas Ort assured them.

Marcel van der Spek, co-founder of decking specialist Esthec – and the last HISWA Holland Yachting Group chairman – said: "NMT has a great track record in creating new business opportunities worldwide. That's why I am convinced it's the right partner for our industry. We looked at alternatives to NMT but found none."

Leaving a watersports lobby for the high-octane industrial heft and reach of NMT, is a cultural transformation for some Dutch yacht builders.

At least half a dozen ex-HISWA members spent their salad days making simple craft. Many decades later, they still work in the often bucolic sites where their ancestors began.

Hakvoort squeezes yachts from its halls in a picture-perfect village outside Amsterdam. To the south, a Disney-esque island is home to a Feadship facility. Balk Shipyard and Royal Huisman rise from meadows flecked with black-and-white cows. And Amels – the Netherlands' largest yard – abuts miles of blond North Sea beaches, dunes and rural cycling routes. NMT membership will unlikely change that. **IBI**

“The activities are primarily focused on trade promotion and changing market conditions in which refits are increasingly important”



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Overview: Exports lead the way

Ten years after the 2008 financial crisis, a smile has returned to the faces of leisure boat professionals in France. But the good results are mainly from exports as the home market remains lacklustre

WORDS: OLIVIER VOITURIEZ

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Positive trend



The 2019 Cannes Yachting Festival

The French nautical industry's turnover for 2019 was up 5% at €5.3bn, consolidating the previous year's results that had already shown a 5% growth. For the record, pre-crisis turnover was €4.9bn. Thanks to the general dynamism, the sector is showing a high rate of recruitment. "These are the best results since the 2008 crisis. They are being driven by the export market which accounts for 77% of sales from our French shipyards," said Yves Lyon-Caen, president of the Fédération des Industries Nautiques (FIN). "Activity was underpinned by the strong European market, with the American market performing well too," he continued. These two zones account for 80% of the world's nautical industry. "We have seen a strong continuation of last year's trends," he adds. "But we are cautious about the future. Growth could be curtailed in 2020 by slower demand in North America, and the United Kingdom on account of Brexit."

Export sales reached a record high of 77%, driving the French market. "We're walking sideways, crab-like. Our exports are growing a little each year, in a dynamic international context. But our own market isn't that active," FIN's top man explains.

The charter market, accounting for between 20% and 25% of French output, also boosted sales. The 10% growth was partly due to hurricanes like Irma that devastated parts of the West Indies and destroyed over 500 boats in 2017. "The urgent demand from many professionals seeking to replace the boats they had lost put pressure on the market."

PRE-CRISIS LEVELS

The 2019 figures published by FIN for the year ended 31 August 2018 show turnover for the entire sector (covering shipyards, equipment, rental, sales and services) at €5.08bn.

"The share for Industry in these overall figures (building and imports of boats and equipment) is €1,943.9m (+10%). Services (dealers, sales, related activities and rentals) represent €2,496.7m (+2.2%). Leisure port operations account for €531m (+1.5%), with the Southern Mediterranean region (from Marseille to Nice, including the French Riviera and Saint-Tropez) bring in the largest part (22.4% of national turnover).

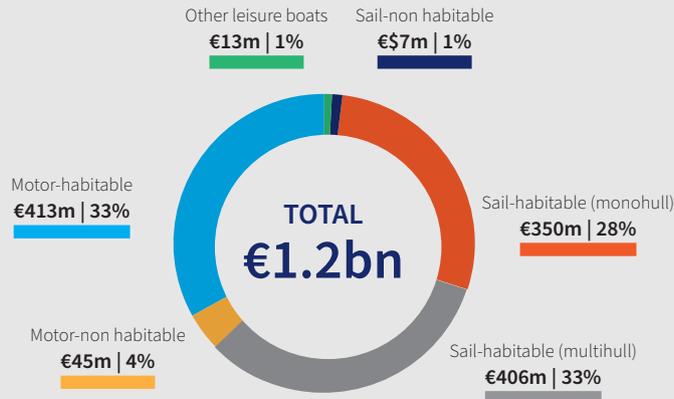
For the first time in 12 years, production of leisure boats by French shipyards seems to have reached its pre-crisis level. In 2018 turnover



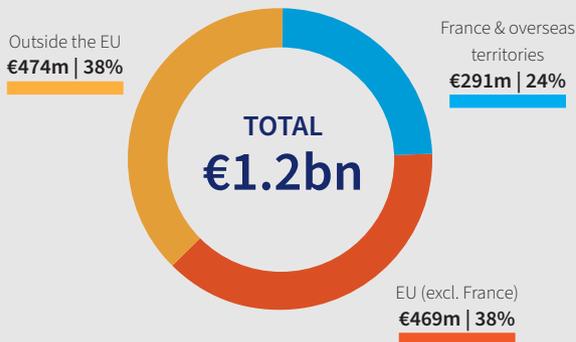
FRANCE | STATS & FACTS

COMPILED BY ARLENE SLOAN

FRENCH BOAT PRODUCTION BY CATEGORY VALUE

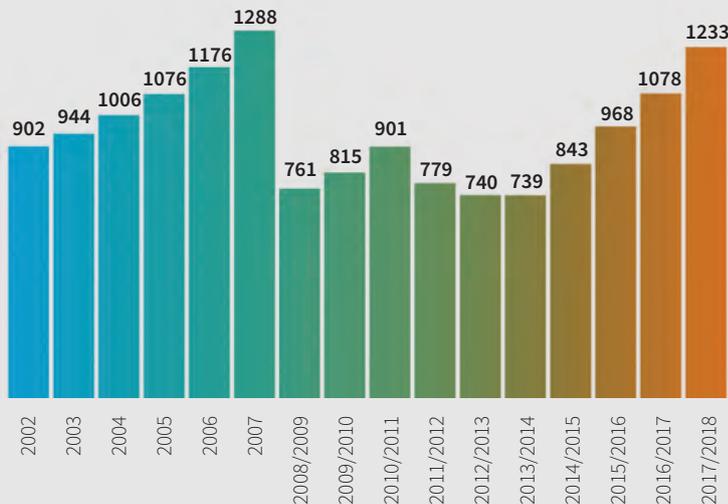


FRENCH BOAT SALES DESTINATIONS BY VALUE



Evolution of Boat Production Turnover (€ mil)

Source: FIN; Note: prior to 2008/09, statistics were reported on an annual basis



FRENCH BOATING INDUSTRY

€5.08bn of total turnover (+6%)

5,530 companies

42,930 employees

€1.2bn boat production turnover (+14%)

48,530 boats produced (-5.6%)

4,554 sailboats (+32%)

11,069 motorboats (-1%)

76% industry turnover from exports



FACILITIES

400+ marinas

252,000 berths

11,000 spaces in 40 dry ports

1,000+ sailing schools

200+ motorboat schools



PARTICIPATION

11 million occasional practitioners

4 million regular boaters

12,200 new boat registrations:

→ 81% motorboats; 48% <6m

59,400 pre-owned boat sales:

→ 80% of motorboats; 60% <6m

97,300 pleasure boat licenses issued

4,000 avg number of charter weeks per month (coastal & rivers)

Source: Fédération des Industries Nautiques figures

France is the world's top producer of luxury catamarans. This is Foutaine-Pajot's Alegria 67 sailing cat



was €1.23bn (against €1.08bn the previous year, ie up 14.4%) continuing the positive trend since 2015. Production “continues to be driven by catamarans and outboards, two sectors that are particularly dynamic in Europe,” says Yves Lyon-Caen.

FRENCH SAILBOATS LEAD THE WAY

Already up 16.8% in 2016/17, sales of sailing boats, which spearhead French output, continued to grow in 2017/18 with a turnover of €762.5m (+14.7%), almost 79% representing the export market. The liveaboard monohull segment, where France leads the world, grew 7.5% with a turnover of €349.5m. The liveaboard multihull sector over the same period and again where France is world leader, continues to show strong growth with a turnover of €406m (+24.2%).

In 2017/18, motorboat production continued to grow with a turnover of €457.7m (+12.6%), driven overall, says FIN, by the dynamic market for units of over 6m. In this motorboat segment, French exports (73% of turnover) are substantial, with major export markets representing €179.8m (+14.2%). Sales to the European market are up 27.7% at €154.16m.

Sales to the French market continue their upward trend (+7.8%) to €290.5m. The motorboat segment (€123.7m) is slightly down (-3.3%), whereas the sailing boat segment (€160.9m) posts strong growth (+20.9%).

As regards the number of boats built in France during 2017/18, sailing boats are up 30.4% on the previous year, with turnover up 15.9%, primarily due to an increase in sales of both multihulls (+35%)

and liveabords (+32%) between 12m-15m. The other sectors have also all grown with the exception of monohull liveabords measuring under 9m, and both liveaboard and non-liveaboard motorboats under 6m. The number of boats for export is up (+5.3%), as well as turnover from exports (+16.6%).

There had been an increase in 2016/17 of almost 9% in the number of new boats registered, but this came down again 3.06% in 2017/18. Motorboats (9,242) continue to represent a large majority, just over three quarters, of the 12,200 newly registered boats, 89% of which are under 8m. The number of new registrations in sailing boats (1,846) is also down by 5.53%, although the number of those measuring over 12m is up.

THE USED BOAT MARKET

The second-hand market in 2017/18 was down 3.8%. There were 59,405 units sold against 61,783 in 2016/17. The market though has been relatively stable over the past years, even during the period of crisis (2008-2014). 80% of changes in ownership concern motorboats and almost 61% boats under 6m. The latter sector though is down (-5.55%) like the rest of the business.

The number of leisure licences in 2017 is up 9.22% (97,318) after remaining stable in 2016 (+0.04%), reflecting the appeal that nautical pastimes pose for the French.

In this new environment, firms are finding it increasingly difficult to recruit; the shortage of skilled labour is a new challenge for the sector. Numbers of staff in nautical industries and services increased

by 3.6% in 2018 to 42,930 (direct employment). There was a similar increase in 2019 and should continue in 2020, according to a survey carried out by FIN. 70% of the respondent firms envisaged short-term recruitment for three main reasons: increased production, workforce retirement (especially in the construction sector) and the start of new activities. “The firms have been recruiting about 1,000 people a year for the last three years, and this trend is continuing,” says Yves Lyon-Caen. There is a great demand for marine electricians, chandlers, marine carpenters, especially those who specialise in composite materials and polyester finishers. “Our companies are facing workforce shortages, and are finding new ways of attracting qualified candidates,” FIN points out. **IBI**

“Production continues to be driven by catamarans and outboards, two sectors that are particularly dynamic in Europe”

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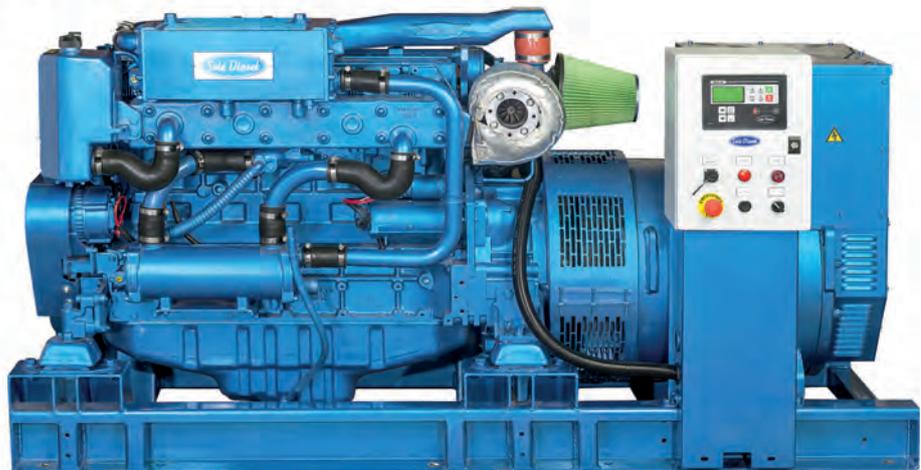
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Boatbuilders: Beneteau Group and cats rule

Thanks to exports, the principal French shipyards continue their growth. While Groupe Beneteau remains the giant in the sector, Fountaine-Pajot and Catana are gaining ground in the catamaran market

WORDS: OLIVIER VOITURIEZ

French shipyards are pretty close to pre-crisis levels of production enjoying a trend of sustained growth since 2015, with a combined output valued at some €1.23bn for 2018. For the record, production peaked in 2007 at €1.28bn. With an overall 48,500 units produced this past season, construction is “still driven by catamarans and outboards, two sectors that are particularly dynamic in Europe,” says Yves Lyon-Caen, president of French marine industry association FIN. Around 77% of this production is for the export market.

There is a fundamental imbalance in the French nautical universe, straddled by both the mighty and omnipresent Groupe Beneteau, a world giant and ‘national champion’, and a plethora of small and medium-sized yards led by Fountaine-Pajot and Catana, two companies that have enjoyed good and regular growth thanks to the promising multihull market.

Groupe Beneteau increased total turnover to €1.336bn for the year ended August 31, 2019, although net profits for the group fell to €49.5m against €61.3m for the previous year. The group’s annual report states: “Boat operations (representing €1.143bn turnover) have increased 3.2% at constant exchange rates for the fifth consecutive year of growth. Profits derive from the dynamic segments of multihull sailing boats, where the group is the world leader, and of the outboard motor where the group is European leader, as well as good results from monohull sailing boats (world leader).”

The outboard motor market is also dynamic, “compensating for falling sales of large motoryachts (over 60ft) and American



brands penalised by new customs tariffs in Canada and in the European Union for boats built in the States.”

The group’s big news from the Düsseldorf Boat Show in January was the unveiling of ‘Project E’, a new line of displacement yachts to address the growing popularity of the expedition segment allowing boat owners to explore longer-range destinations.

At 62ft and 73ft (18m and 22m), the two motoryachts will be the largest models in the Beneteau line-up, providing its Swift Trawler customers

an option for moving up to a larger vessel specifically designed for long-distance passagemaking. The largest yacht in the semi-displacement Trawler series is soft. ➔

Beneteau unveiled a new line of displacement yachts at Düsseldorf. At 62ft and 73ft, the Project E vessels are designed for long-distance passagemaking and take the builder into a new market niche

“Construction is still driven by catamarans and outboards, two sectors that are particularly dynamic in Europe”

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2019 was an important transition year for Groupe Beneteau. In February 2019 there was a new form of governance with a single board of directors presided by Jérôme de Metz. Hervé Gastinel continued as CEO of the group until 17 June when he was replaced by Jérôme de Metz, who is now both president of the Board of Directors and CEO.

“The ‘Transform to Perform 2017-2020’ plan launched by Hervé Gastinel will continue until 29 April 2020, when the group’s half-yearly results are published along with new strategic directions for the group determined by Jérôme de Metz and his team,” said Mirna Cieniewicz, head of Corporate and Financial Communications at the group, when *IBI* met her last December at the Paris Boat show.

The plan set up by Hervé Gastinel “laid the ground for good directions for the future, although putting them into practice proved rather more difficult.” This led to disappointment then loss of confidence from the shareholders, leading to the hasty departure of Hervé Gastinel.

Jérôme de Metz, with a financial background that makes him “allergic to loss”, on the board of directors of numerous companies, is ready to make radical changes to the general organisation of the group. Instead of managing several small and medium-sized businesses, perceived as a grouping of 10 brands that were not always well coordinated, Beneteau’s new ‘big boss’ intends to centralise management and eliminate geographic control.

“It’s quite a revolutionary way of thinking and working for the group,” says Mirna Cieniewicz.

First step in this new way forwards is Jérôme de Metz’s appointment of a small management team made up of three men in key posts.

Chief operating officer for products and brands, Gian Guido Girotti (previously general director for the Beneteau brand), also heads up marketing, sales, and independent networks of the group that today has 12 brands, 200 models and 1,000 points of sale throughout the world. His new product plan for the coming five years will be published in April. Using market analysis, this plan will determine the exact positioning of each brand, and product response to needs in accordance with ‘House of Brands’ principles.

Jean-Paul Chapeleau, former CEO of Jeanneau



The Catana Group sold 142 new boats in 2018-19

and Prestige Yachts, is appointed chief operating officer for industrial studies, purchases, and design of the group’s brands. One of his roles will be to perfect and confirm the specialisation of industrial sites by production: catamarans, luxury units, outboards, etc. He will also be in charge of strengthening strategic partnerships and joint developments, as well as promoting innovation.

Christophe Caudrelier, former financial director of the group, is appointed chief operating officer in charge of operational excellence at the 19 production sites. He will push underperforming sites to match the excellence achieved elsewhere. His priorities include improving staff safety and quality of finished products for customers.

Now considered number two in European sailing boats, Fountaine-Pajot is benefiting from the boom market for catamarans, as well as its purchase of Dufour Yacht in the spring of 2018. The boatyard at La Rochelle, founded in 1983, has announced that 2020 will again be a year of growth. For the year ended 31 August 2019, it

has posted a 50% increase in turnover, at €207.1m, four times what it was five years ago.

An added indication of the group’s good health is that operating profit has soared 32.8% to €20.8m.

The synergy between Fountaine Pajot’s catamarans, highly popular in the rental market, and the monohulls of Dufour Yacht is now showing its value. The acquisition of Dufour means that Fountaine-Pajot has been able to spread its

“Using market analysis, this five-year plan will determine the exact positioning of each brand, and product response...”

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markets: formerly concentrated on major export markets (the US, West Indies), the group now has the strong presence of Dufour in Europe.

To increase production for a growing market, the group has invested in a new 6,200m² site in Aigrefeuille-d'Aunis, near La Rochelle, which started production last summer. It now has four sites. It will also be investing a further €12m this year, and continuing its recruitment drive. Its staff had increased from 150 to about 1,000 at the end of 2019, and it plans on recruiting a further 120 employees in 2020.

Another winner on the multihull market with its brands Catana and Bali, is Catana Group, which has reported a global growth of 42% for 2018-19, with turnover of €74m. Net profits are €9m, cashflow €12m. With 142 new boats sold during the year, profits tripled on the previous year. Next year, Catana Group will be selling 200 new catamarans to order.

With a staff of 740, Catana Group has invested almost €10m in its different production sites in France and Tunisia. The group purchased an industrial joinery near its site at Canet in the Roussillon to equip 80% of the interior fittings of its catamarans. In December 2019, Catana announced it had acquired a 75% control of Magic Yachts, a boatyard specialising in yacht-building at Bizerte in Tunisia.

With a staff of 450, and turnover of €50m in 2019, Groupe Grand Large Yachting is a rising star in French leisure boating. The group, founded in 2003 by Xavier Desmarte and Stéphan Constance, comprises 12 firms in both boatbuilding and services. It has a varied portfolio: catamaran brands (Outremer, Gunboat), monohull sailing boats (Garcia, Allures) and professional marine interests (Alumarine).

Grand Large Yachting has grown sharply (about 35% annually) in the recent past. "We started from scratch, but our present size means that we are beginning to be significant in the industry. We plan to continue growing, but at a more sustainable pace, about 20% annually," Stéphan Constance told *Entreprendre* magazine in June 2019: "Discounting outside growth, we plan to double our size in five years' time and reach €100m in turnover," he added.

The Zodiac group had a more eventful year, with Dominique Hebert-Suffrin's sudden departure last November from the semi-rigid manufacturer. The majority shareholders in Zodiac Nautic, Pierre Bastid and Florent Battistella, deemed that after a four-year upturn and despite an investment of €10m, profits were not what they should have been, and Zodiac Nautic was still not on a strong footing. "This new stage now has one clear objective: a return to the fundamentals of the company with strong profitability from 2020, meaning we

will achieve financial balance in two years' time," wrote Pierre Bastid in a statement. Bastid is in charge of operations at Zodiac until a new director is appointed. Dominique Heber-Suffrin remains a minority shareholder.

One bit of bad news was the winding up of the Ocqueteau shipyard on November 12. The yard was founded in 1948 on the île d'Oléron, near La Rochelle, and specialised in small motorboats. There were no serious offers made for the boatyard, which had a turnover of €2.4m in 2018 but lacked enough future orders to warrant keeping it afloat. **IBI**

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Equipment: Positive trend

France's equipment manufacturers and distributors are doing well, buoyed by robust new-boat sales and a healthy aftermarket

WORDS: OLIVIER VOITURIEZ



Groupe Wichard is one of a number of French equipment manufacturers that have benefitted from a robust OEM market

France's equipment sector is on an upward trend with total sales hitting €581m for the year up to August 2018, according to the Fédération des Industries Nautique (FIN) – up 4.3% on the previous year. Those figures are bolstered with the €1.731bn turnover generated by dealerships and maintenance (ship chandlers, repairs, maintenance, electricity and electronic supplies, specialised clothing, etc.) that FIN reports under Services, registering a growth of 1.3%. With a total turnover of €2.1bn, the sector maintained that positive trajectory in 2019 and is looking forward to more growth this year.

"2019 was a good one for equipment makers and French distributors. The sector's growth exceeded inflation," Jean-Paul Roche, CEO of Alliance Marine, told *IBI*. "The original equipment market did well on account of the good results of the shipyards, on which it depends." The head of the largest European group for sales of equipment for leisure and professional marine boats sees a bright future for the sector. "It's always difficult to forecast the future. And when one has a good year, there are always misgivings about a repeat. But today I am reasonably optimistic. I can't see any clouds on the horizon, no contraction in growth, but of course, there's always a

possibility that something beyond our control could happen, some catastrophe that might jeopardise consumer confidence."

Each of Alliance Marine (AM)'s subsidiaries grew about 5% in 2019. Alliance Marine has B2B distribution brands such as VDM-Reya, Berthelot, Seimi, Bukh Bremen, Forniture Nautiche Italiana, and Kent Marine, and B2C brands such as the large purchasing group for hardware Accastillage Diffusion (AD Intermer). Accessory manufacturers for boat brands 4Water, Plastimo, Ocean Safety and Thyphoon are also part of AM. The group employs 750 people, and had a turnover of €175m in 2019. Its main activity is linked to the aftermarket: "We don't make a living from building boats but by maintaining them. It is our core activity, the guarantee for our model", says the CEO.

AM has nine geographic divisions responsible for their own operations. The organisation is "simple and not standardized", with each division manager in charge of finance and sales, his own development objectives, his own sites and logistics. AM can be described therefore as a network of several independent small and medium-sized firms, made up of agile business units, in touch with their customers. "With a fragmented and difficult market, each subsidiary has to remain autonomous and flexible," says Jean-Paul Roche. They have the powerful group behind them for costly and pan-divisional issues, such as the digitisation that was launched this year as the Environment Social Government project to be adopted by each of the entities of the group. "Our size and strength bring credibility. We are able to recruit interesting and well qualified managers."

INTEGRATION

The owner of Alliance Marine is Weimberg Capital Fund. "They are closely involved with us, give us support and allow us to continue our development and branch out internationally," Roche maintains. 2019 was devoted to integrating UK group 3SI (€25m turnover) that it bought in 2018, and the acquisition in July of SOGERIC, a company with a staff of 10 and turnover of €6m, which markets paints and antifouling for boats and yachts in the south east of

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France. “We could continue making acquisitions, but we prefer to be judicious. Each acquisition is followed by a two-year integration period,” Roche points out.

An important part of Alliance Marine is Plastimo, with a turnover of €26m last year. Plastimo is both manufacturer and distributor, employing 105 people at its site at Lorient (Brittany) and its factory in Fagaras (Romania). “Our operations grew with new dynamic marketing and our Research Unit,” Cathy Millien, Plastimo’s communication manager, told *IBI*. There have been many new products designed and manufactured at Lorient: safety products of course, but also a wider range of protection, and the Active brand of garments. Many pieces of the custom-made original equipment (deck hatches, shower appliances) are designed by the Research Unit together with the boatbuilders, with the manufacture of some of the resulting products then sub-contracted out. In parallel, Plastimo continues to work with specific niche markets such as the navy and sail racing market. “The Research Unit engages experts to study specific needs, with solutions that might be adapted for the general public’s use. It’s a pretty invisible part of our business, but it’s highly strategic and a strong growth area”, Millien claims. Plastimo benefits from working closely on R&D and purchases from suppliers, with sister company in the UK, Ocean Safety (3SI Group): “Sharing like this with a sister company is new for us, but it will become more important,” admits Millien. Lastly, the Lorient site will be acquiring new premises in July 2020, to house the headquarters of Plastimo, its management team and administration, Research Unit, prototype workshop and purchases department.

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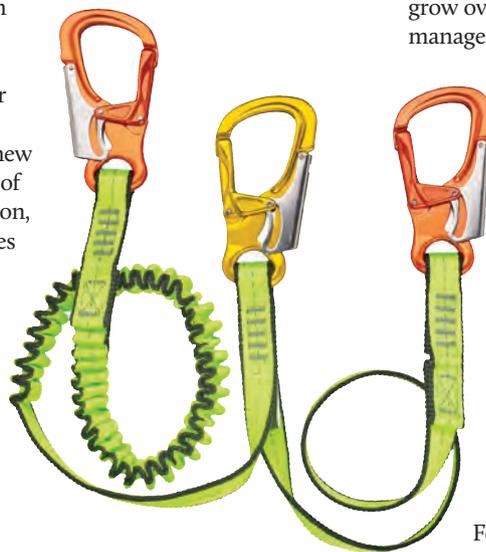
Another key player on the French equipment scene is Groupe Wichard that has also benefited from robust OEM sales and a stable aftermarket. With brands Wichard, Profurl, Lorima, Sparcraft and Facnor, the company reported a small rise in turnover to €45m – 45% of which relates to

the direct export market through its subsidiaries Wichard USA and Wichard Pacific (Australia). At the end of 2018, the group acquired Peguet Maillon Rapide. The group employs 300 and is owned 70% by French investment fund Naxicap and the remainder by the management. “We are a French group specialising in high-quality, high-performance and high-safety products, and 99% made in France,” Jean-Claude Ibos, the group’s CEO, told *IBI*. “We are obliged to position ourselves on quality, otherwise we wouldn’t exist,” said the head of the group which also sells to the building and construction industry.

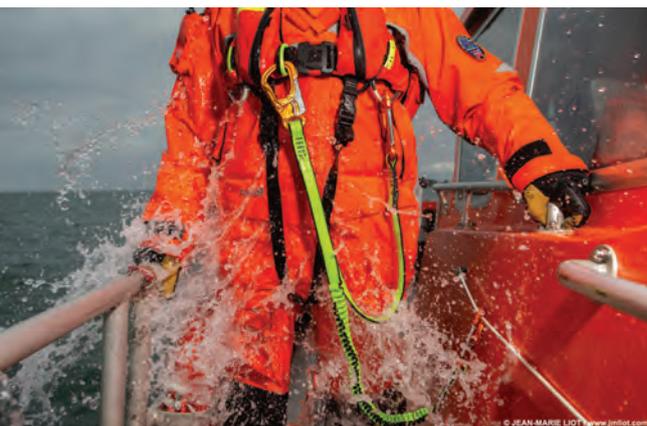
CONTRACT WINNING

NKE Marine Electronics continues to flourish as an electronic equipment maker that has specialised for the past 30 years in the design and manufacture of high-tech instruments for sailing boats. Based in Brittany with easy access to Lorient and the ‘Sailing Valley’ where ocean-racing activities are concentrated, NKE Marine Electronics has a turnover of €2.4m. “Even though we are a ‘Tom Thumb’ in our domaine, our results have done nothing but grow over the past 10 years,” Stéphane Siohan, sales manager, told *IBI*. The manufacturer’s operations are 60% devoted to electronic equipment for sailing yachts. The ‘ocean-racing’ division was awarded two good contracts for 2019 and 2020: on-board equipment (marine sensors, displays, automatic piloting) for 60 sailing boats in the Class Figaro (built by Beneteau) as well as some 20 L30s that will be racing at the next offshore world championship. As there is continuous progress in the high-tech universe that needs heavy investment, the Breton company has added a Research Unit, with six engineers in its 16-man staff.

Also located in southern Brittany, the marine paint manufacturer Nautix is celebrating its 40th anniversary this year. Founded in 1980 in Guidel, the manufacturer employs 25 people, has a turnover of about €4m, and is said to be constantly growing. Paint manufacture accounts for 65% of its operations – The company also manufactures equipment for sailboards. Nautix products are exported to over 40 countries, exports representing about a third of the company’s operations. Its closeness to Lorient means that Nautix can benefit from the dynamics of the ‘Sailing Valley’: “We are at the heart of ocean-racing here. It’s a strong point for us. Nautix equips many of the racing boats (Imoca, Ultim) and has signed an exclusive partnership with Class Figaro. This universe of competitive racing and high quality demands has given us public renown. And deserved recognition in the sailing and motor boat markets,” Thomas Fatosme, export manager, told *IBI*. **IBI**



Life vests and other safety equipment have become a core staple of the Plastimo portfolio



Photos: J.M. Lior / Plastimo

Prestige Yachts – Where the sea feels like home

A global leader in the 40ft-60ft flybridge yacht sector, the Groupe Beneteau brand has entered a new market niche with the launch of its X Line. *IBI* took a trip to the Vendée to get a closer look at the yard and learn about its vision for growth

WORDS: MIKE DERRETT



Erwin Bamps joined Prestige in 2018 after a 17-year long career with Gulf Craft



The new Prestige 420, launched last year in Cannes, will help consolidate Prestige as a leader in the 40ft-60ft yacht sector

The 2019 Cannes Yachting Festival saw Prestige launch its new 42ft flybridge model, the Prestige 420, and a move to broaden its market reach with a soft launch of the new Prestige X Line range. This year's boot Düsseldorf revealed more details of the X Line that will take the builder into a larger size category, and news that its new 42 Flybridge had become the best-selling Prestige model ever in the four months since its Cannes debut.

Prestige is one of the 12 boat brands in Groupe Beneteau, one of the largest employers in the Vendée region which employs worldwide over 7,000 people at 20 manufacturing sites for its boat

business line, producing nearly 10,000 boats a year. The other core group business is the manufacture of leisure homes for campsites, which employs over 1,000 people at eight production sites.

IBI visited the Prestige factory deep in the heart of the Vendée in South West France, an area steeped in boat manufacturing, to meet Prestige general manager Erwin Bamps and director of product marketing, Erik Stromberg. Bamps has been in the general manager role since November 2018, joining Prestige after a 17-year long career with Gulf Craft where he rose to the CEO role, helping transform the UAE-based builder from a local to a global brand.

“The 500 attracted a lot of customers; owners felt it was no longer a small boat trying to be big – it felt like a real motoryacht. This was the yacht that put Prestige on the map”

Photo: Les Herbiers



BRAND HISTORY

Originally under the Jeanneau brand umbrella as a model range, the Prestige name was born in 1989 with the launch of the Prestige 41 open cruiser.

“At the end of the 1980s flybridge boats were not as popular as open sports boats and Jeanneau decided to target the open sports boat market with a new Sports 41ft model,” recalls Bamps. It was a logical extension of the Jeanneau powerboat range into a more luxurious segment.

The Sports 41 was the brainchild of Jean-Paul Chapeleau, at that time the general manager of Jeanneau, alongside consultant designer Vittorio Garroni and Michel Villeneuve, the Jeanneau internal design office manager. It proved to be a huge success, combining performance, style and large accommodation space below decks.

GARRONI DESIGN

Based in Genoa, Italy, Garroni Design has had a long association with the Jeanneau and Prestige brands, having designed all of the Prestige models since 1989, a total of 40 different designs and the association continues with Vittorio's son Camillo now managing the design studio.

Camillo recounted the development of the Sports 41 to *IBI* during the recent Düsseldorf Boat Show: “In 1989 my father designed an open and fairly sporty yacht with three large double cabins, each with a shower, and a generous galley-saloon area. In 1989 this had never been seen before in a 41ft powerboat. The layout was possible thanks to highly innovative technology based on four internal U – shaped bulkheads greatly improving the space inside. My father and I are really proud of our long and successful association with Prestige Yachts which all started with the 41 Sports.”

BRAND DEVELOPMENT

Prestige made its mark in the flybridge yacht market in 1999 with the launch of the 36ft flybridge design, which also saw the introduction of resin infusion for the mouldings, a manufacturing system relatively new at that time. While the 36 was successful, the ➔

Prestige Yachts: Production

The Prestige facility in the heart of the Vendée

PRESTIGE YACHTS OPERATES from a substantial 16,000m² factory in the Vendée, France, which builds all of the Prestige range.

Resin infusion is widely used, with all boats over 50ft being completely infused. The laminating shop uses a two-shift system with what Bamps says is a surprisingly large (35%) proportion of women workers, something he claims goes back to the very start of boat production by Jeanneau in the locality. Groupe Beneteau is one of the largest employers in the Vendée region of France, locally employing nearly 5,000 people at 13 manufacturing sites.

The laminating shop works with a system of fixed position rotating moulds on spindles with an extensive overhead crane system for lifting and transporting the completed mouldings. Resin infusion is used on all boats over 50ft and partially used for some of the mouldings below 50ft.

After the moulding stage the hulls and decks are passed to the assembly area where the two units have all the fittings, engine, plumbing and electrical systems installed before the hull and deck is joined together. Each completed boat is fully tested in a water pool, such is the attention to detail that final alignment of the doors and drawers of the interior furniture is done at the afloat stage to allow for the fine changes in the joinery when the boat is fully supported in the water rather than on land.

Automation has been taken as far as it can with CAM used including an impressive 5-axis robot capable of handling mouldings up to 20m in length. This is used for cutting all of the holes in the deck and production of plug tooling.

Photo: Jean-Jacques Bernier



Photos 2, 3 & 4: Dominique Chiron

Clockwise from top left: The resin infusion process; the assembly line in Les Herbiers; the 20m five-axis robot; a hull being fitted out

real turning point for the development of Prestige as a stand-alone brand came in 2010, with the Flybridge 500.

Director of product marketing Erik Stromberg told *IBI*: “The 500 attracted a lot of customers; owners felt it was no longer a small boat trying to be big and it felt like a real motoryacht. This was the yacht that put Prestige on the map as an international flybridge yacht brand with its distinctive features of aft galley and separate access for the owner’s cabin. A massive number of 450 units of the P500 were built becoming the bestselling Prestige model ever and a game changer for the business that really put Prestige on the map. It was one of the first boats in the world designed from scratch with a hull optimised for the Volvo IPS drive systems. It came to market at the right time. In 2010 there was not a lot of competition with new designs, many manufacturers were reluctant to commit to investing in new designs post the 2008 global financial crisis.”

Alongside the launch of the 500 in 2010, the Prestige range also assumed its own branding. Stromberg explains: “We needed to move Prestige to another market segment with more exclusivity, marketing 70ft flybridge yachts alongside the mainstream Jeanneau outboards boats did not make sense. Prestige follows on where the Jeanneau power boat range finishes while still carrying on

the core Jeanneau DNA of seaworthy boats.”

Moving on to the present day, Stromberg said: “Since the Cannes Boat Show last year, the new Prestige 420 has become our fastest-ever selling boat in the 30-year history of the Prestige brand, a period where we have produced 4,000 boats. This reinforces our market position as global leader in 2019 in terms of unit sales in the flybridge sector from 40ft-60ft. The 420 is the latest model in our range and represents the core values of the brand offering an incredible quality of life aboard a boat of this size. Her bold, elegant lines are signatures of the Garroni Design studio. This 420 boasts a V-Drive propulsion system that ensures perfect balance due to the centralisation of weight with multiple engine possibilities (2 x 380hp or 2 x 425hp) using a V-drive propulsion system to give weight distribution and balance.”

BRAND DIFFERENTIATION

How is Prestige distinguished from the Jeanneau brand? According to general manager Erwin Bamps: “We have a different customer base than Jeanneau, which has a strong powerboat range below 40ft. With our 13-model range, Prestige starts where Jeanneau stops. Overall the 12 Groupe Beneteau boat brands offer a great mix between entry and luxury brands. The Prestige DNA really relates to the fact that once

past the 40, you have the space to put in all the luxury features the customer desires for life and comfort on the water. For the future our intention is to move the Prestige brand up in terms of perceived quality, as well as addressing new market niches with our X Line range.”

MARKETS

Discussing the market, Bamps focused on competitors to the Prestige offering. “Direct competitors for us are Absolute, Ferretti Yachts, Princess and Fairline – all key brands in the 40ft-70ft flybridge and sports yacht range. We are very global in our distribution, as is Princess which has expanded its product range and market outreach significantly more than the other competitors. We are present in all of the significant markets through our dealer network many of whom have been with us for a long time. The Prestige brand gives and gets a lot of loyalty from its partners and customers and this represents perfectly one of the core DNA’s of the Prestige brand of friendship and family.”

“We have a good global spread of 150 dealers in 50 countries,” Stromberg adds. “Currently our strongest market is the USA which takes just over one third of our production in unit terms with France number two and the UK third. Further afield sales in Asia, Middle East and South America are considerably down, in total representing just 5% of our total unit sales in the past year compared to 25% back in 2014, in line with the slowdown observed in these markets. In the past Asia has been good for us especially in 2010 to 2012 where China, Hong Kong and Singapore saw significant sales. South America has a good boating culture, but in recent years sales have been subdued due to the political instability and economic issues.”

Reflecting on the downturn of the markets in Asia, the Middle East and South America, Stromberg added: “The downturn has affected all manufacturers resulting in a concentration of sales and efforts into the United States and Europe which have shown steady growth, taking up the slack from weaker markets. The US and European markets are quite homogeneous with regard to customer expectations, but have become very competitive as the major brands re-focus their attention on them. Because of this it’s important as a manufacturer to come up with a unique selling point that the other brands don’t have, for us this is a key reason for continuous development of the Prestige line and bringing to market new concepts like the X Line.”

Talking about brand promotion, Stromberg said: “We are focusing on major boat shows such as Düsseldorf and the Cannes Yacht Show in Europe and Miami in the USA. Apart from these we focus a lot on corporate events which include regular ➡

Erik Stromberg, director of product marketing



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Designer Camillo Garroni



The new X70 line takes the builder into a new league

factory tours here in France as well as events where customers can see and test new models on the water. These events allow us to take the pulse of the market and get first hand feedback from existing and prospective owners. We develop new boats by evolution rather than by revolution, to do this successfully we have to be very close to our customers. We have found that customers are increasingly more comfortable with these type of events which are not as intense as boat shows where time to discuss with customers can be an issue.”

X LINE – THE GENERAL MANAGER’S VISION

The two existing lines in the Prestige range, the S-Line and the Flybridge Line, will now be followed by the X Line. “The Prestige brand has had a clear focus on family boating developed over the last 30 years,” says Bamps. “Looking to the future, since I joined Prestige just over one year, ago my team including Erik Stromberg as head of Product Marketing, has been analysing how people will use yachts in the future which has led to the development of the new X Line. The X Line takes Prestige into a larger boat size category with the idea that customers are looking for more space and light on board and want to use boats differently than in the past with more emphasis on outside space. The X Line will have the ability to navigate and have the comfort level you would expect in a home away from home. There will be smaller and larger X Line models to complement the X Line 70.”

Series or semi-custom builder, or something in between for the X Line? Bamps explains: “We are a series production builder offering a standard yacht platform, although with a lot of listed options. However, with the X Line we will be able to offer

custom options for parts of the yacht interior, mainly in the saloon which is why we have a flat floor with no interior mouldings to enable lots of interior furniture options so you can have your own table and sofa but still be safe for use on the sea. Ducting and pipework runs are also kept clear of the decks and deck heads, giving clear spaces and easy maintenance access. We are offering very high interior specification options including with Bowers and Wilkins speaker systems, Duvivier sofas and Foglizzo leather upholstery.”

“ *The X Line is the equivalent of an SUV in the car market; it’s the equivalent of a Porsche Cayenne, not an expedition boat to go to the Arctic* ”

X LINE – A DESIGNER’S VIEW

IBI discussed the X Line at the Düsseldorf show with Prestige Yachts designer Camillo Garroni: “The X Line will be an important addition to the Prestige brand as our customers are looking for new ways to enjoy the sea. Our main strength with the Prestige

brand is to produce boats that perform well on the sea and can really be used by a family as well as having good styling, in other words, form follows function. With the X Line we have a new concept with a huge cockpit that we call an infinity cockpit like a terrace on the sea so you have the panorama of the sea behind the boat. Our intention is that from any position on the boat you should be able to have a sea view. The design for the X70 redefines space, light and luxury with an emphasis on hand selected materials and exceptional fit and finish. We have worked to create a revolution in space and movement by moving the side decks to the flybridge enhancing circulation and optimising room on the main deck. Redistribution and blending together of interior and exterior living spaces greatly increases the size of the cockpit and ensures entertainment areas flow throughout

the vessel. In addition, there is a beach club fully integrated into the aft platform providing further entertainment space and proximity to the water.”

Prestige director of product marketing Stromberg has been highly involved with the development of the X Line and about moving Prestige into a new and developing market sector giving three model ranges in the Prestige brand – the Flybridge Line, S Line and X Line.

“The X Line is a cross-over product. Our research found that there is a developing market for a boat between a trawler yacht and a conventional flybridge. The X Line is the equivalent of an SUV in the car market; it’s the equivalent to a Porsche Cayenne, not an expedition boat to go to the Arctic, but to have a lot of space and comfort, the equivalent of the city SUV. It’s light and comfortable for life on the water – we say the X Line is where the sea feels like home. The boat is a home away from home, not an explorer yacht but still enjoyable for long voyages and able to entertain large groups of people when needed.

According to Stromberg, priving for the X Line 70 will be in the “mid-range” of the 70ft flybridge yacht market. Sea trials will take place in August with the official launch at the Cannes Yachting Festival in September 2020.

Talking about production of the X Line, Stromberg said: “We are a volume boatbuilder so we need an identifiable market niche that is big enough to sustain series production and we believe this market segment is sustainable. The Prestige Flybridge and Sports ranges are primarily aimed at the owner who wants to drive his own boat and be involved with the operations. The Volvo IPS engine system and other navigational features makes operations of the boat for the owner driver entirely feasible. Our market for the X Line 70 model is also focused on the owner driver, as we have always had a customer segment who come to Prestige moving down from a 100-footer or larger yacht to a Prestige model. They have become tired of living on a boat with a crew and start to feel it’s not really their own boat. They are looking for a smaller yacht that they drive themselves without compromising quality and performance and still have the features of a larger yacht.”

The new X Line will be revealed in the flesh at Cannes in September and promises to be one of the most innovative model premieres this year.

“Prestige yachts have a timeless elegance,” says Erwin Bamps. “It’s less about the yacht and more about the pictures of people enjoying themselves. Prestige owners don’t need to show off... Prestige is a yacht to live on in style and luxurious comfort and celebrate success.” **IBI**

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Overview: Industry riding high, but can growth rate be sustained?

Exports and confidence continue to rise, as the industry gets ready for what it predicts will be another good year

WORDS: BELINDA SNELL



The Boating Economic Forecast panel in Genoa

added value worth around €12bn, including subcontractors, commerce, services, repairs and the charter segment.”

The latest industry figures show that Italian boat production generated €2.5bn in turnover in 2018, or 58.8% of total industry turnover. This was followed by marine equipment at €1.16bn, engines at €358m, and refit, repair and maintenance services at €243m.

Cecchi continued: “The internationalisation of the sector is evident from the share allocated to exports: 75.4% of domestic production was in fact placed on foreign markets for an amount equal to €2.7bn, up 10% compared to 2017. Domestic production directed to the Italian market (equal to 24.6%) was €878m, up 11.3%.”

The contribution of the boating sector to the national GDP has also increased, rising from €3.2bn in 2017 to €3.5bn in 2018.

As for 2020, a study carried out by Confindustria Nautica’s Research Department across the association’s members in relation to their order portfolios for the year ahead is overwhelmingly positive. The analysis shows that 62% of all businesses are seeing an increase in revenue in their 2020 orders (37% say growth will be below 5%; 14% that it will be between 5%-10%; and 11% are looking forward to an increase of over 10%). As for the remainder, 27% predict a year of stability and just 11% expect a contraction in revenue compared to 2019.

Following on from a successful Genoa Boat Show in September last year, the ➔

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Italy’s top boating markets
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Full A-Z of key players
- 57 EQUIPMENT**
Solid 2020 predicted with confidence remaining high

The Italian leisure marine market recorded its fourth consecutive year of growth in 2018, with total revenues up 10.3% over the previous year to €4.27bn. Saverio Cecchi, president of Confindustria Nautica (the trade body that, since January this year, now comprises members of UCINA and Nautica Italiana), told *IBI* that the outlook for 2019 is equally positive. Based on current balance sheet predictions, 2019 should see an estimated growth of 9.7% – up 11.1% for shipyards and 6.9% for accessories and motors. Growth is largely attributed to exports, with Italian boat production now worth over €2bn in foreign markets.

“Over the past two years the sector has grown by 20% in terms of direct employment,” Cecchi told *IBI*. “An impressive 22,000 joined, along with an even more impressive 180,000 total jobs throughout the supply chain, generating an

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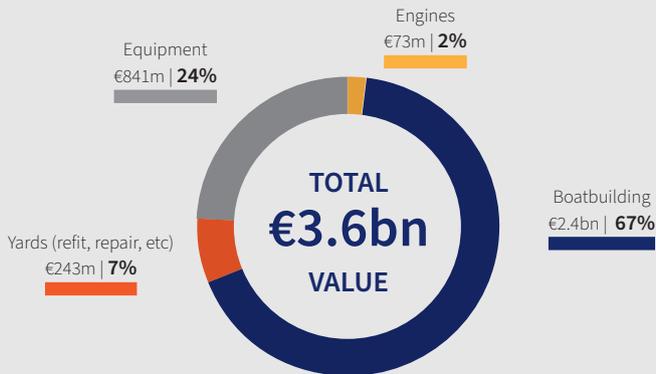
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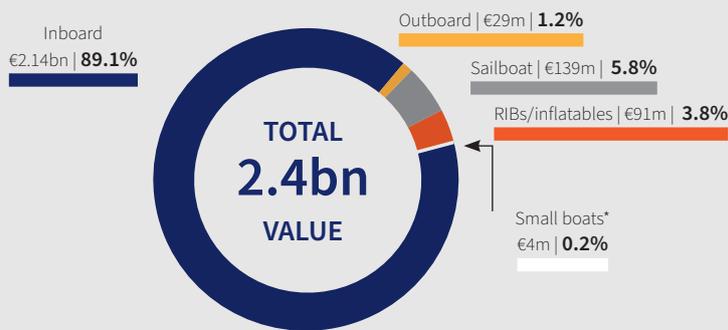
ITALY | STATS & FACTS

COMPILED BY ARLENE SLOAN

ITALIAN MARINE INDUSTRY PRODUCTION TURNOVER



PRODUCTION TURNOVER BY CATEGORY



*Inboard boats include sterndrive and jet drives; Small boats incl. all boats <2.5m, dinghies, race sailboats, boards, canoes, kayaks, paddle boats, etc.

ITALIAN BOATING INDUSTRY

€4.3bn total industry turnover (+10%)
 (+9.7%) est. 2020 growth
180,000 jobs across all sectors
725 boatbuilders
€2.4bn boat production turnover (+13%)
2,300 boats produced (est.)
€2.1bn in boat exports (+13%)
379 superyachts on order
37m avg. superyacht length
€841m equipment production turnover (+9%)
€436m in equipment exports (+9%)

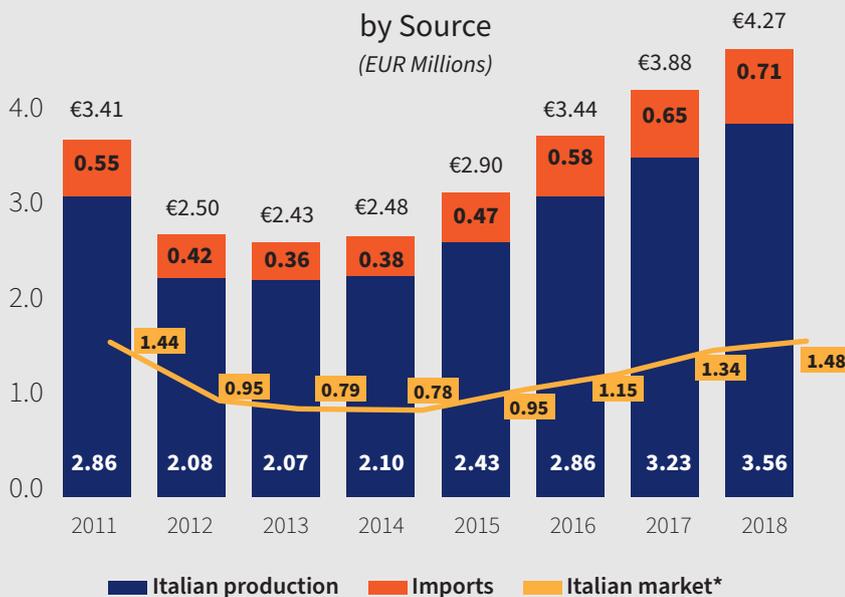
BOAT PARK

97,500 registered boats (-0.3%)
 → 81% motorboats | 19% sailboats | 0.2% superyachts
 → 54% boats < 10m
900 new boat registrations (-0.4%)
480,000 unregistered boats (est.)
7,830 boats per km/coastline

BOATING FACILITIES

86 marinas
459 multi-purpose ports/docks
236 berthing points
160,690 berths | **4** boats per berth

Total industry turnover



ITALY'S TOP BOAT EXPORT MARKETS

COUNTRY	€ MIL
US	410.7
Cayman Islands	210.9
Malta	204.4
British Virgin Islands	175.1
France	156.6
UK	80.1
Hong Kong	69.3
Turkey	59.6
Spain	39.6
UAE	38.3
Marshall Islands	32.4
Australia	24.9
Germany	22.3
Singapore	21.6
Gibraltar	20.8

enthusiasm for 2020 can be felt at this year's events too. As IBI went to press, the 18th edition of Seatec, the trade show for technology, components, design and subcontracting applied to recreational boating, was coming to a successful close at Marina di Carrara. For the first time, large shipyards were promoted in an exclusive Shipyard Lounge that covered a 400m² area where each yard had its own dedicated space. More than just a simple VIP Lounge, it was a multi-faceted area where shipyards were able to hold B2B meetings reserved for exhibitors at the show, arranged beforehand with

“ The 2019 Global Order Book shows Italian shipyards once again at the top, accounting for an unmatched 46% of orders across the globe ”

individual schedules.

Meanwhile, Italy continues to lead the world in superyacht production. The 2019 Global Order Book shows Italian shipyards once again at the top, accounting for an unmatched 46% of orders across the globe. Inflatable units from Italy are also leading the global market in the over 7m segment, while accessories and components are seeing positive trends too, demonstrated by the significant increase in exhibitors at the Genoa Boat Show over the past four years. Last year alone saw accessories brands request 35% more space to showcase their products. **IBI**



2020 event will welcome bigger yachts

Viareggio show: New dates and location

THIS YEAR'S VERSILIA Yachting Rendez-vous (VYR) will be held from May 28-31, taking up a more strategic position on the calendar of nautical-related events.

VYR 2020 will also have a new location: starting from Via Coppino it will extend to Viareggio Dock, a body of water better suited to the hosting of larger yachts with deeper draughts.

These are the first new details to emerge regarding the fourth edition of the Versilia Yachting Rendez-vous, which attracted more than 22,000 visitors to Viareggio last May – 10,000 of whom were professional operators.

According to the organisers, the change of date is the result of “growing interest in the show” and allows VYR to promote itself as the only spring exhibition dedicated to the nautical world.

As for the new location, it is claimed to be better equipped to welcome the yachts and megayachts that can be more easily hosted within the VYR exhibition circuit. In addition, the piers, that will be wider and better structured, should make for a more flowing path through the exhibition, that extends around the perimeter of the dock. The organisers say It will also allow for additional services and facilities to be provided to visitors.

YARE: Returns for 10th annual edition

YARE, THE INTERNATIONAL aftersales and refit event dedicated to the superyacht sector, is returning to Viareggio in March for its 10th annual edition.

Around 100 superyacht captains will descend on Italy's yachting capital on March 18 for three days of business meetings and in-depth discussions. This year the popular B2C-Meet the Captain event will be split into two half-days and have its own dedicated app, providing a unique opportunity for pre-arranged, face-to-face meetings between captains and refit and aftersales companies.

Innovation, technology, perspectives and market trends will be the topics discussed during the workshops of The Superyacht Captains' Forum. The annual meeting explores the state of the market, dynamics and future prospects by analysing and comparing the sector data.

YARE is organised by NAVIGO, a research



YARE president Vincenzo Poerio

and innovation service centre for the nautical sector, and endorsed by SYBAss, the international superyacht builders association. The organisers describe it as a “strategic event due to the important presence of captains and top international shipyards operating in the Mediterranean and North European area.”

Around 100 captains currently at the helm of yachts from 30m-60m and above will be attending

YARE 2020. Most represent private ship owners. Yards and companies will include Lürssen, Sanlorenzo, Overmarine, Amico & Co, Pendennis, Palumbo and TRS Refit, along with representatives from Port Vell, Porto Mirabello, Marina di Arechi and West Istanbul marinas in attendance.

Over the past decade, YARE has hosted 1,000 superyacht captains and 1,400 companies, resulting in some 13,000 meetings, it is claimed.

SAVE THE DATE

Genoa, **17th** - **22nd** September 2020

60th
BOAT SHOW | **S[n]**

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Show preview: Venice 2020

Winning hearts comes naturally to the city of Venice, but can it win minds and consolidate its position in the global leisure marine industry calendar?

WORDS: ED SLACK

The inaugural Venice Boat Show was billed a success by the event organiser last year, attracting some 27,000 visitors over its six-day run in June. Few could argue with the capacity of the location to lure potential buyers, or the majestic appeal of the Arsenal venue, but can this year's event increase its international contingent of exhibitors and smooth out the logistics of moving visitors through the city's canal network? *IBI* talked to the show's director of communications, Fabrizio d'Oria, about this year's event and what lessons have been learned.

How will the 2020 event be different from the first show?

This year we will host more sailing boats and concentrate on environmental issues with hybrid and innovative engines as a main topic. The Venice Boat Show is growing and living an evolution that we are trying to concentrate on what we call a 'full floating experience'.

What did you get 'right' last year and where do you need to improve?

What proved successful was the multi-faceted appeal of the first event – we not only focussed on the commercial aspect but also on culture and entertainment, to appeal to different target groups of visitors but also to local citizens. Venice is a key location, a starting point for centuries for journeys along the Croatian coast, Montenegro and Greece, finally ending up in Istanbul. Our perspective is very different from the other boat shows in the Mediterranean, that mostly vie for the same 'market' and fight for a leadership by pushing shipyards to be always present, with high costs for them. No other city hosting boat shows on the sea can boast an airport as efficient as Venice. Furthermore, Venice has beautiful locations to host dedicated events with



More sail and innovation for 2020, says d'Oria

ship owners and potential clients.

But there are areas we know we can improve – we want to extend the space for sailing boats within the Arsenal, to raise awareness of new technologies and, from the infrastructure point of view, provide more comfort for the visitors and the hosts.

What improvements will be made for the 2020 edition?

We will have a greater number of important shipyards, so the show will be bigger. We're also pushing the environment and sustainability side, hosting conferences, design challenges and other initiatives. We have recently obtained the ISO 20121 certification by Bureau Veritas Italia for the sustainability of the event from the environmental, social and economic point of view in the planning, management and implementation phases.

The first Venice show had a very 'Italian' feel – are there plans to further internationalise the show?

Venice is a true international city, and it is perfect for a complete experience that combines heritage and business. Last year it was the first edition and the event needs time to grow and to be trusted by a wider audience. We also believe that the Italian atmosphere coming from the high value of the venue, the historic Arsenal of the City, makes the event a very special and unique experience. Don't forget that we mostly sell 'Made in Italy' and Italian boats to foreign clients. International shipyards come here for the same reason, to compete with the Italian design and to offer a wider selection of boats.

Can you give me an indication of exhibitor numbers so far?

We are still taking new arrivals – the submission deadline is February 29 – but at present we can't divulge too many details. Last year approximately 30,000 people visited the show and we expect a bigger number this edition. But our goal is not to have massive presence but higher quality.

The capacity of the venue will be extended this year – both on water and on land, inside and out. The Arsenal at full capacity can host some 100 boats.

How is the show linking up with other events in the city?

This year the International Exhibition of Architecture is taking place in the nearby Arsenal area (South end), on the opposite side of the Boat Show area. This event usually drives a public more interested in design which is becoming a key point in high-level yachting and a strong marketing driver for all shipyards. We're talking about wealthy visitors; people that are passionate about art and architecture and often have among their properties, a boat for leisure. **IBI**

The Capital of Yachting. **GENOA, 17-22 SEPTEMBER 2020** 60th BOAT SHOW **S_[n]**



Major plans are underway to turn Amico and Genoa into a superyacht refit hub

Amico gets lift into the big league

Major new investment at the refit specialist looks set to transform not just its own superyacht refit potential but the prospects of Genoa itself as a leading superyacht hub

WORDS: DAVID ROBINSON

Last October, a 4,000-tonne capacity shiplift was inaugurated at the Genoa shipyard of Amico & Co. The new facility, which cost €27m, is both an important development for this global leader as a superyacht refitter, and a key asset for Genoa in its ongoing campaign to become a leading superyacht hub.

The new shiplift, which was developed by Amico itself, allows the company to handle superyachts up to 95m (312ft) instead of 60m (197ft) previously. It also means that along with its associated special track and trestle transport system, Amico will be able to work on up to six 95m superyachts at one time.

This major project, which took two years to complete, involved the strengthening and restructuring of a 25,000m² area, including the construction of a network of underground tunnels with dimensions of 2.75m x 2.4m to allow the movement of people and equipment servicing the various projects on the hard stand. Its ecological footprint is light too – being entirely electric, the system emits

zero emissions in situ.

The shiplift is based around a submersible platform housed in a dedicated structure. It is able to rise and fall up to 10m (40ft) and allows superyachts to be hauled up to ground level through the use of synchronised hoists. The special track and trestle system completes the infrastructure of the shiplift, enabling superyachts to be moved onto the hard stand and the five new work-station slots.

Amico chairman, Alberto Amico, commented: “The construction of the shiplift springs from our desire to continue competing as a leader in the Mediterranean superyacht market... We are convinced that it represents a great opportunity and an occasion in which to make Genoa a hub of global reference for super and mega yachts, activating and strengthening a quality economic system that generates development and prosperity for the entire surrounding area, with an important knock-on effect on the city even from a cultural point of view.”

The shiplift was eligible for public funding support with Invitalia (the Italian

National Agency for Inward Investment & Economic Development) awarding a capital grant of up to €4m to Amico & Co along with a subsidised loan of up to €13m with a long repayment period. The other €10m came out of Amico resources.

Construction of the shiplift, which is seen as a crucial facility in enhancing the competitiveness of Genoa as a superyacht hub, involved 84 companies – all of which are Italian with the exception of the Dutch Enerpac company. Some 200 workers were involved on the project over an 18-month period and the shiplift will create at least 15 new jobs to Amico’s current directly employed workforce of 100 people.

In addition to the shiplift, a further €6m is to be invested in developing a new marina facility in the Darsena Nautica dock which will have 35 berths for superyachts of 30m-110m (100ft-361ft). This project is at an early stage and its final layout is still being worked on. Visible developments are expected in autumn 2020. The marina will offer priority to refit or repair projects visiting Amico, but it will also be available for guests visiting superyachts. Amico & Co is creating a hub dedicated to the reception of large yachts, their crews and owners, responding to the necessity of providing hospitality suitable for the superyachts that choose the Italian shipyard for their maintenance work, not only during their planned technical pit stops.

At a more general level, the project is an important contribution to the final goal of establishing Genoa as a superyacht home port, allowing for the siting of marine service companies, a trend which is already underway. Amico & Co’s project for the Darsena Nautica redevelopment, once completed with docks and services, is that it will become a marina dedicated to hosting large yachts, crews, owners, and, every year the location for the Genoa Boat Show.

The total redevelopment project is seen as a major boost for the ‘Genoa for Yachting’ campaign to promote the city as a leading superyacht hub. Two years ago a cluster was formed under the ‘Genoa for Yachting’ branding which now has a membership of some 35 companies that employ 700 people and have annual revenues of around €140m. **IBI**

Boatbuilders: New launches and new innovations breed optimism for 2020

Players in the market now face the challenge of maintaining the strong level of growth through 2020 and beyond

WORDS: DAVID ROBINSON



Azimut-Benetti topped the Global Order Book in 2020 for the 20th year running. This is the Azimut Verve 47

With the anticipated growth of nearly 10% for the Italian boating industry in 2019, this important sector of the country's economy will have recorded growth for the past six years since the low point in 2013. This record, plus the merger of the country's two marine recreational sector trade bodies, UCINA and Nautica Italiana, as of the end of January 2020, and the ongoing growth of the Genoa Boat Show, all reflect a strongly performing market segment facing the challenge of maintaining this level of growth through 2020.

“ The strongly performing market segment faces the challenge of maintaining this level of growth through 2020 ”

The 2019 projection comes from an initial survey of industry members which suggests that the turnover for the whole Italian boat sector will reach around 9.7% last year with boatbuilding members going higher at some 11% and just 7% for the engines and accessories areas combined.

Preliminary estimates from members of the Italian boating industry point to continued growth in 2019, approaching 10%

According to an initial UCINA Confindustria Nautica survey of industry members, turnover in Italy's boating sector is

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forecast to show growth of around 9.7%, with as much as 11% growth projected for boatbuilding and close to 7% for the accessory and engine sectors combined. If this is confirmed, or goes higher, means the full Italian boating industry will reach a total turnover of some €4.7bn in 2019.

Some 62% of the members surveyed provided a view on how 2020 looked to them based on their current order books. Of the total, 11% anticipated growth of more than 10%; 14% came in at between 5% to 10% and another 37% were looking at up to 5% growth. Another 25% envisaged a stable year and just 11% were forecasting a contraction.

All this adds on the previous six years with the full Italian boating industry having achieved a turnover in 2018 of €4.27bn which was a 10% rise over the €3.88bn of 2017. Of this total, 59% was credited to boatbuilding; 27% to equipment, 8% to engines and 6% to refit repair and maintenance. Within the total turnover, 62.9% went to export; 20.5% for the Italian domestic market and the remaining 16.6% was imports. This strongly supports the 'Made in Italy' branding which is increasingly used by the Italian industry.

The boatbuilding segment of the total industry achieved an 11.2% rise in turnover reaching €2.75bn of which over 90% was accounted for by newbuilds and less than 10% by refits. The progress through 2019 and looking ahead into 2020 follows:

ABSOLUTE

After launching three new models at Cannes - the Navetta 68, Absolute 47 Fly and the Absolute 62 Fly - Absolute announced in Düsseldorf that the last model in the Navetta range, the Navetta 64 will be premiered this year.

In its fiscal year to the end of September 2019, Absolute constructed around 85 craft compared with 75 the year previous, an increase of some 18%. Other facets of the 2017-18 financial year are that turnover also increased by 13.4% and the average size of yacht built rose from 45ft to 48ft. The company continued to expand its dealer network in places such as Dubai, Mexico and Thailand.

ADVANCED ITALIAN YACHTS

The main new project being worked on by Advanced Italian Yachts is its new A100 flagship model, which follows on from the success of the A80.

AICON YACHTS

Following the acquisition in 2018 by its majority shareholder and his financial partner, Aicon Yachts recently announced that it has re-entered the yacht market with the development of a new 20m (66ft) Aicon 66 model which will be launched in the near future. This new model will bring a

totally fresh design to the Aicon 64, a previous model of the company which sold well.

AMER YACHTS

This established yacht builder is currently working on a new challenge that focuses on an innovative mineral fibre. To address the fibreglass 'End of Life' recycling issue, Amer has abandoned glassfibre and chosen to adopt instead the volcanic fibre FILAVA, obtained from enriched basalt through a proprietary process. FILAVA is claimed to be completely recyclable.

Amer hopes to use the fibre for its next generation of superyachts to make them sustainable and recyclable.

A development roadmap has already been drafted, with ENEA and RINA already working on the certification process for the new composite material. The shipyard has signed a collaboration agreement with GS4C and the composite manufacturer to design and build the first non-structural element that will be featured on the next superyacht under construction.

In terms of yachts in build, Amer launched its second 29.6m Amer F100 series in December 2019 and another two yachts in this series are in build for delivery this year.

ANVERA YACHTS

Anvera has expanded its existing range of luxury tenders with a new Anvera 42 model to complement the Anvera 48 and Anvera 55. This new model, the company says, responds to a market need for craft that includes more quality, safety and exclusivity. The Anvera 42 includes a 13m² beach area with two side opening terraces. Made largely of carbonfibre, the Anvera 42 is a light, fast and sporty boat.

ARCADIA

With eight projects in build Arcadia continues to be a very active yacht builder. These comprise one each for the 115, 105 and 85, three Sherpas and two Sherpa XLs. To cope with the scale of work, the company is building a new shed and currently working on developing new models in the 90ft-rooft range which will be introduced next year.

In terms of its network of brand ambassadors, it is looking for new representation in markets like Scandinavia, Russia, the UK, Greece and Turkey.

CANTIERI AUSTIN PARKER

This 20-year-old-plus company is working on expanding its current range of seven models. Work is currently underway on the new AP74 Fly, which is the first model in a new yacht line between 22.5m (74ft) and 32m (104ft); the AP74 Fly; and two more projects - the AP35 and AP 60 Sportsfly. ➔

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MARCO VALLE, MANAGING DIRECTOR
AZIMUT

The US market is going down the road of wanting more and more outboard models. The 47 represents a design revolution including a new layout and better performance

AZIMUT-BENETTI GROUP

This leading player in the luxury yacht market again topped the Global Order Book 2020 for the 20th year running; very appropriate, seeing as 2019 was Azimut's 50th anniversary. The group had over 100 yachts accounted for by the order book, representing a length of some 3,500m (11,491ft).

Azimut completed 35 craft last year and the company has a strong order book going forward. While it presented a good model range at Boot Düsseldorf, its main new model launch for the start of 2020 will be at the Miami International Boat Show with the new 47 model. This new 47 has had a total redesign, including a new stepped hull designed by Michael Peters. It was developed for the US market and will be an outboard-powered craft either with four Mercury 450 engines or four 300 new engines. The former engines will provide a top speed of 52kt.

Marco Valle, Azimut's managing director, told *IBI* at Düsseldorf: "The US market is going down the road of wanting more and more outboard models. The 47 represents a design revolution including a new layout and better performance." He explained that the US market accounts for about 30% of Azimut sales, as does Europe, and the Rest of the World including Asia and the Middle East make up the remaining third.

In terms of other new models the 25 Metri Magellano will be launched in May with four models having been sold as of late January off-plan. Because of the volume of work that it is having to cope with, Azimut is discussing potentially using some of the capacity currently available at the Benetti facility in Viareggio.

The 25 Metri will be followed by the 38 Metri towards the end of this year which will be the brand's new flagship. Four 38 Metris have also been sold off-plan as of late January.

As to Benetti, last year saw the completion of its trio of superyachts over 100m but as far as is known no further orders of this size currently feature ➔



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in the company's order book. There has been a number of deliveries from Viareggio and Livorno. Towards the end of January, the launch of the first 44m (144ft) *Diamond 145* took place at Viareggio's Benetti slipway.

BAGLIETTO/CCN

Gavio Group, the parent of the Baglietto, CCN and Bertram yacht brands, is a leading player in the Italian market. According to the Global Order Book 2020, the two Italian-based yards had 10 projects active through 2019 totalling some 430m (1,412ft). In mid-December 2019, Baglietto secured an order for a 47.6m Baglietto 48 T-Line superyacht for a South American owner with delivery scheduled for 2021.

This is the third in the T-Line series to have been ordered.

Baglietto has been strengthening its design link with Francesco Paszkowski and this has led to a number of new concepts being launched last year. Among these was a new 65m concept which was introduced at the Monaco Yacht Show in 2019.

In addition to this new contract, the Baglietto order book also includes a 54.6m yacht for delivery in 2020 and a 44m vessel for 2021 completion. The company has been seeking to significantly increase the size of the La Spezia shipyard by acquiring an adjacent site.

Among CCN's order book are two near 40m yachts, both for delivery in 2021, and a 37m for completion this year. CCN had a particular success with the 31.2m *Vanadis*, which has won a couple of eco-related awards.

CANADOS

This shipyard delivered its first 37m Caesar 120 model last year and it currently has an Oceanic 140 design in build for delivery later this year.

CANTIERE DELLE MARCHE (CDM)

Since being formed in 2010 this brand has developed a strong position, especially in the the explorer yacht market with its Darwin and MG series. CDM's order book includes at least 10 projects set for delivery between 2020 and 2023. This year will see at least five yachts being delivered, followed by three in 2021 and currently one each in 2022 and 2023. The one for 2020 is the contract for a second MG115 model which was

concluded earlier this year.

In other moves, last year the company set up its own Pre-Owned Sales Department and opened a new dock area in Ancona which offers four berths for yachts up to 45m (148ft). This dock has 40m of quay length supported by a dedicated 500m² area.

CANTIERI DI PISA

Following its takeover by the Sea Finance arm of the Yotha yacht charter platform, the Cantieri di Pisa brand, formerly owned by Mondomarine, has steadily been rebuilding itself in the Italian yacht market. Two Akhir 108 hulls are now being worked on and both are due to be completed this year. The new owners are also undertaking

some refit work and investment has been made to improve the yard facility. The company was officially relaunched at a beach party held at the Cannes Yachting Festival last year.

CETERA

This new brand launched at Düsseldorf in 2019 presenting an 18m (60ft) yacht design that offers a different internal layout for a yacht of this

size. Currently two hulls are in build with the first having been sold for use as a charter yacht. The first Cetera 60 in the flesh will be seen at Düsseldorf 2021.

CODECASA

This established Italian brand had a busy year and it started 2020 with the interesting launch of a new 70m (230ft) concept called the Codecasa Jet 2020. It is a yacht, as the name suggests, that was inspired by aviation with the forward section being similar to an aircraft's cockpit. The yacht offers a vast amount of space, combining as it does both luxury accommodation and a support yacht role.

Codecasa hopes to start building the new flagship model in the first half of 2020 and has not said whether it has been sold or will initially be built on spec.

The brand's previous flagship, the 65m (213ft) *Regina d'Italia*, was delivered in June 2019 following the completion of a 43m (141ft) the month previous which was built on spec.

Work is also underway of a 55m yacht that is now being fitted out at the company's Pisa facility and it is due for delivery in June this year. ➔

“The Codecasa Jet 2020 was inspired by aviation with the forward section similar to an aircraft's cockpit. It offers a vast amount of space”



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Riva's 50m launching in Venice

COMITTI

This small Italian boatbuilder globally presented its new Breva 35 model at Boot Düsseldorf and hull 2 is to be delivered to a relatively new UK dealer. The company also has the Breva 29 model which was launched at the Cannes Yachting Festival last year. Comitti builds 20 boats a year, all to order.

CRANCHI

Celebrating its 150th anniversary, Cranchi also held the world premiere of its new 25m Settantotto, the company's new flagship. It was designed by Christian Grande who owns the Invictus brand and it presents an innovate yacht with a number of new design features. This new model takes Cranchi into the entry level end of the superyacht market – currently they do not have plans to go bigger.

FERRETTI GROUP

For Ferretti Group, 2019 was a significant year. It went from seven to eight brands after the acquisition of Wally; it strengthened its finances with a €250m loan to equity transfer making it debt-free, and it aborted a planned IPO over valuation issues.

Ferretti Group reported at Boot Düsseldorf that its order intake rose 20% in 2019 compared with 2018 and that the order value rose 6% from €709m in 2018 to €753m in 2019. A new shareholder was also identified in Adtech which now holds 3% while F Investment has an 11% stake and majority shareholder Weichai with 87%.

The group's financial performance continues to develop but Galassi indicated that both the value of production which was €669m at the end of 2018 and the EBITDA which was €53m at end 2018, "were both higher". The group's order book rose by 6% in value. Over the past four years some €200m has been invested in product development and facilities such as at the Ancona Superyacht shipyard, expansion at Forli and additional land bought at La Spezia.

Regarding product development, over the past four years 36 new models have been launched and another six will follow this year. This excludes CRN's custom builds. Over the past four years, the new models launched accounted for 90% of 2018 revenues.

Looking to 2020, Ferretti will be entering three new market segments. These comprise the new Pershing TQ range; the Wally Outboard range and Wally Sailing craft. As to the Pershing TQ, only a small 'teaser' was given. For Wally Outboard there will be a new 48X tender which will be debuted at the Miami show. Also, the Wally sail range has the already 101 project announced with a new 145 being planned.

Other new products include a Pershing 7x coming this year and a Pershing 170 for later. Ferretti Yachts will have a new entry Ferretti 500, which will be launched this year, and also a new Ferretti 1000 flagship model that will be introduced in 2021.

Under the Riva brand there will be the 88 Folgore project which will be launched this year, plus a new Riva 130 to extend the Riva Flybridge range. In respect of the Riva Superyacht series, with the Riva 50 having been launched, others will follow with the 50 being the first of a range that will also include 40m, 60m, 70m and 80m.

FIPA GROUP

Fipa Group is now known as the Group of Fipa combining as it does the brands Maiori Yachts, AB Yachts and Cbi Navi and Cantieri Navali Intermare. This change follows the deal with Sanlorenzo under which some of Fipa Group's build facilities in Massa and Viareggio were transferred to Sanlorenzo. This deal is now all completed and Fipa is a single entity.

As to its order book, the company has five projects across its brands to be completed this year in its three shipyards including a Maiora 35.

GRAND SOLEIL

At Boot Düsseldorf, Grand Soleil launched its new

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“*Atelier Invictus guides customers through a virtual laboratory in which a yacht is designed with individual material inserts and equipment*”

Performance 44 model of which four had been sold prior to the show off-plan. This new model sits in the middle of the Grand Soleil range, which runs from 34ft to 58ft. To cope with a growth in orders the company is working to expand the capacity of its Forli build facility.

INVICTUS

The growth of Invictus continues apace as does its range of small luxury boats which has sold so successively over recent years. At Boot Düsseldorf 2020 the company held the global debut of its new GT 320 Atelier which readily illustrated the brand's ability at customising. Atelier Invictus guides customers through a virtual laboratory in which a yacht is designed with individual material inserts and dedicated equipment.

At the show the company also had its first-time display of the CX270 and GT280S, both with outboard motors. Looking ahead to Cannes, this year, the 460 TT model will be globally launched as the first in a new series within the full Invictus range.

ITALIA YACHTS

This company continues with its new product developments resulting in the carbon version of the IY 11.98 being shown at Boot Düsseldorf and it will be fully launched at Cannes this year. The designs for the new IY 14.98 were also on show and this model will be launched at the beginning of summer 2020. Also the IY 15.98 Bellissima project was part of the stand.

As far as the 15.98 model goes, the first sale was achieved last November and the first craft will be completed in May 2020. It has a new interior design and the first yacht is for a European owner.

Italia Yachts is expanding its output that is expected to rise from 24 completions in 2019 to 32 this year. The company plan is to reach an output of 45 yachts by 2025. Italia Yachts exports 70% of its production, of which the US accounts for 22% and other markets include Japan, Finland, Spain and Asian markets. Italy accounts for about 30%. A new 69ft model is being developed for launch in 2022.

ITALIAN SEA GROUP

The Italian Sea Group (TISG), which owns the ➔



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EXTRA Yachts, part of the Palumbo Group, launches this 130 Alloy at Monaco

Admiral Yachts, Tecnomar and NCA Refit brands, has announced its intention to float in the second half of 2020. Giovanni Costantino, company owner, has indicated that at least 35% would be part of a free float linked to the Star section of the Borse Italiana in Milan.

In 2019 TISG reported a consolidated turnover of €84m; a net profit of €1.27m and an EBITDA of €6.9m. There are currently nine yachts in build at the yard at Marina di Carrara which covers a 100,000m² site and includes a 200m (656ft) drydock. Among the yachts in build is the 55.2m (181ft) *Geco* which is due to be completed this year. Also there are other yachts of 53m (174ft); two of 46m (151ft) and one of 37m (121ft).

At Boot Düsseldorf TISG Asia announced it had entered a joint venture with a Hong Kong investment company to set up a new Asian charter operation. This will have two 36m superyachts and a 54m vessel by next year. Looking ahead it was suggested that a 100m-plus yacht might be in prospect.

Earlier this year Admiral Yachts announced that it had appointed a new head of sales namely Frank Grzeszczak Sr, who has joined TISG from IYC, the international brokerage and yacht services company.

MANGUSTA

Overmarine Group with its Mangusta brand currently has an order of six vessels with delivery due through 2020 and 2021. For completion this year there are yachts of 40m, 31.8m, 43m and 46m with a 50m and 54m due in 2021. Looking to the future the company has a new 60m concept developed by Alberto Mancini.

MONTE CARLO YACHTS (MCY)

Have launched the second-generation models of the MCY 66, 70 and 76 in 2019, for 2020 this

leading brand has developed this series into a second range by adding an enclosed flybridge. These were launched at Boot Düsseldorf but the first model will be shown at Miami.

The other key change for MCY is that following the Monfalcone shipyard being designated the luxury build site for Groupe Beneteau, models for other group brands are now being built there. This includes CNB yachts and the new Beneteau E-Project expedition yacht series.

NEREA

Having launched at Düsseldorf last year this company is still awaiting its first sale.

OTAM

Genoa-based Otam currently has three yachts in build which comprise an Otam 80HT which includes new custom feature; an Otam 65 full custom yacht with a new hard top and top speed of over 60kts with 4,000hp engines power and a full custom interior design by Francesco Guida, and lastly a Otam 45 custom designed Hard Top which is the first such 45 HT model.

For the future the company has a 30m (100ft) design being developed while hull and deck moulds and engineering for the new Otam 70HT model are in production now. The latter has already been sold and delivery is expected in June 2021. It will have its world premiere at Cannes 2021.

PALUMBO GROUP

Over recent years the Palumbo Group through its lead yacht company Palumbo Superyachts, has steadily expanded its yacht involvement and now additionally boasts the brands of Columbus Yachts, ISA Yachts, EXTRA Yachts and Mondomarine.

During 2019 and into 2020 this path of





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Grand Soleil's new 42LC, launched in 2019

expansion continues with new orders, investment and refit projects. At Ancona, which is now the group's main superyacht build centre, a new 3,300 tonne lift capacity synchrolift was inaugurated in May on the same day the 80m (262ft) *Dragon* was launched by Columbus. This division includes among the yachts in build a 49.5m Sport S50 superyacht to be completed this year. In May 2019 Columbus launched a new 120m concept design.

Both ISA and EXTRA won new orders last year. These included a 45m Gran Turismo and Super Sportivo 100 GTO models for ISA Yachts and an EXTRA 86 for a European owner. An EXTRA 130 Alloy was launched in September last year. At the Monaco Show EXTRA launched a new Continental range with two models of 65m and 80m to start with.

DEL PARDO/GRAND SOLEIL

It's been a busy 12 months for Cantieri del Pardo which has seen its revenues climb approximately €10m year on year since 2017 with turnover hitting €41.5 in 2019. Since 2014 the group has registered 30% growth year on year. The forecast is for a similar rate of growth in 2020 with sales expected to top €52m as it continues its strategy of one new launch a year respectively for its Pardo line of motoryachts, and Grand Soleil sailing yacht range. 2019 saw the launch of the Grand Soleil 42LC and the Pardo 38, both of which the builder says resulted in an uptick in

sales. Joining the line-up for 2020 will be a Pardo Endurance 60, its largest build to date and the first in a new range of 'trawler' style yachts. The Endurance name signifies the new range's capacity for long range navigation. The new E60 will make its debut in October following the Cannes launch of a Grand Soleil 44 Performance, details of which were first unveiled at the Dusseldorf boat show in January. Beyond that 2021 will see a Pardo GT 52, a Grand Soleil 60 LC and a Grand Soleil 68 Custom. Last year the builder produced some 80 units across both lines, and will increase that to 110 this year, 70% of which will be destined for the export market.

PERINI NAVI

This Italian leader in large sailing yacht builds plus luxury motor superyachts is continuing to rebuild its order book from the low point a few years ago. In November 2019 it announced the sale of the 47m E-evolution. The yacht, the construction of which was begun on spec, has been sold to a European owner with delivery scheduled for summer 2021. The hull of the 47m is currently in build at the Perini Navi yard in Tuzla, Istanbul, and will arrive into the Viareggio shipyard in spring 2020 for completion.

The 47 E-evolution is the third model in the E-evolution series with two 42 E-evolutions having been signed up over the last 18 months. The 47 sloop will be built from aluminium with a carbonfibre boom and rigging, with the in-house Perini Navi team overseeing the naval architecture.

The 47m E-evolution has three guest cabins in addition to the master suite aft and a versatile cabin which can convert to an office or a gym depending on the owner's needs. A very large flybridge of around 90m² offers uniquely

generous space for a craft of this type.

Perini Navi currently has the largest number of over-40m sailing yachts under construction in the world. Its production plans span the building of seven yachts, five of which are sailing yachts and two motoryachts. Specifically:

- Sail models comprise the 42m E-evolution; 42m E-evolution GTS, 42m E-evolution on spec, 47m E-evolution, and the 60m Classic. As for motoryachts, it has plans for a 53m and 56m Voyager.

“ Perini Navi currently has the largest number of over-40m sailing yachts under construction in the world. ”



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Sanlorenzo's SL96
launched at Düsseldorf

REALE YACHTS

This is a new brand in the market introduced in the latter half of 2019. To start with Reale is building the new 32m (105ft) Pacific 32 model now in build at its Darsena Pisana facility near Pisa, and which has already been sold. The Pacifico 32 is the first of a new line of yachts between 28m (92ft) and 50m (164ft). The 32 is being built for an owner wanting to take long voyages. Delivery is scheduled for spring 2021.

Reale offers four product series namely the Pacifico, Panarea, La Navetta and Baltico series; all in the 28m-50m range and all fully custom built in steel and aluminium.

RIZZARDI YACHTS

Rizzardi Yachts announced its comeback to yacht building after a decade or more, at last year's Genoa show with the launch of its 62ft IN Six model. This will be followed by the IN 5 of 52ft and a new IN 8, (82ft-84ft) in a couple of years.

ROSSETTI SUPERYACHTS

Rossetti's Ravenna-based San Vitale shipyard is progressing well on the 38m Explorer which is due for delivery in Spring 2021. Further orders are in prospect. The 38m (125ft) is the yard's first order.

The company has the possibility of enlarging its production and office facilities at its yard, but says it will only do so when when it has a concrete need to build different yachts of relevant dimensions at a time. In September 2019 it received planning authorisation to build a new shed 132m x 32m x 32m with luxury offices.

Rossetti is working hard to develop new projects and turn them into reality with some prospects and designers located in different countries. Among the future new yachts, a special place is dedicated to its RSY 65m Explorer Orca, an ice class explorer. The company considers that it has a "comfort zone" ➡

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Solaris Power's new 48 Open, named European powerboat of the year

in manufacturing big yachts of 60m-90m but this is complemented by its ability to also construct smaller 40m-50m yachts.

ROSSINAVI

This leading Italian, Viareggio-based superyacht builder started the year strongly by highlighting three superyachts namely *Lei*, *Florentia 52* and *Vector 50*, that will be launched this year. Of these the 49.7m *Lei* was launched in early February. In addition, the company announced at FLIBS 2019 its Super Sport 65 superyacht concept produce in cooperation with Pininfarina at this year's Fort Lauderdale International Boat Show.

SANLORENZO /BLUE GAME

For Sanlorenzo, 2019 was a very pivotal year in that the company started a listing on the Milan Stock Exchange with around 30% of the company having been included in the IPO. The company is still majority-controlled by executive chairman, Massimo Perotti, and his family with 60% of the shares.

At its Boot Düsseldorf press conference there was no mention of financial figures as this will now be more restricted. The company announced that it had established a new High-end Services Division, which is led by Carla Demaria, and has four separate business channels. This includes Lease financing; charter, the crew academy and Sanlorenzo Timeless, which helps owners maintain and manage their yachts.

At Düsseldorf, Sanlorenzo launched its SL96A

model and gave details of Bluegame's product development plans. These include launch of the BGX 60 at Cannes. New models designated the Big Game 42 and Big Game 62 will also be launched this year. In 2021, the BG 52 will be introduced at Cannes and there will also be the first of the BGM (with the M standing for multihull) at that event.

Also in 2020 Sanlorenzo has announced that it has opened its new production facilities in Ameglia. The 22,000m² Ameglia plant comprises three main units of which two are for the production of yachts (a total area of 10,000m²) and an office complex. A second phase of development will now start.

SOLARIS

Solaris Power celebrated in Boot Düsseldorf 2020 the fact that its Solaris Power 48 Open, which was launched last year, won the European Powerboat of the Year 2020 award. *IBI* was told at Düsseldorf that two 48 Opens had been sold. Currently the range consists of the 48 and 57, but new models such as a 58 Open and 68 Fly are planned as are further smaller and larger models. At the German show, Solaris power held the world launch of its Solaris 48 Lobster Flybridge.

As for the sailing side of the group, this too continues to expand with new models in prospect.

SUNDECK YACHTS

Sundeck is actively working on its Sundeck 430 model which will be its new entry level yacht, and the larger Sundeck 700. Both of these are in build for completion this year and one or both of them will be premiered at the Palma boat show in May.

TANKOA

Tankoa Yachts continues to work through its carefully orchestrated growth plan which links controlled-expansion, strong finances and well designed superyachts. The latest example of the latter was the 50m *Binta d'Or* which was delivered last year to a European owner. She was Tankoa's first hybrid vessel.

The Genoa-based builder has at least two other 50m superyachts in build and hull 3 of this series is due to be completed by May this year with hull 4 following around a year later. Hull 3 is the first of its new builds to have its hull and superstructure built at the company's new facility in La Spezia and then floated round for completion in Genoa.

In mid-December 2019, Tankoa announced its new TLV62 design concept which combines the shared ideas of Giancarlo Mussino, managing

director of the SINOS brokerage house that sold and delivered Tankoa's 50m hybrid M/Y Bintador and the yacht designer Luca Vallebona. The TLV62 is based on Tankoa's 60-metre technical platform.

TECNORIB

At Boot Düsseldorf 2020 the new TecnoRib. Pirelli 42 was globally launched. This is a sporty walkaround model which marks the start of a new range for the Milan-based shipyard. Such was the interest at the show that the company claims to have already allocated 90% of the production of the Pirelli 42 for 2020.

VISMARA SHIPYARD

At the 59th Genoa Boat Show, Vismama announced its new 21m Nacira 69 sailing cruiser and in January 2020 the company unveiled its new 26.2m V80 sail superyacht. The latter will be built of sandwich and carbon and a teak deck plus a carbon mast and boom.

VSY (VIAREGGIO SUPER YACHTS)

The main happening at VSY over the past year has been the launch in June 2019 of the 64m (210ft) *Atomic* in Livorno after which she was moved to Viareggio to be outfitted and subsequently delivered. This is the first superyacht to have been built by VSY since 2013. As with other VSY superyachts she was designed by Espen Oeino and Laurent Giles Naval Architects did the naval architecture

WIDER

In 2019, Wider was acquired from its former ownership by Genting HK by a trio of companies including the Monaco-based Nautical Hybrid Tech, Hopafi Holding Srl and the Zepter Group. At the Monaco show last year the company launched the new 54m Wider 180 and construction of this started early in 2020. This new yacht is projected to be delivered in February 2022. The Wider 180 has been designed by Andrea Vallicelli and C Yacht Design.

In February 2020 the company made known that it had a new Wider 135 design to add to its portfolio of sizes. Negotiations with a number of potential owners are in progress but no date has yet been given as to when, or if, construction will begin.

Also at the Superyacht Design Festival held in February in Italy, Wider's president, Marcello Maggi, announced a revolutionary technology: the Thermionic Converters (TCs). Responding to ever more demanding environmental requirements, the Thermionic Converters are solid-state devices that are able to transform heat directly into electricity with no moving parts, consisting of two metal plates separated by a vacuum gap. Developed by the Fintel Energia Group SpA, the technology will be the sole right of the Wider shipyard as to its use in the marine market. **IBI**

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Equipment: Solid 2020 returns expected

R&D investments could prove critical to growth this year as mini boom of 2019 gives way to more stable conditions in 2020

WORDS: BELINDA SNELL



Hydraulic steering systems are driving growth at Mavimare & Mancini

2020 will be a good season.”

According to Mancini, hydraulic steering systems appear to be driving growth. The company is seeing increased requests for its smallest power steering kit in the range, along with hydraulic steering systems for outboard engines up to 80hp.

“Until a few years ago, the trend was to install mechanical steering systems only,” says Mancini. “But now, boat owners and builders are choosing hydraulic instead. When it comes to outboards, customers want lighter, smoother, better-performing steering combined with more powerful engines. So basically the request is for having an electrohydraulic steering system at an accessible price, and this is what we are going to promote next season.”

POSITIVE MARKET FEEDBACK

Being able to diagnose onboard systems remotely, at any given time, is of utmost importance to Glomex, the Ravenna-based manufacturer of antennas and other connectivity devices. “We introduced three new products in 2019, all of them digital,” Piero Baldassarri, Glomex president, told *IBI* at boot Düsseldorf in January.

ZigBoat, for instance, is a 100% wireless remote control system that allows users to monitor and interact with their vessel via a free app. Also new is the weBBoat 4G Lite, an internet system that provides high-speed connectivity anywhere up to 20 miles from the coast, and CamBoat, a WiFi HD IP security camera that can be monitored remotely, ensuring safety and peace of mind at all times.

“Feedback from the market has been positive, but it’s hard sometimes to get people to commit,” Baldassarri ➔

Italian industry federation UCINA, now trading as Confindustria Nautica, presented its latest figures on the country’s marine equipment sector at the Genoa Boat Show last year and, while somewhat more subdued than the previous year’s tally, the results were still impressive. According to the findings, turnover reached €1.16bn in 2018 – an 8.8% rise over the previous year. The value of production came to €841.1m (€405.1m from domestic sales and €436m from exports), while sales of imported products came to €319.2m. *IBI* spoke to a handful of Italian equipment firms to see how they fared.

“Our domestic sales increased by around 5%-6% last year, so things are getting better in Italy... which makes me think 2020 will be a good season”

“We increased turnover by working with new boatbuilders, but sales at some of our foreign distributors decreased slightly. It’s linked to the economic situation in those markets,” says Antonio Mancini,

one half of mechanical and hydraulic steering systems specialist Mavimare & Mancini.

Mavimare is largely export-focused, with sales outside Italy accounting for around 80% of the business.

“Turnover in 2019 was roughly on par with the previous year, but

our domestic sales increased by around 5%-6%, so things are getting better in Italy. The 2019 Genoa Boat Show also generated strong interest, which makes me think that

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A custom Frigomar fridge for a 60m Perini Navi

confides. “It’s not a matter of price, quality, or features... all of these products are based on peer-to-peer connection, offer 100% privacy, and are intended for mid-sized boats with no subscription or set-up fees.”

Baldassari is forecasting a stable year in 2020, with demand coming mostly from the aftermarket. “People want small devices that are easily managed by app. They want hassle-free products in general, and that’s where we come in.”

HVAC specialist Frigomar registered a 25% increase in sales last year, thanks to its second-generation, variable-speed aircon units with inverter BLDC technology. The new self-contained chiller is lauded for its low power consumption, silent operation and high reliability in all working conditions. It was recently named 2019 Product of the Year by the British Marine Electrical & Electronics Association (BMEEA) for its innovative qualities. “The new range has attracted OEM boatbuilders who are more aware of the benefits offered by inverter BLDC technology in terms of energy efficiency, comfort and quality,” says Frigomar export manager Bernardo Cerrai. “Clients are concerned about the energy efficiency of the products installed on their boats, so we’ve been investing a great deal of resources into this – ever since the development of our first inverter BLDC chiller, which was nominated for a DAME Award in 2013.”

Based in Carasco, near Genoa, Frigomar is a family-owned company with more than 45 years’ experience manufacturing marine air-conditioning systems, refrigeration



Veco's variable-speed Climma DC35 chiller

systems and ice-makers for boats. Today around 70% of production is exported, a figure that is constantly increasing. “Exports have grown over the last five years, especially in Europe, the US and Asia,” says Cerrai.

All Frigomar products have been available with inverter BLDC technology since 2019 – from very small, self-contained units to powerful three-phase chillers, suitable for every type of yacht and working boat.

ENERGY EFFICIENCIES

Concerns over energy efficiency are also evident in the refrigeration market, as OEMs look to exploit as much onboard space as possible. “In 2019 we saw growing demand for custom-made fridges and cold rooms, and Frigomar offers more than 40 years’ experience in design and manufacturing,” Cerrai adds.

Another climate control specialist is Veco, whose Climma aircon systems and Frigoboat fridges can be found on boats of all sizes – from small sailing boats up to the largest superyachts. “We consolidated the double-digit growth that we had in 2018 and increased overall turnover once again by around 5%, so we are very satisfied,” says sales director Giulia Formenti.

Last year Veco renewed its Climma DC range of variable speed chillers, which are now available in four sizes with an output capacity of 35,000 BTU to 130,000 BTU. They come in modular versions, enabling up to 520,000 BTU of power in a single chiller. Major improvements include ‘plug

and play’ connectors for quick installation, a new white housing, and seawater and freshwater flow meters for easy troubleshooting.

“Size and ease of use have always been the leading factors in the marine market, but when it comes to air-conditioning systems, we have seen a change in the last few years, as energy consumption and efficiency have become more and more important,” Formenti explains. “Air-conditioning units are responsible for most of the energy consumption on-board, driving generator sizing and electrical balance; this is the reason why more efficient air-conditioning solutions are always more interesting to our clients, and this is also the reason why Veco SpA has invested a lot in the last four years into developing and improving its Climma variable speed chillers DC line.”

Climma DC chillers have a unique water-cooled inverter and are programmed to automatically run at the optimum speed depending on heating/cooling requirements, with no start current. At lower speeds, they allow for a 50% reduction in total energy consumption compared to a traditional chiller. “Since the DC range was launched, this line of new Climma variable speed chillers has been our best-selling, due to the fact that it’s a unique technology with huge advantages compared to on-off chiller solutions,” Formenti says. “With the re-design of 2019, we expect this trend to grow.”

At paint and coatings specialist Gruppo Boero, global turnover grew by 5% in 2019 and was mostly driven by a rise in exports and growing demand from superyachts.

“Last year we launched our new Challenger PRO topcoat range, a hybrid, polishable finish which is now registering steady growth,” says Andrea Cavalleroni, marketing intelligence specialist at Boero’s Yachting Business Unit. Challenger PRO is available in 200,000 different colours – from pastel tints all the way to special effects such as metallic and pearl.

In 2020, Boero plans to launch a new lightweight filler, Epoyacht, that shows excellent resistance to physical and thermal stress. “We are bringing decades of experience gained with our previous

products and best-sellers on the Italian superyacht market into a new development which allows a 1:1 mixing ratio and, most importantly, is suitable for use with automatic mixing machines.”

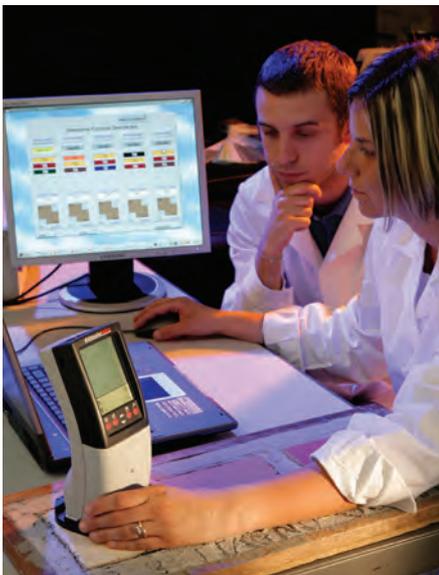
According to Cavalleroni, customers are looking for more water-borne products that are deemed more eco-friendly. Another request is for high-performance antifouling that is biocide-free.

ANTICIPATING MARKET NEEDS

“For these reasons, Gruppo Boero is investing 3% of its turnover in R&D in order to anticipate the market’s needs with the development of new and innovative products,” Cavalleroni adds.

Business is also performing well at Opacmare, a leading supplier of custom-built steel and aluminium gangways and ladders, tenderlifts, doors, ports, hatches and more. “We signed several new clients last year, but we also improved turnover with existing clients, especially in the second half of the year,” Opacmare sales manager Mohamad Almbayed told *IBI*. “This was thanks to our biggest clients, Princess Yachts, Azimut, Ferretti and Gulf Craft. We’re supplying lots of equipment for the biggest GRP boat that Gulf Craft has ever built – a custom 54 Majesty 175.”

According to Almbayed, Opacmare grew turnover by around 5% in 2019. “After Cannes and Monaco, we received lots of requests,” he says. “We have more than 25 engineers in our technical team, so we can personalise whatever the client wants. ➔



Boero is investing heavily in R&D

“ We signed several new clients last year, but we also improved turnover with existing clients, especially in the second half of the year ”

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Last year Opacmare presented SAFE 2, an updated version of its award-winning, high-low platform for outboard-powered boats that provides safe and easy access to the water at the stern. Working closely with Aquila Power Catamarans, the company installed the new unit on Aquila's latest model, the Aquila 32, where it sits flush with the main deck and wraps around the back of the outboards. Both Aquila and Opacmare were shortlisted for a 2019 IBI-METSTRADe Boat Builder Award in the 'Collaborative Solutions Between a Production Boat Builder and its Supply Chain Partner' category for their efforts.

Elisa Pavesi at power transmission specialist Transfluid SpA told *IBI* that the market is slowly waking up to the possibilities of electric propulsion. “These systems are naturally consumer-oriented and we are handling, through our distributor network, a growing B2C market with very good feedback – especially for refitting existing boats,” she says.

Working with Bellmarine, Transfluid recently introduced the SternMaster – an electric propulsion system designed for powerboats – along with the ShaftMaster for commercial applications. Both models have garnered strong interest at global exhibitions. In 2020, the company will introduce some new hybrid systems, although full details are as yet unavailable.

ECO-SOLUTIONS FOR THE FUTURE

“Environmental policies are improving by the day, and so is customer awareness of the problems that the world faces,” says Pavesi. “Transfluid is here to suggest and propose solutions for the future, both helping the shipyards and showing that a different way of boating, and working with boats, is possible.

“Italy is a traditional country and its marine industry is more conservative than others, but this is changing and once alternative propulsion becomes part of everyday culture, end-users and OEMs will embrace the change. It will take some effort

in the beginning, but there is so much satisfaction to be gained in the future.”

At marine pumps specialist Marco SpA, Michele Bergamaschi, MD of sales, told *IBI* that turnover in international markets was up by almost 7% in 2019. Continued signs of stabilisation were also evident in Italy. “We had record sales in the main European markets and the USA with double-figure growth,” he said.

Marco specialises in electronic pumps for fresh water systems, oil and diesel pumps for professional applications, and signal horns, exporting around 70% of production. “Generally all the OEMs we supply had interesting growth in 2019, as well as our main distributors.”

Marco recently launched a new heavy-duty oil and diesel pump with integrated control panel for flow regulation. The UP8-RE, winner of a 2019 IBEX Innovation Award and shortlisted for the DAME Award too, offers electronic flow control based on the viscosity of liquids and reversibility of the flow direction. “There is no other ➔



The Lofrans Lofrans' factory in Monza, Italy

Lalizas Italia: growth through acquisition

TWENTY YEARS AFTER it first entered the Italian market with offices and a warehouse in Genoa, the Greek-founded equipment firm Lalizas began an expansion plan in 2012 that involved the strategic acquisition of the Nuova Rade, Lofrans' and OCEAN fenders brands from Italy as well as Max Power from France. In November last year, its portfolio was strengthened yet again when it bought Arimar, an Italian liferaft manufacturer with facilities in Cesena.

Stavros Lalizas, group founder and CEO, told *IBI* that the company is always open to opportunities, especially when it comes to historic brands that have an impact on the nautical industry. Arimar is a historic brand, a leading manufacturer in the European market for liferafts and boat tenders, and the intention is to capitalise on that – on its heritage and on helping it not only to improve, but expand.

“At this moment Arimar does face some issues, but this is not a restraint for us. That was also the case in 2012 when we acquired Lofrans', Nuova Rade, Max Power and OCEAN fenders,”

Lalizas concedes. “For example, even though Lofrans' and Max Power had an unbeaten product, they also had major availability issues, as well as lack of organisation and management, which we resolved with great success. Right now, Lofrans' and Max Power have 98% availability in spare parts, which are dispatched from the factory in Monza, to all over the world, in just 24 hours after the order is placed.”

While the focus last year was squarely on Arimar, Lalizas Italia still managed to grow sales by around 5%. But growth is not always shown in numbers. “The expected returns and synergies that we can accomplish with this acquisition have more value than can be shown in numbers; even in two years from now,” he says. “And we are certain of our success because we did the same thing during the acquisitions of 2012, and we managed to turn around all four companies (Lofrans', Max Power, Nuova Rade and OCEAN fenders). We have both the experience, and the know-how, to do the same thing with Arimar.”

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Anchor windlasses for yachts from 20m-60m are among MZ Electronic's best-selling products

pump on the market that offers these features," Bergamaschi claims.

Marco's electronic sensor pressure pumps for fresh-water systems and oil/diesel gear pumps have been strong sellers for the company in recent years, followed closely by marine horns. "We're seeing greater demand for increasingly high-tech products," says Bergamaschi. "It's a need that we anticipated, so we're constantly upgrading our line of electronically controlled pumps."

MZ Electronic, owner of the Italwinch brand of anchor windlasses, ended 2019 with a 20% jump in sales. "This was the result of past investments and a new range of products added to our catalogue," MZ sales manager Alessandro Fossati explains.

EXPANDING THE PRODUCT PORTFOLIO

Last year MZ Electronic launched the NV-16, a vertical anchor windlass in AISI 316 stainless steel that is aimed at large yachts of up to 42m and is capable of handling stud link chains of 12mm-16mm in diameter. Available in electric and hydraulic versions, it boasts a high-efficiency gearbox with magnetic brake, and has dog clutches instead of the standard conical clutch.

"Anchor windlasses from 20m-60m yachts are our best-selling products," says Fossati. "The new NV-16 anchor windlass presented in Genoa and at the 2019 METSTRADE Show is having great success."

MZ Electronics is now putting its efforts into a new thruster range; they start with a tunnel diameter of 300mm and have a unique AISI 316 stainless steel tailpiece. "From our perspective, the pleasure boat market is growing," says Fossati. "We're simply following requests by making new products and custom solutions."

Celebrating its 50th anniversary in 2019 was Gianneschi Pumps & Blowers, a leading producer of pumps, water pressure systems, blowers, water heaters, engine pumps, air compressors and dampers for yachts and megayachts from 20m-120m.

Alessandro Gianneschi, business manager at the family-run firm, told *IBI* that turnover grew by 7% last year after the company expanded its product line with new items such as the ABC 451 and CP 40 – self-priming pumps made entirely from bronze. "2019 was a great year for us," Gianneschi says. "We also launched an innovative new pump with an air-lock feature for an air-conditioning unit at IBEX in the US. And in the megayacht market, we created a water heater skid unit, all plumbed with accessories and ready to plug in."

Gianneschi told *IBI* that the company is investing €400,000-€500,000 between the end of 2019 and the whole of 2020 on product performance indicators and improved testing conditions that will provide important feedback on production. For now, full details are under wraps but it is expected to bring great benefits to both Gianneschi and its clients.

Last year Bergamo-based Besenzoni created the Unica brand of 'unique' yacht accessories to better focus on the expanding



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market for bespoke superyachts – an effort that appears to have paid off. Thanks to new technical and design solutions, the company closed 2019 with around €18m in turnover.

“One of the new products we’re launching this year is the automatic Flush door,” says Fiorella Besenzoni, marketing director at the family-run firm. “It was developed, like all our other products, after a detailed assessment of the customer’s needs while using tailor-made solutions that meet the technical and safety requirements of the shipyard during installation.”

Besenzoni’s automatic Flush door has a painted steel main frame with moving door panels made from painted aluminium. The opening and closing mechanism is electric, while the sliding door is manual. When the door opens, it automatically locks into position. A control panel with backlit buttons can be customised in terms of the size and number of panels required.

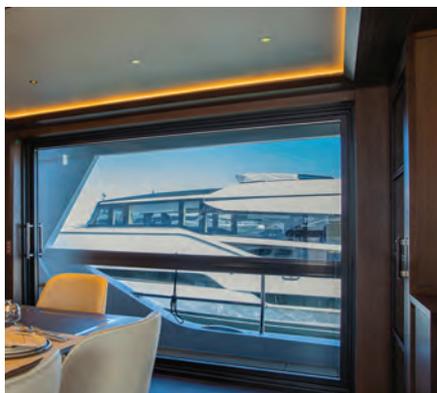
CUSTOMISATION IS KEY

“Our production flexibility and customisation capabilities allow us to work on all types and sizes of boats, paying attention to the research and development of new materials,” says Besenzoni.

Going forward, one of the company’s main priorities is to provide customers with completely bespoke products for individual boats, especially the larger ones.

“Passarelles are and will be the heart of our investment in 2020, together with a new range of helm seats that are dedicated to speed while still maintaining the comfort and design that characterise us.”

At stabilisation specialist CMC Marine, turnover as of August 2019 was around €15.2m – an 18% rise over the previous year. “2019 was a great success,” says CMC’s Sam Crockford. “First of all, we confirmed our leadership in the superyacht



Besenzoni’s automatic Flush door

stabilisation industry as our systems are installed on about 35% of superyachts worldwide, a record number.

“Secondly, during the September Cannes Yachting Festival, we introduced to the market Waveless, a new family of ultracompact electronic stabilisers designed for boats starting from 12m in length. The first batch is going to be delivered late February/early March and will replace similar products from our competitors mounted aboard Arcadia and Overmarine yachts.”

CMC’s new Waveless range is suitable for installation on yachts as small as 50ft LOA. The smaller model has a footprint inside the hull of only 9.5in. “We used the same components and technology of our products for larger yachts, therefore Waveless fins are technologically very advanced,” Crockford adds.

While superyachts represent a significant part of CMC’s business, demand for stabilisation in smaller yachts is the company’s biggest growth area. “In the past it was rare for a yacht of 15m to have a fin stabiliser, and if it did it would be for cruising only,” says Crockford. “It is now very much the norm... and also to have a zero speed system.



CMC Marine’s Waveless STAB50 stabiliser



Michele, Chiara and Carlo Marzucco of Quick SpA

CMC Marine’s experience with compact electrical stabilisers has given us a head start in this sector, as demonstrated by our ability to respond with the Waveless range.”

Michele Marzucco, president and CEO of Quick SpA, told *IBI* that new product development helped lift sales by 10% in 2019. The Ravenna-based company designs and manufactures accessories such as gyro-stabilisers, windlasses, and bow and stern thrusters, along with LED lighting for some of the world’s most prestigious yards.

TECHNICAL SOLUTIONS

“2019 was a positive year for Quick. We increased turnover by around 10%, reaching a total of €38m, while investment in new products was equal to €1.1m,” says Marzucco. “Our strategy was to focus on innovative and highly technological solutions, and to accept the requests that were arising from the market.”

Making its world premiere at Cannes last year was the QNN-Quick Nautical Network, an innovative device that allows for the integration of Quick systems with other navigation systems from Garmin, Raymarine, Simrad, B&G and Lowrance. This was followed by the launch, in Genoa, of two new anti-roll gyro stabilisers – the 12V DC battery-powered MC² Quick Gyro X2 and X3. Both models are suitable for centre-console or light-tonnage day-cruiser boats and are characterised by their low weight, compact design and simple ‘plug & play’ installation.

“Many trends are emerging from the

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leisure boat market, including the need for a smooth, more comfortable ride,” says Marzucco. “We responded to this with our MC² Quick Gyro stabilisers that are highly valued and always in strong demand.”

Attention to detail and design is another strong trend that led to the development, last year, of the new QNC (Quick Nautical Controls) range. This involved restyling the company’s classic controls for propellers and windlasses, as well as its gyroscopic stabiliser display and chain counter panels, in order to provide a more uniform, elegant and modern dashboard.

As for 2020, the Q-SY Quick Synchronous Motors was launched at METSTRADE in preparation for the upcoming season. The new range of electric motors feature an integrated power inverter and a permanent magnet synchronous reluctance motor, leading to improved energy efficiencies and zero maintenance. They are IP68-certified and therefore ignition-protected.

“At the beginning of 2019, we didn’t

expect such a good year, given the political worries influencing business,” says Alberto Osculati, executive director at one of Europe’s leading nautical accessories firms. “But we ended up with a satisfying 8% jump in turnover to more than €73m – and that was after an already excellent year in 2018.”

GROWING ORGANICALLY

Osculati is a key partner for OEM shipyards, distributors and retailers worldwide, with more than 22,000 items in its catalogue. Positive performance was recorded across all markets and product categories last year, with sales in Italy up 6% and sales in the rest of Europe up 10%. In countries outside of the EU, sales were up by 14%.

“We are proud to underline that this is all organic growth,” says Osculati, “made mostly through the strengthening of relations with current customers,



Osculati's Nuvola deck shower

the improvement of present products and the introduction of new products ranges.

In all these years we have reinforced our management team and we are now openly evaluating

external growth opportunities as well.”

Last year Osculati launched a new ladder, a new latch, and new showers among other things. They all distinguish themselves for being practical, easy to use, reliable, nice looking and, last but not least, value-priced for their quality.

“The Italian boating market, especially the OEM sector, was booming last year,” Osculati told IBI. “We have fantastic fellow countrymen who imagine, design and produce wonderful boats that are appreciated worldwide. My compliments and congratulation goes out to all of them.” **IBI**

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Overview: One step forward, one step back

A turbulent trade landscape has presented its share of challenges to the Canadian boat industry, where it seems like every win is met with another fresh roadblock

WORDS: CRAIG RITCHIE



Consumer outreach efforts like the Women's Day program at the Toronto International Boat Show have helped drive new boat sales

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Back to the future

"It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of light, it was the season of darkness, it was the spring of hope, it was the winter of despair."
- Charles Dickens

Charles Dickens was writing about the French revolution when he penned the oft-quoted introduction to his 1859 historical novel *A Tale of Two Cities*, but he could have just as easily been referring to the past two years in the Canadian recreational boating industry.

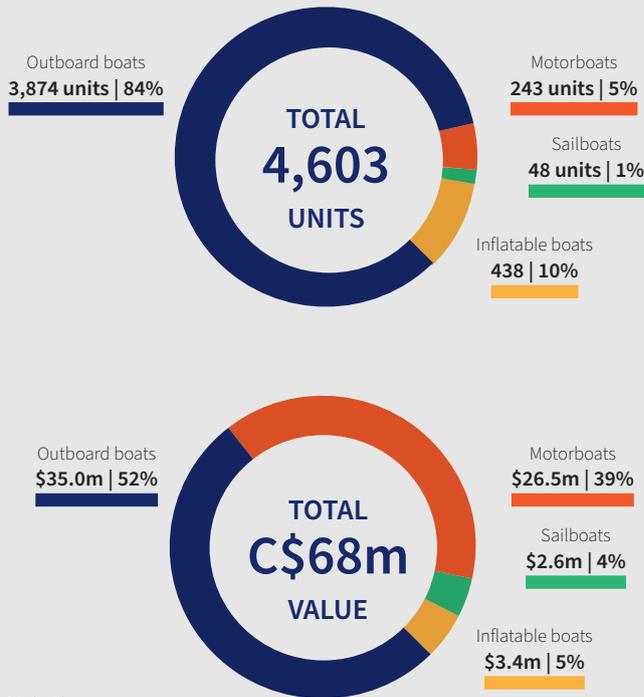
In spite of a stable economy, solid employment figures and continuing low interest rates helping to hold the line on retail pricing, over the past 18 to 24 months the leisure marine business in Canada has been every bit the best of times and the worst of times, with each triumph countered by fresh obstacles.

Two years ago the entire industry was sailing along. With the Canadian dollar trading at ➔

CANADA | STATS & FACTS

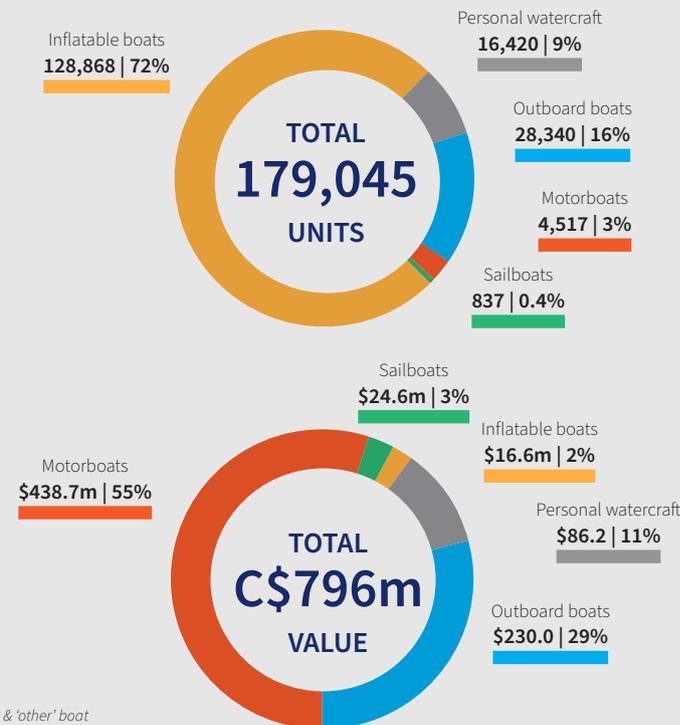
COMPILED BY ARLENE SLOAN

2018 BOAT EXPORTS



Note: Canoes & 'other' boat exports totaled 385k, C\$100m

2018 BOAT IMPORTS



Note: Canoes & 'other' boat imports totaled 54.4k, C\$61.5

Source: Statistics Canada

BOATING INDUSTRY

(Canadian dollars)

\$10bn industry turnover
\$5.6bn annual GDP contribution
396 boat manufacturers
1,000+ dealers/service shops
75,000 jobs (est.)
\$2.9bn salary income

DOMESTIC MARKET

28.9m adult population
12.4m boaters
 (46% of population)
202,080 km coastline (world's longest)
36,563 islands | **2 million+** lakes
1,400+ marinas
4.3 million Boat Park
1,830k Ontario | **860k** Quebec
650k The Prairies | **610k** British Columbia
350k Atlantic

BOAT SALES

(Canadian dollars)

41,729 new boats | **\$2.0bn** retail value (est.)
62,089 used boats | **\$985m** retail value (est.)

ECONOMIC INDICATORS

505,000 HNWI's
US\$1.6 billion HNWI total net worth
US\$48,400 GDP per capita
+1.7% real GDP growth (2019)
+1.8% real GDP growth (2020 est.)
6.3% unemployment rate
1.6% Inflation rate
+2.0% house prices (Dec 2019, yoy)
1.9 million car sales 2019 (-3.6%)

Sources: NMMA Canada, Economist Intelligence Unit, CIA World Factbook, Credit Suisse, Capgemini



NMMA Canada president Sara Anghel says a proposed federal luxury tax on boats would cause significant damage to the Canadian boating industry

about 77 cents US, manufacturers were enjoying an economic sweet spot, having a strong enough currency to stand up to buying materials in US dollars without seriously compromising margins, yet a low enough dollar to maintain an attractive price advantage on finished goods over their American competitors. The currency rate also hit a sweet spot for boat dealers and wholesale distributors importing product from the US and overseas. The market was strong and sales were good, with most Canadian dealerships reporting sales at the 2018 winter boat shows among the best in years, and in both units and dollars.

Everything changed in March 2018 when US president Donald Trump announced all-new tariffs on imported steel and aluminium. Rather than receiving its expected exemption under NAFTA, the Canadian government was surprised to learn that the new tax would also be applied to its own metal exports. Ottawa's response was to implement retaliatory tariffs on a wide range of goods imported from the US, including boats. The timing – the tariff came into effect on July 1 that year – could not have been worse for Canadian boat dealers as it coincided with a point in the year when inventory levels were depleted and they were just about to attend manufacturer dealer meetings and order new stock for the coming year. With approximately 85% of all boats sold in Canada sourced from builders in the US, the retaliatory tariff immediately pushed average retail prices skyward. Predictably, retail sales declined. “Many dealers were able to have boats delivered from the US manufacturers prior to the tariffs coming into effect on July 1,” says NMMA Canada president, Sara Anghel. “But after the tariff came into effect, we saw sales drop by 15%.”

The reciprocal tariff on boats was ultimately

DON HAMBLY, PRESIDENT AND CEO
CMP GLOBAL

The US-China trade war is damaging to us because we're caught in the crossfire. Honestly, it's been a nightmare

rescinded in May 2019 after furious lobbying by NMMA Canada and regional marine trade associations demonstrated that the measure was doing far more damage to Canadian businesses than to the US boat manufacturers that it targeted. But the respite came too late in the year to salvage the critical spring selling season. Further, the government's refusal to rebate tariffs paid by Canadian dealers on boats they had already imported left hundreds of dealerships across the country stocked with over-valued inventory, which will now have to be sold at a loss.

THAT SENSE OF DEJA-VU

No sooner had the dust began to settle on the retaliatory boat tariff when another new threat to the boat industry appeared on the horizon. Like the tariff, the industry's latest challenge also comes straight from the Canadian government – this time in the form of a proposed luxury tax on boats priced above \$100,000.

A surprise add-on to the incumbent Liberal government's re-election platform announced last October, the proposed 10% luxury goods sales tax will be applicable to all automobiles, aircraft and boats sold in Canada which are valued at \$100,000 or more. Re-elected to a minority government, Justin Trudeau's administration has not yet made good on its luxury tax threat, but legislation to implement the new measure is expected to appear on the spring agenda. It's enough of a concern that NMMA Canada has bumped its annual Boating Day on the Hill federal lobbying effort from its traditional May timeslot forward to late February, in order to air its concerns with Ottawa before the spring budget is finalised. “The industry will gather on Parliament Hill and request to meet with

more than 150 members of parliament, ministers, political staff and departmental staff in order to express our concerns,” says Anghel. “The luxury tax will negatively impact boat sales, and buyers will simply chose to spend money on other recreational activities and products that are not taxed.”

Or, she concedes, simply buy their boats in the US. With more than 70% of Canada’s population living within 100 km of the US border, the threat of retail losses to cross-border shopping cannot be understated.

An organised lobby effort to diffuse the luxury tax before it becomes law is already well underway, led by NMMA Canada in collaboration with regional marine trade associations including Boating Atlantic, Boating BC, Boating Ontario, Nautisme Quebec and the Mid-Canada Marine and Powersports Dealers Association. “Our position is that luxury taxes have failed all over the world including the United States, Italy, Norway and New Zealand, as consumers simply diverted their spending to other forms of recreation and the governments ultimately collected less net tax,” says Anghel. “Our ask is that recreational boats that bring families together, just like other recreational vehicles, be excluded from this proposal.”

ENTER THE RED DRAGON

With the Canadian and US economies so tightly integrated, separate, ongoing trade disputes between the US and China have also impacted the Canadian industry – and particularly in the case of companies with multi-national operations like Delta, British Columbia-based CMP Global. “The US-China trade war is damaging to us because we’re caught in the crossfire,” says CMP Global president and CEO, Don Hambly. “We have a plant in China, we have a facility in the US, and we sell to a lot of product to customers in both the US and China. Honestly, it’s been a nightmare. There’s a whole series of different tariff lists that started with a smaller list at 10%, an expanded list at 10%, and then another list at 25%. And in some cases we’re up at 35% tariffs on imported goods that are sold into the US which obviously represents a significant impact on margins.”

The achievement in December of a phase one trade agreement between the US and China brings a promise of greater stability and cost-certainty for Canadian manufacturers and wholesale distributors that have been entangled in the ongoing dispute. But with business analysts such as Bloomberg Economics forecasting tariff-related losses in the US to reach US\$316bn through the end of 2020 even with the agreement in place, Canadian manufacturers remain cautious – and particularly so for those with a large proportion ➡



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Reflecting Canada's multi-cultural population, the Toronto International Boat Show offers consumer outreach programs presented in Mandarin

of annual sales coming from customers in the US.

Further complicating an already dynamic trade landscape, Canada remains embroiled in its own disagreements with China. Tensions between the two countries have been rising since December 2018, when Canada arrested Huawei Technologies CFO Meng Wanzhou at the request of the US. Days later, China detained two Canadians in what has been described as a tit-for-tat response. While some trade disputes between the two countries have been resolved since, relations with China remain – in the words of one Canadian manufacturer – “a big whirling propeller you don’t want to walk into.”

SOLID EXPORT GROWTH

Bucking the ‘one step forward, one step back’ tone of recent years has been solid export growth among Canadian manufacturers, and particularly those in the parts and accessories sector who continue to enjoy year-over-year revenue gains and increased penetration into international markets, driven in part by a significant ongoing effort by NMMA Canada to develop export trade. The organisation has led trade missions to overseas boat shows for years as part of its strategy to help Canadian manufacturers expand their market footprint, with upcoming trade missions scheduled

“Bucking the ‘one step forward, one step back’ tone of recent years has been solid export growth among Canadian manufacturers”

this year to include the Biograd show in Croatia, the Genoa show in Italy, the Sydney show in Australia. “For the last seven years NMMA Canada has been actively supporting Canadian manufacturers to export,” says Anghel. “That includes having organised more than a dozen trade missions around the world, supported with Canadian government funding of more than \$525,000.”

And, there’s METSTRADE, which in 2019 saw the largest number of Canadian exhibitors to date, encouraged by the provisional application of the Comprehensive Economic and Trade Agreement (CETA) between Canada and the EU which eliminates 98% of tariffs between the two markets. “METS remains the best B2B marine equipment trade show for the Canadians,” says Anghel. “Our pavilion is growing every

year and we continue to receive support from the Canadian Embassy in the Hague to grow.”

Export trade into the lucrative US market will no doubt benefit from the stability brought about by the Canada-US-Mexico Trade Agreement (CUSMA), with Canada expected to join Mexico and the US in ratifying the pact in the next few weeks. The NAFTA replacement modernises the original agreement in multitude ways, including

adding provisions for internet, digital services and e-commerce which did not exist when the original trade deal was signed in 1994. The new trade agreement will have its greatest impact on the parts and accessories manufacturers which form the backbone of the Canadian boating industry.

A STABLE DOMESTIC MARKET

In spite of the uncertainty and margin pressures created by ongoing trade disputes and the threat of a new luxury tax, retail boat sales in Canada have held fast at reasonable levels. Boating participation remains stable, at approximately 46% of the total population, with total boat sales approaching CAD\$3.0bn.

Speaking at the Toronto International Boat Show industry breakfast in January, Nick Bennenbroek, managing director and head of Currency Strategy for Wells Fargo Securities said that a positive economic outlook for Canada through the end of 2020 provides reason for optimism moving forward. “In terms of our economic growth forecast, in 2019 we’re seeing growth at 1.6% and we don’t think it’s going to be much different in 2020,” said Bennenbroek. “It doesn’t sound fantastic, but in reality [the economy] is pretty much on cruise control. The year 2019 was a year of risk, with uncertainty associated with various tariffs, Brexit and the US-China trade standoff. In 2020, we should probably see a de-escalation of this risk, and that is good news.” **IBI**

Welcome to the water: Boating programs bearing fruit

Some credit for continuing sales momentum in the Canadian market must go to continuing outreach programs by NMMA Canada’s Discover Boating program, which has enjoyed considerable success in introducing the boating lifestyle to prospective new buyers through extensive PR and social media campaigns. An online content program launched in mid-2018 that worked with dozens of bloggers and influencers to share boating content on their online channels was particularly successful in spreading the message that boating is fun, and continues to gain momentum – particularly among the younger Canadians that represent the industry’s future market. New data from Numeris/RTS Canada reveals that the 18 to 34 age class now comprises the largest segment of the Canadian population, at approximately 8.28 million people – for the first time exceeding the boomers in the 50 to 64 age class (7.72 million) and Gen X of 35- to 49-year-olds (7.21 million).

Simultaneously, companion programs organised by individual boat shows have proven highly successful at introducing boating to new audiences. The Toronto International Boat Show, for example, has made its New Boater Welcome Centre a central feature of the country’s largest and most important boat show, where a diverse range of speakers deliver presentations on a range of topics designed to make the process of getting involved in boating easier. “About eight years ago we held a series of focus groups with boat show attendees, including people who had been coming for 30 years, people who had come for five or six years, and people attending for the first time,” explains Linda Waddell, president and show director for show owner, Canadian Boat Shows Inc. “In every instance, people attending for the first

time said the same thing – that walking into the show was an overwhelming experience and they had no idea where to begin.”

The show’s response was to create its New Boater Welcome Centre, consisting of a large, well-signed display space physically located right in the middle of the show floor where prospective new boaters can learn about different types of boats, ask questions and enjoy free seminars on topics



Canadian Boat Shows president Linda Waddell

such as how to buy a boat and how to arrange financing and insurance. The show even includes a New Boater section on its website to help newbies prepare for their visit. “It’s been hugely successful,” says Waddell. “We’ve had people walk into the show office and tell us that thanks to their experience at the New Boater Welcome Centre the previous year they bought a boat, and it was all due to the help they received by the people there.”

In a nod to Toronto’s multi-cultural population, the show has also operated a successful outreach program for new Canadians, extending its New Boater Welcome Centre offering with seminars and boat show guided tours presented in Mandarin. “Toronto is a multi-cultural city and the Mandarin-speaking population in particular has grown significantly over the past 10 years,” says Waddell. “In response, we began offering seminars on how to buy your first boat in Mandarin, which are followed by a tour of the show with our unbiased expert who answers questions and translates. If a show visitor is interested in taking a purchase further, this individual will then assist the buyer by serving as a translator through the purchase transaction. Our aim is to expand this initiative and offer similar services in additional languages moving forward because Toronto is a multi-cultural city and boating truly is an activity that everyone can enjoy.”

The largest indoor boat show in North America, the Toronto event is also home to the world’s largest indoor lake, where many potential boaters can take their first-ever ride in a boat. “People who don’t know someone with a boat generally have no way of getting on one and having that experience,” explains Waddell. “They can come to the show and take a boat ride for free. We see them putting on a lifejacket for the very first time, taking pictures of their kids, and we see the look in their eyes when they leave the dock and suddenly experience what it’s like to be on a boat. We know that 30% of our attendees every year are visiting the show for the first time, so offering a way for them to try boating, gives them that first taste that they can’t get any other way. And then they can go talk to the experts and get all the advice they need to take things to that next logical step and become boaters.”

Boatbuilders: Go fish

Canada's leisure boat industry has always been driven by the recreational fishing market

WORDS: CRAIG RITCHIE



In spite of a flat market, aluminium fishing boats remain top sellers throughout Canada

Recreational fishing has long been a key driver of recreational boat sales in Canada, and it continues to be a key driver today as evidenced by both NMMA Canada sales data and by the sheer number of fishing boats on display at virtually every Canadian boat show.

That's particularly true in the case of aluminium boats, which in spite of relatively flat year-over-year sales growth continue to represent the vast majority of vessels sold each year in the domestic market. Lightweight, maintenance-free and durable enough to handle periodic scrapes against granite, aluminium boats have long represented the backbone of the Canadian boat market. Surprisingly, many of these boats – up to 85% – are not produced in Canada, but imported from manufacturers in the US. Canada's vast geography and comparatively sparse population

have typically seen domestic manufacturers do well in their own region, but face steeper competition in more distant markets where they come head-to-head with US-based competitors that are located physically closer to local dealerships, in

spite of being situated on the other side of an international border. That's been especially true since the implementation of the Canada-US Free Trade agreement in 1987 and, more recently NAFTA in 1994. Accordingly, US manufacturers located near the Canadian border such as Crestliner, Alumacraft, Lund and Smoker Craft command a significant share of the Canadian

aluminium boat market.

Those are brands which compete head-on with Princeville, Quebec-based aluminium fishing and pontoon boat manufacturer Princecraft Boats. The company, with about 325 employees, sells

“ Up to 85% of the boats sold in Canada are imported from the US ”

approximately 90% of its total production run to its Canadian dealer network, with the balance exported to American dealerships located in the eastern US. It's precisely the type of business that the 10% retaliatory tariff that the Canadian government imposed on US-made boats in 2018 was intended to protect. Instead, the tariff had precisely the opposite effect, and killed sales overall. "We were in good shape where retail pricing was concerned, but media picked up on the idea that the tariff made boats more expensive and it spilled over the entire market," says Princecraft marketing director, Jean-Philippe Martin-Dubois. "The end result was that people wouldn't even talk to us, they would just throw up their hands and say 'whoa, boating is way too expensive for me' and they were out of the market just like that."

Martin-Dubois notes that while the elimination of the tariff in late May 2019 was welcome news, the relief came far too late in the season to make a significant positive impact. "For 2019, we are looking to be flat to the year before," he says. "Our sales are good in Canada, it's our home market. But the 2019 season did not start well with the tariff still in place, and that was followed by flooding in much of eastern Canada right when we should have seen the strongest sales. Things improved over the summer though, and sales did pick up at the end of the season. We'll be keeping a close eye on the 2020 winter boat shows, because they will say a lot about how the rest of this year should play out."

Even without tariffs to impact the bottom line moving forward, Martin-Dubois says retail pricing is one element the company keeps a very close eye on.

"When I came on board here in 1994, one particular fishing model of ours which is quite popular was selling for \$32,000 to \$35,000," says Martin-Dubois. "Today it's over \$50,000. The cost of materials has gone way up, labour costs have increased, that's just how it is. Back in the day you would see people with an RV on their campsite and they had a boat in water. Now, they pick one or the other – the RV or the boat. They no longer have the money for both."

BUCKING THE TRENDS

In British Columbia, KingFisher Boats has also felt second-hand impacts from the Canadian government's retaliatory tariff. The company, which manufactures a range of adventure fishing craft with a concentration on heavy-gauge welded aluminium vessels for saltwater fishing along the Pacific coast, reports strong sales through the second half of 2019 after the tariff was rescinded. "Business has been very brisk," says CEO Byron Bolton. "The last few months in particular have been extremely positive at the retail level, giving the dealers a very high level of confidence. We're continuing to see a clear shift to larger vessels with more feature-rich content, and in particular for our larger cabin models."

Bolton notes that because KingFisher serves a highly specific market with a smaller number of competitors, it may have not been impacted as directly by the retaliatory tariff as other Canadian boatbuilders. However, he notes that the company continues to be indirectly impacted by dealers placing smaller orders until they can rid themselves of so-called "tariff boats" – vessels sourced from US boat manufacturers while the tariff was in effect, ➔

KingFisher Boats has seen strong demand for its heavy-gauge welded aluminium fishing boats in spite of continuing tariff woes



KingFisher Boats CEO Byron Bolton



BRP's Marc Lacroix



Even PWC manufacturers like BRP compete in the fishing market

and which remain unsold as non-current inventory now carrying inflated price tags. “We see there are a few tariff boats in the dealer pipeline that the dealers need to move, and that obviously represents a challenge for them and for us,” says Bolton. “Until the dealers can sell them and free up capital, there is a limit to how many boats they can order from us. In that way, the tariff continues to impact us as a Canadian manufacturer.”

Trade developments are something which KingFisher watch carefully, with just over half of the company’s production run exported to dealers in the US. KingFisher has also begun exporting small quantities of boats into northeastern Europe, though growing opportunities in eastern North America – and particularly on the Great Lakes – represent a more immediate priority for the company. The opportunity to capture share in such distant domestic markets is in large measure due to a lack of foreign competitors operating in the region, says Bolton. “The Great Lakes are a lot like our home market in the Pacific northwest, being big, open water that can get rough. And, they’re located in an area that can be surprisingly cold even in mid-summer, making it a market that’s less suitable for open centre console-style boats. It’s a very large market, and we see a good fit with our product. We’ve also been successfully growing our business in central Canada and the northeastern US, where we also see a lot of potential.”

JUST DOO IT

So strong is Canada’s fishing market that even personal watercraft manufacturers have seen fit to jump in. Valcourt, Quebec-based BRP introduced its Sea-Doo Fish Pro in late 2018 as a 2019 model, billed as the first personal watercraft to come from the factory rigged specifically for fishing. “The response to Fish Pro has been tremendous,” says Marc Lacroix, BRP’s director of global marketing for Sea-Doo, Ski-Doo and Can-Am ORV. “It came about from our vision of expanding the usage of personal watercraft.

The natural answer was fishing, and in some global markets – New Zealand being one – our research showed us that over 70% of PWCs sold there were used for fishing. We realised we were onto something, and that’s when we started developing the Fish Pro product.”

Along with the enduring popularity of its low-cost Spark model, Lacroix notes that Fish Pro sales have helped Sea-Doo continue to grow its PWC sales in Canada, a significant proportion of them now coming from first-time boat buyers. “Our latest figures show our Fish Pro is bringing in more than two thirds of new entrants to the sport,” notes Lacroix. “The industry has anywhere between, depending on the market, 30% to 50% new entrants every single year. So PWC sales are bringing a lot of new participants into boating, and that’s something we’re very proud of.”

With more than 13,000 employees working at a dozen different facilities located in six countries, Lacroix notes that BRP has also taken its lumps in ongoing global trade disputes. “We look at that the same way we look at the weather,” he says. “Things like tariffs are simply beyond our control. We can absorb them, and we can try our best to minimise the impact with a good value chain, and a good product line, and pricing that fits consumer needs. As one manufacturer, we can’t control external factors like that. So we concentrate on doing our best to create interest in the products and share the experience of boating with as many customers as we can.”

In the near future, that effort will focus on promoting its new Fish Pro model at this winter’s boat shows. “Right now our full attention is on the Toronto Boat Show,” says Lacroix. “That show represents our biggest retail opportunity anywhere in North America, it’s where we see the most pre-orders of any show we do. There’s a magic at Toronto that I wish we could recreate at every event we go to. It’s a short boating season in Canada, so the passion among our dealers and among our customers there is on a whole other level.” **IBI**



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Equipment: The right stuff

Some marine components manufacturers compete on innovation, others on quality, others still on price. Canadian equipment manufacturers continue to disrupt the market by competing simultaneously on all three

WORDS: CRAIG RITCHIE



CMP promotes its Martyr line of premium aluminium and magnesium anodes as a non-toxic alternative to zinc



CMP aluminium anode planogram

Although Canada has a relatively small number of domestic boatbuilders, its marine parts and components manufacturing segment is comparatively huge, representing the backbone of the country's leisure marine industry. On the strength of innovative designs, a skilled workforce that produces high-quality goods, and a favourable exchange rate relative to the US dollar, the sector has thrived by being able to produce advanced, well-made equipment that frequently comes with a cost advantage in both domestic and export markets. That the sector has been able to grow steadily in spite of continuing US tariffs on Canadian aluminium and steel speaks to its remarkable ability to anticipate global markets and consistently show up in the right place with the right product at the right time.

That can certainly be said for Delta, British Columbia-based CMP Group Ltd. The manufacturer of marine equipment ranging from anodes, anchors and chain to dock equipment and precision autopilots has manufacturing facilities in Canada, Italy, the US and China, leaving the company firmly entangled in president Donald Trump's ongoing trade wars between the United States and Canada, China and the EU. "No question, it's a challenging situation," says CMP Group CEO, Don Hambly. "We manufacture product in China, and we manufacture product both in Canada and the US. In each case, components and raw materials may be sourced locally, or come from somewhere else. We have some products where we do a portion of the manufacturing in one facility and build the other portions elsewhere, with those subcomponents shipped to our Chinese facility for

completion, so the whole thing is hit by tariffs.”

With approximately half of its global sales going to clients in the US, tariff adjustments represent a significant and continuous impact on CMP's bottom line. To the positive, solid economies in key markets continue to boost demand for its products and sales remain strong, allowing the company to continue to grow its revenues in spite of the tariff headwinds. “The Canadian market is stable, and there's still a lot of growth potential. The domestic market in China is growing. Europe is growing nicely. Australia is growing nicely. And the US market is very strong,” says Hambly. “Other than the tariffs, there's nothing to complain about.”

Much of that continued growth comes from CMP's Martyr line of premium aluminium and magnesium anodes, which the company has been promoting as a non-toxic alternative to traditional zinc. Hambly notes that virtually all of CMP's business as an OEM to engine manufacturers including Mercury, Evinrude, Yamaha, Honda, Suzuki and Volvo Penta has shifted from traditional zinc anodes to the Martyr aluminium product. “It's just a better anode in every way,” he says. “Apart from being non-toxic and cadmium-free, aluminium lasts longer, it's less expensive and it's a lot lighter in weight, so it's less expensive to ship.”

Where aluminium anodes may now be the choice for CMP's OEM customers, Hambly notes that the company still faces an uphill fight in the aftermarket, where work still needs to be done to educate distributors, dealers and end-users on the benefits of non-toxic anodes. “I really believe that all else being equal, the consumer will choose the non-toxic product especially since they're effectively getting a premium product without having to pay a premium price,” says Hambly. “But the term ‘zincs’ has become generic, almost like Kleenex. So consumers go up to the parts counter and ask for zincs, and that's exactly what they get. Overcoming that is a dealer education function, and we recognise that is something we need to keep working on.”

CMP has worked diligently over the past few years to diversify beyond its core anode business, acquiring the Rocna anchor line in 2011 and expanding it with a new Vulcan anchor specifically designed for powerboats the following year. The subsequent launch of its Titan chain line, and its 2016 merger with Dock Edge + Inc greatly expanded the company's product catalogue and its global customer base. Today, the majority of the company's revenues come from export markets, with about half its current revenues from the US

“The term ‘zincs’ has become generic, almost like Kleenex”



and as much as 25% from overseas clients. “We have participated in numerous overseas trade missions organised by NMMA Canada, and have been a longtime exhibitor at METSTRADE, both of which have been essential to developing that business” says Hambly. “We see some tremendous opportunities ahead of us, we just need to determine where the best fits are and ensure that our growth is measured and sustainable.”

Shockwave has participated in several NMMA Canada trade missions in order to develop export business for its S5 shock-mitigating seat base

EXPORT DEVELOPMENT

Export sales opportunities are also very much front-of-mind for Vancouver-area marine seating manufacturer Shockwave Seats. The company has been steadily promoting its line of shock-mitigating suspension seating to a number of prospective clients in both the aftermarket and OEM sectors worldwide, as it seeks to capture a larger share of the leisure boating market.

While aftermarket sales have been growing at a pleasing pace, the company has been particularly focused on establishing itself as an OEM to boatbuilders. Among its first clients was Canadian heavy-gauge aluminium fishing boat manufacturer KingFisher Boats, which began offering Shockwave's S5 suspension seat base initially as a factory upgrade, then as standard equipment on a number of high-end models with the 2020 model year. “We learned that a number of KingFisher's dealers were ordering boats from the factory and then pulling out the existing seats and retrofitting them with our S5 base,” says Keegan Moynihan, sales manager for Shockwave's recreational division. “We had been having conversations with them before that and it was clear there was a fit there since our products ➡

both target the same end-user.”

Since then, Moynihan notes that Shockwave has entered into OEM agreements with three other boatbuilders based in the US. “There is a lot of interest among the centre console builders but ergonomics is a bit of an issue,” he says. “Centre consoles have traditionally been driven from a standing position, so depending on how the helm is designed there may or may not be enough room to install the unit. So we’ve started to see some traction in that market but it’s going to take some time to develop on a large scale.”

Beyond the North American market, Shockwave has seen growing interest in its product line in Europe and Australia, following several years of working overseas shows including METSTRADE, Southampton, Cannes and Sydney; the company exhibited at Düsseldorf for the first time this year. “We now have distributors in the UK, Greece, Australia and Germany. We’re talking comparatively small volumes at this point, but at least now we have our feet on the ground,” says Moynihan. “We’ve also had a lot of interest from a number of Scandinavian boatbuilders. That market is very similar to the Pacific Northwest where we’re based, in that it’s rough water and there’s a lot of heavy-gauge aluminium boats. There seems to be a lot more awareness of suspension seating in Europe, perhaps because there are a lot of medium-sized builders and competition is significant. Every builder wants a way to differentiate. We do have plans to bring some distribution into Scandinavia, and then into the Mediterranean region. Our export markets are developing steadily, and most of that has been organic growth.”

GeigerTec Marine
vice president of sales,
Tim Fernandes



KEEGAN MOYNIHAN,
SHOCKWAVE SEATS

I’m hoping to see significant sales increases... particularly in the Pacific northwest. My goal is to double our sales in that region

On the aftermarket side, Shockwave has been equally busy developing its refit business in Canada and the US. “The business split is probably 50-50 between OEM and aftermarket right now,” says Moynihan. “Moving forward it will most likely evolve to somewhere around a 70-30 split between OEM and retail, just because for so many vessel profiles the product does have to be integrated into the design. In the near-term, I’m hoping to see significant sales increases in our US aftermarket, and particularly in the Pacific northwest. My goal is to double our sales in that region throughout this buying season.”

REINVENTING THE WHEEL

GeigerTec Marine, a Toronto-based manufacturer of precision aluminium and steel articulated brackets for mounting electronics, is yet another Canadian manufacturer that has found significant success in export markets. The company began distributing its precision brackets in the US last year, even as the tariff spat between Canada and the US reached its zenith. Debuting its product line at the ICAST fishing tackle show in Florida last July, the company was surprised to be quickly overwhelmed with orders – in spite of coming in at higher list prices than many of its US-based competitors. “That was an eye-opening experience, no question about it,” says GeigerTec’s vice president of sales, Tim Fernandes. “Everyone in our company is a serious fisherman, and we all tend to fish on large, open lakes with rough water all the time. What we found is that a lot of the adjustable electronics mounts currently on the market just won’t stand up to those conditions, they might work fine on protected waters like they have in the southern US, but they just won’t last out on the Great Lakes. So we developed a line of tremendously tough, billet aluminium mounts that are quite honestly unlike anything else out there. We showed them at ICAST and we were just blown away by the response.”

Fernandes notes that while tariffs did contribute to raising the cost of his company’s product, price sensitivity was not an issue with prospective



GeigerTec has found an eager market in the US for its heavy-duty articulated electronics mounts

distributors. “The end-users are installing MFDs worth thousands of dollars using these mounts, so we designed and built them to be the highest quality – period – without any regard for the eventual selling price. Ironically considering the tariffs, we used 6061 billet that we source from the US. These aluminium blanks are then milled on quarter-million dollar machines using the latest CNC software for design and modeling. The result is that they do come in higher priced at retail than some of the other brackets on the market, but they’re built to a whole other level of quality. A pro angler can put a \$12,000 MFD on it and be 100% confident they’re not going to have any problems.”

As a smaller company competing against multi-nationals with deep marketing pockets, GeigerTec has leveraged the power of internet influencers, using a pull strategy to drive sales. “Honestly, it’s a wonderful time to be a small manufacturer and to be in this market, because so much has moved to social selling online,” says Fernandes. “We have a wonderful pro staff team who work very hard to promote the product line. Consumers follow them on social media, and see the pro anglers using certain products and having success with them, which drives them to purchase. For a company our size, even five years ago before Instagram and Facebook had the kind of marketing power that they do, it

would have daunting to take on the existing players in the market. But right now social media affords us an opportunity to communicate directly with the end-user to drive awareness and sales.”

That elevated profile among end-users has helped the company to form significant strategic alliances with key industry partners. At last November’s METSTRADE in Amsterdam, Johnson Outdoors exhibited GeigerTec’s Mega

360 mount on its stand as part of the company’s Humminbird electronics display. “That drove a tonne of people over to our own stand in the Canadian Pavilion,” says Fernandes. “METSTRADE really helped solidify our brand’s identity and get us to that point of critical mass internationally. Through 2019 most of our business has been domestic within Canada, but based on

where things are heading export business is going to become a much bigger part of our business overall.”

That could also include new business as an OEM. Fernandes notes that GeigerTec Marine has entered into discussions with at least one US boatbuilder with an eye to offering the product at the factory level. “At METSTRADE we met with the trade commissioner from the Canadian Embassy in The Hague, and they’re helping with some further contacts in the Netherlands. Right now we’re just running flat out, following up on leads and keeping the wheels turning.” **IBI**

“Competing against multi-nationals, GeigerTec has leveraged the power of internet influencers... to drive sales”

Global express

For fan manufacturer Caframo, exporting seemed a good way to diversify its customer base. Today, the firm has distribution in 36 countries and is about to open a new distribution centre in Europe

WORDS: CRAIG RITCHIE



Caframo owner Tony Solecki

Few companies in the Canadian recreational boating industry are stronger proponents of exporting than specialty fan and heater manufacturer Caframo. The company, celebrating its 65th year in business in 2020, has developed a global market for its precision cabin fans, which are sold through both aftermarket and OEM channels. Where marine was a comparatively small part of the company's overall business not that long ago (Caframo also manufactures fans for residential applications, along with precision stirring equipment for laboratory use), today it represents an increasingly important and fast-growing business segment, posting double-digit annual growth over the past several years.

"Our international business has been really good," says Caframo's strategic account manager, Jodi McMullen. "We've been working hard to grow it by ensuring we have the right distribution partners and by developing new products specifically for export markets. We've also adjusted how we do things internally, with respect to market research and prioritising which markets



Jodi McMullen, strategic account manager

we need to focus on most immediately. We've been doing a lot of research on new products that will make sense for our key market: smaller to mid-sized boats."

Increasingly, that sales growth is being realised as an OEM, supplying cabin fans and related equipment to major boatbuilders. Most recently the company has entered into a new supply agreement to furnish a custom defogger to Beneteau.

"We had a conversation around some of our existing products, but to best fit the requirements they had we went back to our engineers and co-created a custom solution," says McMullen. "One of the benefits of being a smaller company is having the agility to enable the development of custom

products that meet specific applications."

Between OEM sales and a substantial base in the aftermarket, Caframo has been growing steadily over the past several years. Based in the picturesque village of Wiarton about three hours north of Toronto, the company recently completed a significant expansion of its main manufacturing facility, effectively doubling its production and warehouse space. In addition, the company operates two satellite warehouses in Toronto and Buffalo to serve the Canadian and US markets, and is in the process of establishing Caframo Europe BV in the Netherlands to serve its European clients.

"That's brand new, we aim to be processing orders there by March so that our European customers can now purchase domestically instead of importing," says McMullen. "It's a critical step because having that presence in the Netherlands will make it much easier for us to partner with European companies that simply don't want to have to import and deal with that end of it. Our business in Europe has been growing at an average rate of 29% per year, so we see this as an important step in supporting that market and our own long-term growth strategies."

With similar year-over-year growth in Australia and strong annual gains in the Middle East, South Africa, southeast Asia, New Zealand and the Caribbean, exports have come to represent the bulk of Caframo's marine business.

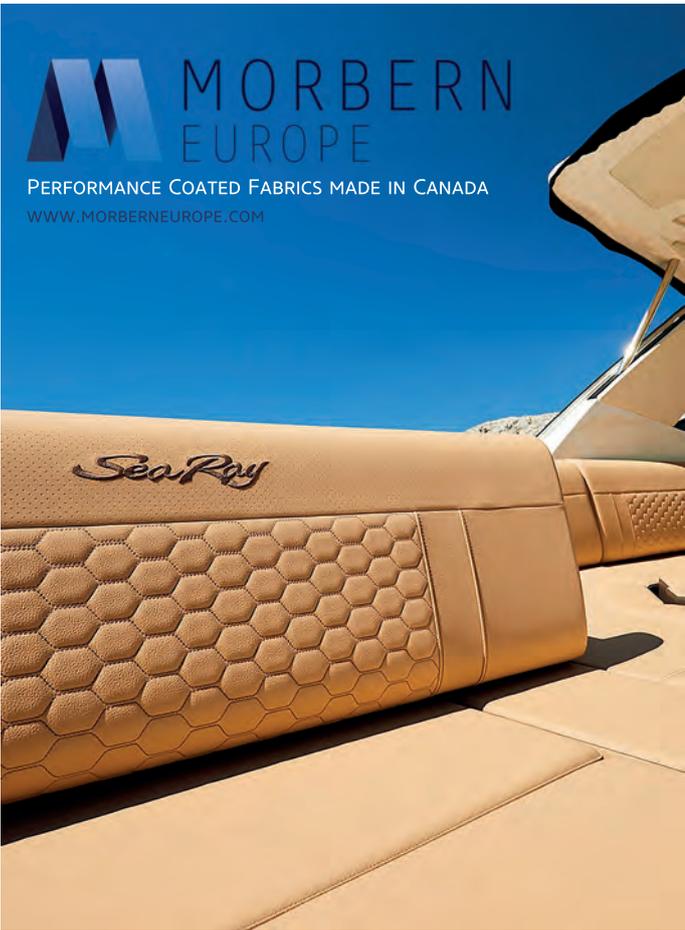
"Things are going really well in Canada – it's our home market, and we have wonderful partners we work with there," McMullen says.

"But it's a big world. The US hasn't seen quite as much growth for us in recreational marine products, it's been good but more of a stable market. The strongest growth has been internationally, both in the aftermarket and as an OEM. With our new operation in Europe we hope to continue to build on that." **IBI**



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Technology: How innovation is driving new markets

Innovation and product leadership have been paths to success for Canadian electronics and electrical equipment manufacturers

WORDS: CRAIG RITCHIE



The Space Shuttle's conspicuously-branded Canadarm

Canada enjoys an enviable history as a technology leader, responsible for the development of numerous ground-breaking innovations including the first telephone in 1877; the first hydrofoil boat in 1908; the first functional sonar in 1918; plexiglass in 1931; the first functional walkie-talkie in 1942; the first cardiac pacemaker in 1950; the track ball as an input device in 1953; the first alkaline battery in 1954; the first practical smartphone – the BlackBerry – in 1984; and the first internet search engine – named Archie – in 1988. But perhaps the country's best-known technological achievement was the Space Shuttle's unique articulated arm, used to deploy and retrieve payloads in space while also providing a means to inspect the exterior of the Shuttle for any damage to its thermal protection system. Properly named the Shuttle Remote Manipulator System but better known as the Canadarm, the iconic device affirmed Canada's position within

the space program as a key supplier of critical, high-tech components.

Nowhere is that heritage of technological innovation more in evidence today than in the leisure marine industry, where Canadian high-tech components are increasingly being used in boats manufactured all over the world.

Rudy Muller, international sales manager with British Columbia-based electronics manufacturer ComNav, says that demand for his company's thermal cameras, autopilots, AIS systems and precision GNSS equipment has been growing steadily – not just globally, but right on its doorstep in the Canadian domestic market. "The rebound of the luxury yacht market on Canada's Pacific coast in particular has been good to see," he says. "That's had an impact on the boat builders, the refit yards and the charter industry here, which ultimately trickles down to us. Our dealers and distributors are doing a ton of refitting and maintenance work, and that has been driving sales in this market."

In many cases those refits include major

upgrades to outdated navigation systems. Muller notes that ComNav's high precision GNSS antennas are attractive refit options with their support of multi-constellation GPS, GLONASS, GAGAN, BeiDou and Galileo for complete redundancy, along with the company's precision RTK receivers that can provide up to 1 cm position and up to 0.01° heading accuracy. That level of

accuracy gives the company an edge on lower-priced competitors offering a standard GNSS product, says Muller. "We pride ourselves of being amongst the leading companies in our sector," he says. "There are companies entering the market with equipment that is below our price point, but they're serving a different market altogether. We always ask, is the end-user using the equipment to cross Lake Como,

“Those refits include major upgrades to outdated navigation systems”

or are they going around the Fire Islands to travel from Vancouver to Europe? Those are obviously two completely different things, and the long-distance cruising customer will spend a bit more in order to get a product that's going to truly meet their needs.”

While the domestic Canadian market has been steady for ComNav, accounting for approximately 35% of its leisure marine business, the company has also been successful in building substantial export sales. “We’re active in 110 countries with our distributor network and their service centers,” says Muller. “In all we have about 1,800 sales and service points globally, but Canada and the US are by far the largest markets.”

POWER PLAY

The addition of more sophisticated electronics and increased levels of integration in vessels of all sizes has driven demand for more stable power management systems says Burnaby, British Columbia-based electrical equipment manufacturer Xantrex, which has seen the proliferation of high-tech onboard electronics drive demand for its line of high-tech inverters, chargers and battery systems. “When you think of inverters and inverter chargers, there are more boats with a Freedom product from Xantrex than any other brand globally,” says marketing manager Mitul Chandrani. “We offer a fully-integrated system with a lithium-ion battery, solar panels and the inverter-charger. We are investing right now in developing the full integration of these components so they all talk to each other and you can see all the information on a single panel. We are also working towards making our communication comply with the NMEA 2000 standard in the marine market, which will deliver additional benefits.”

Chandrani notes that since being acquired by Mission Critical Electronics in December 2018, Xantrex has been working steadily to build its global OEM footprint. “Our aftermarket business is very



Comnav International sales manager Rudy Muller

strong and well established,” he says, pointing to the growth of the refit sector over the past decade. “But with our new Freedom E-Gen offering, we have a lithium-ion battery-based power system that offers safe, clean, efficient onboard power with high power density and low operating cost that is particularly well suited to the OEM. Boat builders can have way more power in half the space. They really get four times the energy density in the same space if they were to use a Xantrex system. Plus, ours are the only UL 1973-listed batteries on the market. It will not catch fire, even if it is punctured or crushed. No one else can offer that, so that’s huge.”

Xantrex’s bid to develop its OEM business is a global undertaking, with more than 90% of its product already exported to a distribution network of near 50 countries worldwide. “The key to lithium-ion batteries is that they provide a steady, consistent output, where with AGM batteries the voltage will fluctuate as the battery runs down,” says Chandrani. “There’s not much point in investing a lot of money in high-end electronics if they can’t work as they’re intended to because they don’t have a stable power supply. I mean, it seems very basic, doesn’t it? But the reality is that there are a lot of boats on the water with exactly that problem.” **IBI**

MITUL CHANDRANI, MARKETING MANAGER
XANTREX

There's no point in investing in high-end electronics if they don't have a stable power supply



Xantrex marketing manager Mitul Chandrani



The Victoria International Marina has injected new energy into Canada's luxury yacht sector

Luxury yachts: Supersize me

Canada's luxury yacht sector may no longer be as prominent as it once was, but a steady increase in activity points towards a potential future resurgence

WORDS: CRAIG RITCHIE



West Bay Sonship president Wes Vermuelen

The number of shipyards may be smaller today and their annual output still well below pre-recession levels, but surely one of the most pleasing success stories in the Canadian leisure marine segment these days is the growing activity within its luxury yacht sector. Facing total collapse just a decade ago as orders for new-builds dried up in the wake of the recession, the segment has not just managed to survive but has reinvented itself to the point that business is thriving and there is talk of a full-on resurgence.

Centred on Canada's Pacific coast with its more temperate climate and year-round boating opportunities, luxury yacht builders such as West Bay Sonship and Crescent Beach Yachts were part of a small but busy community of boat builders crafting high-end vessels in the 20m to 50m class. The recession nearly wiped the sector out completely as demand for new-build

yachts vapourised among its primarily US-based customers. Anxious to retain their skilled employees, some yacht builders responded by shifting focus from new-builds to shipyard services in the form of maintenance, upgrades and refits

on existing yachts. For Delta, BC-based West Bay Sonship, that was a decision that not only kept the operation afloat through lean times, but set the stage for an entirely new business model as the economy recovered.

"It was a fairly organic progression, since we had always serviced the yachts and commercial vessels that we built," says West Bay president, Wes Vermuelen. "As the

economy recovered and the exchange rate went back to its historical level of our dollar trading at around 70 cents US, we're seeing more and more clients bring their boats to our shipyard from Washington, Oregon and California."

Business has proven brisk enough that

“Facing total collapse a decade ago as orders for new-builds dried up, the sector has not just managed to survive but has reinvented itself”



Platinum Marine and Crescent Custom Yachts owner Tim Charles

the company has more recently expanded its operations, purchasing a neighbouring property to give it more than 600ft of frontage on the Fraser River just a few miles from the Vancouver airport. West Bay’s shipyard complex now boasts more than 100,000ft² of climate-controlled production space, more than 450 linear feet of docks, a 200-tonne slipway and a launch ramp with a trailer that can accommodate yachts to 100 tonnes. A floating boathouse with aircraft hangar-type double doors accommodates two additional vessels of up to 35m in length. “Beyond that, we’ve recently introduced a mobile service,” says Vermuellen. “It operates as an extension of our shipyard, and provides a level of convenience for customers that we can serve that way.”

Nearby, Platinum Marine has also experienced an uptick in service business at its shipyard on Mitchell Island, in the Vancouver suburb of Richmond. The 45,000ft² state-of-the-art facility can accommodate up to six vessels to 60m. Formerly home to Crescent Beach Yachts, the shipyard was purchased by present owner Tim Charles after Crescent – which was run by his grandfather, Jack Charles – closed its doors in 2004.

“I really wanted to be in the yacht business, so I started Platinum Marine Services, specialising in refits and transformational overhauls,” he says. “I hired back many of the former Crescent employees, and leased the service bays from the building’s new owner. Within a year I had the entire facility, and I have had it ever since.”

After re-acquiring the Crescent brand in 2015, Charles established Crescent Custom Yachts as a sister company operating within the same facility, but focused exclusively on new-builds. One of

West Bay’s floating boathouse can accommodate two yachts up to 35m in length



TIM CHARLES, OWNER
CRESCENT CUSTOM YACHTS

We’re constructing a 50m Crescent 164 for a client in the US, which will be the largest new-build yacht completed in Canada

its first projects – a 44m, Lloyds-classed Crescent 145 fibreglass yacht designed by Jonathan Quinn Barnett – allowed the company to relaunch the brand at the 2016 Fort Lauderdale Boat Show with a yacht already in production. Additional new builds soon followed, including a 33m all-aluminium Crescent 110 and a 35m Crescent 117. In 2018, Crescent Custom Yachts won a prestigious Best In Deck Design award in the International Yacht and Aviation Awards. “At present we’re constructing a 50m Crescent 164 for a client in the US, which will be the largest new-build yacht completed in Canada,” says Charles. “We also have a 42m steel hull in our yard that’s in production, and another Crescent 110 project that’s in the works. At the same time, we’ve been doing some major refits on the Platinum Marine side so we’ve been extremely busy.”

Charles attributes Crescent’s success to two key factors – quality and price. “Unfortunately we saw a number of yards close in this area, so we’ve been able to reinforce our own team with some extremely skilled people,” he says. “Having that kind of a talent base definitely gives us an advantage over our competitors. The fact we’re located in Canada and operate the business in Canadian dollars also represents a competitive advantage. About 75% of our clients are based in the US, so with the US dollar coming in at around \$1.30 Canadian, we can offer those customers unbeatable value. At the same time, that exchange rate encourages our Canadian customers to keep their work in Canada and avoid paying the currency premium they would face if they were to go to a competitor in the US. We’re not building any less of a boat, we’re just enjoying the benefit of a favourable exchange rate.”

While one might be tempted to think that operating in Canadian dollars could represent a disadvantage on the supply side, Charles says that’s not the case. “We’re more of a global purchaser in terms of how we operate,” he says. “If we need to order something from Australia or materials

Artist's rendering of a planned Crescent 155



Victoria International Marina CEO Craig Norris

from England or China and bring it in directly, then we're happy to do so and I don't see a lot of other builders doing that."

THE PLACE TO BE

Perhaps no single event underscored the resurgence of Canada's luxury yacht sector quite like the official grand opening of the Victoria International Marina in July 2019. The C\$42m, 28-berth superyacht marina is described as the first of its kind on North America and is, according to CEO Craig Norris, the greenest facility of its type in the world. Rather than a ribbon cutting, the official grand opening appropriately featured the slicing of a discarded fishing net.

Located on the scenic outer harbour of the city of Victoria, British Columbia's capital city, the Victoria International Marina bills itself as the gateway to the Pacific Northwest, considered one of the world's most pristine cruising regions. Leveraging the exchange rate and high standards of service, the marina emphasises Victoria's particularly attractive location at the southern tip of Vancouver Island as an ideal location for American citizens to home-port their yachts. Norris notes that Victoria is easily accessible with a modern international airport and close proximity to both Vancouver and Seattle. "Victoria Harbour is a natural starting and ending point for yachters exploring the remarkable beauty of the Gulf Islands and north to Alaska," he says. "This year we've hosted 160 boats, and in 2020 we hope to double that. The Pacific Northwest is a tremendously beautiful yachting paradise, with more than 25,000km of coastline to explore between Victoria and Alaska. The marina is a critical step in that process, but it is only the first step in our end goal of facilitating memorable and remarkable experiences."

“This year we’ve hosted 160 boats and in 2020 we hope to double that. The Pacific Northwest is a yachting paradise”



A Crescent 145 for a US-based owner nears completion

In line with its long-term goal of developing Canada's Pacific coast as a superyacht cruising route, in June 2020 the marina will host the Pacific Superyacht Forum. "That will be a major boon for us and the whole region," says Norris. "It will be an invitation-only event to keep the numbers down to around 200 to 250 people, with an emphasis on C-suite executives from all the major shipyards."

The event will also serve as an official launch pad for the newly-created Canadian Superyacht Association which aims, in partnership with the American Superyacht Association, to develop luxury yacht cruising in the region. "Part of that is to have a body that can work collaboratively with our counterparts in the US to promote this area within the superyacht community," says Norris. "And, part of that is to protect a pristine wilderness area, because the experience here really is all about being able to connect with nature and experience something truly unique in the world." **IBI**

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Back to the future

Mustang Survival made its name in recreational marine with its ‘float coat’, going on to become a leading supplier to commercial and military sectors. Now its new owners are taking the firm back to its roots

WORDS: CRAIG RITCHIE



The focus is on leisure boaters for Mustang Survival president Jason Leggatt

In many ways everything old is new again for Canadian safety apparel manufacturer Mustang Survival. Founded in Vancouver by Irv Davies in 1967, Mustang launched with a single product – an innovative “float coat” that used closed-cell foam insulation to combine the floatation capability of a lifejacket with the styling of traditional foul weather apparel. Put into commercial production, the original Model 100 Floater Coat proved an immediate hit with sailors and offshore fishermen, and quickly established Davies’ newly-formed Mustang Sportswear Ltd among the market leaders in the performance safety apparel sector.

Before long, the Floater Coat, along with additional products including life vests, caught the attention of the

Canadian Coast Guard. The agency, along with the US Coast Guard, not only approved Mustang’s products for market but adopted them for their own use, and continue to wear them to this day. Military contracts – including the provision of equipment to NASA – followed. By the time the company was acquired by Jacksonville, Florida-based Safariland Group in March 2013,

Mustang’s primary focus had drifted away from its original recreational customers and increasingly toward industrial, law enforcement and military clients.

Now known as Mustang Survival, the company was sold in June 2019

to Lafayette, California-based Wing Group, manufacturer of rafts and kayaks for white-water rafting. Mustang Survival president Jason Leggatt says

“We determined that becoming more of a brand, and less of just an item manufacturer, presented the greatest opportunity”

that while the firm’s institutional and industrial clients will remain a pillar in the company’s business strategy, its new owner’s roots in consumer products align more closely with the firm’s current plans to assign greater focus on the leisure marine sector.

“The previous owner, Safariland, was focusing increasingly on their core consumer, which is law enforcement,” says Leggatt. “That’s still an important market for Mustang, but our core trajectory is a focus on building our recreation brand, which is where we started. We believe we’ve found a good home with the Wing Group. Like us, they also have their roots in building consumer products and they understand that market.”

Moving forward, he says, Mustang Survival’s business strategy aims to focus more heavily on opportunities within the global leisure marine segment. “We celebrated our 50th anniversary in 2017 and we were looking ahead at where the company goes in the next 50 years,” says Leggatt.

“We determined that becoming more of a brand, and less of just an item manufacturer, represented the greatest opportunity. We were heavily engineering-focused, and for all the right reasons to suit our military clientele. But to become a brand that has a more meaningful relationship with consumers, we realised that we need to rethink how we go to market.”

Leggatt notes that Mustang Survival’s current sales are split roughly evenly between its military, commercial and recreational business.

“Moving forward, growing our presence internationally is going to be a key focus,” he says. “We have a strong market position in Canada and the US... probably about one-third of our sales are from Canada and the remaining two thirds are mainly out of the US. But we have limited penetration outside of North America at present. There’s a huge opportunity when you kind of look at the dry wear products we’re producing, particularly among serious offshore sailors who are exposed to dangerous situations and who want to have the best dry kit possible. We’ve made incredible dry suits for our

commercial and military customers for years, but we have never developed that product for the consumer market. So that's the first step."

Achieving significant gains in the sailing segment will require the company to invest in developing its distribution network beyond its North American base. "The reality is that in North America sailing is a relatively small consumer segment," admits Leggatt. "But on a global scale, it's a tremendously meaningful market. Sailing's way bigger in Europe and Australia, for example, so we're absolutely looking at that segment as representing a major opportunity for us to grow internationally."

A critical step toward developing that international network came with the company exhibiting as part of the Canadian Pavilion at METSTRADE in November, where it won a DAME award in the Clothing and Crew

Accessories category for its new Callan salopette and waterproof jacket. "That opened some doors with respect to distribution," says Leggatt. "Right now we're taking our time and working things out to make sure we go to market the right way, and we don't stub our toe as we expand into Europe."

With approximately 250 employees, Mustang Survival's corporate headquarters, including design, sales and marketing, remain in the Vancouver suburb of Burnaby, British Columbia. The company's complex also includes approximately 40,000ft² of manufacturing space, which Leggatt says provides the company with an edge over its competitors. "It's a huge advantage, to be honest," he says. "There are few other companies where designers and marketing teams can simply walk to the back of the building and actually make prototypes, or check on production as they work on product

development to get everything just right. The model with most of our competition, not to diminish it, is that they draw a picture, send it to Asia and wait a couple of weeks for a sample to come back. We aren't restricted by that limitation, we can be far more nimble and that gives us a tremendous advantage when it comes to product development."

The June 2019 acquisition by Wing Group included Mustang Survival's additional manufacturing facility in Jacksonville, Florida, and its US distribution centre in Spencer, West Virginia while retaining all key employees.

"We're genuinely excited about the future," says Leggatt. "With Safariland, we were a very small fish in a very big pond. By comparison, the Wing family companies are smaller, and Mustang is the largest entity. So now we're the big fish in the smaller pond." **IBI**

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ONBOARD WITH OUTBOARDS

Outboard motors continue to command a greater share of the global engine market with each passing year. With refined features and the continued development of diesel and electric options, all indicators point to continued category growth

WORDS: CRAIG RITCHIE

Brunswick has found high-performance bass boats to be a good market for its Mercury Racing product

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FOR THE PAST several years the outboard engine segment has ranked among the brightest stars in the global leisure marine business with annual unit sales increasing some 30% over the past 10 years to a global total of 842,000 units – the estimate of worldwide demand in 2018, from Yamaha Motor. (For a more detailed breakout of global outboard volumes by region from *IBI Plus*, please see www.ibinews.com under Market Intelligence)

On a regional basis, the growth of the outboard market has been strongest in the US, where a surging economy and a shift in consumer preference toward boat categories that use outboard power, such as pontoon boats and centre console models, has fuelled demand for engines. Data from America's National Marine Manufacturers Association reveals annual US outboard sales mushroomed from 180,700 engines in 2009 to 278,500 units in 2018 – an increase of over 54%. However, preliminary figures indicate the outboard market was mainly flat in 2019 with sales of less than 1%.

Where the US market has followed a more or less continuous upward trajectory, sales for Europe, Eastern Europe and North African countries boarding the Mediterranean have experienced more of a variable pattern over the past decade, with figures from the International Council of Marine Industry Association (ICOMIA) showing a near 20% dip in sales from the 166,974 engines sold in 2010 to just 133,701 units in 2013. Since then, however, five consecutive strong years have seen numbers rebound to 159,017 engines in 2018, with the upward trajectory expected to continue through the following year.

By far the most volatile outboard market over the past decade has been that of Russia, which grew rapidly from annual sales of 41,691 engines in 2009 to a peak of 115,319 units in 2014 – an astounding growth rate of 176% – before plunging to just over 50,000 engines in 2016 in the wake of the Russian financial crisis and the sharp devaluation of the ruble. Slow but steady growth since then suggests the market is

recovering and gives cause for cautious optimism, particularly among the Chinese engine builders that have flourished in the Russian market.

The ICOMIA statistics become even more interesting when one looks deeper to evaluate sales by power category within each region. According to the organisation's Recreational Boating Industry Statistics Book, the majority of engines sold in Europe and the Mediterranean in 2018 (the most recent year for which data is available) were either portable outboards of less than 27 horsepower, or mid-range product of up to 100 horsepower. Russia, by comparison, shows comparatively sparse sales of engines above 100 horsepower, and a strong concentration of product in the 4 to 27 horsepower range. The US market, meanwhile, shows the greatest volumes in the mid-range and high-horsepower categories, with the number of high-power outboards (64,502) nearly equalling the number of engines in the mid-range category (74,043).

BIG GROWTH IN BIG POWER

That steady demand for more powerful outboards among US boaters has been well documented for several years, with engine manufacturers leapfrogging one another with increasingly refined and sophisticated products that have collectively encouraged a corresponding upward creep in boat size. Where just a decade ago the typical aluminium fishing boat might be 16 feet long and be powered by a 60 horsepower outboard, today that boat is far more likely to be an 18-foot model propelled by a 90 or a 115. And where the standard centre console fishing boat was once a 25-footer powered by twin 150s, today's boats are more likely to be above 30 feet and powered by triple or quad outboards of 300 horsepower or more – engines which didn't even exist before the downturn. Even in the comparatively stable pontoon boat market, the quest for more power has seen the development of larger boats capable of accepting outboards of up to 450 horsepower – sometimes in twin configurations.

The result of these simultaneous growth spurts is that outboard sales in the US today skew heavily toward higher horsepower units. "In the US, sales of larger motors are significantly outpacing sales of smaller horsepower models," says Yamaha US marine business unit president,

Ben Speciale. "With improvement in our ability to align large engine production to market demand, we continue to see stronger growth with these reliable, large-horsepower outboards – both in new boat segments and in the repower market."

But the demand for larger outboards is no longer exclusive to North America, says Mercury Marine president Chris Drees, who refers to mounting interest in higher horsepower as a global phenomenon. "We see this all across the world," says Drees. "We certainly see it in Asian markets, and especially in the Australian market, which is going through a transition as we speak due to new emissions regulations and the elimination of two-stroke products. Across the globe, the trend for larger boats requiring higher horsepower outboards is very well established and continues to grow."

NEW ALTERNATIVES

The demand for higher horsepower and greater torque has created an opportunity for new alternatives to enter the market, including outboards powered by diesel engines.

Diesel outboards appear to have enjoyed greater prominence at last November's METSTRADE than ever before, where manufacturers emphasised their unique advantages in the yacht tender market, chief among them being fuel commonality with

the main vessel which eliminates the need to manage a separate fuel supply simply for the tender. Reduced maintenance requirements, a life expectancy of greater than 10,000 hours, greater fuel economy and enhanced operating range are additional benefits that could help diesel manufacturers differentiate their product

in coastal markets.

"There is a higher cost to a diesel, but it brings clear benefits," notes Ralf Losch, chief commercial officer with Angelholm, Sweden-based Oxe Diesel. "You use 40% less fuel. You can go much farther without refueling.

The emissions are lower. But the market is not fully educated on all the advantages of the product, and therefore we can see occasional hesitation to accept the higher cost. We work with total cost-of-ownership calculations to help people understand that the product is giving a fantastic return."

Traditional gasoline-powered outboards aren't just seeing new competition at the upper end of the horsepower spectrum. In the portable segment, they face sales challenges from electric outboards that are starting to gain greater market share. Originally marketed on the basis of generating zero emissions, electric motors have more recently been touted as offering practical advantages over gasoline-powered portable outboards, including lighter weight, quieter operation and

“Across the globe, the trend for larger boats requiring higher horsepower outboards is very well established”



Demand for large outboards remains strongest in the US, and particularly in the south-eastern coastal market



Monterey 385SE with triple Mercury Verado 300s



MJM Yachts' new outboard-powered 53Z

greater convenience. “There are a variety of motivations to go electric, but if the primary motivation is only to be more environmentally friendly, then to be honest not much happens,” says Torqeedo CEO founder, Dr Christoph Ballin. “But when we talk about the motor being lighter in weight so that a woman or a smaller man can more easily handle it, then that solves a problem. When we talk about it being silent so you can talk to people, that solves a problem. When we tell people they no longer have to go buy gasoline

and transport it to the boat, that solves a problem. Those benefits resonate with boaters because those are not abstract thoughts, they solve problems that the boaters encounter every single day.”

Whether diesel and electric newcomers are able to find wholesale success in the outboard market remains to be seen. But what is certain is that the outboard engine space is about to become more competitive.

TREND 1 Gas engines will keep getting bigger

Demand for larger outboard engines continues to increase as even more boat builders that used to deal exclusively in inboards or sterndrives come to market with all-new models featuring outboard power – including prestige brands such as Cigarette, Formula, Monterey, Regal, Tiara, Hinckley and MJM Yachts. With many of these vessels topping 40 feet in length and sporting dry weights in excess of 20,000 pounds, the sight of big boats with three, four, five or even six outboards lined up across the transom will become increasingly common.

TREND 2 Diesels will carve a niche

Increasingly larger, heavier boats require mountains of torque from the propellers, creating a legitimate opportunity for diesel outboards to capture market share. The diesel’s potential to offer greater operating range could be the factor that opens the door to more widespread market penetration, particularly in the south-eastern US, the Caribbean and the Mediterranean. UK-based Cox diesel is targeting sales of 2,000 engines in 2020 once EPA approvals are attained, says global sales director Joel Reid. The company

forecasts sales to grow into the 5,000 unit range by 2025, after it opens a new 75,000 sq ft manufacturing plant and warehousing space in Florida.

TREND 3: The mid-range will remain the core of the market

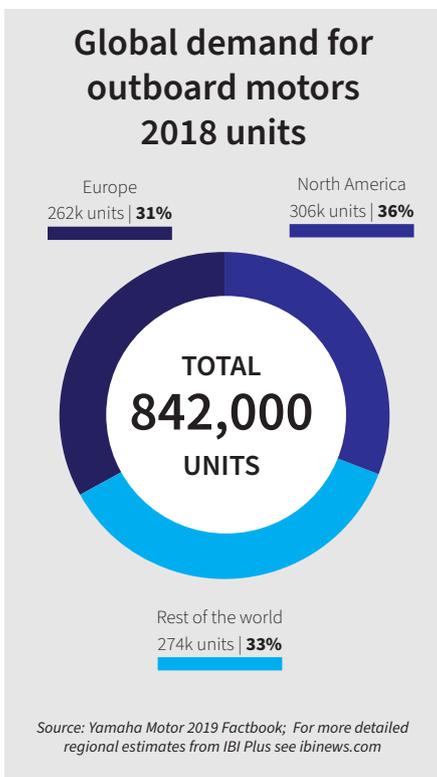
Outboard engines of 100 horsepower or less dominate every major boating market worldwide according to ICOMIA, NMMA and Japanese data, making the mid-range the undisputed backbone of the market in terms of overall sales volumes. Even in the US where the most large outboard-powered boats are sold, concerns over entry-level buyers being priced out of the market are resulting in new boat designs that increasingly use smaller engines in an effort to hold the line on retail pricing.

TREND 4 Electric motors will dominate specific markets

Their light weight, convenience, silent operation, absolute lack of emissions and elimination of fuel handling concerns have allowed electric outboards to gain market share in the portable category, where they can offer legitimate advantages over gasoline-powered outboards. With further advances in lithium-ion battery technology, look for electric outboards to dominate as the power of choice in segments such as small sailboats and inflatable yacht tenders.

TREND 5 Greater sophistication

From the largest V8 monsters to the smallest portables for canoes, outboards are universally growing increasingly sophisticated. Consumers want the same amenities regardless of the horsepower level, driving premium feature content down throughout the model range. **IBI**





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THE ELECTRIC MARKET

Electric outboards leverage cutting-edge technology to gain share in a highly competitive market



The light weight of electric motors appeals to many boaters

Relentless developments in the area of battery technology continue to support slow but consistent growth in the adoption of electric outboards as primary power sources, and particularly in the small to mid-range power categories.

Driven by factors such as growing restrictions on the use of internal combustion engines on environmentally sensitive waterways and a wider interest in green technology overall, electric motors have gained increased acceptance. Helping to propel this change are technological advancements that provide electric motors with competitive advantages that go beyond a reduced carbon footprint.

Electric engines still represent a small proportion of the total outboard market – somewhere around 1.3% according to Torqeedo CEO and founder, Dr Christoph Ballin. That figure is comparable to the automotive industry, where electric cars now represent close to 2.0% of global auto sales. “The majority of that share is represented by outboard motors, as opposed to inboard systems,” says Ballin. “In boating there are numerous niches and the reality is that at least right now, electric mobility is simply not suitable

for every segment. While you will find powerful boats with electric inboards of up to a hundred kilowatts with which you can waterski, the majority of the market today is represented by small horsepower outboards purchased through aftermarket retail channels to replace small gasoline outboards.”

Electric’s market share is expected to grow in the coming years as further technological developments enhance performance and consumer tastes continue to favour products with lower greenhouse gas emissions and lower overall ecological impact. Practical considerations are also beginning to weigh into sales, says Ballin, with today’s buyers just as likely to be swayed toward purchasing an electric outboard as a result of factors like lighter weight and the convenience of not having to repeatedly buy fuel and carry it to the boat. “The ease of handling and reduced maintenance requirement are important drivers,” says Ballin. “If you want to equip a racing sailboat with the

Torqeedo CEO Dr Christoph Ballin sees significant growth opportunities

lightest option possible, for example, that will be an electric. And then in the large sailing yacht segment, it is to the point that you don’t need your generator because you can harvest lots of energy from hydro generation turning your prop while you’re sailing. And so, you have less vibration, less noise, less fumes, lighter weight and far greater convenience. There are a variety of motivations for consumers to go electric beyond the original environmental considerations.”

For Changzhou, China-based Golden Motor Technology, the adoption of new technologies represents a key pillar in the company’s marketing strategy. Its Sport and Leisure series of electric outboard motors include a range of innovative features which have nothing to do with the traditional eco-related sales points. These include innovations such as connectivity to a companion smartphone app to display operational data, along with a user-adjustable variable shaft length that can be lengthened or shortened as required – eliminating the need to manufacture and warehouse motors of different shaft lengths. Founded in 2006, the company currently boasts a dealer network spanning 60 countries. Mercy Meng, who oversees trade sales for Golden Motor, says the company’s OEM business is growing. “We offer open support for any 48-volt DC battery system,” she says. “This allows customers to choose local battery suppliers.”

The comparatively maintenance-free attributes of electric power have also proven an effective competitive advantage for Moosburg, Austria-based AquaWatt Green Marine Technologies, which manufactures a range of electric outboards from 4kW to 50kW. The company, located on



the Wörthersee, has been building electric motors since 1990 and today enjoys global distribution, with customers in Germany, Norway, Sweden, Greece, India, Mauritius, Singapore, Australia and New Zealand. Founder and owner Dieter Seebacher says the perception that electric motors are only for lightweight, slow-moving boats is a myth. “Lakes and rivers in Austria are our drinking water, so the use of fuel boats has been prohibited for 50 years,” says Seebacher. “In the past electric boats had less power, and were very slow, but, today it is very different. Now we can go water skiing or wakeboarding. We have one commercial customer located on a lake in Austria, 2,000 metres high in the mountains, using one of our motors to power a 50-tonne raft with a restaurant on it. He moves it around the lake with just the one motor, way up in the middle of the Alps.”

“There are [many] motivations for consumers to go electric beyond the original environmental considerations”

AquaWatt sells four lines of electric outboard, with the cowling, mid-section and lower unit of each intentionally styled to look like a comparable gasoline outboard – including a polished stainless steel propeller. “It looks like a boat motor, not like a toy,” says Seebacher. “The customer looks at this and it is familiar, the appearance is more what they are used to seeing so they have more confidence to power larger boats, or use it in saltwater. Then they learn there is no gasoline, there is no need to handle smelly fuel or to worry about polluting the water. The customer has the same capabilities they do with a fuel motor but less fuss and problems, so it is an enticing proposition.”

While developments in motors have generated consumer interest in electric outboards, the other key factor supporting the segment is significant developments in battery technology that greatly improve practicality – along with greater awareness of these developments, thanks to



Today's electric fishing motors offer greater levels of electronic integration

The Fishing Market

WHILE ELECTRIC MOTORS have only recently begun to make serious inroads into the primary propulsion sector, anglers have widely used them as secondary trolling or positioning motors for decades, with the first commercial models coming to market prior to the second world war. Manufacturers competing in this original electric motor market have also been leveraging significant technological advancements in the quest to gain market share. Much of that new technology focuses on increased levels of integration with other onboard equipment, including GPS and chartplotters. In 2019, Garmin and Lowrance – both newcomers to the sector – won DAME awards with their focus on connectivity.

Garmin's Force electric motor features wireless integration with the company's chartplotters, a built-in autopilot and an anchor lock capability that enables anglers to keep the boat in a static position with automatic correction for wind, current or wakes from passing boats. Primary control is through a wireless foot pedal, while a floating remote control offers point-and-go gesture steering. An integrated CHIRP transducer works with the company's GPSPMAP 8400/8600xsv and ECHOMAP Ultra models.

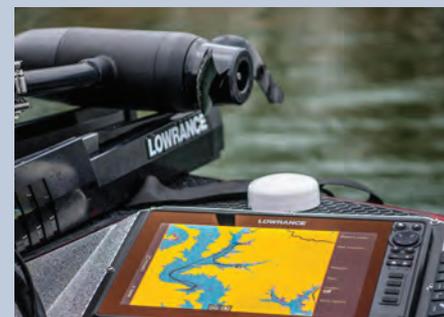
The Ghost motor from Lowrance uses an advanced propulsion technology for silent operation with more thrust and greater run times. It also features integration with the company's HDS Live, HDS Carbon and Elite Ti2 displays, along with a GPS anchoring capability to hold boats in position and a user-configurable control pedal with fly-by-wire steering. A choice of nose cones on the motor's lower unit allows buyers to select from integrated downscan or 3-in-1 Active Imaging transducers.

For its part MinnKota, which introduced its

first electric outboard motor in 1934, also offers integration with Humminbird chartplotters on its Ulterra, Terrova, Ultrex and Fortrex models, introducing motors with built-in transducers in 2018. As a component in parent company Johnson Outdoors' One-Boat network, the motors feature Bluetooth compatibility allowing control of the motor from the Minn Kota app, and i-Pilot Link to allow control from a compatible Humminbird chartplotter.

Brunswick Corp's MotorGuide brand also offers a GPS anchoring capability with its Tour Edition product, along with chartplotter integration with compatible Lowrance, Simrad or Mercury VesselView displays. Built-in transducer options include both traditional 2D capability in the company's Xi series motors, while Tour series motors offer full HD+ universal compatibility with Lowrance, Simrad, Mercury VesselView, Garmin, Humminbird and Raymarine displays.

These fishing motors clearly demonstrate the potential for enhanced onboard connectivity in electric motors that are used for primary propulsion. Innovations in this area could provide electric motor manufacturers with key points of differentiation against traditional internal combustion competitors.



The Ghost motor from Lowrance



e-Propulsion; lightweight and easy to handle

extensive media coverage of parallel innovations in electric automobiles. The challenge for motor manufacturers, according to e-Propulsion marketing manager Chandler Xu, lies in educating consumers about the differences between new lithium-ion batteries and the older lead acid cells they're familiar with. Many prospective customers initially base published data on battery performance on parameters associated with the older technology, he says. "There are major changes in the batteries starting with the fact that the lithium ion batteries are 48 volts," he says. "Old lead acid batteries are

normally 12 volts, so the customer thinks they need four batteries in serial. They don't understand that's not what they need."

Xu notes that once initial misgivings about battery capacity are overcome, the choice to purchase an electric outboard becomes easy. "Nobody wants to deal with fuel, nobody wants to get the smell on their hands or on their clothes or in their car trunk," he says. "You don't have that with an electric motor and consumers like that. It is also much lighter weight, so it is easier for older people or smaller people to handle." Practical considerations shape not only today's buyers of electric motors, but the future path for product development and market growth. For Torqeedo's Dr Christoph Ballin, market focus is clearly linked to the capabilities of the current technology, yet with an eye to long-term evolution. "If someone were to come to us and say electric propulsion is a great idea, let's put it on a freshwater bass boat or a saltwater fishing boat I would have to be honest and say I don't think it's going to happen right now because the technology is not yet there," says Ballin. "On the other hand if we look at sailboats, I think we can say with absolute certainty that today, electric propulsion is the superior alternative. It is the same for tenders, where electric presents so many advantages. So we focus on those market segments. But technology is evolving rapidly and if we want to be ready to compete in other markets, we have to start taking some baby steps now or we won't be able to catch up. We are committed to leading the market, not following it." **IBI**



New battery systems give electric motors even greater appeal

Advances in battery technology

ADVANCES IN ELECTRIC propulsion have been made possible in large part by significant progress in battery technology, and specifically in the development of lithium-ion cells. Compared against traditional Absorbent Glass Mat (AGM) batteries, lithium-ion provides significantly improved run times, steady power output with no voltage loss as the battery discharges, and a battery that is lighter and more compact than what would be required from AGM cells in order to deliver comparable performance.

Their unique ability to access most of a given battery's charge is what gives lithium-ion batteries a clear edge when powering electric motors, and is what gives today's propulsion systems such vastly improved run times. "If you look at a standard 12-volt AGM battery, the actual voltage when fully charged is somewhere around 14.1 volts," says Dave Maryanov, marketing manager for Power Products Inc. "By the time it's depleted the voltage will have dropped to around 10.3 volts. By about 50% depth of discharge, you start seeing performance declines for equipment connected to the battery, meaning your electric motor is losing power. But with a lithium ion battery, you don't see that begin to happen until you've reached 85% depth of discharge, so that's a huge step. That's what gives the lithium ion battery maximum performance for a much longer time than what you can get from an AGM."

One disadvantage to lithium-ion batteries is their higher cost. However, battery manufacturers argue that this is offset by the lithium-ion cell having a much longer life cycle. Where a traditional battery might deliver anywhere from 500 to 900 charging cycles before requiring replacement, a lithium-ion battery can provide a service life of 3,000 to 5,000 charging cycles before it needs to be replaced. "In spite of their higher initial cost, lithium-ion batteries provide superior ROI by offering up to six times more charging cycles than a traditional battery, and thereby requiring less frequent replacement," says Donald Hasler, strategic account manager with Xantrex. Beyond representing a financial savings over the life of the battery, he notes that less frequent replacement also means less waste material winding up in recycling depots and landfills.

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Fuel commonality gives diesels an edge in yacht tender applications



Sander Gesink, marketing manager, Yanmar Marine International

THE CASE FOR DIESELS

Diesel outboards were primarily developed for commercial applications like tour boats and water taxis, but are now finding a niche in the yacht tender market. Their potential to compete with gas engines on large offshore boats by offering greater range could give them an edge in a crowded market

One segment of the outboard engine market that has been attracting greater attention with each passing year is the diesel sector. Offering high torque, impressive fuel economy and a longer operating life than comparable gasoline-powered outboards, diesels have so far been primarily marketed at commercial buyers for use on work boats, tour boats and water taxis. But those same distinguishing attributes – combined with low emissions and fuel commonality with the main engines on large yachts – have also given diesels growing traction in the leisure marine space.

Fuel commonality has proven a clear point of differentiation for Yanmar Marine, which serves as the global distributor for the

“ The key benefit is that the yacht only has to carry one type of fuel onboard ”

Neander DTorque turbo diesel outboard produced by Neander Shark GmbH. Delivering 50 horsepower at the propshaft, the 804 cc, twin-cylinder aluminum powerhead generates an astounding 111

Nm or 81.8 ft lbs of torque at 2,500 rpm. It also features a unique common rail design with twin counter-rotating crankshafts to greatly reduce vibration and noise, while simultaneously reducing steering torque. An expected lifespan in excess of 10,000 hours, combined

with excellent fuel economy, have given the DTorque considerable appeal not just among commercial operators, but in recreational markets. “With the fuel commonality advantage we see this engine

as ideal for use on yacht tenders,” says Sander Gesink, marketing manager of Yanmar Marine International. “The key benefit is that the yacht only has to carry one type of fuel onboard, which represents a huge convenience as well as a safety benefit given that diesel is not as flammable as gasoline. There is also the matter of availability, as gasoline is not always offered at superyacht ports.”

Gesink notes that while the current 50 horsepower model has proven popular for tender use, future expansion of the diesel outboard lineup is being considered to facilitate the engine’s use on larger vessels. “We have a dealership in the south of France that specializes in superyachts and they offer the DTorque product for tenders, sometimes in twin installations” he says. “We are examining possibilities in the higher power segments, possibly in the 70 horsepower range, but right now we are focused on the current model as the market for it is

The OXE300 diesel is scheduled for a February 2020 release

still developing. This is a unique product, and we need to ensure that the dealerships which sell it and service it are set up and trained properly.”

MORE RANGE

Joining Yanmar in the superyacht tender market is Angelholm, Sweden-based Oxle Diesel. The company, which bills itself as the manufacturer of the world’s first high-performance diesel outboard, offers a line of 2.0L outboards rated at 125, 150, 175 and 200 horsepower respectively, along with a 3.0L 300 horsepower model that delivers an eye-popping 680 Nm or 501 ft lbs of torque. In addition, a white-painted, 2.0L 150 to 200 horsepower model called the Kreta is marketed specifically for use on superyacht tenders.

To date Oxle has more than 500 units in service worldwide according to chief marketing officer, Pim Polesie. “The advantages of diesel are considerable,” he says. “Diesel provides more torque, greater reliability and a longer service life while using up to 40% less fuel than a comparable gasoline outboard. That translates into a substantially greater range and much more time on the water before you need to refuel. In some places availability of fuel is a consideration, so that can be a tremendously important benefit.”

While the company has initially focused on the commercial market, Polesie describes the potential for diesel outboards in the leisure boating segment as “huge” and growing rapidly, thanks to the current trend toward larger and heavier vessels designed for outboard power. “Outboards on the market today are built to comply with the CE and EPA regulations, which state that the engines should work for 350 hours or 10 years of service, whichever comes first,” he says. “Our target is 10,000 hours and more than 10 years, because we think that there is a market for engines which go beyond the 110 year-old technology that other outboard manufacturers use.”

GREAT EXPECTATIONS

Soon to enter the diesel outboard market is Shoreham-by-Sea, UK-based



Cox Powertrain, which announced at METSTRADE that production of the company’s CX0300 diesel outboard is at last ready to begin following more than 11 years of development.

While the company’s competitors focus primarily on commercial markets, Joel Reid,

Cox Powertrain’s global sales director, feels that the unique properties of diesel power should make the company’s CX0300 especially attractive in the North American market, and in particular, the south-eastern US. “Florida is probably the single largest boating market in the world,” says Reid. “They have an island-hopping culture there, where people hop in the boat and go over to the Bahamas for dinner or they go fishing miles and miles offshore, so there’s a strong demand for power and speed and particularly, operating range. Besides Florida, the Gulf states of Louisiana, Alabama, Mississippi and Texas also represent enormous markets for the engine, along with Georgia and the Carolinas on the Atlantic side. So there’s a huge concentration of potential buyers in a comparatively localised area.”

Reid believes that diesels have the potential to outcompete gasoline engines in that market on the basis of their greater range and torque. “To be perfectly blunt the gas outboards have no torque,” he says. “That’s why they need to go fast. So the faster you spin the engine, the shorter the life is going to be. That provides us with the

opportunity to deliver a much more relaxed engine that can produce huge torque to get those heavy boats onto plane, and still achieve the top-end speed owners want while delivering far greater range. Range is a huge factor, because it means people can go places they can’t reach now.”

Reid notes that Cox also sees Europe as a prime market for diesel outboards. Beyond the superyacht tender niche, Reid says sales opportunities in the Mediterranean region particularly will develop in parallel with the growth of the centre console market there. “That market is changing, and it’s changing quickly,” he says. “In the Mediterranean we’ve got some amazing places. If you look at Barcelona, as an example, fast centre consoles provide the opportunity to go to Mallorca, you can go to Menorca, or Ibiza. If you’re in Italy, you can go to Sardinia, Corsica, Sicily or Malta. If you’re in Greece, you can just go island hopping endlessly, the way they do in Florida. But that culture doesn’t really exist in Europe just yet, it’s still a couple of years away. The people who are doing this now are doing it in big Sunseekers, so if they leave from Barcelona to go to Mallorca it might take them five or six hours to get there. But in a big centre console with diesel outboards, they can travel at 40 or 50 knots and be there in two hours. They can go for the day then come home, and because time is so precious these days I do believe that’s what we’re going to see more and more of. Which, of course, is excellent news for us because diesel outboards are perfect for that exact scenario.” **IBI**



Joel Reid, global sales director for Cox Powertrain



THE CORE OF THE MARKET

The mid-range has long represented the core of the outboard market. But the arrival of new competitors from China promises to drive innovation in an already active segment



Suzuki's DF90. The high-power outboard segment may be growing fastest, but the mid-range sector remains by far the most popular worldwide

Where the fastest growth may be taking place in the high horsepower segment, the core of the outboard engine market remains the mid-range, representing engines of 30 to 115 horsepower. It is mid-range outboards that power the vast majority of boats in use world-wide, from RIBs in Europe to fibreglass runabouts in Canada to pontoon boats in the US to aluminium fishing boats in Australia. It's enough horsepower to let a boating family have some fun, yet still an economical enough package to keep the cost of ownership affordable.

And while it may represent the core of the outboard market in terms of sheer sales volumes, the mid-range has become a challenging space to play in. Consumers buying these boats and engines have come to demand similar features to what they see offered on bigger outboards, but at a price they can easily afford. For engine manufacturers, this dichotomy represents a bit of a balancing act – and one which has

brought unprecedented levels of innovation to the segment.

It has also brought unprecedented levels of competition, with more and more players sparring for market share.

ENTER THE CHALLENGER

Among the new players competing for a slice of the global outboard pie are a growing number of manufacturers from China, such as Hangzhou Hidea Power Machinery, which has been selling portable and mid-range outboards under its Hidea branding since 2008. The company, which manufactures four-stroke carbureted and EFI engines from 2.5 to 60 horsepower, currently has

operations in more than a dozen countries located in Europe, the Americas, Africa, Asia and Australia. For vice president Victor Wu, the mid-range segment forms the foundation for the company's growth strategy. "Right now the biggest market for us is Russia, but our future is in Europe and the US," he says. "The US outboard engine

market is the largest in the world, so that is also a focus for Hidea."

Wu acknowledges that the company will need to grow its product mix in order to maximise opportunities in Europe and the Americas, where mid-range engines tend to dominate the segment.

"We are working to develop larger engines now," says Wu. "We are developing a 115,

“China is just booming... this is just the beginning, the market will grow very fast, perhaps for the next 10 years”

because right now the largest we make is a 60 horsepower engine and we know we need more power than that in the US and Europe. Our plants in China have capacity to develop new engines, so we will be ready.”

Founded in 2001, Suzhou Parsun Power Machine Co is another outboard manufacturer from China looking to grow its share of the global outboard market, and with its eyes set squarely on the mid-range segment. Vice president of sales and marketing Tom Yang notes that the company, which manufactures four-stroke outboards from 2.6 to 60 horsepower, will also have to extend its product offering in order to appeal across the full spectrum of the mid-range segment in global markets. “We just brought out the 60 last year and we have a 115 coming in June 2020,” says Yang. “People like larger engines and a lot of boats require larger engines, particularly in Europe, North America and China.”

Parsun has experienced steady growth in recent years, and particularly in its domestic market. “It’s booming,” says Yang. “The China market is very, very strong. After China, for us the European market is also very good. It is now our number two market. It used to be the US was our number two market, but today it is



Parsun’s new 60 horsepower model will soon be joined by a 115

Europe, with the US market being third. But China is just booming. Right now we sell 20,000 engines per year in China – but with a population of 1.4 billion people. So this is just the very beginning, this market will grow very fast, perhaps for the next 10 years.”

Yang notes that one key for the company’s success in China’s domestic market is a significant sales and service presence. “The market used to be totally occupied by Japanese and American engines,” he says. “They are expensive, and the service can be slow because they don’t have an extensive network here. Parts can be difficult to find. But we have a wall-to-wall network, so service is much faster and it is less expensive because of the scale.”

A CHANGING MARKET

Chinese manufacturers entering the mid-range outboard category face stiff competition from entrenched Japanese and American manufacturers that are already well established in both OEM and aftermarket retail channels. While the mid-range represents a growth opportunity with more and more boat builders in the category moving toward outboard-power,

competition for transoms and quality dealerships is already fierce among the established players. “Boat manufacturers all over the world are switching to outboard power and most hulls today are more suited to outboards, where the weight is further back,” says Mark Beeley, national sales manager, UK and Ireland, with Suzuki Marine. “Nowhere is that more prevalent than the RIB in the UK. RIBs are well-suited to UK waters providing safe comfortable family boating for most of the year. But hard boats are also switching toward outboard power, with manufacturers such as Beneteau now building cabin boats with only outboard power available.”

Regardless of type, one thing all manufacturers agree on is that boats are generally creeping up in size, and require increasingly larger engines. Tokyo-based Tohatsu Corporation has responded to the new opportunities within the mid-range by augmenting its own lineup, showing an all-new prototype of its new 115 horsepower four-stroke outboard in Dusseldorf. Building on the core design elements first revealed in the company’s top-selling MFS40/50/60 models, the new 115 – along with planned 75 and 90 horsepower models – incorporates a new exhaust manifold design that contributes to the engine’s particularly high torque, a design feature aimed at giving the new model an edge in pushing large boats like pontoons. “Approximately 90 percent of our sales are represented by portable engines of less than 30 horsepower,” says Tohatsu Corporation president, Isami Hyuga. “The global outboard market has been changing, and our aim is to expand sales of the mid-range engines with an expansion of our model lines. The prototype of the new four-stroke 115 horsepower engine was exhibited at the Dusseldorf boat show, and it will also be exhibited at the Miami International Boat Show, the Helsinki International Boat Show, the Japan International boat show and some others. Production of our new 75, 90 and 115 horsepower four-stroke engines will begin in summer 2020.”

The new engines are expected to boost Tohatsu’s market share in both the aftermarket and OEM channels, with the company hinting of potential new supply arrangements with US boat builders.

Yamaha has also witnessed a steady upward creep in boat size. “Instead of buying a boat with a 60 horsepower



Hidea has been successful selling boat and engine packages

engine the serious new-boat buyer today is purchasing a larger boat with a 90- or 115-horsepower engine,” says Yamaha Marine US business unit president, Ben Speciale. “But it’s not just size, the buyers are also looking for engines with more feature content. We have expanded our Super High Output models (SHOs), such as the SHO 115, SHO 150 and most recently the SHO 90 in answer to that. We now see these models growing, not only in the traditional bass fishing segments, but in walleye, pontoon, rigid inflatable and inshore markets.”

The challenge for engine builders is to deliver those premium features while maintaining an attractive overall cost of ownership, given that buyers of mid-range product tend to be more price-sensitive than purchasers of large outboards of 200 horsepower or more. “Two words I use all the time are accessibility and intuition,” says BRP Marine Group president, Tracy Crocker. “Accessibility refers to making boating accessible, and being able to provide clean-burning, reliable engines with a cost of ownership that won’t concern somebody buying their first boat. Yet at the same time, the engine also has to be intuitive to operate so the person buying it doesn’t feel like they have a big learning curve ahead of them.”

Crocker notes that accessibility and intuition were key considerations behind the launch of Evinrude’s new 115 H.O., 140 horsepower and 150 horsepower models in July 2019. With advanced features including digital shift-and-throttle, Evinrude’s iTrim control system, digital instrumentation, custom color panels and

optional iSteer dynamic power steering, the new G2 models target aluminium fishing boats, pontoon boats, mid-sized RIBs and fiberglass runabouts. “Our way of addressing affordability is to look at the total cost of ownership,” says Crocker. “Because the acquisition cost of the engine is one thing, but what about fuel consumption? How much will the G2 architecture save an end-user over a five-year timeframe? They offer one-touch winterization, so how much does that save over the five-year timeframe? Those are important factors to consider beyond that entry-level price tag, and they work toward making boating more accessible.”

Ensuring that market accessibility extends to every segment, Mercury Marine has taken aim on the recreational fishing market with a new tiller control for its outboard engines from 40 to 115 horsepower. Tiller controls are an important part of the mid-range segment, says Mercury Marine associate category manager, Kevin Hockerman. “Fishermen in particular like the tiller control because they can steer and control the throttle with one hand, leaving the other hand free to hold their fishing rod,” he explains. “So when we began designing our new tiller handle for the mid-range outboards, we focused on its ergonomic design, making it all about comfort and control. This new tiller provides the most vertical and horizontal angle adjustments on the market, and it’s the only tiller with the capability of swapping the shift handle to either side and reverse the throttle grip rotation, so it can be set up properly for right-handed or left-handed operation.”

Hockerman adds that the new

tiller comes standard with Mercury Troll Control, allowing trolling speed adjustments in increments of only 10 rpm. Another new feature is an integrated engine warning display that includes visual and audible warnings for engine oil, temperature, electrical and other faults, as well as for instances in which the driver’s safety lanyard becomes disconnected. There’s also an available upgrade to a heated grip with three temperature settings for operation in cold weather. “The best thing is that it’s fully retrofittable,” says Hockerman. “It’s available as a P&A item.”

TREND 1 More players than ever

As Chinese engine manufacturers look to gain more global market share, the mid-range represents an attractive space. Increased competition in the sector is inevitable.

TREND 2 Balancing features and affordability

Elements like digital shift-and-throttle, automatic trim control and digital connectivity aren’t just for the big V6 and V8 product. Increasingly, buyers of mid-range outboards are looking for such features – yet without a significant impact on the cost of ownership.

TREND 3 Upscale tiller controls

Buyers of tiller-controlled outboards want all the same features that are offered in models with remote steering, and they want to control it all with one hand. Ambidextrous designs, heated grips and advanced shift-and-throttle controls will soon be expected features. **TBI**



Yamaha Marine US business unit president, Ben Speciale



Mid-range outboards are widely used on aluminium fishing boats

POCKET ROCKETS

Portable outboards continue to sell well in a stable global market, but increased competition from electric alternatives threatens to disrupt the category



Small outboards are popular for tenders



Larger portables are increasingly used on small RIBs and aluminium fishing boats

Where the mid-range remains the core of the outboard engine market, the portable sector – much like the high horsepower segment – is experiencing growth overall but that growth remains sharply defined by geography.

In Europe and the Mediterranean, sales of portable outboards under 30 horsepower dominate all other categories, with ICOMIA data pegging the number of engines sold in these two regions alone during 2018 at more than 91,500 units – far beyond the US market at 60,195 engines and the Russian market with 51,989. It's a particularly important space for Tohatsu, which has made a strategic decision to focus on the portable market with approximately 90% of the company's sales represented by engines of 30 horsepower or less, according to president Isami Hyuga. The company's Tohatsu Marine Corporation (TMC) joint-venture with Brunswick Corporation in Nagano prefecture, Japan, produces all Tohatsu-branded and Mercury-branded four-stroke portable outboards below 30 horsepower (as well as two-stroke engines of 50 horsepower and below). With an annual production capacity of 250,000 units, TMC is the largest portable outboard engine factory in the world.

While the portable market has been doing well overall, the global picture is a bit

spotty, with solid growth in some regions and declines in others, explains Hyuga. "The European market in 2019 was almost the same as it was in 2018. The Asia market was also at about the same level as 2018, with the exception of the Australian market where we saw a volume decline as a result of the new emission regulations there," he says. "The US market had been increasing steadily from 2009 to 2018, but declined by between 6% to 7% in 2019. Simultaneously the Russian market was decreasing because of the economic situation there, with demand in 2019 down by more than 10%, compared to 2018."

Overall, however, Hyuga is pleased with the market outlook. "We just released our new four-stroke 2.5/3/5 horsepower and 4/5/6 horsepower engines, which feature Tohatsu's new corporate branding for 2020," says Hyuga. He notes that the engines were completely redesigned following extensive customer feedback, and incorporate features such as large front and back carry handles for easier transportation and the ability to be stored in the front, starboard or port sides without leaking oil or fuel, making them more attractive options for powering inflatable tenders. "Those new portable models are the first ones with our new design concept."

Staying ahead of competitors is critical in the hyper-competitive portable market,

particularly as new electric-powered rivals enter the sector. "In Europe the small engine segment under 25 horsepower is still the largest by far in terms of unit volumes," notes Jan Koopmans, marine division manager at Yamaha Motor Europe. "But a part of the market is being taken over by electric engines."

Mark Beeley, national sales manager, marine, Suzuki UK and Ireland, agrees. "I believe we are experiencing a bit of a shift away from petrol," he says. "I think the market is being affected where electric alternatives are available. The problem is electric marine engines are (comparatively) expensive and still far behind automotive technologies development-wise. On the positive side, a petrol 2.5 horsepower engine puts out 2.5 horsepower until the last drop of fuel runs out. But a battery-powered outboard is losing power output all the time the battery is in use, and as the charge runs out so does the power."

In North America, Suzuki's portable engine sales have been growing, with the greatest gains seen at the upper end of the horsepower range. "Interestingly we're seeing sales increases among the larger portable engines, like the DF20, DF25 and DF30 which are almost starting to reach into the mid-range," says Gus Blakely, division head, marine sales, for Suzuki Motor of America. "A lot of dealers and boatbuilders have been bringing out packages based on smaller engines in an effort to keep entry-level boats affordable, and that may be part of the uptick we're seeing there."

TREND 1 Greater usability

New four-stroke designs that can be stowed on their side without leaking fuel represent a huge benefit for end-users buying them to power inflatable tenders. This capability has become essential.

TREND 2 Lighter weight

With newer electric motors gaining popularity, heavy gas outboards will need to shed pounds in order to remain viable in a buyer's market.

TREND 3 More feature content on larger portables

As engines in the 15kW to 22kW/20 to 30 horsepower range are increasingly used to power small RIBs and aluminium fishing boats, demand for greater feature content will grow. **IBI**

STEADY AS SHE GOES

With the engine shortages of the past behind them, outboard manufacturers focus on developing the full potential of their high-horsepower platforms



Mercury Marine president
Chris Drees

from 6,356 units in 2009 to 11,763 engines in 2018, while in the 150kW/200 horsepower and greater category, the 4,144 engines sold in 2009 more than doubled to 8,939 units in 2018. Those are growth rates of 85% and 115% respectively. “We see outboard sales growing overall in Europe,” notes Jan Koopmans, marine division manager at Yamaha Motor Europe. “But the growth is especially in the 100 horsepower and up segment.”

Even in Russia, where portable outboards dominate the market, growth of high horsepower outboards has followed a comparable trend, increasing from 236 engines in the 110kW to 150kW or 150 to 200 horsepower category sold in 2009, to 592 engines in 2018 – a growth rate of 150%. Sales of large outboards over 150kW or 200 horsepower have grown almost as quickly, from 181 units in 2009 to 412 units in 2018 for a gain of 127%. “The outboard market continues to increase in size and the number of higher horsepower engines sold has grown dramatically over the last few years in particular,” notes Mercury Marine president, Chris Drees. “We see most of the growth occurring in that higher horsepower segment. And a lot of that is due to changes in boat designs. There has been tremendous innovation in the market, and centre console boats in particular continue to grow larger. But also contributing is the technology development that’s been occurring in the engines themselves. Joystick piloting has been huge, allowing consumers to feel perfectly comfortable operating and docking even large centre consoles. So between the innovation in boat designs leading to larger vessels with greater power demands, and ease of operating these boats through innovations like joystick piloting, the market has grown tremendously.”

In the US market more than half of all outboards sold are 150 horsepower or more

Not being able to build big, high-margin engines fast enough to meet demand is a nice problem to have. But it is a problem nonetheless, and one which outboard motor manufacturers are now happy to have behind them, allowing the companies to focus on developing their respective platforms to full potential.

The current demand for high horsepower is truly a global phenomenon, as evidenced by recent sales data. In the US – which remains the largest single market for high horsepower outboards in the world – sales of big engines have grown exponentially over the past decade. The number of outboards in the 110 to 150 kW or 150 to 200 horsepower range sold in the US has grown by 130% over the past decade, from 18,734 engines in 2009 to a total of 43,224 engines in 2018. Preliminary from 2019 suggest demand was flat last year with sales growth of less than 1%. Sales of engines exceeding 150kW or 200 horsepower have grown even more rapidly, from 25,442 in 2009 to an incredible 64,502 engines in 2018 for a 153% rate of growth. Of the 278,500 outboard engines of

all horsepower ratings sold in the US during 2018, more than half – 150,950 to be precise – were of 110kW/150 horsepower or greater.

According to the National Marine Manufacturers Association: “We’re seeing the trend in consumer demand for higher performance engines continue, with outboard engine sales growth in 2019 led by engines over 200 horsepower accounting for 27% of sales, and sales of engines over 300 horsepower up 18%,” said Vicky Yu, director of business intelligence for NMMA.

“Sales of big engines have grown exponentially over the past decade”

“After a pick-up in nearly all high-volume categories in the fourth quarter, inventory turns are healthy and manufacturers are expanding capacity in anticipation of demand. We expect another growth year for outboard engines sales in 2020.”

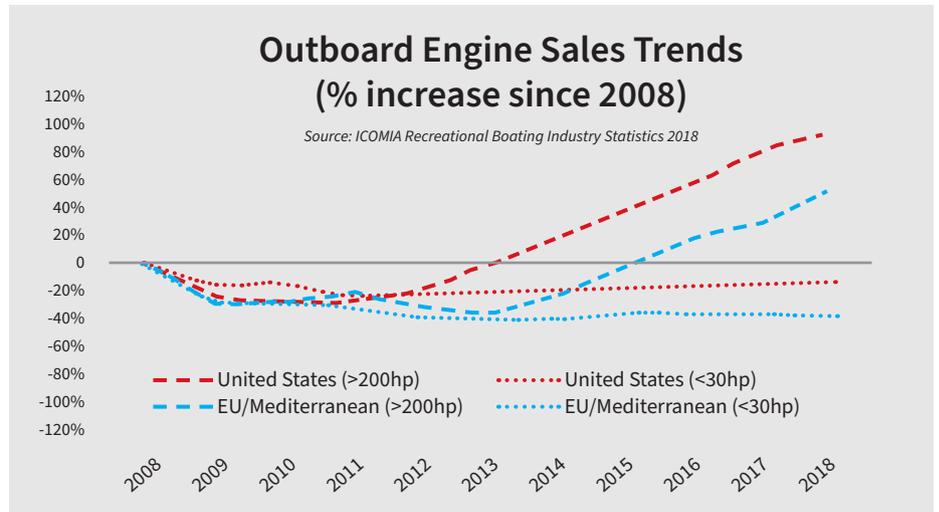
While large outboards remain a smaller portion of the overall market in Europe and the Middle East, the rate of growth for the segment follows a parallel course to that of the US. ICOMIA notes that sales of outboards in the 110kW to 150kW/150 to 200 horsepower class grew

TAKING CARE OF BUSINESS

Drees notes that the widespread adoption

of outboards among boat builders has been overwhelmingly positive for Mercury in multitude ways – in spite of the demand for product requiring Mercury to invest in additional production capacity. “Development of these products has allowed us to partner with a lot of new OEMs and dealers,” he says. “We’ve seen a trend for boat builders to produce more boats powered by outboards versus stern drives just because of the reliability and other positive features on outboards. Our new 175 to 300 models, and then the 400 and 450 models certainly have helped us tremendously, to a point where we had to add production capacity. In the last year we have invested heavily in developing capacity to prepare for new OEMs and dealers being added to the Mercury family. Overall it’s been very, very positive.”

Yamaha has also been enjoying strong sales of high horsepower outboards used to power large centre consoles, pontoons, RIBs and a plethora of new boats in the luxury dayboat segment. Yamaha Marine US business unit president, Ben Speciale, says the company’s growth in the high-power category comes down to a combination of having the power and features that the luxury day boat manufacturers demand. “We are very focused on the larger, heavier boat segment because we listen, we understand the market, and we provide purpose-built marine products,” says Speciale. “The 425 horsepower XTO Offshore has really created more opportunities for larger luxury yachts to transition to outboard power. It is not all about horsepower, of course, it is also about providing



enhanced features like electric steering, high net-charging output, reverse thrust, fuel efficiency, reliability and Yamaha’s network of qualified trained dealers and technicians.”

One interesting and unexpected offshoot of the meteoric growth of the luxury day boat segment is the impact on engine builder’s own dealer networks. For some engine builders, the growing large outboard market has not only brought more lucrative OEM opportunities with boatbuilders new to the outboard spectrum, it has simultaneously allowed them to grow their retail dealer base with A-level dealerships. “That’s certainly been our experience, particularly in the US,” says Gus Blakely, division head, marine sales, for Suzuki Motor of America. “Suzuki’s percentage of OEM business has grown in the last couple of years as new boat builders

introduce outboard models and create new opportunities. But what we’re also seeing is that the dealers who sell these boats are also becoming Suzuki dealers, so we’ve been enjoying growth on both the OEM side and the retail side simultaneously.”

Blakely notes that much of Suzuki’s success in the high power category can be attributed to the company’s DF350 V6, introduced in 2017. “The DF350, and the DF325 that we introduced in Europe the following year, are unique engines in the market and they bring unique benefits,” he says. “We’ll be extending that line at the Miami Boat Show this year with Suzuki’s all-new DF300B, which will include a lot of that technology including the inline contra-rotating propellers. We’ll also have a new DF150 and DF200, so we’ll have new product throughout the high power category.”



Yamaha continues to focus on larger, heavier boats with its 425 horsepower XTO Offshore



The DF350 has been a game changer for Suzuki



Seven Marine's "helm to prop" approach won it an Innovation Award at the 2019 Miami show

A BIGGER BANG

When it comes to high horsepower outboards, Seven Marine continues to lead the segment with its 527, 577 and 627 horsepower offerings – each built on a massive 6.2L GM V8 engine block. Acquired by Volvo Penta in 2017, the Seven Marine line differentiates not only in terms of raw power, but by offering a fully-integrated system incorporating Volvo Penta's Easy Boating features, such as joystick driving and docking, an enhanced helm station with a glass cockpit, dynamic positioning, autopilot-joystick integration and Easy Connect remote connectivity, all tied together by the company's Electronic Vessel Control (EVC) platform. "Seven's integrated approach from helm to prop provides a unique experience on the water, which has been recognized with a Miami Innovation Award in the outboard segment during 2019," says Volvo Penta of the Americas president, Martin Bjuve.

That innovation award was presented in recognition of the system installed on a Tiara 38 LS, making the Michigan-based luxury yacht builder the first boat company to merge



Martin Bjuve, president, Volvo Penta of the Americas

Volvo Penta's EVC with Seven Marine's high-horsepower outboards. With twin Seven Marine 527s, the 18,600-pound 38 LS planes at 13 mph and 2,400 rpm, and achieves a top speed of 55 mph. Those systems are now rolling off the production line at Volvo Penta's production facility in Lexington, Tennessee.

It's an approach that has clearly caught the attention of boat builders and end-users alike in the lucrative south-eastern US market, where large day boats powered by multiple outboards continue to grow market share. "We definitely see a clear trend of growth in the higher horsepower outboard segments, where the Seven portfolio has been a driver of this trend," says Bjuve. "It has been an OEM market and this represents the main portion of the current Seven customer base with builders like Hydrasport Custom Boats and Intrepid. But the brand is making strides into other types of applications, like the Tiara 38 LS with the introduction of the integrated Volvo Penta and Seven Marine outboard package."

GAINING THE UPPER HAND

Although it has most recently focused on the mid-range engines that represent the largest overall sales volumes in the outboard engine market, Evinrude has also been busy developing new opportunities within the high horsepower segment. In December the company announced the introduction of an all-new Evinrude E-TEC G2 Power Tiller, which the company describes as the industry's first 150-horsepower tiller-controlled outboard with integrated power steering assist and digital shift and throttle. With its advanced features, the new engine targets customers who want premium feature content in a V6 outboard, while retaining tiller steering control. "While the competition is focused on releasing larger and larger engines, we spend our efforts developing products that matter to our core market," said BRP Marine Group president, Tracy Crocker. "Because of the E-TEC G2 architecture, we are able to offer incredible features at a value that our customers appreciate. Our power tiller doesn't require accessory

power steering kits, additional batteries or recharging systems."

Crocker notes that the 150 Power Tiller is an engine that is designed primarily for use on large aluminium fishing boats, which are extremely popular particularly in North America and Australia. "With our acquisition of boat companies including Alumacraft in North America and Telwater in Australia, we can package that into a three-pronged strategy," says Crocker. "And that is, buy, build and transform. So the buy phase for the time-being is done. Now we're moving to building out the networks and widening the footprint. But ultimately the strategy comes down to the transform phase, where we think we can bring real innovation to the boating industry and contribute to the consumer experience in ways they've never experienced before."

TREND 1 Big power continues to rule

The numbers don't lie – sales of high-power outboards continue to post the fastest growth in virtually every outboard market worldwide. As boat builders continue to develop new designs based on bolt-on power, this shift will only continue.

TREND 2 Bigger engines are simplifying installations

One of the great benefits to outboard power is the ease with which boats can be re-powered. Replacing three 300 horsepower outboards with a pair of 425s or 450s means buying one less engine, while greatly simplifying rigging. Reducing weight and drag can yield further performance gains, including faster top speeds, faster time-to-plane and improved fuel economy.

TREND 3 It's all about features

Muscle alone doesn't mean sales in an environment where end-users expect the same intuitive operation they've come to take for granted in their vehicles to also exist in their boats. Features like automatic trim control, digital shift and throttle and GPS-enabled virtual anchor capability are rapidly becoming table stakes.

TREND 4 Greater full-boat integration

End-users expect a seamless, fully-integrated experience at the helm similar to what they have enjoyed in automobiles for years. Closer integration between engine manufacturers and providers of glass helms will become key to securing OEM contracts. **IBI**



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e2s.com

THE NEW HAZARDOUS Location D2xB1LD3 LED fire alarm beacon from E2S Warning Signals generates an effective candela rating of 82.1 cd under UL1971 test conditions, making it the brightest UL1971-compliant visual emergency signalling device from any manufacturer suitable for use as part of a public mode fire alarm installation for hazardous areas. The NFPA 72-compliant, 20ms high-intensity pulse generates light output equivalent in perception to a traditional strobe, but with ultra-low current consumption (150mA) and low in-rush. The D2xB1LD3 contains a supervisory diode and duplicated pluggable terminals that not only simplify installation, but also enable a four-wire connection. All members of the D2x family are housed in marine grade aluminium enclosures with an ingress protection rating of IP66.

Evinrude E-TEC G2 Power Tiller

evinrude.com

HAILED AS THE industry's first 150hp tiller-controlled outboard with integrated power steering assist and digital shift and throttle, the E-TEC G2 Power Tiller from Evinrude was designed with beginner to advanced anglers in mind. Combining the power tiller with the Evinrude E-TEC G2 Intelligent Piloting System, a suite of integrated engine features like iSteer, iTrim and iControl instills confidence in boaters. The 150hp Power Tiller has zero steering torque feedback and offers boaters exceptional running quality with precision performance. The comfortable twist-grip throttle has adjustable friction capability to fine-tune resistance. It is easy to control the running attitude of the boat with iTrim, as well as the thumb-operated tilt and trim switch. The Evinrude E-TEC G2 Power Tiller has adjustments for both vertical and horizontal arm position, enhancing comfort and control.



Actisense TER-U terminator

actisense.com

THE TER-U FROM

Actisense is a smart, universal micro-terminator that provides instant feedback as to the state of the NMEA 2000 bus onboard. It can be used as an in-line terminator or as a Male or Female terminator, as it comes supplied with blanking caps. If the voltage falls below the minimum required level of 9.0V, then the LEDs illuminate 'RED', showing there is a potential problem with the NMEA 2000 bus power. Similarly, if the LEDs do not illuminate at all, that would indicate that there was no power or that the polarity was incorrect. This monitoring function would happen continuously and remain permanent. Because these terminators are illuminated, they instantly provide feedback that the terminator is actually present (ie, able to identify that there are two terminators present) – especially helpful in difficult-to-reach locations.



HydroPort Epic

Boatlift.com

THE HYDROPORT EPIC PWC docking platform from HydroHoist Boat Lifts has a wide walkway and a built-in, anti-slip surface for easy access around a craft. The additional walkway footprint also allows operators to safely clean and cover their PWC after use without having to balance on smaller walkways.

For simple maintenance, the HydroPort Epic has enhanced drainage to remove any debris or water from the platform. A redesigned rear entry allows for a smoother loading and launching process.

The PWC platform can also connect to the existing HydroPort Extreme model so that individuals and marinas can grow their HydroPort fleet. The Epic model is available in blue, grey and tan, and weighs 430 lbs.

SEND NEW PRODUCTS TO: belinda@ibiplus.co.uk



Sharrow Propeller Model MX-1

sharrowmarine.com

THE SHARROW PROPELLER Model MX-1 is a patented, new propeller design that boasts a higher top-end speed and claims to be considerably more fuel efficient than standard propellers. Third party testing demonstrates that it is 9-15% more efficient than the industry standard Wageningen B-Series design. It is available in aluminium and stainless steel and fits most outboards and sterndrives from 100hp-450hp.

Souriau M+ connectors

souriau.com

SOURIAU, A FRENCH expert in marine connectors, now offers a range of products that can be mated underwater. For maximum safety and service life, the connectors, known as wet-mate, feature a special method of ejecting water from the connection interface, thus reducing the possibility of short-circuits or contact corrosion. Souriau offers a wide range of products that respond to the evolving needs of applications in very deep but also shallow waters, at very high and low pressure. The new M+ range of connectors for depths down to -7,000m (pressure resistance up to 700 bar/4350 Psi on open face and coupled connectors) are currently available in size 10 and in size 14.



Sprenger S-Block Series

www.sprenger.de

SPRENGER'S S-BLOCK SERIES

of rotatable and tiltable stanchion blocks offer a number of advantages, including optimised rope guidance by curved cheek parts, a continuous stainless steel strap for added security and stability, and wobble riveting that avoids sharp burrs on the rivet head. The UV-resistant cheeks are made of glass fibre reinforced polyamide. The blocks are designed to fit standard 25mm stanchions and they have a recommended line diameter of 8mm-10mm and a breaking load of 600kg-900kg.



Lowrance HOOK Reveal

lowrance.com



HOOK REVEAL IS the latest in the HOOK Series of fishfinder/chartplotters from Lowrance. Available in 5in, 7in and 9in models, it includes one of Lowrance's most popular features, FishReveal, and its live-mapping solution, Genesis

Live. A simple interface and HOOK-exclusive Autotuning sonar make HOOK Reveal easy to use.

Autotuning sonar delivers the best sonar image by automatically adjusting settings as fishing conditions change. HOOK Reveal also comes with a built-in, high-detail C-MAP US Inland fishing map with 1ft contours on nearly 4,000 lakes. Anglers can choose their preferred combination of display size, sonar type and navigation from TripleShot (High CHIRP, SideScan and DownScan Imaging) or SplitShot (High CHIRP and DownScan Imaging) transducers and mapping chartplotters or non-mapping GPS plotters.

Fischer Panda VS Series generators for hybrid cruising

fischerpanda.de

FISCHER PANDA'S VS

Series of variable speed hybrid DC generators for electric propulsion come in various output voltages up to a current of 300A and an output power of up to 100kW.

They enable either silent electric cruising powered from the battery bank alone or hybrid cruising using the batteries and the variable speed DC generator as a range extender. In emergency mode, the variable speed hybrid DC generator can power the drive system directly.

A new control system, FP Control, which allows various set-ups as well as the connection to a CAN BUS system, monitors the VS Series. It provides information on the generator, as well as the connected drive system and batteries, to update data on overall power being drawn, power supplied for battery charging and the electric drive system. When using batteries only, the battery-charging status, as well as the remaining drive time, are also displayed.



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1st Mate by Mercury Marine

mercurymarine.com

1ST MATE FROM Mercury Marine is said to be the world's first engine-integrated man overboard and proximity-based theft deterrent system. Utilising a highly styled wearable for up to eight people, 1st Mate turns the engine off or sounds an alarm during a man overboard event (MOB) and optionally sends notifications to emergency contacts. If the proximity of the fob is not in range, the system disables or puts the engine in guardian mode.

1st Mate is composed out of an intelligent hub, a set of wearable products and a mobile-device app that integrate with a boat's propulsion systems. Its three main features are: man-overboard monitoring and warning system, distress-calling capability, and deterrence against theft of the boat and/or its engine(s).

Vadac PowerAce X10

vadac.com

THE POWERACE X10

portable battery box from Vadac BV comes in a polypropylene case with a telescopic handle, internal cabling, a battery capacity meter, an automatic fuse to multiple 12V outlets, a dual USB socket and a so-called 'Anderson connector', a plug for electric outboards. Putting the battery box on wheels significantly improves the user friendliness. "We have shown the first prototypes at major boat shows already. The initial market reaction is positive," says Vadac sales and marketing director Bob Sonntag. The X10 will retail at €89.95 (US\$99)



Raymarine Axiom MFDs with CZone

Raymarine.eu/czone

THE RAYMARINE AXIOM MFD line is now compatible with CZone digital control and monitoring systems. CZone digital switching simplifies the installation of boat electrical systems through the replacement of traditional switch and fuse panels with networked digital switch interfaces, providing ultimate control of onboard electrical systems. When integrated with an Axiom MFD, the CZone system offers control of many different types of onboard electrical devices, including lighting and climate control. Raymarine says boatbuilders and system integrators can now create highly customised graphical CZone control pages that integrate seamlessly with Axiom's LightHouse 3 dashboard app.



Schmitt & Ongaro Model 30 wheel

schmittongaromarine.com

SCHMITT & ONGARO Marine Products' 356mm Model 30 marine steering wheel is a striking, contemporary design by Stella. It's ideal for ski and wake boats, runabouts, cuddy cruisers and pontoons.

The Model 30 is solidly built and its bold, three-spoke pattern is available in anodized black or satin silver, offset by black, chrome or matte silver trim, highlights and center cap.

The durable black polyurethane grip has a substantial hand feel. Supple simulated cowhide surface is contrasted with the look of perforated leather surrounding the spokes. It provides a gentle, ergonomic curve for all-day comfort.

Available with a 19mm tapered or splined hub, the Schmitt & Ongaro Marine Products Model 30 comes fully assembled and ready for installation.

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Lloyds Register
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On paper it looks simple, but in reality the product development is horrific

Jan-Erik Viitala, co-founder, Axopar

Words: Ed Slack



Jan-Erik Viitala at the launch of the new 37 at boat Düsseldorf

FINNISH BRAND AXOPAR is revolutionising the boat business by adopting a 'platform' approach to model development. Debuting five new models at Düsseldorf in January, the builder has sold over 2,200 boats to date in more than 70 countries with another 500-plus on order. Its co-founder **JAN-ERIK VIITALA** talks to the *IBI* about building the brand into an €80m-plus business this year and the secret to its success

How does the year ahead look?

I'm really looking forward to 2020. We launched the new 37 on Saturday (the beginning of Düsseldorf boat show) and we had 100 signed customer orders even before the launch, thanks to our pre-marketing. We've been working closely with Mercury and Simrad on user-interfacing. We want to improve the intuitive functionality of the boats for our owners to help them

become better boaters. We introduced our Axopar user interface to make boating easier and less intimidating for beginners. We have a clean helm and glass bridge project 1.0 and will have a 2.0 version ready for Cannes. 3.0 is already in our heads! It's not just about a touch screen. We want a system that can educate and control the boat in a much deeper way than is currently available – make it much more like driving a car.

How is the Axopar market evolving?

We've seen two big developments: the boat is increasingly being picked for charter – they have the right price point, usability and driver friendliness to make a good charter platform. They're being used as VIP transfers for instance between luxury resorts. We're also seeing them being used more and more as tenders – particularly in the 40m-50m superyacht sail sector. The Shadows are also being used by the owners on big superyachts – it's a boat they can escape on with family and guests as they're easy and fun to handle.

What about your eco footprint?

We want to make a boat that has a very long lifespan. It's easily repairable, useable after thousands of hours and still looks modern. We've really pushed the efficiencies of the hulls – the stepped hull is greener as lighter and you use less material – a new 37 with the latest Mercury V8s has up to 25% lower fuel consumption compared to the old 37 with Mercury L6s. Electric power is not viable at the moment, but we're monitoring it.

Will you be increasing production?

Today we're building around 700 boats annually,

thanks to the addition of a second OEM in northern Poland recently that's enabled us to build an extra five 28s a week, and within the next six months from now, another five 37s a week. The 37 is key to the business model. It hits a sweet spot, with the same margins as the 28. It's the product that's enabled the company to grow. It's also the right product to take outside of Europe where anything under 35ft is considered small. It can tackle oceans which is why Florida is by far our most successful sales region. Increasing our footprint in the US is where the major potential lies.

Ultimately the goal is to build 1,000 boats a year, that would be a nice milestone.

Will you be expanding the range from the current three lines and nine models?

We will refresh the 24ft soon and there will be a completely new product, the 45, which is already in the pipeline for a 2021 launch, but we don't have plans to expand the range as such as the business model is based around platform thinking. We developed the 37, 28 and 24 platforms that we're constantly renewing, instead of trying to make a uniform fleet like most other boatbuilders. We think of ourselves more like BMW, which has a 1,2,3,4,5,6,7,8 series that it refreshes line by line every few years, without having to create a whole new family of cars in one go which would be financial suicide. A lot of boatbuilders are going to the wall because they build say a 28, then develop a 32 which they make look the same, and then a 38, 42 and so on, all designed to look like a family. The problem is by the time you're launching your 42-footer it's based on a platform, look and layout that's already 5-7 years old. Then, when they do launch a radical, modern look, they find customers suddenly want the new look, so they have the mammoth job and cost of renewing an entire fleet.

To continue the car analogy, at the moment Axopar has say an Audi and a Porsche – is there room for a Bentley and VW on the platform, perhaps yes. On paper it's simple, but in reality, the product development is horrific. There are so many variables you need to consider for the long term. The number one challenge was the hydrodynamics – the power versus weight. We're getting the hang of it now – it never gets easy doing platform thinking, but you learn to think smarter. **IBI**

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