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INTERNATIONAL BOAT INDUSTRY

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The business of boating

EUROPEAN ROUND-UP

Will trade wars and uncertainties spoil the party?

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BUILDING AN ICON

Chris-Craft CEO Steve Heese on how the brand is evolving under new ownership **Page 70**

SOUTH AFRICA REPORT

Big cat demand and weak rand provide boost but systemic challenges remain **Page 44**

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WHO'S WHO AT IBI

EDITORIAL

Editorial Director: Ed Slack
Tel: +44 (0)1984 026 733 Email: ed@ibiplus.co.uk
Deputy Editor: Belinda Snell
Email: belinda@ibiplus.co.uk
Art Editor: Madeleine Fitzsimons
Email: madeleine@ibiplus.co.uk
Research and Business Analysis Editor:
Arlene Sloan Email: arlene@ibiplus.co.uk

ADVERTISING

Commercial Director: Philip Pereira
Tel: +44 (0)7866 462 577 Email: philip@ibiplus.co.uk
Marketing Director: Philippa Drysdale
Tel: +44 (0)7511 221 833 Email: philippa@ibiplus.co.uk
Account Manager: Amanda Barlow
Tel: +44 (0)7730 314 989 Email: amanda@ibiplus.co.uk

MANAGEMENT

Publishing Director: Simon Owen
Email: simon@ibiplus.co.uk
Executive Chairman: Nick Hopkinson
Email: nick@ibiplus.co.uk
Finance Manager: Christine Chisholm
Email: finance@ibiplus.co.uk
Accounts Payable: Katy Pereira
Email: kathy@ibiplus.co.uk
IBI Plus Account Manager: Isabella Mitchell
Email: isabella@ibiplus.co.uk

CORRESPONDENTS

Australia/New Zealand: Barry Thompson
Benelux: Robert Wieland
Brazil: Fernanda Teixeira Velloso
Europe: David Robinson, Jake Kavanagh
Far & Middle East: Mike Derrett
France: Olivier Voituriez
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Russia: Eugene Gerden
Scandinavia: Lars-Ake Reden
South Africa: Bobby Jordan
Turkey: Bahar Ozturk
USA: Tony Esposito

INTERNATIONAL ADVERTISING REPRESENTATIVES

Italy Ediconsult Internazionale SRL, **Eva Green**
Tel: +39 010 58 36 84 Fax: +39 010 56 65 78
Email: genova@com

Netherlands, Belgium BAAS
(Boating Advertising Advice & Service),
Ted de Vries Tel: +31 (0) 36 522 7446
Email: baas@boatingadvertising.eu or
www.boatingadvertising.eu

Sweden & Norway, Marina Media Sverige AB,
Mr Henrik Salen Tel: +46 706 18 61 61
Email: henrik@batmedia.se

China UICE - United International Conference & Exhibit Co., Ltd.,
Beijing **Cynthia Tan**
Tel: +86 (0) 10 87224826 Fax: +86 (0) 10 87224828
Email: cynthiatan@uice-expo.com

Taiwan Alpha Trading Company **Hur Hor Chou**
Tel: +886 (2) 351 2225 Fax: +886 (2) 394 1138
Email: transpac@ms2.hinet.net

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IBI Customer Service, Abacus, 21 Southampton Row, London WC1B 5HA, United Kingdom
Tel: +44 (0)208 955 7029, (Monday to Friday 9.00am – 5.00pm GMT)
E-mail: ibicustomerservices@abacusemedia.zendesk.com

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Together they paint a picture of life at the top of the boating business becoming more precarious

Ed Slack | Editor | IBI

TS Eliot proclaimed April the cruellest month. Had he been working in the marine industry today he might have had a rethink and made it June, given the managerial blood-letting that took place earlier this summer. The biggest bombshell was the news on June 16 of Hervé Gastinel's departure as CEO of Groupe Beneteau to be replaced by chairman Jérôme de Metz. From an outsider's perspective, the French builder's recent robust financials and dynamic new launch programme should have found its CEO secure in the role he had held since 2015, but then the manner in which his predecessor Bruno Cathelin was ousted might have given him pause for thought.

A week earlier, across the Channel, Sunseeker generated its own Richter scale moment when it announced the resignation of CEO Christian Marti, barely 12 months into his role, and perhaps as significantly, the appointment of Italian boatbuilding veteran Andrea Frabretti as his replacement. Not to be outdone, rivals

Princess announced within hours that its longstanding MD, Chris Gates, was stepping down after more than 30 years at the helm. He remains at the brand as special advisor to executive chairman Antony Sheriff. Before the month was out it was announced that Gregory Yeakle was calling time on his role as CEO of Emirates-based shipyard Gulf Craft, barely 12 months in.

Is there a lesson to be learned? It's impossible to draw a direct line between any of the individual cases above, but together they paint a picture of life at the top of the boating business becoming a little more precarious. It's territory we find ourselves in no doubt as a result of the industry shifting away from the family/founder-run business model to the disciplines of more corporate, shareholder-driven enterprises. Changes of the guard are inevitable and in the right circumstances are to be welcomed, but if the revolving door is being pushed a little bit harder now we'd better make sure we have the very best talent in the wings – and as importantly, the wherewithal to hold on to it. **IBI**

“ If the revolving door is being pushed a little bit harder now we'd better make sure we have the very best talent in the wings ”



Ed Slack

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AMERICAS

Brunswick financials: US market turning?

USA Brunswick Corp has reported second-quarter and half-year financial results, posting a 6% increase in year-to-date net sales (adjusted for the disposition of the yacht sector) up to \$4.21bn. Second quarter net sales also saw 6% growth (adjusted) to \$1.16bn. However, performance shows a mixed picture across segments where the company confirmed a challenging first half, due in large part to poor weather across most regions of the US and Canada resulting in lower demand for value-priced boats and engines.

For the first six months of the year, international sales overall were up 2% with the Engine & Boat businesses contributing equally to growth, except in Europe. Notably, international boat sales –

which represented 26% of total revenues – were down 17% for the second quarter due primarily to a supply disruption with contract manufacturing in Europe. "Because boats are typically shipped in Europe without engines which are then installed by the dealer," explained Brunswick's CEO David Foulkes in a webcast with investors, "the slowdown in boat shipments did not affect engine sales in the region over the same period."

Across the business as a whole, Parts & Accessories drove most of the growth with net sales up 14%, while engine net sales were down 5% in the quarter. Sales of Brunswick's marine engines and accessories in its second quarter were up 4.5% at \$871.5m due in large due to the 2018 acquisition of Power

Products. Demand for engines larger than 150hp also helped offset softness in the smaller horsepower motors. The segment reported earnings of \$164.6m compared to \$149.1m in the second quarter of 2018.

Boat sales were down 2% for the quarter to \$367.3m and up 1% year-to-date. Brunswick's boat segment reported net sales of \$366.6m for the quarter down 7.2% compared to the same period in 2018, which included \$19.9m of Sport yacht and Yacht Sales (now discontinued).

At the outset of the call, Foulkes noted: "The demand environment in the first-half of 2019 was challenging in certain of our businesses." Data presented showed retail sales in the main powerboat segments 7% down nationally in the US for the first half of the year.

Canada targets abandoned boats

CANADA The government of Canada is busy promoting the official implementation of its new Wrecked, Abandoned or Hazardous Vessels Act, which provides fines of up to C\$50,000 for individuals and \$250,000 for businesses which are found to be guilty of

abandoning boats.

The new legislation, which became law on July 30, increases owner responsibility and liability for both commercial and recreational vessels, and enables proactive intervention when problem vessels begin to pose navigational hazards. "This

significant legislation is making vessel owners responsible under the law for the safe disposal of their vessels," said Minister of Transport, Marc Garneau. "Most boat owners are responsible, but for those few who are not, we now have the ability to hold them to account."

MarineMax Q3 sales up 6%

USA US dealership chain MarineMax released its 2019 third quarter results, marking year-over-year gains in both revenue and net income. The company reported revenues of US\$383.5m for the quarter ended June 30, 2019, a 6.0% increase over the \$361.3m in revenues reported for the same period last year. Net income for the quarter grew by 4.5% to \$19.1m, compared against \$18.3m for

Q3 2018. Earnings per diluted share also grew, marking a 6.3% increase to \$0.84 compared to \$0.79 for the previous Q3.

MarineMax further noted same-store sales growth of 3.0% for the quarter, on top of an 8.0% gain for the previous third quarter.

"Producing same-store sales growth of 3% driven by even greater unit growth, MarineMax outperformed



▲ **MarineMax rising to challenging market conditions**

during a challenging quarter for the industry," said MarineMax president Brett McGill.

Johnson Outdoors reports Q3 revenue gains



▲ New products driving growth

USA Marine and outdoor equipment manufacturer Johnson Outdoors Inc has released its 2019 third quarter results, reporting higher revenues on the strength of solid fishing equipment sales. The company reported net sales of US\$176.3m for the quarter ended June 28, 2019, representing a 3% gain over the same period in 2018. Operating expenses for the quarter increased \$4.3m versus the prior year period. Gross margins dipped to 45.2%, compared against 46.5% for Q3 2018, attributed in part to \$1.9m in tariffs paid on Chinese components.

Net income for the fiscal

third quarter was reported as \$22.1m, compared to \$23.8m for the previous Q3, while operating profit was reported as \$28.0m compared to \$32.0m for Q3 2018.

“Outstanding new product success over the past three years continues to power growth in fishing and sets the stage for exciting innovations on the horizon. We feel good about where we are headed,” said Johnson Outdoors’ chair and CEO, Helen Johnson-Leipold. “The scope of Johnson Outdoors’ portfolio and the many opportunities for growth it provides puts us in a strong, unique position in an increasingly competitive outdoor recreation industry.”

The company also released year-to-date results, showing net sales of \$458.4m up 1.0% over the \$453.1m reported for the same period in 2018. Year-to-date operating profit was indicated as \$61.9m compared with \$65.0m during the prior fiscal year’s first nine months.

Merritt Precision expands operations

USA Merritt Precisions has acquired five acres of land in Titusville, Florida, and will break ground later this summer on an expansion project that will double capacity of the specialty milling company.

Merritt Precision is part of Watershed Innovation, which was established by Correct Craft to focus on “identifying, researching, developing and integrating exponential technologies to benefit Correct Craft, its subsidiaries and the marine industry.” Merritt Precision

specialises in large-format CNC machining, with an emphasis on creating complicated plugs for the marine, automotive and aerospace industries.

“This expansion really will allow Merritt Precision to move in a direction that enhances our existing product, bring new capabilities to the company, and reach more companies that want only the very best for their brands,” said Doug Keehn, Merritt Precision vice president/general manager.

The project is expected to be completed in late 2020.

APPOINTMENTS

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NAVICO

Knut Frostad is Navico’s new president and CEO, replacing outgoing chief executive Leif Ottosson. Frostad has been on Navico’s board for 14 years and brings experience in the industry as former CEO of the Volvo Ocean Race and director and advisor to several international companies.



Knut Frostad

SANLORENZO AMERICAS

Marco Segato has been appointed CEO of Sanlorenzo Americas, the division that has aided in the Italian superyacht-builder’s expansion in North, Central and South America for the last 10 years. Segato was formerly VP of sales at Sanlorenzo Americas, a position he has held since 2014.



Marco Segato

BEHNEMAR

BehneMar, the Dubai-based superyacht brokerage firm, has named **Tim Trenker** as its new CEO. Trenker’s corporate background is in the premium automobile and maritime industry.



Tim Trenker

MARQUIS YACHTS

Marquis Yachts has named **Scott Nault** as national sales manager, responsible for the US builder’s Marquis, Carver and Lexus yachts lines. He will also oversee dealer development and product education.

ARKSEN

Arksen, the new UK-based builder of hybrid explorer vessels, has hired **Jim Mair** as technical director. Mair joins Arksen from Meercat Workboats, where he served as technical manager. His background includes operational/maintenance of yachts, the design of high-speed crew transfer boats, build management and the refit of large motoryachts.

CATANA

French multihull builder **Catana** has hired **Matija Klemenc** as the group’s new regional sales manager for Central European markets and charter clients. In his previous position, Klemenc was responsible for marketing at two Slovenian boatbuilders – Greenline Yachts and Elan.

FAIRLINE YACHTS

The UK’s **Fairline Yachts** has named **Ben Sangster** as its new international sales manager – Europe. Sangster will be responsible for Fairline’s European sales operations and managing its European dealer network. For the past 10 years, Sangster has held the post of Fairline’s chief commissioning engineer.

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Sunseeker reports solid growth in profitability

UK Sunseeker International has reported substantial growth in gross margins and retained profit for the year ended December 31, 2018. Profits grew from £1.1m in 2017 to £6.6m in 2018, an increase of £5.5m. Pure boat operations – excluding other operating income – increased by almost £10m year-on-year. Underlying EBITDA was over £13m for 2018, more than doubling the £5.9m of EBITDA recorded in 2017.

Overall group (Sunseeker International Holdings Ltd) revenue was £299.8m in 2018, with gross margins increasing by 39% (£9.8m) from £25.5m in 2017 to £35.3m in 2018.

“To oversee a 39% increase in our underlying gross margin is testament to Sunseeker’s focus on the quality of business, and not simply revenue growth,” says Sunseeker CFO

Mike McMillan. “We have worked hard to provide an exciting product range for our customers that can deliver increased levels of profitability, to fund further innovation and product development.”

Andrea Frabetti, Sunseeker CEO, says he is “extremely happy” with the group’s performance in 2018. “Looking ahead, we will further develop the framework for the business and drive the Sunseeker brand forward to even greater success, aided by a £50m CAPEX investment in R&D, new products, innovation and technology over the next five years,” he says. “This investment means our product development plan will see a doubling of the product range to 22 models over the next three years.

“The response we have had for our latest models has been incredible,” Frabetti adds. “Our



▲ Sunseeker’s 116 Yacht, Mr K

future models will include new product segments, as well as improved differentiation between various lines, all of which will help us to continue to grow profitably.”

Meanwhile, the UK-based Sunseeker London Group – the world’s largest distributor of Sunseeker yachts – recently announced that it had sold three 100ft-plus yachts with a retail value of over £50m in the month of July.

Two Sunseeker 131 yachts and a 116 have been delivered to their Mediterranean destinations and are available for charter for the remainder of the season.



▲ Moonen was building a sister ship to the 36m *Brigadoon*

NETHERLANDS Moonen Yachts says it has a new investor to replace Mexican steelmaker Altos Hornos de Mexico (AHMSA), whose financial downfall plunged the Dutch superyacht-maker into bankruptcy on July 11.

“At this moment we are close to entering a new era,” Moonen

New investor, new era for Moonen Yachts?

Yachts CEO Johan Dubbelman said in a statement. “A new investor has been found [and it is] to be expected final decisions will be taken within the next few weeks,” he added.

Dubbelman did not identify the new investor. *IBI* understands he is talking with an Australian investor.

Dubbelman expressed confidence the new investor would boost production of Moonen’s steel yachts from 30m-50m. The yard aims to spec-build at least two to three yachts per year to shorten delivery times.

AHMSA’s troubled finances are not new. In 2015, it briefly denied funds to Moonen when world steel prices tanked. AHMSA’s accounts were frozen last May when its chairman, Alonso Ancira Elizondo, was arrested in Spain on bribery charges.

In recent years, Moonen has delivered several yachts, including the 36m *Brigadoon*. When it went under, Moonen was building a sister ship due for launch next spring.

Moonen was founded in 1963. Since 1999 it has built some two dozen superyachts.

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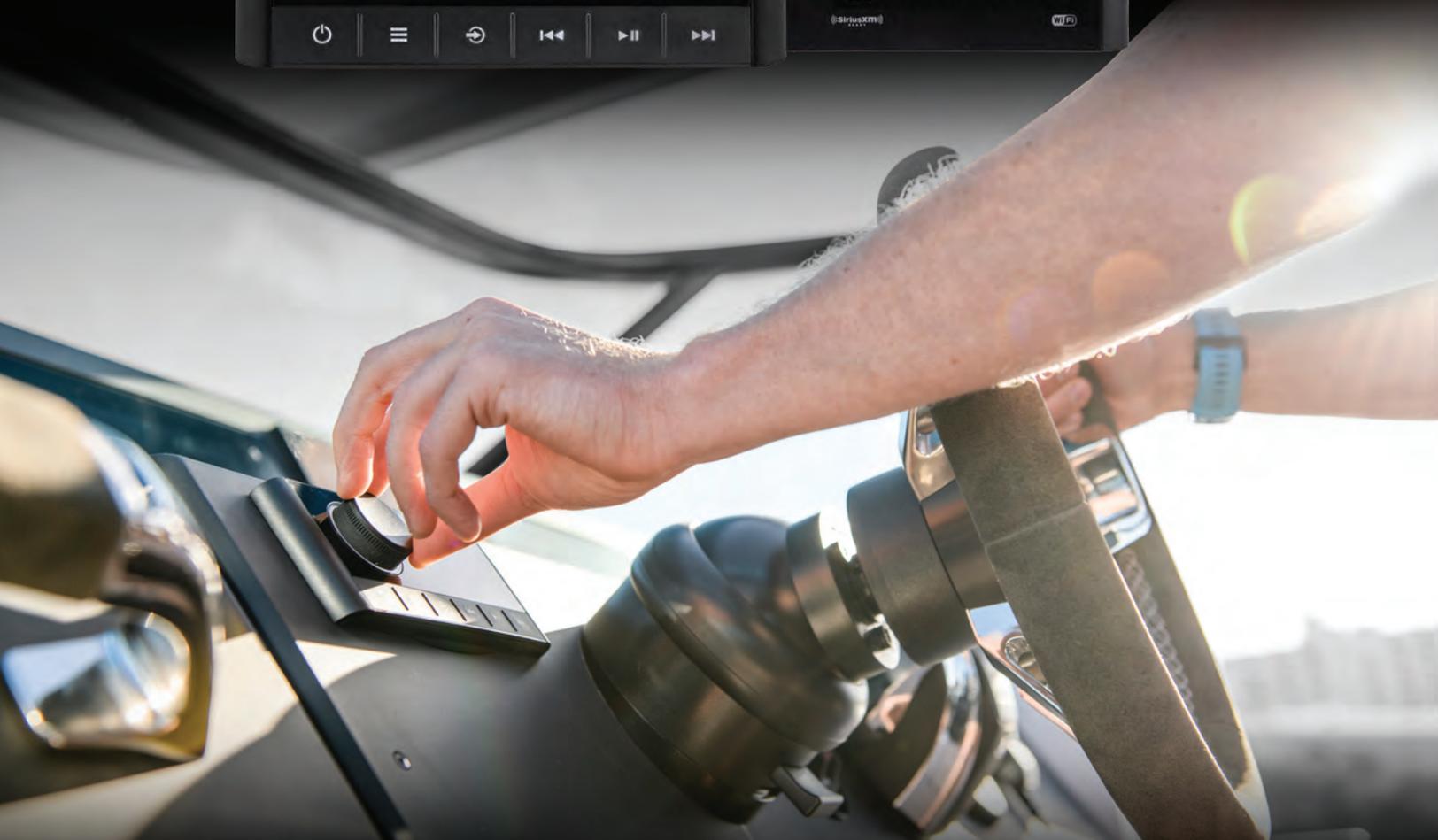
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FEATURING



EUROPE

EU to crack down on yachting 'tax breaks'

EUROPE The European Union Commission (EUC), in its ongoing mission to rid the EU of "unfair tax avoidance practices," is taking steps to end illegal tax breaks in the yacht industries of Italy and Cyprus.

A statement for the EUC claims that both countries failed to levy the correct amount of VAT on the leasing of yachts, while the Commission further referred Italy to the EU Court of Justice

for its failure to address an illegal system of exemptions for fuel used for charter yachts plying EU waters.

In its referral to the court, the EUC states: "In breach of EU rules, Italy allows chartered pleasure crafts, such as yachts, to qualify as 'commercial' even if they are for personal use. This situation may allow them to benefit from excise duty exemption on fuel used to power their engines."

The EUC issued its opinion

on the VAT tax, warning the two countries that without corrective action in two months, the Commission will be referring the two countries for violations before the EU Court of Justice.

"Cyprus and Italy have established VAT rules according to which the larger the boat is, the less the lease is estimated to take place in EU waters. As a consequence, the applicable VAT base can be substantially reduced," the statement reads.

Heesen expands to meet demand for bigger yachts

NETHERLANDS Heesen Yachts has grown its build capacity by 27% and is increasing its workforce to meet demand. The Dutch builder has expanded its interior workshop in Winterswijk, an hour's drive north of the yard's home at Oss, to 2,240m², raising the yard's total build capacity by some 27% to 8,100m².

Heesen first acquired the Winterswijk facility in 2000. Its total office space has grown by 332m² to almost 1,000m².

In tandem with the increase in production space, Heesen is hiring 30 new employees, bringing the total workforce in Winterswijk to 130.

"The expansion of both the facilities and workforce comes in direct response to the increase in size and volume of the yachts being built by Heesen today," the company said in a statement. "In turn, the level of sophistication and expertise required to produce interiors on this level means more space, more equipment, and more artisans."

Wider Yachts acquired

ITALY Wider Yachts, the Italian brand owned by the Hong Kong-listed Genting HK group, has been acquired by a trio of businesses for an undisclosed price.

The acquisition trio comprises the Monegasque group Nautical Hybrid Tech, headed by Marcello Maggi; the Swiss-headquartered Zepter Group; and Italian investment firm Hopafi Holding Srl. The three have purchased the entire ownership of the company.

In a statement, the three companies said that the signing marked "the beginning of a new era for Wider and exciting news would be unveiled in the near future."

Under the purchase deal, Wider will be led by Marcello Maggi, a prominent player in the nautical industry for more than 30 years, and the company will boost its leadership in 'green energy' yachting.

"The new group of investors will contribute to accelerate the company growth and eventually list it in the stock exchange within three years," the statement adds.

The last news from Wider

was in May 2019 when the Wider 165 M/Y *Cecilia* picked up a World Superyacht Award in the 'displacement motoryacht between 300 and 499GT - 48m and above' category. There had been no news of further projects since the announcement of a Wider 130 being in development in 2017.

As part of the acquisition, Marcello Maggi has been appointed president and sales & marketing director, and will be based in the Monaco office. Born in Ancona, but living for more than 20 years in Monte Carlo, he has always been an ambassador of Italian shipyards, strategically developing companies like ISA, which he co-founded in 2001, and CRN.

Under the deal, Wider will be focusing on aluminium hybrid vessels and it has concluded a license agreement with the German shipyard, Lloyd Werft, for hybrid yachts over 76m (250ft) that will be produced in Bremerhaven.

Lloyd Werft is owned by Genting HK. A Wider spokesman confirmed that the builder would remain in Ancona.



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▲ 60,000 visitors attended the Sydney show in early August

Australian boating market a “sleeping giant”

AUSTRALIA With new boat registrations averaging 14,000 per year, the marine industry in Australia is still an A\$8.65bn industry led by sales, yard services, and charter operations. But the numbers are a bit misleading, according to Domenic Genua, general manager for marketing and events at Australia’s Boating Industry Association (BIA).

While Australia has over 900,000 registered boats, boats that travel under 10kt need not be registered, and it is estimated there are 300,000 more of those. Around 20% of the population – some five million Australians – have access to or participate in boating, with some two million possessing a boat licence.

As the largest boat show

in the Southern Hemisphere, the Sydney International Boat Show (SIBS) – which ran from August 1-5 – leads the way in showcasing the Australian boating culture to the world and jump-starting the industry each year. “Post GFC [Global Financial Crisis] in 2009, we took a substantial hit to our industry, which reduced in size by about 40%,” Genua told *IBI*. “However, at our peak, during [SIBS] our industry would expect to turn over A\$5m per hour, A\$250m during the course of the show, and another A\$200m in August follow-up sales activity.”

The boating mix is as diverse as the country itself, Genua said, with a trend moving toward multi-use boats that can combine fishing and family fun.

“If you appreciate that 93% of all registered vessels in Australia in Australia are less than 8m long, that tells you that we are a very large trailer boat market,” he told *IBI*.

Illustrating the point, personal watercraft (PWC) sales have increased each year for the past 10 years, while boat registrations have remained flat. There are some 76,000 PWCs registered in Australia.

The marine industry

in Australia employs approximately 28,000 people, with most – about 75% – working in small businesses employing five people or less.

According to Genua, the industry is showing evidence of small growth, but is taking new forms like boat sharing and charter services. “The Australian market place is a sleeping giant,” he said, “and what we have is an opportunity, moving forward, that we are going to say to the countries around the world, ‘watch this space’. You’ll be surprised at how we blossom and grow.”

That growth, Genua further explained, will come with adapting to the changing market place.

“As an industry we’re going to be modern, thinking outside of the square, and we’re going to embrace not only modern technology but modern thinking about the share economy, how we create more effective land-water interface – better boat ramps, better marinas – so that’s going to be a really good thing.”

With total attendance at just over 60,000 people, this year’s Sydney International Boat Show (SIBS) was dubbed a “resounding success”.

Ferretti Group expands in Vietnam

VIETNAM Italy’s Ferretti Group has expanded its presence in the Asian market by announcing a new dealership agreement with Vietnam-based Luxury Yacht Limited (LuxYacht). LuxYacht will exclusively represent the Ferretti Yachts, Pershing and Riva brands.

“The partnership with LuxYacht is a new and strategic commercial partnership for our group, and it is of fundamental importance for our growth

path in the South-East Asian market,” says Stefano de Vivo, CCO of Ferretti Group. “We have decided to rely on a highly experienced nautical broker in a country that is experiencing record economic growth with a 7% increase in GDP and a consequent growing demand for luxury goods.”

Led by Nguyen Duc Thuan, president of LuxYacht, the team includes yachting experts and engineers, and a sub-dealers

network spread throughout Vietnam. With many years of experience in maritime industry, the company has become a pioneer in the field of genuine yacht distribution and watersports products imported into Vietnam.

“The partnership between LuxYacht and Ferretti Yachts, Pershing and Riva in Vietnam is very exciting because we know the quality, craftsmanship and elegance

of the Ferretti yachts,” says Nguyen. “I’ve been working with smaller sized yachts from other brands over the last three years and seen good results. We now see that the market is maturing, with many clients showing an interest in owning yachts over 30m. LuxYacht is committed to supporting the new boating community in Vietnam, and helping them to integrate yachting into their lifestyle.”

NZ builder to expand European distribution network

NEW ZEALAND Extreme Boats, a new name in the European trailer boat industry, is in the process of appointing dealers across Europe to sell its export range manufactured in New Zealand.

Extreme builds over 450 aluminium boats a year ranging in size from 5m-11.85m and has received numerous awards in its home country, including four major awards this year at the highly competitive Hutchwilco Boat Show. These include

winning the best new model, specialist fishing boat up to 7m, specialist fishing boat up to 8m, and also winning the overall boat of the show. With over 20 different models from the 5m Sport Fisher right up to the 1185 Game King, the Extreme range meets a wide variety of applications.

Aluminium boats are particularly popular in New Zealand, Australia and Scandinavia, as they are lightweight in comparison to

GRP craft of similar length, making them very suitable for trailing and ease of launching, qualities which Extreme are hoping will also be appreciated more widely in the rest of Europe in future.

Extreme Boats EU Limited will be the European distribution hub based in Coventry in the UK with offices and a showroom in Southampton. It is currently in the process of establishing a dealer network in over 15



▲ Europe-bound Extreme

European countries, including the appointment of up to six main dealers in the UK to service their prospective clients. A number of regional territories are still open to interested parties.

Mixed 2019 Q1 results for Suzuki

JAPAN Suzuki Motor Corp has released its 2019 first-quarter results, revealing lower overall sales and profits attributed to a sagging Indian automotive market offsetting gains in the company's marine and motorcycle business.

Overall net sales for the quarter ended June 30, 2019, were reported as ¥907.5bn, a decline of 8.1% from the ¥987bn in sales reported for the first three months of FY2018. Overall operating income also declined to ¥62.7bn, a year-over-year drop of 46.2% from the ¥116bn reported in Q1 2018. Net income decreased YOY by 52.8% to ¥40.5bn for the

quarter, producing gross profits of ¥261.1m compared against gross profits of ¥294.5m for the previous Q1.

The company's motorcycle business fared a bit better; net Q1 sales increased by 2.0% YOY to ¥65.6bn.

Net sales for Suzuki's marine segment meanwhile increased by 9.9% to ¥24.8bn for the quarter, driving operating income for the business unit to ¥5.8bn and a YOY gain of 16.5%. The strong marine segment performance was attributed directly to demand for large outboards, and in particular it's DF350A model, in the surging North American market.



▲ Strong demand for big outboards is driving marine sector growth

TALKING POINT

HYDROFOILS



Uli Heinemann



When is a hydrofoil not a hydrofoil?

Recently I saw in a marina in the Mediterranean some peculiar construction which brought up the question: Are these add-ons at the boats' skeg already called "hydrofoils"?

Why is the answer to that question important? EU Directive 2015-53-EC (known as the 'RCD') under which the CE label is given to watercraft, has some exemptions, one of which is "hydrofoils".

This means that all 'hydrofoil' watercraft are outside of the scope of the RCD. Regrettably RCD does not come with a definition for that type of craft.

When it comes to CE assessment and certification of craft the EU market surveillance, notified bodies and manufacturers can certainly agree that a hydrofoil is something in-between a motor craft like the one shown in the picture and some flying sailing dragsters like the America's Cup AC45 F. But when does 'hydrofoiling' start?

Now first series production boats, be it the Figaro Beneteau 3 or catamarans like Nacra 17, are arriving on the market. Are they both hydrofoils trying to fly or do they just have some support to increase hydrostatic stability after a certain speed? There's no clear line yet.

Regulators and standard writers will have to find a way to deal with these boats soon!

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.



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Life Time Achievement Award winner Annette Roux, chairwoman Groupe Beneteau Foundation, with IBI's publisher Nick Hopkinson (left) and sponsor Ronny Skauen chief executive of Side-Power at the 2018 awards.

ORGANISED BY



Customers may have returned, but confidence is beginning to look fragile

2019 LOOKS SET TO BE A DECENT YEAR, BUT THE THREAT OF A NO DEAL BREXIT AND A GENERAL GLOBAL ECONOMIC SLOWDOWN, MEAN PROSPECTS FOR 2020 LOOK LESS ROSY

WORDS: ARLENE SLOAN

Nobody wants a good party to end early and those in the boating industry would not be criticized for wanting the band to carry on playing. After the crippling effects of the financial crisis – including massive layoffs, closures and consolidation – boatbuilders, equipment manufactures and their partners up and down the supply chain had good reason to start celebrating again.

Across Europe, industry news for the past two years has been largely positive as companies regained their footing, restructured operations, righted balance sheets, and started hiring and investing again.

But the ongoing uncertainties of Brexit and the US-China trade war are drowning out the music. After finally hitting its stride in 2017 – nearly nine years after the onset of the financial crisis – Europe’s broad-based recovery began to slow down last year. Achieving 2.7% real GDP growth in 2017, growth eased to 2.1% in 2018 and is expected to slow considerably more in 2019, down to 1.2%.

As our survey of key boating markets in Europe reveals, results in 2018 were largely positive and continued an upward trend that some regions have been enjoying for more than five years.

Boat exports across core boat categories from EU countries were up 5.2% to €8.6 billion in 2018 and

up 57% from 2014, while inboard motorboats – a particular specialty of European boatbuilders also show 56% growth since 2014. Boat imports showed more mixed results last year with gains in outboard boats, sailboats and inflatables, but a decline in higher value inboard motorboats, leading to an overall decline of 13% down to €3.5 billion across EU countries. However, the improvement in domestic boat demand is clear across the past 5 years, where boat imports have grown 31% across Europe.

Most of those interviewed for this year’s overview were still cautiously optimistic for the industry’s performance in 2019. Indeed many companies are still riding fairly high on full order books so they may not feel the impact of a weaker economy for some time to come. Sustained employment and wage growth

over several years has given consumers the means to continue enjoying boating, and developments in the industry, such as boat clubs and expanding charter fleets, offers enthusiasts many affordable new routes to get on the water without big outlays.

Softening global trade and the politically inflicted risks of a no-deal Brexit and extended trade war are now feeding into business and consumer confidence, as seen in our economic indicators for European countries covered in this report, but we can only hope that those trends don’t take a firm hold ... and the music continues to play for a little longer. ■

“Most of those interviewed for this year’s overview were still cautiously optimistic for the industry’s performance in 2019”



STATS & FACTS

COMPILED BY ARLENE SLOAN

Top EU Boat Importers

BY VALUE

- NETHERLANDS
- CYPRUS
- FRANCE
- MALTA
- SPAIN
- GERMANY
- ITALY
- UNITED KINGDOM
- CROATIA
- SWEDEN

BY UNITS

- NETHERLANDS
- BELGIUM
- FRANCE
- SPAIN
- UK
- SWEDEN
- FINLAND
- GERMANY
- ITALY
- CROATIA



Top EU Boat Exporters

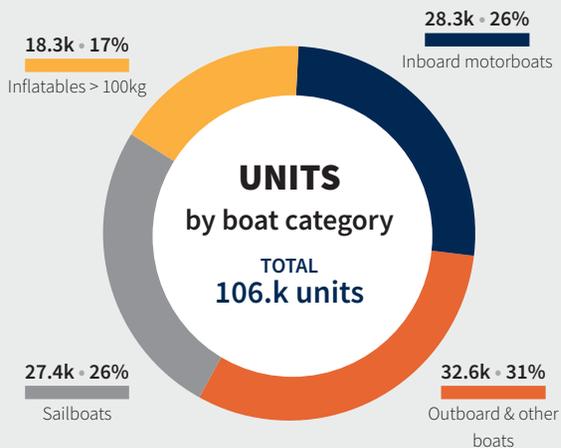
BY VALUE

- NETHERLANDS
- ITALY
- GERMANY
- FRANCE
- UNITED KINGDOM
- POLAND
- CYPRUS
- FINLAND
- SPAIN
- BELGIUM

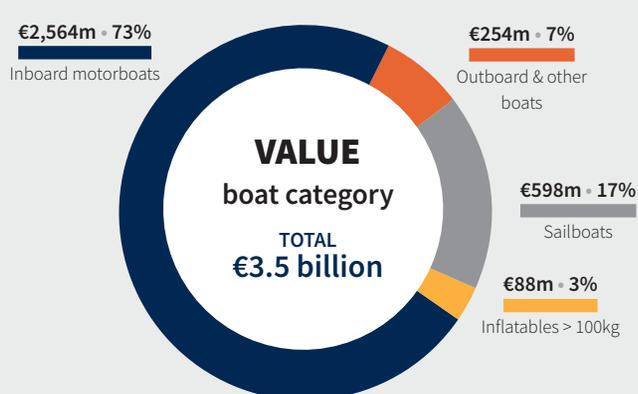
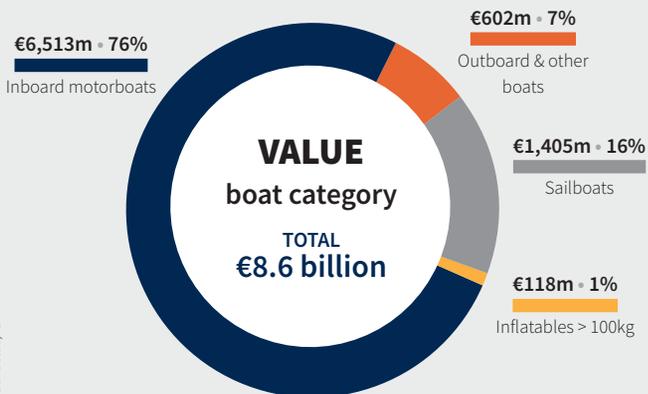
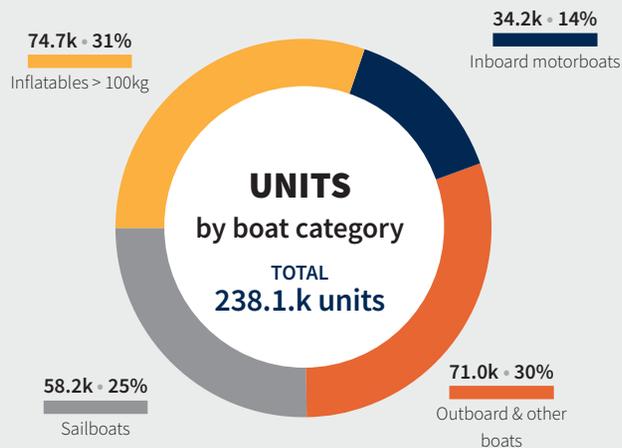
BY UNITS

- POLAND
- FINLAND
- UNITED KINGDOM
- BELGIUM
- FRANCE
- NETHERLANDS
- ITALY
- PORTUGAL
- GERMANY
- SWEDEN

2018 EU BOAT EXPORTS



2018 EU BOAT IMPORTS



Source: Eurostat, IBI

Note: Figures represent the combined units & value of exports and imports from all 28 individual EU countries, including intra-EU trade

▼ Tight restrictions on the use of powerboats on Austrian lakes means that many of its citizens use their boats outside the country



AUSTRIA



REAL GDP GROWTH (2018) 2.7%
 REAL GDP GROWTH (2019 est) 1.3%
 NUMBER OF ADULTS 7.1 MILLION
 NUMBER \$ MILLIONAIRES 229,000
 BOAT PARK 65,000
 CONSUMER CONFIDENCE
 (Change in index points Jun/Jul) -0.2%
 NEW CAR SALES
 (Change Jan-Jun '18/19) -8.8%

Not much has changed in the Austrian leisure marine market since *IBI* last reported on this small, landlocked country back in 2018. Despite being mountainous, with few places to enjoy boating, Austria's high living standards mean its citizens have plenty of disposable income; with limited places to berth, most boaters can afford to keep their yachts in nearby Italy, Croatia or Slovenia.

"The current business year is extremely positive, but we also have to look at the global economic situation," says Stefan Frauscher of Frauscher Boats, Austria's biggest shipyard. "We're seeing some negative signs for 2020. For the moment, though, we're cautiously optimistic."

Most Austrian companies, whether they're targeting customers looking to use their boats at home or abroad, are small, family-run operations – and business is said to be stable. In Austria itself, where restrictions on the use of marine

combustion engines are in force on the country's lakes and rivers, electric boating and sailing are the norm.

"We're still seeing a demand for electric boats, but there aren't enough moorings in our harbours. That is one of the biggest restrictions to growth," Frauscher told *IBI*. "The trend is towards higher-powered electric boats, but pricing and poor marina infrastructure are a hindrance to widespread adoption."

"Austrians also use their boats a lot on foreign lakes and seas, so there's good demand for our powerboat range too."

Frauscher currently exports more than 85% of production. The company recently founded a sales and boat test company in Mallorca (Port Adriano) and another in France (Port Grimaud, close to St Tropez) to help grow the brand and sell boats in those areas. "We work with good dealers in many European countries," says Frauscher, "and the US market (especially Florida) is also growing." ■

STEFAN FRAUSCHER, OWNER
 FRAUSCHER BOATS

There's a trend towards higher-powered electric boats, but pricing and poor marina infrastructure are a hindrance to wider adoption



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Photo: Wouter Van Vaerenbergh

▲ Demand for sailing yachts is slowing



▲ The Belgian Boat Show in Ghent. Next year's event will be shortened to just five days

While 2018 was another difficult year for Belgian marine firms, some segments of the industry seem to be picking up. “Second-hand sales are increasing, charter is booming, catamarans are doing well, and speedboats from 16ft-26ft are selling well too,” says Ludo Janssens at marine trade association Nautibel, adding that some companies are reporting growth of 15%.

Like last year, small motorboats under 9m continue to account for some 80% of local demand, and while many are taken to the Mediterranean for the summer boating season, others are used on the Belgian coast and inland waters. When it comes to bigger boats, most Belgians use and often buy them in countries like the Netherlands, France, Spain or Croatia.

Christophe Coseyns at Conceptum Exhibitions, organiser of the annual Belgian Boat Show in Ghent, told *IBI* that despite a slight pick-up in the market, new boats from 8m-25m are still difficult to sell – especially sailing yachts – and that charter is the preferred option for large models. Difficulties selling new boats are compounded by the widespread availability of second-hand yachts at rock-bottom prices.

Keen to reverse this trend, Conceptum recently launched a new on-water show



Photo: Pi De Jonge

BELGIUM	
REAL GDP GROWTH (2018)	1.4%
REAL GDP GROWTH (2019 est)	1.2%
NUMBER OF ADULTS	8.9 MILLION
NUMBER \$ MILLIONAIRES	424,000
BOAT PARK	45,000
CONSUMER CONFIDENCE	
(Change in index points Jun/Jul)	-1.0%
NEW CAR SALES	
(Change Jan-Jun '18/19)	-6.3%

called Belgian Boat Show Float. The two-day event is relocating this year from Breskens to Nieuwpoort Marina, and will take place from October 19-20, 2019. “We needed to reinvent ourselves, as people have become more demanding,” Coseyns told *IBI*. “We’re doing everything possible to refresh our events with more dynamic lifestyle experiences, including VIP moments, while not losing our focus on boats. In Ghent we have new timings – five days in February 2020 – as well as new halls and new content. In Nieuwpoort we’ll have a far better communication plan than Breskens ever had, combined with new boats, second-hand boats, charters and all things related.”

But like many countries, Belgium suffers from an ageing boating population and too few young people entering the sport. Other impediments to growth, says Ludo Janssens at Nautibel, are a lack of finance for new boats and uncertainty surrounding boat licensing. A shortage of moorings in cities like Ghent, Bruges and Brussels is also stifling growth.

“We have new, stricter regulations for boat licences and the registration process takes too long – in some cases up to one month – despite moving to an electronic system,” he says. ■

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CROATIA



REAL GDP GROWTH (2018) 2.6%
REAL GDP GROWTH (2019 est) 2.7%
NUMBER OF ADULTS 3.3 MILLION
NUMBER \$ MILLIONAIRES 6,700
BOAT PARK 103,000
CONSUMER CONFIDENCE
(Change in index points Jun/Jul) -3.5%
NEW CAR SALES
(Change Jan-Jun '18/19) -0.2%

Croatia, a top destination for visiting yachts, continues to lead the world in registered charter yachts and bookings. According to the Croatian Chamber of Economy, 630 active charter fleet providers and a total of 3,910 vessels passed through Croatian nautical ports in the first six months of 2019. In 2018, yacht charter in Croatia accounted for 3.5 million overnight stays.

A recently published article in Croatia's *Yacht Charter Review* claims that, until recently, there was a big divide between the bareboat sailing charter market and the luxury mega/superyacht charter market, with the latter being dominated by large international players. "This divide is slowly being bridged by Croatian companies entering the luxury market," states the article. According to the Croatian Chamber of Economy, in 2019 there were a total of 271 active charter vessels in the 15m-20m range, while there were 93 charter vessels above 20m.

"Sailboats dominate the bareboat charter market by far. The main reason is financial, as sailboats typically sleep more guests, cost less and have lower operating and servicing costs, and a longer lifespan. But motorboats have their advantages, and newer, spacious, more efficient designs are entering the middle market, while the exclusive yachts may be few in numbers, but generate big revenues."

The biggest trend in charter yachts over the past few years has been the rise of the sailing catamaran, as it seems to bridge the gap between motor and sailing yachts.

In terms of boatbuilding, Croatian producers of luxury motoryachts and sailboats are few and far between. Instead, there are many small, family-run operations building a variety of pleasure boats that are adapted to the Croatian boating lifestyle and compete more on quality than cost, says Milan Šangulin, director of the Biograd Boat Show (BBS). Held at Marina Kornati in the resort town of Biograd, BBS is Croatia's biggest boat show and one of the biggest in-water shows in Central

Europe. "Customisation is also an important strategy in the battle with volume manufacturers, offering lifestyle-related options that are popular for the Croatian boating environment," says Šangulin. "Exports of pleasure craft have slowed, with the domestic market responsible for most of the demand.

"A couple of local charter companies have entered into production of large monohull sailing vessels such as the More 40 and 55, and



◀ The Biograd Boat Show is Croatia's biggest on-water event

the Kufner 55," he adds. "Other pleasure craft manufacturers have adapted to the needs of the tourist industry by offering specialised fast boats for transfers and adrenalin seekers. A true success story comes from the village of Krilo Jesenice, where 70 families have built and operate more than 100 small luxury cruise boats over the past decade. The total fleet of cruisers is 180 (one for every four citizens of the town) and they employ around 2,000 people during the tourist season. ■ ➔



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DENMARK



▲ Danes tend to favour small motorboats

REAL GDP GROWTH (2018) 1.4%
REAL GDP GROWTH (2019 est) 1.9%
NUMBER OF ADULTS 4.5 MILLION
NUMBER \$ MILLIONAIRES 243,000
BOAT PARK 310,000
CONSUMER CONFIDENCE
(Change in index points Jun/Jul) -2.9%
NEW CAR SALES
(Change Jan-Jun '18/19) +1.3%

In Denmark, the smallest of the four Scandinavian markets, 2018 was another year of solid growth as boaters flocked to the water during one of the hottest summers on record.

“The general trend is positive, both for domestic sales and exports,” says Sune Jensen at Danish boating industry association Skib & Bad (formerly Danboat). “In 2018, exports were up by more than 15% compared to 2017 and were mainly driven by demand from the rest of Europe.”

In terms of production, Denmark specialises in sailboats and small fishing vessels – mostly for export to Europe,



Greenland and the US. X-Yachts is the country’s largest serial boat producer with an estimated output of 200 performance-oriented sailing yachts each year, followed by a handful of smaller companies such as Quorning Boats, builder of the Dragonfly range of trimarans.

In terms of usage, however, the Danes tend to favour small motorboats, and sales of new and used models are enjoying relative strength. Boat rental companies that focus on electric powerboats are an ongoing trend, although the activity takes place mainly in the cities.

The Fredericia Boat Show, held every two years in February, continues to pull in record crowds. “We had a very successful event this year with 30,880 visitors in total,” exhibition manager

“The general trend is positive, both for domestic sales and exports. In 2018, exports were up by more than 15% over 2017”

Lars Søndergaard told *IBI*.

Feedback from the time was overwhelmingly positive.

“We had some really positive and busy days,” said Søndergaard when the seven-day boat show closed. “Many of the visitors are still quite high after the fantastic summer of 2018 and they can hardly wait to get on the water. The feedback from exhibitors is that the mood and desire to act was top notch.”

Sune Jansen at Skib & Bad says Danish marine firms are “slightly positive” in 2019, but growing economic uncertainty from Brexit is dampening potential export growth, and development of the domestic market is restricted by a yearly tax of 1% on the insured value of a boat. ■

◀ Fredericia pulled in record crowds this year

FINLAND



▲ Helsinki Boat Afloat

REAL GDP GROWTH (2018) 1.7%
REAL GDP GROWTH (2019 est) 1.4%
NUMBER OF ADULTS 4.3 MILLION
NUMBER \$ MILLIONAIRES 80,000
BOAT PARK 1,100,000
CONSUMER CONFIDENCE
(Change in index points Jun/Jul) 3.0%
NEW CAR SALES
(Change Jan-Jun '18/19) -13.4%

An exceptionally long, hot summer in Finland and its continued economic upswing helped lift sales in the Finnish boating market by 10% last year. Boat registrations were up by 7.5%.

“This positive sentiment carried through to spring 2019, resulting in a strong first half,” Jarkko Pajusalo, CEO of Finnish marine industries federation Finnboat, told *IBI*.

Most boats sold in Finland are small, outboard-powered motorboats used for day trips to the summer cottage or other leisure pursuits such as fishing. “This part of the market is dependent on the weather, so 2018 was a very good year and some of the most popular models sold out,” Pajusalo says. “PWC sales have been growing at a double-digit rate in recent years and 2018 was the first year when sales surpassed 1,000 units. The 9m-10m range is also developing very well and even bigger motoryachts have seen a recent upswing in the Finnish market.

“Over 70% of boats in Finland are exported though, and exports declined due to the timing of large yacht projects,” he adds. ➔



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▲ Finnboat CEO Jarkko Pajusalo

Day trips, aluminium boats, outboards engines and bigger boats are the four main trends in Finland. “The range of aluminium and hybrid hull boats available on the market is in response to consumer demand,” Pajusolo told IBI. “The average size of boat keeps getting bigger and outboards are now seen on a wider range of boats. Consumers are busy and interest in fast day trips is driving the market for day cruisers and other fast boats. At the same time, the market for large yachts in Finland is doing well, albeit the numbers are naturally much smaller.”

The health of the large yacht market was particularly evident at this year’s Helsinki Boat Afloat show, where the average size of motoryacht on display is getting bigger each year.

The weak spot in Finland, says Pajusalo, is still the sailing boat market with less than 20 new boats registered annually. “The fleet in Finland is ageing and clearly there’s a need for more modern sailing boats,” he says. “We’re seeing an increase in imports of second-hand boats, but during 2019 we’ve also seen some positive signs of new sailing boat sales in Finland.”

Meanwhile, the charter business in Finland has not enjoyed the same robust growth as in other markets. “Finland has globally unique archipelagos and lake districts, so the potential is there, but we need to develop supply and services to cater for the demand during the European peak season, which is in August,” Pajusalo explains. “Finnish schools start in mid-August, which makes it difficult to get seasonal help at marinas. This is probably the biggest

hurdle holding back the growth of marinas and especially charter business.”

The industry mood in Finland is said to be cautiously positive with around 55% of Finnboat member companies expecting turnover in 2019 to be better than 2018. However, this is down from 61% a year ago, notes Pajusalo. “Clearly the cooling down of the economy is changing the sentiment to more cautious,” he says. “Over 70% of Finnish boats are exported, so the biggest challenges are in the global economy with trade wars causing too much uncertainty in the market.” ■

“The average size of boat keeps getting bigger and outboards are now seen on a wider range of boats”

FRANCE

REAL GDP GROWTH (2018) 1.7%
 REAL GDP GROWTH (2019 est) 1.2%
 NUMBER OF ADULTS 49.5 MILLION
 NUMBER \$ MILLIONAIRES 2,15 MILLION
 BOAT PARK 510,000
 CONSUMER CONFIDENCE
 (Change in index points Jun/Jul) +2.0
 NEW CAR SALES
 (Change Jan-Jun '18/19) -1.8%

It’s taken a full decade for the French boating industry to recover its pre-crisis turnover, but the wait was worth it. “We are back to the level of 2008, with a total turnover of €4.8bn,” said Yves Lyon-Caen, president of French nautical industries federation FIN, late last year.

According to FIN’s latest figures, turnover for the 12 months ended August 31, 2017 grew by 5%. Official figures for the 2018 financial year weren’t released in time for this report, but the French boating industry hopes to grow turnover another 8% to €5.2bn.

FIN’s latest data also reveals that the production of series boats reached a value of €1.09bn in 2017 with 52,989 units produced. In terms of turnover, 60.6% of these units built in France



◀ Yves Lyon-Caen, head of French industry federation FIN

were live-aboard sailing yachts, and 33.5% live-aboard motorboats.

Around 27% of the sailboats were monohulls from 12m-15m, while multihulls

represented more than 40% of the units produced. On the motor side, more than 67% were between 6m-9m.

In summary, the double-digit increase in the overall turnover of French production is mainly down to the increase in sales of 6m-12m motorboats and the booming multihull sector. Exports dominate the financials, with sales peaking at €816.4m (compared to €270m of sales in France). In 10 years, the share of these exports has increased from 62% to 75.1%. Of that figure, 35.7% went to EU countries and 39.4% went mainly ➔



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▲ La Grande Motte: Multihull production is a growing industry in France

to the US and Canada, but also Asia and the Middle East.

Though the motorboat segment leads the recovery, France has always been a market where sail has enjoyed a robust following. It remains the indisputable leader in the sail segment. “In France, sailing is more present than elsewhere and still accounts for 40% of sales,” confirmed Lyon-Caen in the newspaper Ouest-France. “In this area, the catamaran has become very important: it is now half the figure.”

FIN’s president, however, remains cautious, noting the many uncertainties that weigh on the geopolitical front. “It would be hard to list everything,” he says. Brexit? “If it’s a ‘hard’ exit, everyone will be impacted, despite the fact that for the last two years it’s not had the negative impact many people feared.”

According to FIN’s figures, boat sales on the French market continued to grow (+5.6%) to reach €270m. The motorboat segment (€128.1m) increased by 3.6% and the sailboat segment (€133.1m) grew by 6.4%.

The leisure fleet also continues to grow – 1,014 million boats were registered in 2016/17. More than three-quarters of them were motorboats, 90% of those less than 8m in length. New registrations are increasing for the first time since the 2008 crisis (+8.9%). 12,585 new boats were registered in 2016/17, mainly motorboats (+11.15%). The number of registered sailboats remained stable (+0.31%).

WES LYON-CAEN, PRESIDENT
FIN

*If it’s a ‘hard’
Brexit, everyone
will be impacted,
despite the fact that
for the last two
years it’s not had
the negative impact
many people feared*

French yards remain dominant, responsible for 47.1% of new boats entering the domestic fleet, with Italy and the US following at 11.6% and 11.2% respectively. All other countries account for less than 10% of new boats.

With 61,000 pre-owned vessels, including 49,000 motorboats, compared with almost 12,000 new boat registrations, the second-hand market remains significant and presents a unique problem – or opportunity to be grasped, as an increasing number of boats near their ‘end of life’. “We are launching a national decommissioning infrastructure in 2019. It is the first in the world with 25 to 30 centres, because in the next five years, we will have to dismantle 20,000 to 25,000 boats,” says FIN. ■

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EUROPE | ROUND-UP

GERMANY



Photo: Messe Düsseldorf/citlimann

▲ Bavaria is back on track with new owners

REAL GDP GROWTH (2018) 1.5%
REAL GDP GROWTH (2019 est) 0.8%
NUMBER OF ADULTS 67.5 MILLION
NUMBER \$ MILLIONAIRES 2.8 MILLION
BOAT PARK 485,000
CONSUMER CONFIDENCE
(Change in index points Jun/Jul) -0.2%
NEW CAR SALES
(Change Jan-Jun '18/19) +0.5%

uncertainty in the market that's affecting business," Tracht concedes. "We now have additional duties for boats coming from the US to Germany – 25% more – and confidence is going down.

"If we're talking about small motorboats below 7.5m, at least 50% come from the US," he adds.

Fortunately, large yachts over 12m in length – both sail and power – are a growing trend in Germany. The latest BVWW statistics show that 1,654 motorboats worth €134.2m were imported into the country last year – a 10.7% drop in units compared to 2017 but a healthy 8.7% rise in value. Small motorboats under 7.5m fell by 16.3% to 1,131 units, and boats from 7.5m-12m were down 0.5% to 417 units. Boats over 12m, however, climbed by 29.3% to 106 units.

As for sailing yachts, German dealers imported 663 units over 12m – up 8.2% compared to 2017.

was acquired by Berlin-based private equity firm CMP Capital Management after filing for administration in April last year. "Being a series production shipyard, Bavaria is a manufacturer of inexpensive boats, not luxury yachts," said CMP managing partner Kai Brandes. The company's focus will therefore be on sail and motorboats from 10m-20m.

As for the sector in general, most German firms are cautiously optimistic for the year ahead. "We don't have that same degree of confidence on the consumer side that we had in the past," says BVWW's Jürgen Tracht. "My impression is that 2019 will be a good year, but we don't expect much growth. I think 2020 will be the year when the economy stalls." ■

The German leisure marine market posted its sixth consecutive year of growth in 2018, with sales of marine goods and services (excluding superyachts) up 2.9% over the previous year to around €2.1bn. Consumer confidence has been rising for the best part of a decade, buoyed by record-low unemployment, high wages and low interest rates. "Our economy is strong and our members are satisfied," Jürgen Tracht, managing director of German watersports association BVWW, told *IBI* at the Düsseldorf Boat Show in January.

Nevertheless, global trade wars and the looming threat of a 'no-deal' Brexit weigh heavily on the minds of German consumers, threatening to undermine growth going forward. "There's an



▲ BVWW's Jürgen Tracht

“The problem is with our harbours, because the infrastructure just isn't there for the bigger boats”

"Motor and sailing yachts of 30m, 40m, 50m, 60m in length... this is really good business for us and it's the same for catamarans," Tracht told *IBI*. "The problem now is with our harbours, because the infrastructure just isn't there for the bigger boats.

The other trend in Germany is for smaller boats, especially outboard-driven models. "That's been a trend for several years now, ever since we changed our licensing system to allow boats of up to 15hp to be driven without a license," Tracht maintains.

Meanwhile, Germany's biggest serial yacht producer, Bavaria Yachtbau, says it plans to return to its original format of manufacturing inexpensive family boats. The news comes not long after Bavaria

GREECE



▲ Athens-based Flisvos Marina

REAL GDP GROWTH (2018) 1.8%
REAL GDP GROWTH (2019 est) 1.9%
NUMBER OF ADULTS 9.0 MILLION
NUMBER \$ MILLIONAIRES 87,000
BOAT PARK 178,000
CONSUMER CONFIDENCE
(Change in index points Jun/Jul) +1.7%
NEW CAR SALES
(Change Jan-Jun '18/19) +5.2%

The Greek nautical sector continued to see double-digit growth in 2018, with a 15.7% increase in the number of registered boats to 3,383 units. After years of austerity and economic reform, the Greek boating market has for the most part 'normalised' and those who held back on yacht purchases in the past are



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now throwing caution to the wind.

John Tyligadas, a board member at Greek marine manufacturers' association SECAPLAS, told *IBI* that boat rentals – sailing boats and yachts, mid-length fiberglass boats and RIBs – fuelled the industry's growth of the past few years. "But there has also been a significant increase in new, privately-owned boats from 5m-6m and larger boats of over 9m in length," he says.

Mid-range boats from 6m-9m, however, remain stagnant – mostly due to taxation and uncertainties. "A large number of boats sold in the past have also remained out of operation, negatively impacting the accessories and services aftermarkets as well as government revenue," Tyligadas explains. "This specific segment traditionally targeted the middle classes, who were first to cut down on yearly family costs. Thankfully, it seems the situation has reversed and people are now looking to invest in their favourite pastime."

According to Tyligadas, customers are looking for high-quality service, simplification of operations, and custom touches to their boats. "The strong point of our local boatbuilding and aftermarket industry has always been the ability to provide personalised services, in contrast to larger global boatbuilders that are more focused on serial volume production."

Greek exports have also risen, both for boats as well as accessories. Demand is mostly from EU countries, eastern Europe, the Middle East and Australia.

Back at home, marine infrastructure is said to be a "daily problem" but some recent marina leases and other developments seem to indicate positive changes are in sight. A number of Greek marinas and harbours are currently in the process of being privatised – including Alimos Marina in Athens, one of the largest marinas in the Mediterranean – as part of the Greek government's growth strategy for marina tourism.

"There is also hope that the current administration will consolidate and simplify regulations that would make it easier and worry-free for private boaters to pursue their hobby," Tyligadas says. "Our customers need a simplified legal framework, since the pleasure boat market is a leisure activity. Anything too complicated will turn people off and force them to pursue other activities."

The industry mood in Greece has been

positive for the past three to four years, Tyligadas says. One such indication is the SECAPLAS-owned Athens Boat Show, which has outgrown the organiser's available space. This year's show, which runs from November 27 to December 1 at the Olympic Fencing Center, is scheduled to be the largest since the onset of the Greek crisis. "Growth related to tourism as well as private boaters returning to the market has reversed sentiment to positive," Tyligadas adds. ■

“ There has been a significant increase in new, privately-owned boats from 5m-6m and larger boats of over 9m in length ”



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EUROPE | ROUND-UP



ITALY

▲ All eyes on potential of domestic market

REAL GDP GROWTH (2018)	0.7%
REAL GDP GROWTH (2019 est)	0.1%
NUMBER OF ADULTS	48.5 MILLION
NUMBER \$ MILLIONAIRES	1.36 MILLION
BOAT PARK	578,000
CONSUMER CONFIDENCE	
(Change in index points Jun/Jul)	+2.2%
NEW CAR SALES	
(Change Jan-Jun '18/19)	+3.5%

still waiting to be fully developed,” says Cecchi. “For now, the weak economy Italy is experiencing, compared to the EU average, and the ongoing lack of consumer confidence doesn’t allow for a complete recovery in national sales.”

Exports are leading sales of Italian boats, with over 80% of production sold abroad. Provisional export figures for 2018 show a 14% increase on the previous year, approaching almost US\$2bn in sales. The traditional markets – Europe

and North America – are performing exceptionally well, says Cecchi. Sales to the US were “outstanding”, he adds, growing by 45% on 2017. The US alone now represents a quarter of Italian exports. “That’s an excellent reason why Italian yards should be

“The domestic market, especially in the mid-range segment, has enormous potential still waiting to be fully developed”

concerned by the escalation of the trade dispute between the US and the EU, which is now directly impacting our sector with

The Italian boating industry recorded its fifth consecutive year of growth in 2018, driven by strong exports. While official figures won’t be presented until the 2019 Genoa Boat Show in September, Saverio Cecchi, the newly elected president of Italian trade association UCINA, told *IBI* that total industry turnover grew by around 9.5% last year, with boat yards seeing a rise of 10.4%.

“Italian yards are showing good sales performances, but we are registering a particularly good trend for RIBs,

motorboats and superyachts,” Cecchi told *IBI*, adding that total industry turnover climbed 60% over the last four years – a feat that no other industrial sector in Italy has been able to match.

But while exports are booming, boat sales in Italy have yet to recover. “The domestic market, especially in the mid-range segment, has enormous potential

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► Newly elected president of UCINA, Saverio Cecchi



the inclusion of recreational boats in the EU counter-measures,” says Cecchi.

UCINA's latest member survey shows a generally positive mood, with two out of three companies expecting turnover growth in 2019. The enthusiasm can be seen among exhibitors preparing for this year's 59th Genoa Boat Show. Preliminary figures have forced the organisers to find new ways of fitting in a surplus of applications. “Confirming last year's trend of companies already stating they would be back again this year, in view of the event's undeniable importance for business development, preparations are 26% earlier than for the previous edition,” says the show's commercial director, Alessandro Campagna. “We can safely say we have already reached 100% of our target.”

Meanwhile, UCINA continues to lobby the relevant government ministries to put into effect several legislative measures



▲ Genoa show organiser claims to be struggling to accommodate a surge in exhibitor numbers

already included in the 2018 reform of the Italian boating code. “We are confident that once all of the necessary application decrees will have become operational, our sector should be able to benefit from a more growth-friendly environment,” says Cecchi.

“Apart from these efforts for a positive conclusion of the reform of the Italian boating code, an important requirement

for our companies is finding adequate national and EU support policies with regards to investment and innovation,” he adds. “In order to be competitive at the highest levels – as our companies are used to – our sector should be considered by the government and by the EU Commission as the sector of the marine economy which has the greatest impact on employment throughout its supply chain.” ■ ➔



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EUROPE | ROUND-UP

NETHERLANDS



▲ Yacht builders are finding life tough

REAL GDP GROWTH (2018) 2.6%
REAL GDP GROWTH (2019 est) 1.6%
NUMBER OF ADULTS 13.3 MILLION
NUMBER \$ MILLIONAIRES 477,000
BOAT PARK 500,000
CONSUMER CONFIDENCE
(Change in index points Jun/Jul) +0.1%
NEW CAR SALES
(Change Jan-Jun '18/19) -10.5%

Dutch marine firms grew revenues by 4.8% in 2018, helped along by a long, warm summer. According to national watersports association HISWA, two-thirds of its member companies expect 2019 to be at least as good as last year and the remainder expect it to be better.

However, HISWA's Stijn Boode told *IBI* there were big variations in performance across different segments. Boat rental companies benefited most from the good weather, with turnover up by around 10%, and sales of new boats climbed by roughly 7%. But marinas, yacht-builders and yacht service companies all reported another year of declining sales, while boat dealers and marine retailers experienced marginal improvements.

On the plus side, occupancy rates at marinas are stabilising. "After years of shrinking, the rate is now steady at around 86%," says Boode. "The yacht builders and importers indicate that sales are picking up too and there's a lot of innovation. Used boats are selling faster and prices are stable. Yacht brokers and experts within the industry are positive about the future, but they are keen to point out that good maintenance is

increasingly important. There is sufficient supply but moderately maintained vessels are difficult to sell."

On the domestic market, demand is mostly for open boats, such as tenders, or boats with small cabins. The large cabin yachts are predominantly for export and are mainly for buyers in neighbouring countries – Germany, Belgium, the UK and Switzerland, but other European countries too. "These exports are extremely important for boatbuilders," says Boode.

Exports in the superyachts segment are also performing well. Having seen its market share value of global superyacht deliveries rise to 30% in 2017, the year 2018 saw further proof of the strength of the Dutch superyacht industry. Delivering over €1.5bn worth of 30m-plus yachts to owners around the world, the specialist yards in the Netherlands also have a further 60 superyachts in various stages of construction.

Late last year, the Port of Amsterdam and Dutch superyacht builders pledged to jointly make the Dutch capital a

superyacht destination. Under the plan, the port will provide space for Dutch builders and suppliers needing more room for new-build, refit and repair projects.

"HISWA Holland Yachting Group and the Port of Amsterdam are now working hard on the logical next step – a dedicated Northern European Superyacht Route for owners looking to move on from the traditional cruising areas," Boode explains. "The city of Hamburg has just signed up to join Amsterdam in this new initiative and more harbour cities in Northern Europe are expected to join the movement for change soon."

The only real hindrance to growth in the Netherlands, it seems, is a shortage of trained staff. "Skilled workers are hard to find and the lack of well-trained technical staff makes it difficult to service or deliver new yachts on time," says Boode, adding that Brexit further complicates matters. "It's led to lots of precautionary measures and a good deal of uncertainty for Dutch companies importing and exporting boats, supplies and other goods from the UK." ■



▲ Overall the Dutch market has seen steady growth, but there have been winners and losers



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◀ Norboat's Leif Bergass



▲ Sales are spreading up the size range

REAL GDP GROWTH (2018) 1.8%
REAL GDP GROWTH (2019 est) 1.8%
NUMBER OF ADULTS 4.1 MILLION
NUMBER \$ MILLIONAIRES 185.000
BOAT PARK 800,000
CONSUMER CONFIDENCE (Change in index points Jun/Jul) -0.5%
NEW CAR SALES (Change Jan-Jun '18/19) +1.9%

Last year's warm summer provided a shot in the arm for the Norwegian boating market. "There were two to three times as many boats out on the Fjords. The temperatures went from 0°C in April to over 20°C within a week," recalls Leif Bergass at Norwegian boating association Norboat. "It was the warmest summer for 50 years – dealers were selling boats well into December. It's meant we've had a good start to 2019 and attendance was up at the Oslo boat show (March) by 5%." Mirroring trends in Sweden, outboard-powered 4m-9m fibreglass day cruisers and bow riders are leading the charge, but sales of bigger boats, from 10m-15m, are also growing, though in much smaller volumes. "The future's very bright for the boat business in Norway for the time being," Bergass confirmed to *IBI*.

"The 4m-9m boats are selling in their thousands, but builders are also speaking of more interest, customers and better leads for the 10m-15m category too. Marinas are also doing well – in fact anywhere offering storage, servicing and repairs are having their best time for 20 years."

“ 4m-9m boats are selling in their thousands, but builders are also speaking of more customers and better leads for the 10m-15m sector too ”

One development of slight concern, Bergass admits, was the recent interest rate rise in March – the first for some seven years. Though modest (up 0.25%) and in line with market analyst expectations, the Norges Bank also gave a strong signal that it would hike rates again within six months. "People have loans on their houses and their cars – if the economy is a little bit stressed, they'll be less likely to think about buying boats this year."

Macroeconomics aside, a 2018 survey conducted on behalf of Norboat presents a positive trend for boating engagement in Norway. In total, Norwegian households own more than 900,000 recreational boats (including canoes/kayaks, dinghies, sail and motorboats). Since 2011 there has been an increase of more than 150,000 boats. Most boats are found in southern and western Norway, although the greatest boat density is to be found in northern Norway where almost four out of 10 households have a boat.

Looking at the potential, one in eight households replied that they plan to buy a new boat within the next five years. It represents a potential of 40,000 to 50,000 boats a year – note the definition of boat also includes kayaks, canoes and PWCs.

The momentum carried from 2018 has had a positive knock-on effect on

Norway's legions of equipment suppliers, refit and repair specialists, distributors and retailers supplying domestic markets. In December, Norway's largest equipment dealer Maritim (Norwegian NMS)

and Swedish retailer Hjertmans, who had been working together under the same ownership since July 2017, announced they would be tying up with Swedish distributor and retailer Byggplast (SeaSea), with a focus on increasing profitability. With a total of two wholesale concepts, three retail web shops, 25 owned stores and about 30 franchise/partner stores, the new group will have revenues of around SEK 650m. ■



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EUROPE | ROUND-UP



▲ Local builders like Galeon are doing well

REAL GDP GROWTH (2018)	5.1%
REAL GDP GROWTH (2019 est)	4.0%
NUMBER OF ADULTS	30.6 MILLION
NUMBER \$ MILLIONAIRES	62,000
BOAT PARK	78,000
CONSUMER CONFIDENCE	
(Change in index points Jun/Jul)	0%
NEW CAR SALES	
(Change Jan-Jun '18/19)	+1.9%

With limited demand for luxury yachts in Poland, the country's shipyards rely heavily on exports with around 95% of sales intended for overseas markets. Core production is from 6m-9m, and many yards double up as subcontractors for foreign firms. But domestic buyers are slowly coming back.

According to Polboat, the Polish Chamber of Marine Industry and Water Sports, local builders produced over 21,500 outboard-powered motorboats in 2018 – roughly on par with the previous year. This represents a near two-fold increase compared with 2009, when the Polish sector was hit by the global economic downturn and output fell to around 11,000 craft.

"In 2018, the production of sailing yachts in Poland was on a similar level to the year before. However, a decisive drop was seen in the production of units with inboard engines, especially in the boat segment up to 7.5m," Polboat secretary general Michał Bąk told *IBI*. "That is why we recorded increases in this segment – 10% among boats up to 7.5m and over 10% in the segment from 7.6m-12m compared to 2017."

Another large increase last year was in the sale of PWCs, Bąk said.

Poland's main export destinations are still Scandinavia and Western Europe (Germany, France and the Netherlands),

although many Polish yards, after years of building a strong position in Europe, are beginning to enter new markets in other Mediterranean countries, the Middle East and Asia, the US and Australia.

"Constant increases are being generated by companies producing motorboats up to 12m with outboard engines, mainly for export, although increases can also be seen in the domestic market," says Bąk. "In addition, manufacturers of luxury yachts like Galeon and Sunreef are doing well. ➔"

“A decisive drop was seen in the production of units with inboard engines, especially in the boat segment up to 7.5m”

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EUROPE | ROUND-UP

“More and more people, including Polish customers, are interested in these units, but in Poland people are not rich enough. They lack significant purchasing power. That is why the charter market and sales of used yachts are developing strongly.”

One problem that is not unique to Poland is a shortage of qualified staff. “Shipyards can receive more orders, have more modern technologies at their disposal, invest in machinery and expand their production space, but in the end, unfortunately, there is

a lack of experienced workers who can be employed to significantly increase production,” says Bąk.

“But the Polish yacht industry is doing well,” he maintains. “Production is growing, there are more and more orders. However, everyone is looking to the future with caution and anxiety. Everyone remembers 2008 and the recession that came at that time. And although it seems that everything is fine now, the shipyards expect a slowdown in the market in the coming years, hence they are holding back certain investments

and are waiting for what will happen.

“The biggest challenge will be creating the Grow Boating program in Poland,” Bąk adds. “Poland has around 38 million people, but at the moment only one in 400 people own a boat. We all want this to change. Polish companies must work together with Polboat to create a national program for the promotion of watersports, to encourage as many people to spend active leisure time onboard a yacht or boat, and in the future to educate a new generation of boat owners.” ■



▲ Lagos Marina, on the Algarve coast. An over-regulated system has always presented a challenge for the Portuguese market

PORTUGAL

REAL GDP GROWTH (2018) 2.1%
 REAL GDP GROWTH (2019 est) 1.7%
 NUMBER OF ADULTS 8.5 MILLION
 NUMBER \$ MILLIONAIRES 94,000
 BOAT PARK 20,000
 CONSUMER CONFIDENCE
 (Change in index points Jun/Jul) +1.9%
 NEW CAR SALES
 (Change Jan-Jun '18/19) -4.4%

Once a naval powerhouse with a strong seafaring tradition, Portugal today has just a smattering of boatbuilding facilities that cater to niche markets. These are mostly small to medium-sized businesses that are highly specialised, building everything from cats for local charter firms to one-off composite projects, dinghies and RIBs.

According to Martinho Fortunato, owner of Lagos Marina on the Algarve coast, these companies are doing quite well. “The current nautical business environment has improved and new changes to national regulations have

brought more simplicity to the system, which is very positive,” he told *IBI*. “There’s still a long way to go, but it’s a decent step in the right direction.”

An over-regulated system that discourages people from boating has always been a challenge for the Portuguese industry, says Fortunato. A lack of infrastructure (marinas and boat parks) and the low quality of those managed by the government is another difficulty. “It will take at least one generation to transform the mentality of the people and bring a new boating culture to the population,” he says. “Boating and the ocean has been, ➔



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for many years, the workplace for a big percentage of the population – transport and fishing, for example. Boating was never seen as a leisure activity. To change this mentality, we need a new ‘Grow Boating’ approach.”

Fortunato told *IBI* that there are not many equipment manufacturers in Portugal, apart from a few sailmakers and rope manufacturers that cater mostly to the local market and parts of Europe. Chandlerys are quite small and very local. “The main struggle is really the size of the Portuguese market,” says Fortunato.

Most foreign boats in Portugal are from the UK, Holland, France and Germany. There are roughly 30 marinas located throughout the country providing a total of 14,000 berths. “Domestic demand is very important, accounting for around 50% of occupancy at Portuguese marinas, but still far from what it should be,” Fortunato adds. Obviously this changes in the north, which is more Portuguese, compared to the south. The Algarve, for instance, is home to many foreign boaters.

“For foreign boats, there aren’t any tax or legislative issues that would discourage anyone from coming to our country,” Fortunato explains. “The tax system is similar or easier than any other country in the Mediterranean.

“The problem with legislation has always been for Portuguese boaters, not foreigners,” he adds. “We are a very warm and welcoming country for any boater in the world.” ■

MARTINHO FORTUNATO, VICE PRESIDENT
APPA - PORTUGUESE MARINA ASSOCIATION

For foreign boats, there aren’t any tax or legislative issues... the problem with legislation has always been for Portuguese boaters



▲ Consumer confidence is high

REAL GDP GROWTH (2018)	4.6%
REAL GDP GROWTH (2019 est)	3.4%
NUMBER OF ADULTS	1.7 MILLION
NUMBER \$ MILLIONAIRES	10,000
BOAT PARK	20,000
CONSUMER CONFIDENCE	
(Change in index points Jun/Jul)	+1.1%
NEW CAR SALES	
(Change Jan-Jun ‘18/19)	-4.4%

The Slovenian boating market showed no signs of slowdown in 2018. Consumer confidence was good and both the main boat show, Internautica, as well as the country’s boat and equipment sellers enjoyed moderate growth – up by around 10% compared to 2017.

Slovenians are mostly interested in chartering boats or having their own small sportsboat. Yacht charter is a popular activity amongst Slovenians, but with just 47km of coast and only two big marinas, the opportunities for growth are limited.

Jurij Korenc, president of the Slovenian Marine Industry Association (SMIA), and Japek Jakopin of J&J Design told *IBI* that many Slovenian sailors own sailboats that are used in neighbouring Croatia in an ‘owner-charter’ or ‘charter management’ model serving in charter fleets and partially sailed for private use. “Increased demand for charter boats in Croatia over



▲ Jurij Korenc, president of SMIA

the past four years has led to a gradual increase in sailboats bought by Slovenian owners, mainly Bavaria, Beneteau (including Lagoon), Hanse, Dufour and Elan,” Korenc told *IBI*. The estimated market lies at around 60 sailing boats of up to 50ft per year.

Sport powerboats and mid-sized power yachts are also performing well, although the majority of powerboats sold in Slovenia are from 18ft-65ft in length. The best-performing brands are imported from Italy, France, Germany and the US.

“Besides the charter fleet replacement market for sailboats there is increased demand in

Slovenia for outboard-powered smaller units between 25ft-35ft, mainly used for day trips or coastal cruising with overnight stays in hotels. This market is estimated at 100-plus units per year,” Korenc explained.

As for exports, Slovenia’s main builders are Greenline, Elan and Seascope. Demand is mostly from Europe, although

“Companies in boating are projecting modest growth for the future, but they feel confident and in general there is a positive trend”



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▲ Slovenia's Internautica show

Greenline also sells well in the US. Cumulative turnover is said to be in the range of €45m, with around 300 units delivered in total. Japek Jakopin told *IBI* that J&J/RnD is also seeing growth in design-engineering-tooling services to some of the world's biggest boatbuilders, with yearly sales of over €6m.

In terms of weak spots, there is less demand for large (100ft-plus) power yachts – possibly due to fewer owners wanting to spend long periods on boats. “Newcomers to boating seem to prefer more frequent shorter stays and see boating more of a fun-entertainment-socialising activity,” says Korenc, adding that marinas are another weak spot, citing poor infrastructure and a shortage of high-quality services.

However, a lack of financing due to a “very prudent and weak banking sector” is probably the strongest barrier to larger sales, Korenc says. “There are negative effects still present generated by extensive leasing activities over the past 10 years.

“Companies in boating are projecting modest growth for the future, but they feel confident and in general there is a positive trend. But again, we need to point out the lack of suitable financing for leisure boat purchases, the development of a high-quality marine tourism segment, and re-organising and upgrading the marinas and ports, including services as required.” ■ ➔

“Newcomers to boating prefer more frequent shorter stays and see boating more of a socialising activity”

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▶ ANEN president Carlos Sanlorenzo

inflatables were also up by 4.3%. Growth was more subdued for sailboats (+1.9%) and motorboats (+0.4%), although motorboats continue to have a majority share of the market at 42.1%. As for boat manufacturing, Spain has lost almost 60% of its industry since the global financial crisis, but shipyards that specialise in niche markets such as superyachts or fishing boats are thought to be holding up well. ANEN continues to lobby the Spanish government to abolish a 12% 'matriculation tax' that is applied to the value of all private boats over 8m in length that are registered to Spanish residents, who also pay a hefty 21% VAT on all luxury purchases.

"Taxation remains a weak point for the competitiveness of the Spanish nautical market," Sanlorenzo told *IBI*. "We continue to have a matriculation tax that does not exist in any other country in the world."

Meanwhile, charter continues to set a trend in Spain as users look for new ways to enjoy sailing.

"As a positive element, it should be noted that in the legislation affecting

charter we have made progress with favourable measures," Sanlorenzo says. "This new legislation has been published recently in order to unify, clarify and simplify the criteria used by the Spanish marine authorities. It implies a substantial improvement of what is required for chartering. With it, we seek for competitiveness and improvement of this sector in Spain which with these types of measures, can be converted in a more attractive jurisdiction, especially for superyacht and megayacht businesses. This economic activity is the industry's main engine for certain regions such as the Balearic Islands, Catalonia and the Spanish east coast."

ANEN's latest figures for the first six months of 2019 show a marked improvement over this time last year, with growth of 6%. "We predict a good outcome for the current season, as the charter market was up by 9.3% in the month of June compared to the same time last year," Sanlorenzo says.

"But we are in a complex political moment, waiting for a new government to start so that we can move forward with institutional relations with the next government," he adds. "This is one of the main challenges for the sector in 2019." ■

SPAIN



▲ Spanish buyers are returning

REAL GDP GROWTH (2018) 2.6%
REAL GDP GROWTH (2019 est) 2.2%
NUMBER OF ADULTS 37.4 MILLION
NUMBER \$ MILLIONAIRES 852,000
BOAT PARK 200,000
CONSUMER CONFIDENCE
(Change in index points Jun/Jul) +1.1%
NEW CAR SALES
(Change Jan-Jun '18/19) +4.4%

In recent years, Spain emerged from the crisis that all but decimated its once-thriving boatbuilding sector to become one of the world's top charter destinations. Boat rentals have never been better – particularly in the Balearics, whose cruising grounds are known for their affordability and general safety.

But after several years of exponential growth, the market is stabilising and private boaters, according to Spanish marine trade association ANEN, are making a return.

ANEN's latest figures show that 5,545 recreational boats were registered under the Spanish flag in 2018 – a 3.3% rise over the previous year. Of that total, 4,037 were registered for private use – a 7.5% jump over 2017 and the best result of the last three years. Boats registered for charter (1,508) were down by 6.5%. "This reflects the stabilisation of the market that, in 2014, experienced historic growth of 60%," says ANEN president Carlos Sanlorenzo.

By length, boats from 6m-8m grew by 15.1% last year, followed by boats from 12m-16m (+9.1%) and small boats up to 6m (+1.2%). Boats from 8m-12m fell by 7.6% and boats over 16m were flat.

PWCs are growing in popularity with a 13.3% rise in registrations, although



▲ The Barcelona Boat Show is enjoying a resurgence along with the rest of the market



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▲ Domestic demand for sail remains soft

REAL GDP GROWTH (2018) 2.5%
REAL GDP GROWTH (2019 est) 1.7%
NUMBER OF ADULTS 7.7 MILLION
NUMBER \$ MILLIONAIRES 348.000
BOAT PARK 755,000
CONSUMER CONFIDENCE
(Change in index points Jun/Jul) -3.3%
NEW CAR SALES
(Change Jan-Jun '18/19) -5.7%

The domestic boat market in Sweden has been enjoying stable growth for several years, fuelled by an upsurge in demand for smaller motorboats up to 8m. Equipment sales too have remained robust with the only softness to be found in the sailboat sector, with the number of sailing yachts dropping to an historic low.

For Sweden, the good times continue to roll on with 2018 registering as the third consecutive year with sales at high levels. In total 20,600 boats, canoes and personal watercraft were sold in the country where one in seven people have their own boat. Buoyant sales and high levels of consumer engagement mean that aftermarket sectors for both equipment and services are also in rude health.

As with much of Europe, the Nordic regions were blessed with a long, hot summer in 2018, giving a major boost to boat sales after a surprisingly cold spring. Overall the weather was a major factor for the good boat sales.

During 2018, Swedish boat exports increased by 11.5% in volume and 21% in value. At the same time, imports grew 10% in volume and fell 10% in value. One of the key factors for this was the shrinking sailboat market, which is particularly apparent in traditionally keen sailing countries like Sweden and Finland.

Swedish boat production overall increased 1.6% in volume and 5.5% in value.

Mats Eriksson, CEO of Swedish boat ➡



▲ Sweden's landscape has always encouraged taking to the water

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association Sweboat, confirmed the robust market situation. “2019 looks surprisingly good. This comes after 2018, which was the third year in a row with growth and thanks to a fantastic summer 2018 ended with a 10% increase in volume. Some economic and political signals have made us cautious – but so far we note that expectations in the industry for 2019 are, as already said, surprisingly positive. Though, we need to be observant on reports coming regarding interest rates, employment figures, household surveys and other economic aspects,” he added.

“2019 looks surprisingly good. This comes after 2018... the third year in a row with growth thanks to a fantastic summer”

Swedish customers in general are particularly sensitive to shifting trends, and that could go some way to explaining the fluctuations in sales patterns in the boat market.

“Sailboat builders are still having a tough time – there remain a large range of attractive pre-owned boats for sale out there. Larger powerboats seem to be undergoing a revival, though at a modest level. It’s aluminium, ‘care-free’ boats that are dominating the Swedish market – vehicles for recreational activities, rather than the boat being the hobby itself,” says Eriksson.

Swedish regulators and authorities have a history of being proactive, especially where environmental matters are concerned.

Sweboat is predicting some challenges on the horizon. “A coming age limit on personal water craft can affect the demand, and all environmental requirements – often with regional differences – make the industry a little



▲ Sweboat’s CEO, Mats Eriksson

cautious at the moment. So does Brexit, Trump and other phenomena as well, of course,” Eriksson comments.

“One common challenge is that most need more workforce. Sweboat has therefore initiated a project named the ‘Boating industry’s integration project’ in order to offer immigrants and people newly arrived in Sweden to join our industry. Since we are out of people, we need to find them outside our box.” ■



TURKEY



▲ Local builder Sirena is doing well

REAL GDP GROWTH (2018)	2.8%
REAL GDP GROWTH (2019 est)	-1.7%
NUMBER OF ADULTS	54.4 MILLION
NUMBER \$ MILLIONAIRES	54.000
BOAT PARK	95,000
CONSUMER CONFIDENCE	
(Change in index points Jun/Jul)	+1.8%
NEW CAR SALES	
(Change Jan-Jun '18/19)	-25.6%

The Turkish currency and debt crisis of 2018 had a significant effect on the country’s leisure marine market. The sharp devaluation of the lira – down at one stage by almost 30% against the US dollar – high inflation, rising interest rates and a slowdown in economic growth dragged Turkey into an official recession last year, one that it has only just climbed out of. A bitter and divisive general election is said to have worsened market confidence and the overall mood of buyers.

Speaking on behalf of Turkish industry association Dentur, Deniz Özçakır of Trio Deniz, one of the county’s leading boat dealerships, told *IBI* that the silver lining is in the Turkish superyacht market, which remains solid.

“UHNWIs are not distracted by a ‘negative’ economy, as megayachts are a long-term project in which buyers invest a lot of time on preparation and selection, and wait even longer to take delivery.

“We’re also seeing a rise in demand for outboard boats, mainly from 8m and up

with high horsepower engines,” Özçakır claims. “Most of the buyers are first-time owners, so it is very positive for the future growth of the marine market in Turkey, as they will most likely want to upgrade to bigger boats in years to come.”

Cruising in comfort, more living space, brand reliability, and dealer reliability in terms of aftersales service are increasingly sought after, he says.

But the industry is definitely less positive than it was at this time last year, Özçakır maintains. “Some pockets of the market are still doing well and we need to focus on these.”

Turkish builders have always produced yachts for the European and North American markets – two regions where the economy is strong. Furthermore, some US brands are looking for alternatives to China in terms of building their products. Turkey, with its highly-developed boatbuilding infrastructure, offers a good solution.

But a depreciating lira against the euro is causing some upheaval on the ➔

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domestic market. “The buying power of the middle and upper-middle classes in Turkey has been significantly reduced,” says Özçakır. “We’ve seen a shrinkage in the 30ft-50ft motoryacht and sailboat markets, which are preferred by these buyer groups.

“Due to our deteriorating economy, the cost of financing went up significantly and credit became less available, which hit the upper-middle class buyer who was

accustomed to reasonable interest rates and easy credit for boat purchases over the last 7-8 years.

“A government regulation that banned financing in foreign currency for individuals, which is much cheaper than lira financing, has also negatively impacted those who were financially capable to do so but not allowed to anymore.”

But there is still room for optimism, Özçakır maintains. “The Turkish economy



▲ Dentur's Deniz Özçakır

traditionally tends to bounce back quickly after a recession, which creates new opportunities.” ■



▲ Southampton remains a key show

REAL GDP GROWTH (2018)	1.4%
REAL GDP GROWTH (2019 est)	1.3%
NUMBER OF ADULTS	50.9 MILLION
NUMBER \$ MILLIONAIRES	2.43 MILLION
BOAT PARK	550,000
CONSUMER CONFIDENCE	
(Change in index points Jun/Jul)	-1.1%
NEW CAR SALES	
(Change Jan-Jun '18/19)	-3.4%

The British leisure marine market celebrated its seventh consecutive year of growth in 2018, with a 1.7% year-on-year increase with revenues of £3.17bn. A weak pound helped boost exports, while local tourism benefitted from a greater number of Brits deciding to holiday at home.

According to industry association British Marine, more than half of the increased revenue last year is attributed to the production of large motoryachts over 12m in length, a large proportion of which was exported. This segment supports much of the industry supply chain.



◀ British Marine's CEO, Lesley Robinson

“In 2018 leisure marine exports surpassed £1bn for the first time since 2013, representing an impressive increase of 16% compared to the previous year,” British Marine CEO Lesley Robinson told *IBI*. “We can attribute this increase to the strong global economic growth during 2018 and notably the weakened sterling (as a consequence of Brexit) making British products more price competitive compared to international rivals.”

But with the proposed EU exit deadline looming, the future health of the industry is not guaranteed. Business confidence among marine firms and consumer confidence in the UK are both on the decline. “Business confidence within the industry relies on consumer confidence and if this uncertainty continues, the industry will pay the price,” Robinson warns. “After all, leisure activities are almost always the first thing consumers cut down on during tougher times.”

While marine tourism had some small growth at the end of 2018 – principally in overseas charter and inland hire – the UK's domestic market is flat with new and used boat sales having declined over the last year. This is in part due to low consumer confidence and a shrinking customer base.

“The eurozone and wider EU remains a fundamental market for the sector, accounting for half of all industry exports,

and therefore a strong, frictionless trade agreement with them post-Brexit is crucial,” says Robinson, adding that the US is fast becoming an increasingly important trading partner for British companies, accounting for a quarter of British exports.

“The continued uncertainty is a significant barrier to growth, impacting business investment and consumer confidence,” Robinson maintains. “The skills shortages across sectors are also having an impact, making it difficult to compete and maintain service levels. Looking ahead, leaving the EU would put an increased strain on the supply chain and further increase this critical skills shortage.

“Marine businesses also suffer from the traditional challenges to small and medium sized enterprises (SMEs) in terms of financial resources for marketing, research and development,” she adds. “This has become more acute in recent years with rising inflation and increased costs from overheads to materials and labour.”

While the mood amongst UK marine firms is relatively positive, Robinson says they are less optimistic today than they were a year ago. Political uncertainty, lower consumer confidence, reduced sales and challenging trading conditions all have their part to play.

“Brexit is one of the biggest challenges the market faces now and in the future,” says Robinson. “Whilst a weakened pound has provided much needed support to industry exports, this has been at the expense of the UK's domestic boating market which has become reliant on the regular spending of existing boat owners.” ■

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WHILE CATAMARANS ARE NOT THE ONLY PLEASURE BOATS BUILT IN SOUTH AFRICA, THE MARKET IS CLEARLY DOMINATED BY CRUISING CATS – BOTH BIG AND SMALL, POWER AND SAIL

WORDS: PHIL DRAPER



◀ **Big cat country – ready to go Leopards in Cape Grace Marina, Cape Town**

health of yacht charter markets and the bluewater cruising sector impacts much of this industry. SA boats do indeed go all over the world, but the majority end up in the USA or Caribbean.

On the big yacht side, two South African yards really stand out. Over the past 27 years Southern Wind has delivered no fewer than 54 monohull sailing yachts from 72ft-110ft, and it has three more currently in build from 96ft-105ft, plus it recently revealed its first super-sail cat concept. Among innumerable smaller projects, Two Oceans Marine, which recently celebrated its 25th anniversary, has delivered 11 60ft-110ft cats since 2011, a mix of power and sail and with an impressive average of 76ft; plus it has two more 85-footers presently under construction.

A mature boatbuilding nation with decades of experience, South Africa's build quality is generally good and prices are keen, especially with the rand as weak as it is currently. The last time this author researched a South African Business Report for this magazine was in 2006 when there were almost R7 to the US dollar. Today a US dollar buys R14. It was at its weakest in recent times in early 2016 when a dollar briefly bought R16.3. Such volatility does not help anyone make decisions. While a weak rand undoubtedly helps exports, it also undermines competitiveness as regards the import of materials and original equipment, particularly engines and hardware. Aluminium spars and sails are produced in volume in Cape Town, but even those manufacturers have to import a lot of bare tubes and sailcloth. Yes, labour is cheap. And despite the fact that unemployment is approaching 30%, skills are in short supply.

Certainly South Africa's economy is under pressure. The ANC's Cyril Ramaphosa, who took over as president from the resigning Jacob Zuma in February 2018, was re-elected president in the general election of May 2019, albeit with his party's lowest-ever majority. He has colossal challenges, not least high inflation and an economic growth rate that has remained below 2% since 2013. Moreover, the first quarter of 2019 saw major power outages ▶

South Africa really is the land of the multihull – or, more specifically, the cruising catamaran. Of course, cats are not the only pleasure boats built in South Africa, but whereas you can count the former well into three figures, the latter sector is in low double digits.

South African builders should deliver around 165 sailing catamarans in the 40ft-85ft range this year, which translates to 13% of a world market presently worth around 1,260 units per annum. The top-line number tells us things have never been better. But the reality is that one player, Robertson & Caine, is responsible for the lion's share. The others are at best building no more than a handful of boats a year, whereas when we last looked at the market there were a couple of others consistently delivering more than 10 boats a year. The country's boatbuilding activity really reflects the transportation issues of getting product from the bottom of the world to the major boating markets in the north. SA yards tend to build either small boats and RIBs that can fit into freight containers, or medium-size boats and yachts from 12m-30m (33ft-110ft) that can be delivered on their own bottoms. But increasingly some leave the county as deck cargo; for example, delivering powercats on their own bottoms is problematic owing to the distances between fuel stops. The



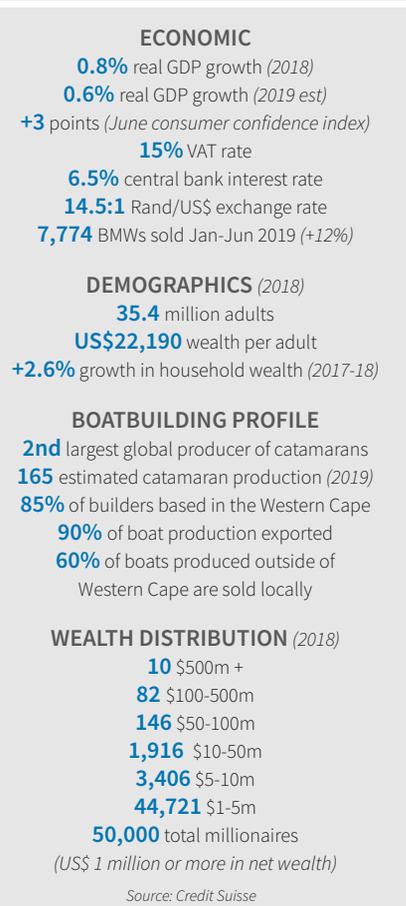
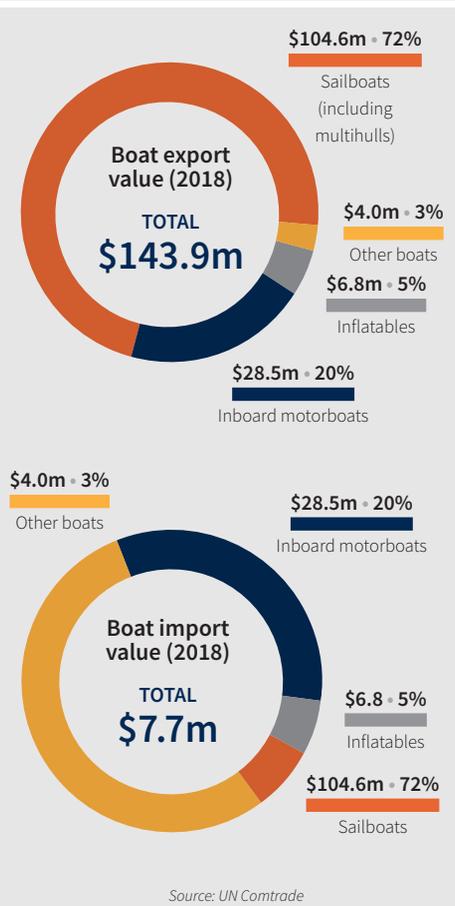
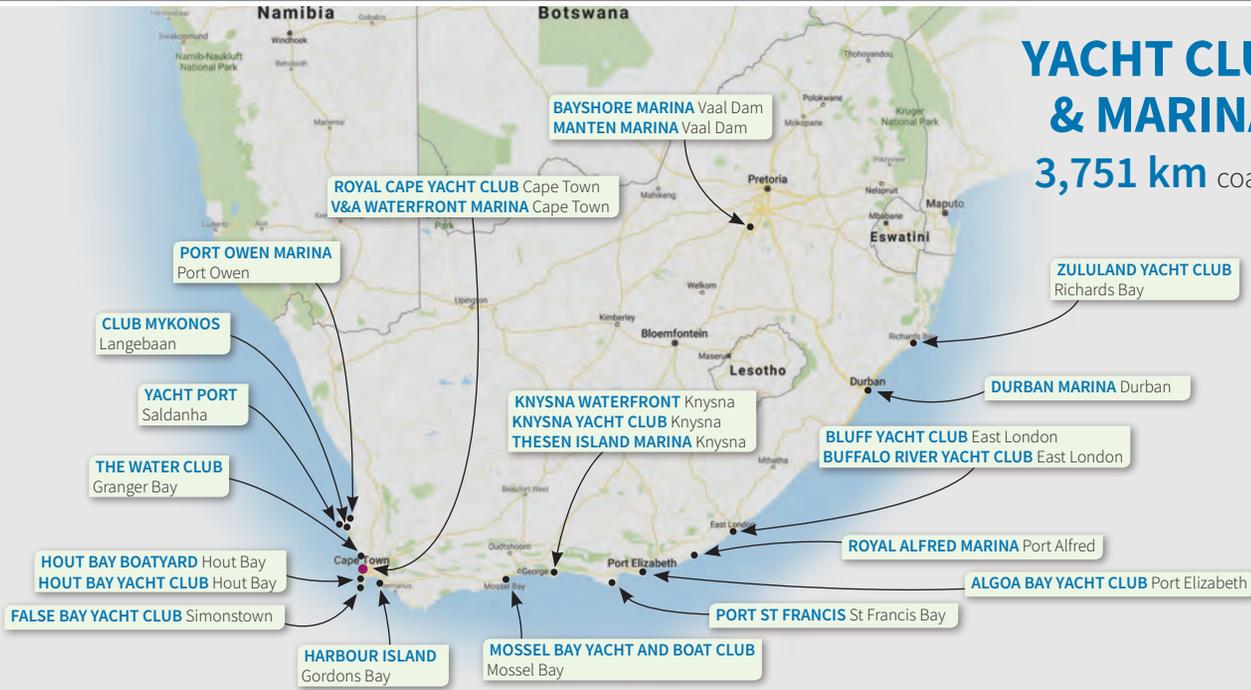
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STATS & FACTS

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▲ Royal Cape Yacht Club, Cape Town

across the country and ultimately economic output dropped further than any other time since the depths of the financial crisis in 2009. Everyone is now nervous that the 2019 Q2 figures when released will show that the country has slipped back into recession, the official definition of which is two successive quarters of GDP contraction. The country was in recession for the first half of 2018.

Unsurprisingly the market for imported boats is not great and not just for currency and confidence reasons. There is considerable wealth in the country. Look no further than the Bentley, Porsche and Ferrari showrooms off Cape Town's Dock Road. But geography is an issue. There are only some 20 harbours and marinas suitable for pleasure boats and the coastline is generally exposed, Atlantic Ocean

to the west, Indian Ocean to the east and nowhere but Antarctica to the south. Probably 65-70% of the country's marine industry is located in the Cape Province, although there is also significant activity in St Francis Bay, Knysna, Port Elizabeth, Durban and on inland waters around Johannesburg. And another important factor with any coastal boating in South Africa is the weather. It blows up quickly, often and hard. There are big surf, kite-surf and kayak scenes, principally because they can respond to weather changes quickly and do not require infrastructure. The market is relatively small as regards mainstream boating and what demand there is now is relatively depressed. Of the boats that do get sold locally, a reasonable proportion go elsewhere on the continent – Mozambique, Seychelles, Madagascar etc. Most of the local fleets are made up of older models, many of them looking used and/or abused.

TAX/FINANCE CHALLENGES

For those prepared to buy a new boat or equipment for local consumption, VAT will now add 15%. It was 14% until the end of March 2018. There is also a boat registration scheme in place, a relatively simple and inexpensive procedure for local listings, but to get a full listing and proper ship's papers (should the owner wish to take their boat beyond territorial waters) is more complicated and relatively expensive. Insurance isn't mandatory as far as the state is concerned, but most boat/yacht clubs require certain levels of compliance. Despite the boat registration scheme, no lenders offer boat loans or mortgages. The risk of financing a movable asset in Africa and the absence of any reliable pre-owned valuation process is simply deemed too great. **IBI**



CAPE TOWN INTERNATIONAL BOAT SHOW

NOW OWNED BY exhibition and conference giant Messe Frankfurt – 2,800 people, 130 country subsidiaries and €3.6bn in sales – the Cape Town International Boat Show has emerged as the industry's main showcase, although other events in Johannesburg and Durban come and go sporadically. Cape Town is the only place for

a truly national event and industry body SABBEX (South African Boat Builders Export Council), according to Bruce Tedder and Vanessa Davidson, is keen to see it firmly established as the pre-eminent Africa event.

“Certainly there's an increasing international interest, although the show has been busier,”

◀ The 2018 edition of the Cape Town show featured 52 boats in-water, 60% power and 40% sail

admits Kathryn Frew, Messe Frankfurt's portfolio director Cape Town. “Back around 2005/06, the show was held briefly across two venues – ashore at the CTICC (Cape Town International Convention Centre) and in-water at Cape Grace Marina. But the market is simply not big enough to sustain more at the moment. What we have had now since 2017 is just the in-water component and that's sustainable.”

The show's entrance is on the North Wharf, just outside the Aquarium. The next edition takes place Friday to Sunday, October 18-20, the same three days as last year, and from 9:00-18:00 for the first two days and 9:00-17:00 on the final Sunday. The 2018 edition included 52 boats in-water – roughly 60% power, 40% sail – the biggest of which was the Two Oceans-built 75ft SY HQ2.



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ROBERTSON & CAINE

Robertson & Caine has come a very long way since it was founded back in 1991 by namesakes John Robertson and the late Jerry Caine. Having started out building monohulls, it has been 'cats-only' for around 20 years now and for most of those has had an exclusive supply agreement with the various entities responsible for The Moorings and Sunsail, presently Travelopia. As of June 2019, that adventure holidays specialist boasted no fewer than 793 charter boats within its Moorings and Sunsail programmes – 312 monohull sailboats, 368 sailing cats and 113 powercats – according to Franck Bauguil, Travelopia's vice-president of yacht ownership and product development. Travelopia not only buys R&C's models for its two charter fleets, but also serves as the worldwide distributor for Leopard, the R&C brand used for private-owner sales. Since the first 45ft 'Moorings 4500' was delivered in March 1997, R&C has gone on to deliver in excess of 2,000 cats across 23 models spanning 38ft-62ft. The model portfolio presently spans 40ft-58ft and includes four sailing cats and a couple of powercats. The favoured designer is now Cape Town-based Alex Simonis, who has been responsible for the entire present range. Depending on the model, they deliver with combinations of Leopard, Moorings and Sunsail branding: the Leopard 40/Moorings 4000/Sunsail 404, which was shown with a facelifted interior at Miami 2019; the new for 2016 and best-selling Leopard 45/Moorings 4500/Sunsail 454; the Leopard 50/Moorings 5000, which is the newest model having had a world premiere at Miami 2018; and the present flagship, the seven-

year-old Leopard 58/Moorings 5800, only a handful of which are built a year. The powercats are the 2015-introduced Leopard 43PC/Moorings 433PC or 434PC, the final digit revealing the number of guest cabins, and the 2013-introduced Leopard 51PC/Moorings 514PC, which will soon be replaced by the 53PC/Moorings 534PC, the first of which launches for October 2019 and should debut at Miami 2020. Basic-spec prices are keen across the board: US\$399,000 for the 40, US\$549,000 for the 45, US\$729,000 for the 50, US\$1,329,000 for the 58; US\$525,000 for the 43PC; and US\$920,000 for the brand new 53PC. Key suppliers include Z-Spars, which does all spar sets save for the 58's, which comes from Sparcraft Masts, Cape Town. All sails now come from the local Ullman factory and all engines come from Yanmar. Since 2015 Robertson & Caine has been majority owned by a private-equity fund managed by Johannesburg-based Capitalworks, although John Robertson has retained a significant minority stake. The company's previous investment partner was Treacle, which acquired around 30% back in spring 2007. Capitalworks's founding partners, Darshan Daya and Shaun Frankish, tell us they are working to a "four to seven-year horizon", which translates to likely exit soon. They entered the company in autumn 2015 with a reported investment worth US\$25m (ZAR1350m). Certainly R&C is back in strong growth mode. Last year it delivered a total of 160 boats, a record output. And this year should see turnover hit US\$100m (ZAR1.4bn) from a record 190 boats delivered, roughly 75% or 140 of which will be sailing cats and 25% or 50 powercats. And the production plan for

JOHN ROBERTSON, CO-FOUNDER
ROBERTSON & CAINE

There's no such thing as a charter boat. Everything that makes a boat good for charter is equally important for private owners



▲ Robertson & Caine's production line

2020 is well over 200 units, according to Franck Bauguil. R&C should have an 11.1% share this year of a total 2019 world sailing cat market worth around 1,260 units, so R&C comfortably maintains its third spot behind Lagoon and Fountaine-Pajot and ahead of Bavaria subsidiary Nautitech. And R&C is presently number one in the world for powercat cruisers from 40ft-55ft, a segment estimated to be worth around 150 units this year, which means its market share in that segment is approximately one-third. R&C's new powercat model will be a game-changer, according to John Robertson. "Up to now the powercat market has piggy-backed on sailing models, but the unit volumes are high enough now to justify dedicated designs. For instance, we gave Alex Simonis a blank sheet of paper for our new 53PC and what he has come up with is definitely not 'yachtie', more glitzy, much more of a motorboat... She'll do 23 knots and has proper engine-rooms, rather than having engines tucked under bunks sailboat-style." The Moorings and Sunsail fleet requirements will account for around 50-55% of R&C production in 2019, whereas just four years ago that charter percentage would have been at least two-thirds. "People say that we build charter boats," says Robertson. "Wrong. To me, there's no such thing as a charter boat. Everything that makes a boat good for charter is equally important for private owners." Despite its considerable experience, 2018 proved to be a more difficult year than most for R&C. Following the substantial Caribbean charter fleet losses to Hurricane Irma in



▲ Capitalworks's Darshan Daya (left) and John Robertson of Robertson & Caine

“ We tried to boost production too quickly, but ended up undermining build quality and our delivery schedules ”

early September 2017, the market needed replacement boats, Travelopia included. R&C did its best to respond, but ended up overcommitting, says a candid John Robertson. “We tried to boost production too quickly, but ended up undermining build quality and our delivery schedules... In the end we simply had to put our hands up and admit that we couldn’t deliver... In the past we had always been able to find enough staff relatively easily when we needed to and always managed to train them fast. Last year we couldn’t. It was a shock and a lesson learned.” Those production issues caused a real headache down the line for Travelopia too, which, given its charter-booking commitments, has ended up having to source cats from elsewhere for the first time. “Ultimately last summer we realised we were going to be 24 units short of the 45-footer,” says Franck Bauguil. “Given that R&C couldn’t supply what we needed, our agreement with them allowed us to look elsewhere and that’s what we have done... We buy more monohulls from the Beneteau Group than anyone else, so not surprisingly we ended up ordering 22 Lagoons, a mix of 42s and the new 46s, all for delivery between fall 2019 and spring 2020... And we have since ordered an additional seven Lagoon 50s for delivery to Sunsail in the Caribbean for summer 2020.” R&C employs around 1,700 employees directly at seven facilities across Cape Town – four production locations with six dedicated production lines and three support sites. The company does everything in-house, save for the upholstery and electrical installation ➔

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work, which are subbed out locally, and the stainless steel work which is imported. All hulls are infused save for the 58's. A new managing director was appointed at the beginning of 2019, Peter Gilliam, who has spent much of his career in the automotive industry, 27 years of which were in senior production posts within BMW; various director-level roles at plants in Germany, the UK, USA and South Africa. He says his principal focus at R&C now is "quality and efficiency"; and that the key means of achieving those will be "proper training".

SOUTHERN WIND

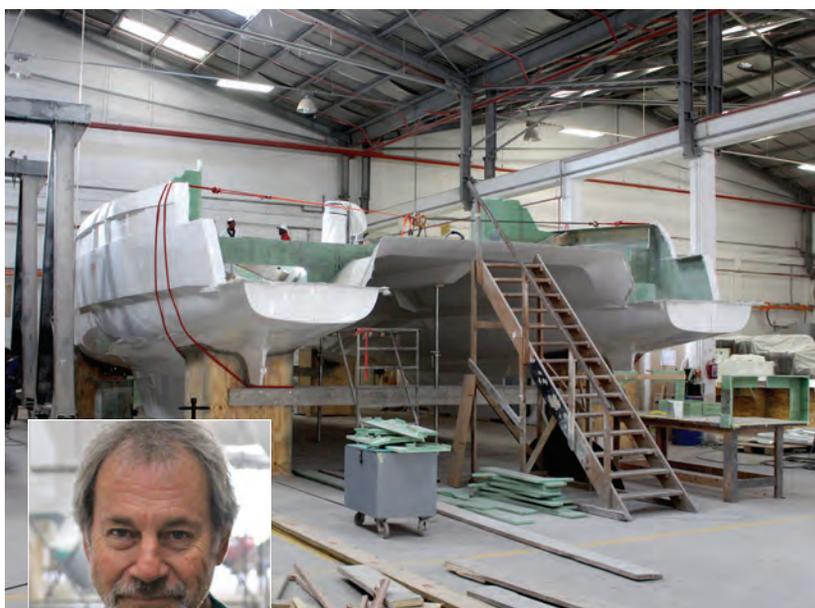
Located in Athlone, Cape Town, but with its commercial office in Genoa, Italy, the Southern Wind Shipyard was started by the late Willy Persico, who died suddenly on May 12 last year while still chairman and major shareholder. His passing was a massive blow to the company that he established almost by accident in the early 1990s, when he needed somewhere to finish off a 72ft Ron Holland-designed sloop as the local yard that had been building her had gone bust.

Scroll on to today and the Southern Wind afloat fleet numbers 54 sailing yachts with LOAs from 72ft-110ft. The average is 90ft, 80% of which are based on Farr hulls and the remainder Reichel-Pugh platforms, save for that first Ron Holland project. Most of the early ones had Antonio Minniti interiors. But for the past 20 years Southern Wind's association with Mario Pedol and Massimo Gino's Nauta Design studio in Milan has been hugely successful.

The company shares are now split 75:25, respectively between a syndicate of external investors made up of one Spaniard, one Dutchman and a Swiss family – and the management team, which consists of Marco Alberti, Alberto Del Cinque, Andrea Micheli and Giampaolo Spera.

Current work in progress includes three super-sloops. There is a full-custom all-carbon 100-footer, which Southern Wind first announced back in early August 2018. The creative credits for this one go to Reichel-Pugh and Nauta. Delivery should be spring 2020. Then there is the third SW96, which should launch in May 2020, and the fourth SW105, which is scheduled to splash in January 2021.

"We are various stages of negotiations for various other monohull projects," says Alberto Del Cinque. "Plus we are now



◀ Voyage director Tom Lubbe (left) and the Paardsen Eiland yard



responding to what seems to be a growing demand for super-cats. We are just starting to promote our first concept with Berret-Racoupeau and Nauta."

A 100ft catamaran, he tells us, would be almost exactly double the volume of a 100ft monohull – and so probably twice the price, which we estimate would be a ball-park €20 million.

The only delivery this year was the third SW105 SY Power of 2, which launched in early February and handed over in mid-April 2019, but two delivered the year before, the second SW96 SY Seatius and the second SW105RS Kiboko³, her owners' third project with Southern Wind.

"Custom care is vital in this business," adds Del Cinque, who has been with Southern Wind for over 20 years. "One owner has built three boats with us and several clients have built two, although ironically all present projects are for first time clients."

Today Southern Wind employs around 300 people.

Current yard capacity would be around 115ft. The largest Southern Wind to date was the 2010-delivered 110RS SY *Thalima*.

VOYAGE YACHTS

Paardsen Eiland, Cape Town-based Voyage Yachts has delivered no fewer than 215 cruising cats since it first started in 1996, although today's volumes are well down on past peaks. Back in 2001 it employed

around 200 people on the same site as today and delivered a record 16 sailing cats that year, a mix of 10 or so of the old Voyage 440 and half a dozen of the old 500. Today it employs around 85 and last year it delivered four of what has been until just recently the company's only really active model, the Alex Simonis-drawn 480. It has been building four or five of those a year since the first one handed over in early 2016.

"This year is something of a transition year for us," says Voyage Yachts director Tom Lubbe. "We will complete just two boats this year as we switch focus from the 480 to the bigger 590. In January we delivered Voyage 480 #15, our first fully electric cat, which is now chartering in the BVI, and we're working on the first and second new 590." The 590 was designed by Phil Southwell. The first should complete for late November 2019 and is scheduled to deliver to the US at the beginning of 2020. The second and third 590s are already sold and will be US bound in March and June 2020 respectively. And the fourth and fifth are said to be 'almost signed', again both to US clients.

Virtually everything Voyage builds ends up in either the USA or Caribbean.

Prices are competitive. The basic-spec price of the 480 is US\$572,000, but a typical delivery would be around US\$700,000. Similarly, the 590 starts at US\$1.35m, but final out-the-door prices can



▲ St Francis Marine offers just one model

be as high as US\$2.0m.

Voyage Yachts also occasionally wins other orders. It offers a day-charter model, the DC45, and a powercat model, the PC65, just one of which delivered in late 2017. But these contracts are few and far between. The last DC45 delivered around four years ago and the powercat started as a contract-build project.

Voyage's senior management team consists of managing director Tom Lubbe and production director Kay Oldenburg, as well as sales director Robin Downing, who is permanently BVI based, where he also oversees Voyage Charters, which runs a 30-strong fleet on Tortola, a very useful resource for demos and making contact with potential first-time buyers.

As for the medium-term future, Lubbe says he wants to boost sales to private owners and the bluewater community. He feels they have neglected that sector in recent years.

All its lamination work is conventional 'wet lay-up' stuff.

ST FRANCIS MARINE

Located in St Francis Bay, which lies some 80km west of Port Elizabeth, St Francis Marine was founded in 1988 by Duncan and Cathy Lethbridge, presently still the majority shareholders but retired from day-to-day business. Since November 2018 the company and its distinctive sun-and-gannet brand has been managed by COO

Rob Brennan, an ex-pat British marine surveyor with considerable catamaran construction experience, in that from 1999 to 2014 he was QA manager at Robertson & Caine in Cape Town; prior to that he worked for the Ford Motor Company. St Francis Marine presently employs 38 people directly and builds just one sailing cat model. Its first was the Angelo Lavranos-designed St Francis 44, which evolved into the 48 and then into the 50, and in turn into the present 50MkII, the base price of which is now US\$970,000, although a typical delivery will weigh in closer to US\$1.2m with options. But, of course, quoted prices can vary a lot with currency shifts, points out Brennan. Not so long ago the base price was US\$900,000. That price excludes AC and a watermaker, essential cat kit, and includes the typical four-cabin layout and standard 45hp diesels, although Brennan tells us the yard has never actually delivered a boat with anything other than the bigger options – currently 57hp Yanmars or 60hp Volvo Pentas. Hull #23 handed over in October 2018. As of June 2019, hull #24 was in final assembly for delivery in July 2019, hull #25 was in lamination for delivery December 2019 and #26 was on order from a Middle Eastern client that expects to take delivery in January 2020, but is pushing for a fully electric installation, which will be a first for St Francis. Hulls #27 and #28 are not yet sold, but negotiations are well progressed with clients from Australia. The next facelift for the 50MkII is imminent, however, and hoped to kick in from hull #30 in two years' time. Bow shape and deckhouse styling will be the principal changes made by Cape Town-based yacht designer Anton du Toit. Since the beginning and across all the various model iterations, St Francis has delivered around 65 hulls, which means one to two of them a year on average. The run rate is a solid two per year now, although Rob Brennan would like to push things a little, perhaps nudging output to five boats a year, but certainly no more. Sales are direct and the clients find the yard from all over the world, although most will use their boats in the US and

Caribbean. The draw is the yard's quality reputation, he says, and because it offers a semi-custom service. Virtually all buyers are private clients and probably two-thirds would be couples with bluewater aspirations. These are not charter boats, he emphasises. St Francis takes an initial 10% deposit, 15% on commencement of hull lamination and 25% at the mating of hull and deck; the final 50% is paid at completion/handover. All hulls have been infused since 2016.

St Francis also offers a small 20ft deck-boat, the FunBoat, which can be spec'd for single or twin outboards. But it builds them infrequently for local markets. Prices from R400-R450 excluding engines and a trailer.

NEXUS YACHTS

Presently employing around 60 people across two buildings some 200m apart, Nexus Yachts now builds exclusively for American company Balance Catamarans, which is an initiative of Phil Berman and his US-based sailing catamaran specialist sales/charter operation, The Multihull Company. According to Berman, the brand name is said to come from balancing the conflicting requirements of cruising comfort and performance. The present

Balance offering spans 45ft-76ft. Berman's chosen builders presently are in Zhuhai, China, where the smallest Balance 45i is built and it is just embarking on a co-operation with Two Oceans Marine in Cape Town to build a new Balance 482 sailing cat and 51ft day-charter and 51ft powercat derivatives

and conceivably its 760 flagship models should clients be found, but more of that relationship a little later. However, it already has a rock-solid relationship with Nexus Yachts in St Francis Bay, for its mid-range offering. Nexus builds the Balance 526 and will soon phase in the new Balance 620. Despite Berman's involvement, all clients sign contracts directly with Nexus, which is owned and managed by three brothers, Roger, Mark and Jonathan Paarman, all originally from Cape Town, and their investor/partner John Henrick, who previously worked in the fishing sector with Mark and ultimately owns the land and buildings they

“ We started Nexus independently in 2007 and our first completion was the first Anton du Toit-designed Nexus 600 sailing cat ”

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▲ The fit-out hall at Nexus Yachts



▲ Nexus co-owners Jonathan and Roger Paarman

occupy in St Francis Bay. The business was the latter two's idea and, having originally tried to find a suitable location in Cape Town, decided St Francis Bay would work nicely for everyone involved, not least because there is a strong pool of labour in the area that trained in a buoyant local furniture industry. Jonathan Paarman is the cat production expert. He worked for many years at Voyage Yachts in Cape Town, which 10-plus years ago used to be the country's second-largest cat builder. "We started Nexus independently in 2007 and our first completion was the first Anton du Toit-designed Nexus 600 sailing cat, which was built over 2007/08, not great timing for a spec build, quips Roger Paarman. "We showed her at the Cape Town show and actually took two orders there. The second and third Nexus 600s were eventually delivered around 2013/14. We also took the 600 to the 2010 Annapolis Sailboat Show, where we made contact with Phil Berman, who was already building 42ft cats in China, but was looking for somewhere to build something a little bigger... That vision has since become a reality for us, the Balance 526." A deal was signed with Berman in 2012 and once the design work was finalised, again with Anton du Toit, the first Balance 526 took almost two years in build, "but getting it right was the overriding priority for all," says Roger Paarman. Balance 526#01 SY L'Ondine eventually launched in December 2015 and #02 and #03 followed in 2016 and 2017,



▲ Cape Town yacht designer, Anton du Toit

#04 and #05 completed in 2018 and #06 delivered earlier in 2019 and #07 is expected to handover in October 2019. During 2020 the next three 526s should finish in February, July and September respectively and work will progress on the first new Balance 620, which should deliver in mid-2021. Anton du Toit is presently working on the design of the 620, a reworking of the original Nexus 600 – 620 #01 will effectively be 600 #04 and should take 18 months to build; subsequent ones should complete in 14-15 months. This model is around 35% bigger than the 526 – 17 tonnes unloaded as compared 12.5 tonnes unloaded. All the Nexus-built 526s are epoxy/E-glass/Core-Cell laminated and all are painted. All the 526s go out with 57hp Yanmars and saildrives, despite the standard offering being 45hp Yanmars; and half have the optional daggerboards. Aluminium spars are standard, but three of seven delivered have had the optional carbon spars. All thus far have been three-cabin boats, but a fourth cabin is available. Prices FOB Cape Town for the 526 begin at US\$1.4m, but typical deliveries would be around US\$1.6-US\$1.7m. The build time of the 526 is presently 12 months – one every five months or so.

TWO OCEANS MARINE

Thirty-year-old Two Oceans Marine is based on two Cape Town sites that combined provide 5,000m² of covered facilities – the main factory in Paarden Eiland and the other inside the commercial

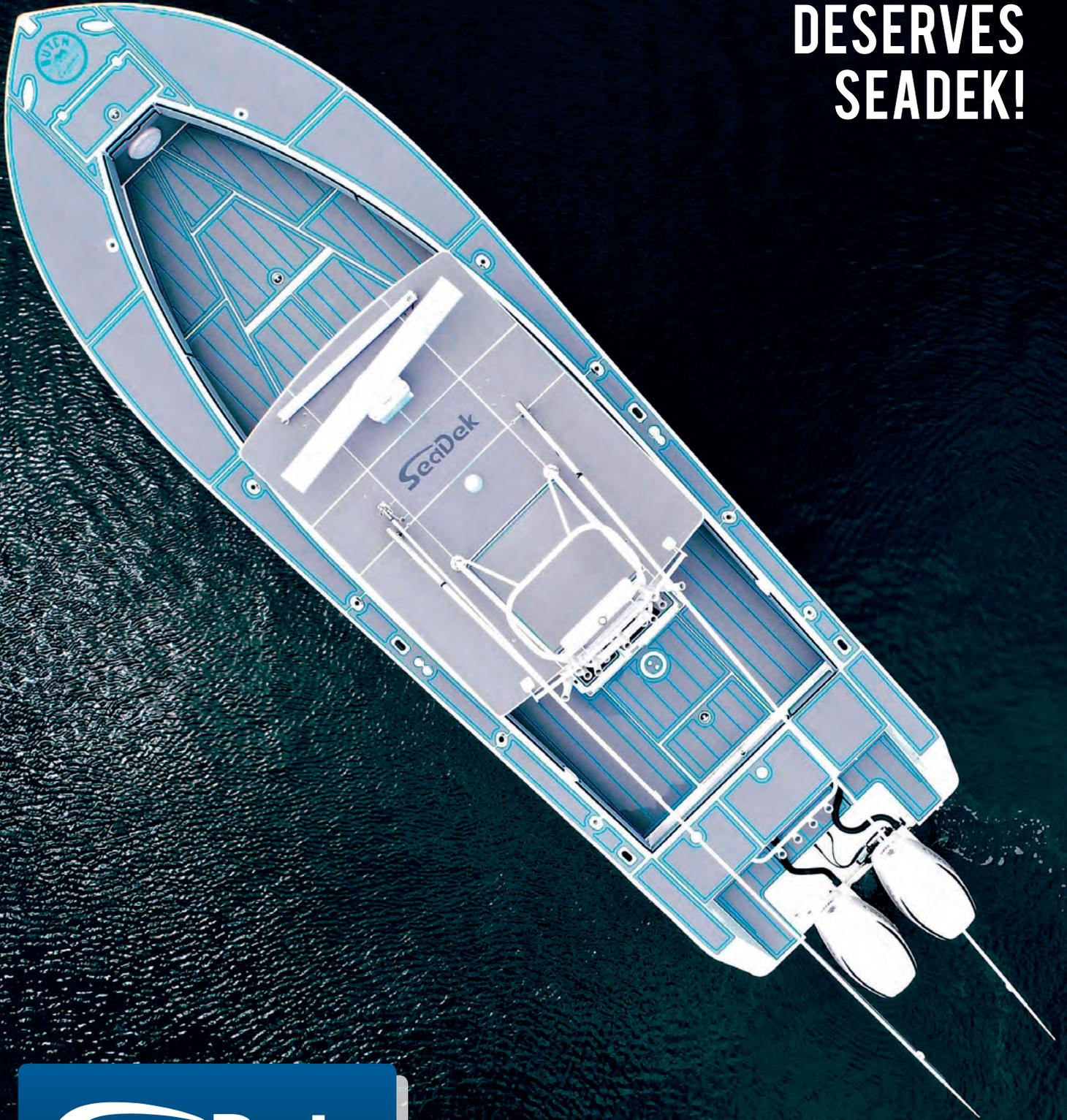
harbour – from where it builds an amazing variety of boats large and small, power and sail, series, semi-custom and custom, but it has done especially well in recent years building large cats and powercats. Two are presently under construction, both drawn by Anton du Toit. One is an 85ft flybridge powercat commissioned by a Zimbabwean. The other is an 82ft all-carbon high-performance sailing cat SY *Liberty* that should launch for late 2019. She was commissioned by a Swiss client. Unusually she will have two hinged-glass 'Windows' that open her deckhouse up with the foredeck area. These doors have been made by the owner's company Mecaplex in Switzerland and utilise proprietary 'Liteshield' panels, which combines acrylic sheets and float-glass.

Since January 2011 it has already delivered no fewer than 11 big cats between 60ft and 110ft – six sail, five power – a mix of private yachts, charter and day-charter vessels and all designed once ➔



▲ Two Oceans Marine offers a variety of boats

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again by Anton du Toit. The biggest was a commercial project, a 110ft 'day-charter' vessel *MY Le Cerf*, which completed for summer 2019. She is bound for service in the Seychelles, can carry up to 275 people, and was recording 'lightship' speeds of 21kt during her June 2019 sea-trials. Her builders confidently proclaim that this US\$3.5m contract as the biggest composite cat ever to have launched in Africa. Other recent big cats include the 2012-launched 75ft powercat *MY Quo Vadis*, the 2013-delivered 75ft *SY HQ2*, the 2014-delivered 75ft *SY Skimmer*, the 2015-delivered 75ft and 80ft powercats *MY Adventum* and *MY Ultra Vires*, all for South Africans, the 2016-delivered full-carbon 60ft cruiser *SY Flydi*, which was commissioned by a German client, the 2016 delivered 85ft powercat *MY Cake* commissioned by a Canadian, the late 2017-delivered 69ft day-charter boat *SY Carnival* for service in St Lucia, and another 70ft day-charter sailing cat with capacity for 170 people that handed over to a Jamaican company in June 2019.

It has also built two sports-fishing cats recently, one 44-footer that delivered in 2018 and a 46ft variant for a 2019 completion.

And Two Oceans Marine has recently secured an order for seven ORC (ocean rescue craft) powercats from South Africa's NSRI (National Sea Rescue Institute). It will deliver two a year from late 2020.

Beyond that it also builds a 23ft-46ft range of mostly outboard-powered powercats for leisure-fishing and light-commercial use under its Magnum brand. These mostly deliver locally or to other African markets. "This really is bread-and-butter activity for us that fits nicely around the custom projects," says managing

CRAIG BOSHARD, CO-OWNER
KNYSNA YACHT COMPANY

Four boats a year has been a comfortable level for this business. Three delivered in 2018 and four will deliver this year

director and founder, Mark Delaney. "The orders are always there and we don't have to push that side too hard... We do between five and 10 a year."

Also interesting for the future is a recent deal with Phil Berman's The Multihull Company, which is investing in tooling that Two Oceans will use to build either a 48ft sailing cat, or 51ft day-charter and powercat derivatives, all under the Balance brand. Once again Anton du Toit was the preferred designer.

KNYSNA YACHT COMPANY

The Knysna Yacht Company employs 45 directly at its facility in Knysna, which lies around 230km east of PE. It is presently delivering three to four yachts a year and up until now has only sported one constantly evolving model, presently known as the 500SE. Prior to its present rendering, it was known as the Knysna 500 and before that the Angelo Lavranos-drawn Knysna 480, which was created from the old St Francis 440 tooling. St Francis built 42 of those 440s and the hull numbers have run sequentially ever since. Thus far Knysna has delivered 47 of its versions, which have delivered to and have been cruised literally all over the globe – a fact beautifully illustrated in the firm's lobby, where a world map records present locations of every boat with coloured dots. Australia has proved a really strong market for Knysna over the past year or two, according to Craig Boshard, who acquired the yard with his brother Grant in spring 2018 from Kevin and Rika Fouché, who started the business in 2002. Hull #87 *SY Private Island*, #88 *SY Bahati* and #89 *SY Stand Fast* all delivered to Australians. All

sales are direct, although the Boshards still make use of the Fouchés as sales consultants and brand ambassadors. As of June 2019 the next three 500SEs were at various stages of construction: #90 *SY Salsa* was close to handover to her Swiss owner, who is based in Cape Town, but intends keeping her in the Seychelles, #91, which is bound for the US in September 2019, and #92 which is still available for a late 2019/early 2020 handover. Quoted delivery slots for #93-#97 extend to January 2021. As of summer 2019 prices for the 500SE begin at US\$895,000, but a usual delivery will be around the US\$1.2m mark. What's new for Knysna is the all-new Anton du Toit-designed 550 Fly. Four delivery slots are quoted on the company's website. The first one, which is already sold to Kevin Fouché and a partner as part of their exiting agreement with the Boshards, should complete for late 2019, but will probably push back beyond that stated slot. The second, third and fourth slots are presently promoted as June 2020, November 2020 and January 2021 respectively. Certainly the 550 is big in comparison to the 500SE and is not necessarily going to be an easy transition for the yard. "There's an extra metre in the beam and that metre is causing us all sorts of problems," says Craig Boshard, "not least as regards getting local government permission for local launches – and not all those issues have yet been resolved." Basic prices are from US\$1.6m. "Four boats a year has been a comfortable level for this business," says Craig Boshard. "For instance, three delivered in 2018 and four deliver this year... But our short-term goal is to pump things to five a year when the new 550 Fly kicks in and for the long-term goal we would like to sustain a consistent production plan of 10 boats a year, which to us means a properly sustainable business. At the moment we have around 3,000m² of covered facility, but we have already acquired the 7,000m² site next door, which will provide the necessary capacity as and when required; we'll rent it out until we need it." The Boshards had previously been involved in less appealing industries in Jo'burg, so speak with experience. But not everything is about money. For them their Knysna investment is also about rebooting family life away from what they view as a 'toxic' home city. Knysna's beautiful.



▲ The Knysna 500SE is nearing completion



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▲ Chris and Rudi Pretorius at Maverick

MAVERICK YACHTS

Maverick Yachts was founded in 2007 by husband and wife team Rudi and Deslynn Pretorius, who are now increasingly supported by son Chris and two non-exec investors. The company, which is based in 900m² factory on a 1,200m² site in the Cape Town suburb of Montague Gardens, delivered its first then-all-new Phil Southwell-designed Maverick 40 in February 2009 and has since delivered 20 more of them in either 40, 400 or 440 Extended Transom versions, 80% to export markets. Maverick 400 #12 – designated as the first facelifted 440 – launched in mid 2014. As of early 2015, #15 was just delivering and #16 and #17 were under construction for completion in mid 2015 and 2016 respectively. Hull #20 and #21 delivered respectively to a local Royal Cape Yacht Club member in spring 2018 and to the US in July 2018. The run rate averages at two per year, which usually means one boat in always is lamination and another always in fit-out. As of June 2019, hull #22 was under construction for a UK-based client expecting to take delivery in September 2019, #23 had had a delayed start, but was soon to commence moulding for a late 2019/early 2020 handover, #24 was scheduled to start in September 2019 and complete in spring 2020, and #25 was due to start in March 2020 and hand over in late 2020. As of summer 2019, the basic-spec price for the Maverick 400 was US\$560,000, but a typical delivery with usual extras would be more like US\$670,000 and the Maverick 440 starts at US\$620,000, but a typical spec would see that rise to about \$730,000. Then the Maverick 440 Hybrid would see a total price of around US\$875,000. The company employs 28 people presently and also

sporadically builds workboats, including marine ambulances and water-taxis, for other African markets.

ROYAL CAPE

Royal Cape Catamarans presently offers the 530 and 570 derivative, all with or without various fly options. Both evolved from earlier designs. Thirteen of the original 45, whose hull forms were actually based on a Van de Stadt monohull, were built by the original Royal Cape founders. Since 2003 the company has been owned and managed by Ken Bircher and business partner James Felgate. In 2004 they started building the 45, but by 2006 developed new tooling for what was launched as the Royal Cape 500, which quickly became the 530, a version with extended transoms and a large aft-deck; and the first 530 Fly version launched in 2014. In all 23 of 500/530s have been delivered to date. The first new 530 and new longer 570 Fly are in build currently, one each in fit-out – and a third is just starting in lamination. The former should launch for August 2019 and the latter for November 2019, which should allow enough time to get her up and across the Atlantic for Miami 2020. Designed in-house with the assistance of Durban-based naval architect Pieter Volshenk,

both the new 530 and 570 Fly sport a more modern hull that in latter guise can carry more sail and can be specified with up to six guest cabins, plus the potential for forepeak crew cabins as well. Usual sailaway prices vary from US\$1.2m for the old 530 and up to US\$1.8m for the new 530/570 with a fly, but Ken Bircher says Royal Cape standard specs include a fair amount of semi-customisation and all the usual necessities, so extras don't usually add more than 5%. The engines are usually Volvo Penta or Yanmar, but Bircher says he is presently dealing with several enquiries for all-electric packages, which will push final prices up considerably, although of

course operating costs will compensate to some degree. In recent years various Royal Cape cats have already gone out with solar-panels aboard, some with 'pull-out extensions' that provide up to 2kW when at anchor. On the product development front Royal Cape is working up an all-new 60ish design

with an external charter-fleet partner. No button has been pressed yet, but preliminary conversations have been had with the ubiquitous Anton du Toit. RCC presently employs 36 currently at its Kloof, Durban, KwaZulu Natal-based factory, and does everything in-house, save for electrical installations, stainless steel and upholstery work. "We're running out of space here,"

“Our five-year plan is to be building six to eight boats a year, up from the present average of two per year”



▲ Royal Cape Catamarans in Kloof, Durban is trying to source a new waterside facility



▲ The Fusion 21 launched in late 2018

says Ken Bircher. “I’m currently trying to source a new waterside facility with government help. At the moment it takes a lorry over an hour to get a finished boat from the yard to the launch point and all the usual wide-load preparations and approvals are tiresome. Our five-year plan is to be building six to eight boats a year, up from the present average of two per year.”

VISION & FUSION

Knysna-based Vision Yachts is building a reworked version of what started out as the Matrix 450, which was originally designed by Peter Wehrley at Matrix Yachts, which built just two of them before ultimately focussing on its 70ft-plus sailing cat offerings. This semi-custom model uses the old Matrix 450 hull, but has a completely new deck and cockpit. It is now known as the Vision 444 and the first one, SY *Nomadic*, launched in March 2019 and delivered to a Canadian paraplegic, who specified the boat in various ways to accommodate his wheelchair. The specs included side gates and two low wheel-helms installed rather than the usual single wheel on the deckhouse bulkhead. The delivery price for that boat was US\$640,000. Summer 2019 sees two more in build – the 444 #02, which was in fit-out for delivery to the USA for September 2019 and weighed in at US\$560,000, and 444 #03, which was in the mould and destined for a Channel Islands-based client that wants her to have Oceanvolt electric propulsion. The previous two boats had 40hp Nannidiesels and saildrives. Vision 444#04 is available for delivery in 2020. The 444s are infused using vinylester resin. Owned by James Turner and Brent Watts, Vision Yachts was employing 22 people in summer 2019, but was going to need to



▲ Current Marine’s Julian Kneale. Current works closely with SA designer Jeff Schionning

hire more in the coming months when the hull of 444 #03 pops from the mould, says production manager Steve Hopper.

Vision Yachts’ adjacent sister company, Fusion Powerboats, offers a three-model 17ft-21ft range of centre-console runabouts for single or twin outboards. As of summer 2019, the models were the Fusion 17, of which 76 had been built in the four years since the company started, the 19, of which 51 had been shipped, and the new for late 2018 21, seven of which have already been handed over – which respectively will take up to 140hp, 250hp and 300hp. The last of the old Fusion 15s, of which 60 were built, delivered in early 2019. The Fusion side of the business employs 26 people and is aiming to deliver up to 50 engineless boats this year, according to general manager Luke Petzer, mostly via a national dealer network of seven dealers – Cape Town, Johannesburg, two in Durban, East London, St Francis, Knysna and Plett; three of them are Yamaha outlets. As of early June, 15 had been despatched. It recently shipped four boats to Australia. Fusion does its own stainless steel work and road-trailers.

CURRENT MARINE

Julian Kneale’s Current Marine in Knysna has developed its own niche – lightweight high-performance structures – mostly carbonfibre and various exotics. A typical year would see perhaps one and a half custom boats delivered, meaning three every two years, plus five flat-pack kits. It does a lot with Jeff Schionning, a South African designer that’s based in Australia. Not surprisingly, being a South African builder, most of what he does are fast cats. But unusually it also laminates its own carbon masts and wing masts.

Current Marine is presently championing two carbonfibre/S-glass cats designs that will be built under licence from Schionning – the CM²45 and CM²51 – and 36ft all-carbon trimaran, the CM³36. Both the former have evolved from the G-Force 14 SY *Waho*, which delivered in 2015. CM245 #01 is under construction for delivery in May 2020; the client is a doctor based in Auckland, New Zealand. This contract is a no-holds-barred racing version with carbon wing-mast and daggerboards started at €700,000 but has since climbed to nearer €750,000. Prices for an epoxy version would start at around €530,000.

Julian Kneale says a CM²45 will take around 12 months to build, so as of summer 2019 he was hopeful of starting the next one on spec and in enough time to get her over to the US in time for an Annapolis 2020 showing. Indeed, if sales go according to plan, he says that he hopes to deliver two during 2020 and perhaps three for 2021.

Current Marine has already built one CM³36. It was shipped to the UK in a 40ft container in autumn 2018.

ADMIRAL POWERCATS

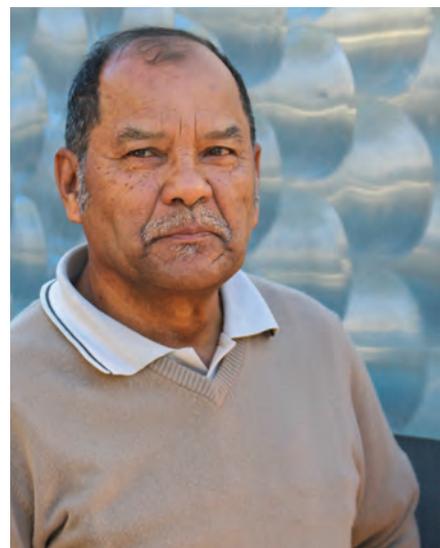
Alan Geeling’s Admiral Powercats is presently building small riverboats for Airbnb-style accommodation in the V&A Waterfront, the heart of Cape Town’s tourist district. The design is the Leisureliner II, a rework of the original Angelo Lavranos-designed Leisureliner, getting on for a hundred of which were built by various South African builders over at least two decades, including for a time John Robertson Yachts, a predecessor of R&C. They were supposedly shipped all over Africa and as far afield as the USA. The Leisureliner II has an LOA of



▲ The Leisureliner II from Admiral Powercats



▲ Gecat Marine allows clients to customise a lot. Flybridges and helm-towers are often requested



▲ Fuad Jacobs of Jacobs Brothers

8.6m and a max beam of 2.95m; minimal draught; and can come with or without a mini-fly. They usually have single or twin outboards. Excluding engines price start at around ZAR1.3m.

From its 800m² facility in Beaconvale, a suburb to the east of Cape Town, the company also builds hull pods that convert PWCs into sportsboats, useful as surf-rescue craft, and the ubiquitous third-world Pangas, long low-freeboard launches used by everyone from fisherman to river traders, not to mention the odd pirate.

GECAT MARINE

Errol Plowes's Gecat Marine builds his own design of 21ft-42ft powercats, mostly for local leisure and commercial use. All these days are outboard-propelled, almost always with Suzukis these days, although it has built plenty of boats with sterndrives and straight shafts in the past. His Francis Bay-based business employs just eight and builds five or six small boats a year; occasionally up to 10. Pre-GFC, when the local market was much stronger, Gecat had a workforce of up to 20 and has managed to deliver up to 15 boats a year. Sales are mostly direct, but there are Gecat dealers in Cape Town and Australia. There are three basic power-cat models now, but Gecat allows its clients to customise a lot. Flybridges and helm-towers are often requested. The smallest model is the Gecat 21, prices for which start at R198,000, excluding engines and trailer. Then there is the new Gecat 23/25, the first of which launches in late 2019 and is aimed

primarily at the game-fishing market. The Gecat 28 is also mostly used for competitive fishing. The base price for the 28 begins at R516,000, excluding engines and a trailer, but including the biggest twin 250hp outboards and trailers would be more like R1.5m to R1.7m. The older Gecat 35 Gullwing and new 42 Gullwing, the first of which delivered last year, are mostly used by charter-fishing companies. Prices including twin 300hp Suzukis, which mean top speeds of 38 knots, would be in the region of R2.6m and R3.5m respectively.

"If there is one obvious trend I can see, it is that the market presently wants smaller boats," says Plowes. "Then there is probably more leisure-related business around for us these days, although in the past we have done well with the likes of diamond mines and trout farms."

JACOBS BROTHERS

The Jacobs family's love of boats has developed into a successful boat-fabrication business – power and sail, workboats or yachts. The family launched their first boat, a 45ft all-steel Van de Stadt cruiser, back in 1974, which was quickly followed by an all-aluminium Andre Mauric 47-footer, for which they fabricated their own spars and marinised their own Mercedes diesel; the family owned her for 12 years. Their next project was for their first actual client. She was a Dudley Dix-drawn aluminium Shearwater 39. Scroll forward to today and the business has a 30-aft-boat portfolio to its credit, the biggest of which was a 74ft all-aluminium

Phil Southwell-designed fast cruiser. The yard's real specialty these days is aluminium expedition style sailing cruisers. For instance, a recent delivery was a 56ft Ed Joy-designed cutter. Summer 2019 saw the completion of a 12m aluminium ferry that was bound for Mozambique.

Employing just six, including Fuad Jacobs's sons Sieraj and Taariq, the business is presently based in a residential suburb, but the Jacobs are soon to start breaking ground on a purpose-built new 900m² factory 3km away, the design of which is already complete, he says.

EQUIPMENT & SERVICES

ULLMAN SAILS

Ullman Sails (South Africa) has two facilities, one in Cape Town and one in Durban. The latter is relatively small and specialises in one-design/sub-30ft sector. This Cape Town business is substantial and

ERROL PLOWES, OWNER
GECAT MARINE

If there's one obvious trend I can see, it is that the market presently wants smaller boats

EQUIPMENT & SERVICES | SOUTH AFRICA

well established, having been an important global producer for well over 20 years, although not always as Ullman. In the past under different management it has been affiliated with both Doyle and subsequently Quantum, but since 2012 it has been working with Ullman Sails, which was originally established by Dave Ullman back in 1967 and is still headed by him from the company's Newport Beach, California HQ. Overall, Ullman, which claims around 8% world marketshare, now supports 75 outlets across five continents, only 35 of which actually produce sails.

Employing 130 people and open 11.5 months a year, seven days a week with consistent night shifts, Ullman Cape Town is a big player by any measure. The world market is probably 60% cruising, 40% racing and we are 70% cruising, 30% racing," says CEO Michael England. "At the moment we are producing between 80 and 110 sails a week across both locations. From Cape Town we handle the bigger sails. Locally, we regularly deliver up to 16 sails sets a month to Robertson & Caine and sometimes six sets a month for the rest of the country's catamaran builders. That means 75% of the catamaran builders in this country are using us. Then we are shipping 1,000 or so 'capex' replacement sails, mostly to cat charter fleets, 60:40 foresails and mains, as well as the accessories such as canvas accessories and trapezes. Charter boats will normally be chartering for only five years and worked hard they will be needing replacement sails after three. We recently delivered our first OEM sails directly to Lagoon in France too."

Approximately 85% of what Ullman

South Africa does is exported and maybe 40% or orders are generated via the Ullman network. Shipping globally means fast turnaround times. Membrane sails have a five-week lead time usually, nylons four, 'standard whites' 10, and accessories two. England says his factory is the only one in Africa producing membrane sails.

One-offs and custom sails are handled by six Ullman approved designers around the world.

Presently big-yacht sails are few and far between. "We are now working on a new mainsail for a Swan 100 and another suit for a CNB 100," says England, "and every now and then we handle replacement sails for some of the Southern Winds, but we need to be closer to that big-boat market. For the future we're considering opening our own office in Palma, Mallorca."

SPARCRAFT

Sparcraft Masts is now the only spar builder in Southern Africa. It is the latest evolution of a business with 30-plus years of experience – Bellamy, Zenith, Sparcraft, Southern Spars, G-Wind have all contributed in some form to the present operation, which came into being in its present guise just 20 months or so ago when North Sail Group subsidiary Southern Spars decided to stop producing carbon spars at its Cape Town facility, which prompted the sale of its Sparcraft aluminium spar business in South Africa to Craig Hulbert, who owned the country's only other spa builder at the time, G-Wind in Durban. That decision had a big impact on the local marine industry. Up until it pulled out, Southern Spars, which built its carbon spars there under the Southern

Spars brand and aluminium spars under the Sparcraft brand, employed no fewer than 150 people at its large Montague Gardens factories. Today the Cape Town site, which has since absorbed what was G-Wind's new spar work, employs just 20 people in one part of the previous building, all under the day-to-day management of Tich Mitchell, who was one of several Sparcraft Cape Town owners that sold out to Southern Spars back in 2010 and has been involved in spars and rigging for over 30 years.

Sparcraft activities there are broadly split 50:50 between spar building and rigging, says the company's Ian MacRobert. On the spar side, 95% concerns new spars and just 5% refit/replacement work. It obviously supplies most of the local cat builders, although only presently supplies Robertson & Caine with five or so spar sets a year for its biggest 58 model. It sources its spar tubes mostly from Groupe Wichard's Sparcraft France, which despite the shared name and trademark is a separate business; the graphic is the same, but one is two shades of blue, the other orange and yellow. Around 60% of the rigging activity is new work and 40% service related.

DRACO

An initiative of Karl Martin and friend Scheepers Schoeman, Draco is an interesting newcomer to the dinghy and mid-range hardware business. Based in Cape Town, it has designed an attractive range of blocks, solid-ring guides, deck-organisers and fairleads, whose USP is simplicity and elegance. The product range makes use of polished stainless steel and hard-anodised aluminium, and crucially does not use roller-bearings, but instead a 'high-strength low-friction self-lubricating UV and water-stable engineering polymer'. All parts are sourced from local subcontract engineering companies.

"It is still very early days for us," says Martin. "We have our equipment on a few local boats, but are just starting to develop international interest. We went to METSTRADE as visitors last year and this year we should have products on display with at least one distributor... And next year we hope to be there with our own stand."

CENTRAL BOATING

South Africa's two most prominent marine equipment distributors and



▶ Ian MacRobert at Sparcraft Masts



▲ Draco is a newcomer to marine hardware



▲ Ian Coward, OEM sales manager at Central Boating, and administrative director Gary Lyttle

retailers are Central Boating and Manex & Power Marine. Together they account for probably 85% of the South African market and both for several years now have been owned by the same parent, Cullinan Marine, part of the large and heavily diversified Cullinan Holdings group. Indeed, for a while Central Boating founder David Barnes served as managing director of both companies.

What differentiates them? Central Boating is probably a bit more sailing oriented. Manex is generally more motorboat, fishing and scuba-diving focussed.

Together they employ 20 or so people. Central Boating occupies a large three-storey building on Bree Steet in the middle of the city, the first two floors of which are retail premises with offices on the top floor. Manex employs a similar number at its two-storey premises, which includes shop and offices in Paarden Eiland, plus it has a sales office in Johannesburg.

Both companies have shared a distribution hub/central warehouse on the Maitland Business Park, but we hear are in the process of dividing things as next-door neighbours.

The big problem with the South African market is its volatility, says Central Boating's OEM sales manager Ian Coward, and administrative director Gary Lyttle. "We're always at the mercy of the

foreign exchange markets," says Lyttle. "For instance, a client can decide to spend R100,000 one month, but next that same order could weigh in at R120,000 or more, so decisions get put back. Confidence is not good... The local economy has been very tough for the past few years. At least officially we have been out of recession for most of this year."

Ian Coward also points out that ultimately the success of their business and their clients' is linked to what happens in the USA, because, given 80% of Central Boating's turnover is OEM related, 70% or so is indirectly exported. "And the biggest single export destination for South African-built boats at the moment is the USA, he says. "If the

USA goes into recession, we will really start hurting here."

EAST INSTITUTE

A relatively new player in the superyacht crew training arena is the EAST Institute – the acronym comes from Expedition, Adventure, Safety and Training. This Cape Town-based business specialises in teaching yacht crews how to manage adventure sports on and off their boats, everything from kite-surfing to fly-fishing, mountaineering to free-diving, not to mention advanced life-saving, sea-rescue and remote medicine. Yacht captains

and managers can opt from off-the-shelf programmes or request custom packages.

"Superyacht owner demographics are changing and the ways they want to use their boats are changing also," says Andrew Bance, who honed his own skills working with a couple of high-profile superyacht fleets. "Owners are getting younger and healthier... What goes with increased demand for explorer-type yachts is more ambitious cruising schedules and more exciting activities... But what is clear is that crew training, especially as regards to safety and risk management, needs to be elevated. We need to surpass what is acceptable currently. Running courses here in Cape Town is ideal. We have perfect natural resources – oceans, wind and mountains – and so much local expertise."

For instance, the EAST Institute recently hosted a course of 50 people from one private yacht fleet over the course of a month, but equally Bance and team will travel to clients' boats when required. **IBI**

“The local economy has been very tough for the past few years. At least officially we have been out of recession for most of this year”

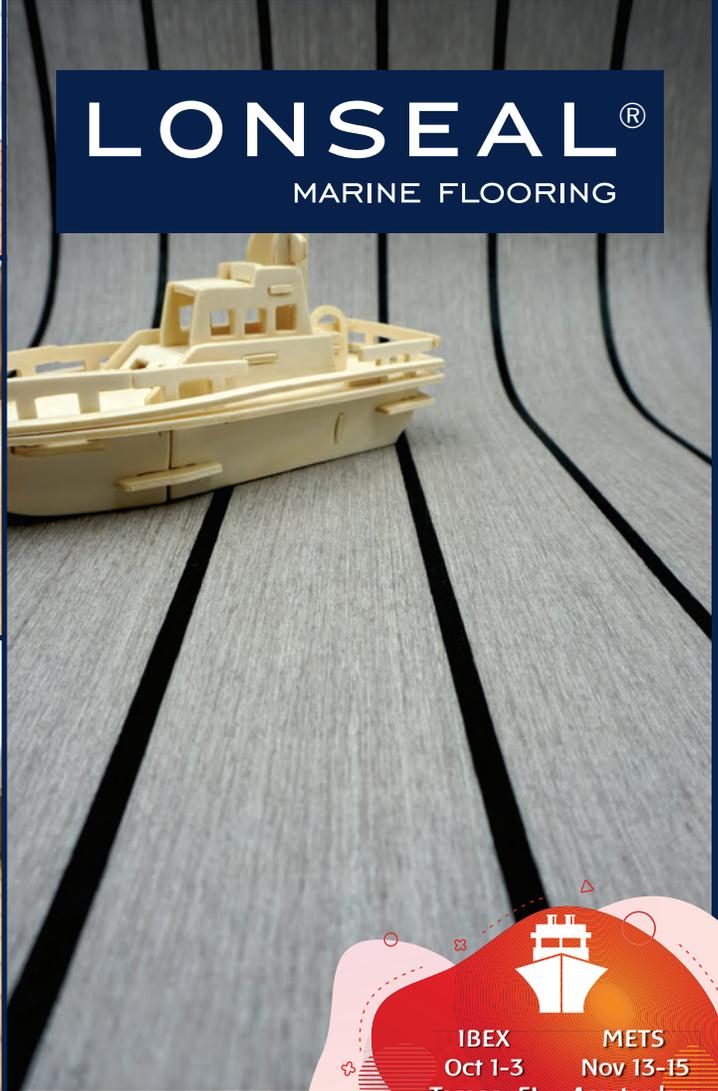
ABOUT THE AUTHOR

PHIL DRAPER SERVED as IBI's special reports editor for two decades and edited various IBI sister titles. Today he is widely acknowledged to be a world authority as regards boat/yachtbuilding activity and many of the industry's best known builders, OEMs and designers, as well as financial analysts and investors, subscribe to his 'New-Build Estimates' and big-boat 'Developing Fleet' databases. These market-modelling files deliver a quite unique view of our industry's structure and health and remain the most efficient means of in-depth marketshare analysis from the 30ft production boats to the biggest superyachts, power and sail. Subscription enquiries to Phil Draper: marketintelligence@ibiplus.co.uk



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▶ Christoph Ballin, founder and managing director of Torqeedo

“Political processes need time. We are not waiting for it”

TORQEEDO CEO CHRISTOPH BALLIN TALKS ABOUT THE IMPACT OF CLIMATE CHANGE ON BOATING AND THE LATEST DEVELOPMENTS IN ELECTRIC BOATING

WORDS: KERSTIN ZILLMER

Earlier this year, ‘Electric Days’ took place for the second time on Germany’s Lake Starnberg. During the event, German motor manufacturer Torqeedo presented its new electric propulsion systems on the water, installed on a dozen electrically powered sailing yachts and motorboats, including the brand-new Frauscher Mirage 740. Christoph Ballin, founder and managing director of Torqeedo, gave Kerstin Zillmer, editor-in-chief of *float* magazine, an insight into Torqeedo following its 2017 acquisition by Deutz, a traditional German manufacturer of diesel and natural gas engines.

It’s been two years since Torqeedo was bought by Deutz. What has changed? Our shareholders are no longer financial investors, but an industrial company. As part of a listed company, we do some things differently than a start-up.

Compliance management and export control, for example, take place at a much higher level. On the other hand, we support Deutz in offering electric mobility for construction machinery, material handling and agricultural technology. To this end, we support development projects for which we also have additional employees.

Do you still have time for Torqeedo if you support the electrification of agricultural machinery at Deutz? Yes, of course! As the managing director of a start-up company financed by venture capital, you don’t have 100% of the time available for operational business. This is no different in the new structure. In addition to my role for Torqeedo, I am responsible for strategy at Deutz. My colleague Ralf Plieninger, Torqeedo’s CTO, is also responsible for Deutz’s electrification and hybridisation projects.

How does Deutz support Torqeedo? On the one hand, Deutz supports us financially. We are still before the break-even and continue to invest. Torqeedo now has 200 employees. We are continuing as before and driving forward electric mobility in the marine industry.

We also work together with Deutz in sales and purchasing. For example, we use the Deutz sales network, especially for the professional segments. But the greatest synergies for Torqeedo will come as soon as Deutz launches its electrical systems. Torqeedo can install components for boats from electrical systems that are installed in large numbers in construction equipment.

Is Deutz interested in marine? Or does it say, land is land and water is water? The latter. Deutz didn’t buy Torqeedo because the company does something on the water. That didn’t matter

for the acquisition. It's about the technology and our application experience. Deutz was looking for a company that could handle all the components of electric mobility. A company that – at the same time – is not only a development service provider, but also has operational experience with working supply chains and systems in the field. The joint work of the Torqeedo-Deutz team saves us time and money in electrification. Deutz will play a pioneering and leading role in electric mobility in its segments.

Have you been able to use the time since the change in ownership to advance Torqeedo technically?

Not faster or slower than before. We have not changed our development projects or our product roadmap. We've expanded our development department, and the expanded team of course also creates more opportunities.

It also remains a fact that our DNA is to be impatient to a certain extent. In order for climate-neutral mobility to gain a foothold in a market, it often requires the impetus of an external or new supplier. Otherwise, existing providers may not do much. We are proud to be this trigger for the marine industry. Converting boat segments away from combustion engines and towards more sustainable electric drive systems is not only an opportunity to expand our business. It is also something the world urgently needs.

What's new on the technical side?

We have launched a new version of the Torqeedo Travel engine for 2019 with direct drive without gearbox. This makes the engine very quiet, and we have also improved the responsiveness. The new power battery has a third more energy density. We've also launched a new 100kW drive as part of our Deep Blue range. The new engine is available in two different forms – as a slowly rotating model for ferries and sailboats, and as a fast rotating motor for planing and other motorboats.

We also have a new kayak mount for the Ultralight models. This bracket is very easy to mount and offers a lot of comfort functions.

What does a Chinese competitor on the market mean for Torqeedo?

Competition stimulates business. We believe that we have the best products. And we are by far the largest supplier in the world. This year we have a turnover of more than €30m. The next largest market player has a fraction of it. We claim to be the 800-pound gorilla in electric mobility. That's what we want to remain.

For 14 years you have promoted electric boating as the only reasonable alternative for the future. Does Torqeedo stand for a different philosophy of boating?

The discussion as to whether climate change exists or whether it is man-made is over. Of course, there are still a few laggards who don't want to believe this because they don't want to change their behaviour. At the same time, the evidence is more compelling and harder to ignore every year. I think it's only a matter of time before the last stragglers have to give up their resistance. If you accept that man-made climate change poses huge problems for mankind – read, for example, the summary of the IPCC report of 2018 – there is no way to avoid climate-neutral mobility at all. And climate-neutral mobility will in future go electrically or later with hydrogen.

Have we actually achieved enough in the marine industry?

First of all, I am pleased that we are not far behind the automotive industry in the transformation of the marine industry. That's a success, because the gap is much wider on many other sustainability issues.

Progress is not taking place simultaneously in all boat segments. There are boat applications that are more suitable for electric mobility than others. Sailing applications are of course more suitable than fast motorboat applications.

We're focusing on applications where electric mobility can be successful today. We look at applications where electric mobility cannot be competitive today, but in a few years' time, when battery technology has further improved, could be. In many mainstream boat segments, the topic is not yet reality. I would like it to go faster, but you can only take on what is realistic.

Do you see yourself as an evangelist for a behavioural change?

It is not Torqeedo's job to convince others to behave differently. I am a big fan of individual freedom. Everyone should choose the product they like. Our task is to offer great climate-neutral solutions that convince people – because they are more progressive and future-oriented, but also because they are simply great products.

In your opinion, is it still okay to ride a boat with 40kt?

I expect political pressure to become much stronger – the more compelling the evidence grows that we need to reduce our ecological footprint much faster than before. And this evidence, as I said, is growing every year. But political processes need time. We are not waiting for it. Until then, we are building sustainable electric drive systems for different segments that are so good that users want them.

Over time there will be more political pressure, and at the same time the technical possibilities for electric mobility will improve. So the future looks very good for sustainable mobility. At the moment we are working with the technology available today and the current political situation.

Batteries are still the energy storage of electric mobility. When will it be the fuel cell?

Between 2025 and 2030, I think. We are naturally having an eye on the topic and are pleased with the progress, because the drive of a fuel cell car is also an electric motor. If we design a fuel cell into the Deep Blue, almost all components will remain as they are. The effort would be manageable.

Is there already a solution in sight for fuel cells?

Nothing that is competitive today. The technology works, but the costs are too high. And the infrastructure is not yet in place. We are involved in a number of lighthouse projects. In my opinion, we will not see a large market volume here in the next five years. But we also have to water the plants that take a little longer to become a tree. **IBI**



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◀ The 24m Amasea 84 is designed for offshore sailing, with 2,000 miles of autonomy

When yachtsman turns yachtbuilder

DUTCHMAN JACK WIJNANTS'S DREAM TO CREATE HIS ULTIMATE CATAMARAN IS ABOUT TO BECOME REALITY. HE REVEALS THE INSPIRATION BEHIND THE AMASEA 84

WORDS: OLIVIER VOITURIEZ

Yachting's appeal is unique – its allure can captivate both leisure sailor and industry professional – architects, designers, builders – in equal measure. Few recreational pastimes elicit such passion that can blur the boundaries between work and play. Little wonder then that avid leisure sailors can often find themselves on the opposite side of the customer/supplier equation. The refrain: “I didn’t find exactly what I was looking for, so I decided to build it,” has almost become something of an industry cliché – where sailor decides to become not only builder, but also designer and financier of the boat of his dreams.

The project may be bewitching on paper, but

will require a good dose of energy, imagination, tenacity, not to mention serious financial clout to bring it to reality. Belief, business acumen and guts

“ Construction will take 15 months. The plan is then to build seven or eight models a year. After that? Wijnants has his eyes set on a 40m ”

must define anyone that enters such an arena. Step up Jack Wijnants – a Dutchman living in Monaco and a passionate sailor since childhood. His dream? To build a luxury 24m tri-deck catamaran in aluminium. It is an ambitious challenge, costing around €8m, and will hit the seas in roughly two years’ time.

Wijnants was born into a family of steel manufacturers, has worked as a distributor of marine electronics, and has even built military patrol launches in Malta. With a tidy sum in his pocket which made him ➔

independent, it was the right time to self-finance a new challenge. His boat is called Amasea (a blend of the Italian 'amare' and English 'sea'), is 24m long and 11m wide, with three bridges. Its selling price will be between €6.5m and €7.5m excluding taxes. In Monaco, under the gilded façade of the Hotel Metropole, Wijnants invited the European nautical press to admire his 130-tonne baby.

INTERNATIONAL TEAM

To run such a large and tight ship, the engineer with an electronics background, was supported by an international team. Naval architect Albert Nazarov is Russian. Communications are handled by Sand People, the well-know Italian public relations firm. The hull and superstructures of the catamaran will be built in a Turkish boatyard. The finishings will then be handled in Europe, either in Italy or in the Netherlands.

"Nobody knows me. I am a new player in yachting," says Wijnants, who launched the project two years ago when he sold his Belgium-based electronics distribution company. He needed the time to choose the best professionals, both as regards the quality of their work and their ability to adapt to his ideas. Having control was fundamental for Wijnants, who chose not to look for partners to finance his project so that he would remain captain of the enterprise. Build work will begin by the end of the year, whether a final customer has been found or not. If Wijnants finds a buyer he will be pleased, but if he doesn't, he will be equally happy to own the first Amasea.

BOLD AMBITION

The Monaco preview of the Amasea 84 revealed a modern design with an imposing and robust shape. It is focused on off-shore sailing, with 2,000 miles of autonomy, and the ability to navigate six weeks without returning to port. The engines (2 x 1,920hp MAN) are good for between 8kt and 18kt. The interior is fully customisable to the owner's brief. The boat features a lounge of 63m² in the main bridge, next to a 15m² kitchen, and two guest cabins of 15.7m each. The master cabin is 33m² on the upper deck, next to the 23m² wheelhouse. And then the panoramic view deck is almost 45m². The crew's discrete quarters are in the two hulls of the catamaran, providing room and privacy for everyone.

Construction is expected to take at least 15 months. The plan is then to build seven or eight models a year. After that? Wijnants has his eyes set on a 40m-long Amasea. **IBI**

THE AMASEA TEAM

JACK WIJNANTS, FOUNDER OF AMASEA



What made you want to design your own catamaran?

I was looking for a 20m-25m catamaran to go around the world, but I couldn't find what I was looking for. They were very expensive, with little scope to fit out the interior. Moreover, the materials used were mediocre quality. And then there was little privacy for the guests, with the crew using the same galley. So I decided to go back to the design table and draw up my own catamaran. When I showed it to my yacht broker friends, they told me I should commercialise it.

What is your link with yachting and industry – the two factors you brought together when creating Amasea ?

My family has always owned Dutch yachts from 20m-24m. My grandfather had a large steelworks, and a garage. When we were kids, my brother and I developed a passion for sailing. At the same time, we learnt all about mechanics and requirements for obtaining a quality product or solution. I graduated as an electronics engineer, but my brother continued to work in high-precision machining of mechanical parts.

ALBERT NAZAROV

Naval architect and designer



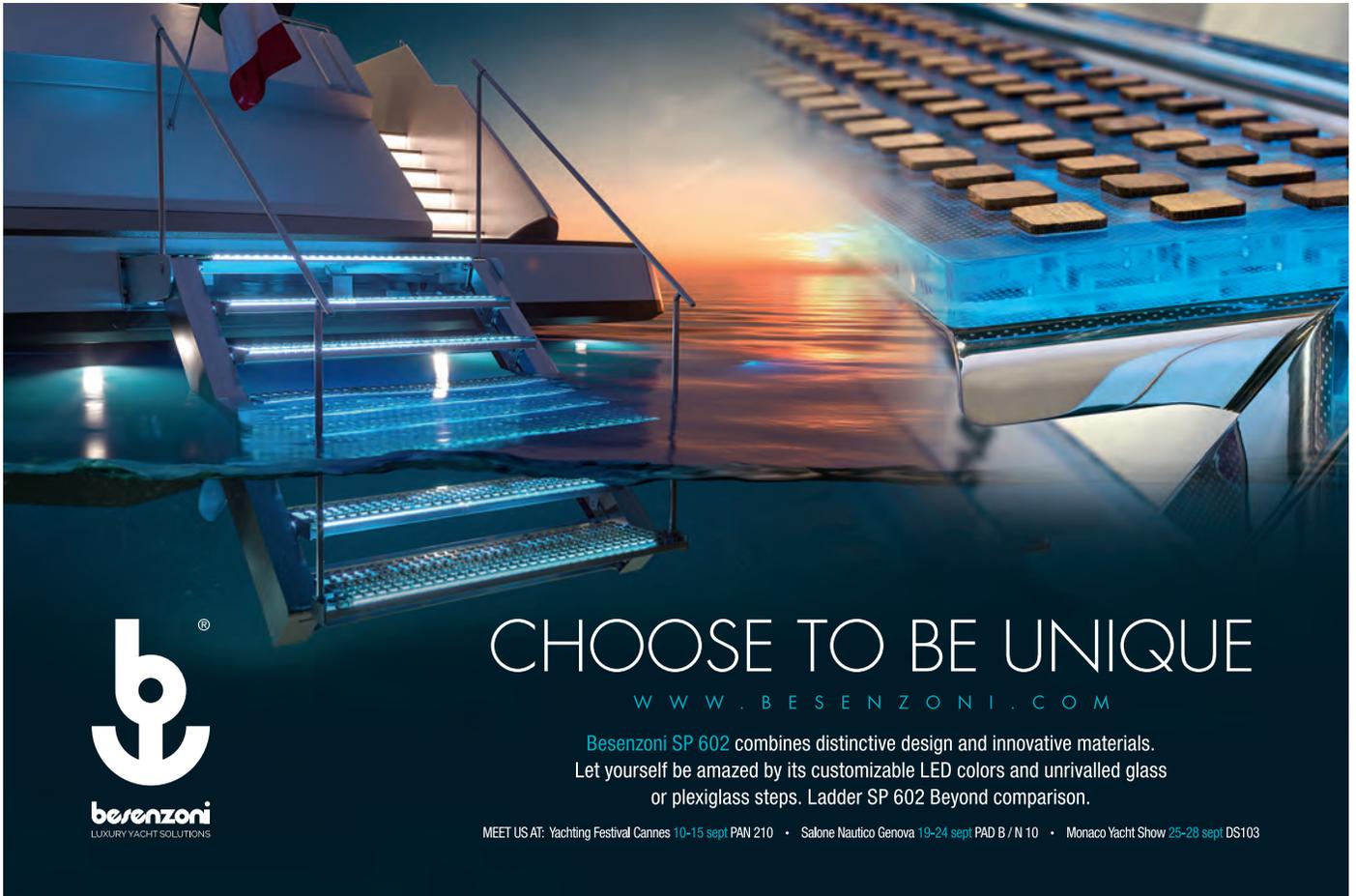
Doctor Albert Nazarov graduated as naval architect from the naval technology faculty at the University of Sebastopol in 1996. In 1999 he won an award in an international competition for yacht design in the United Kingdom. The Russian naval architect then opened his own naval engineering firm. In May 2004, he completed a doctorate on the manoeuvre and performance of sailing vessels, which led to new simulation software on the behaviour and manoeuvrability of sailing boats. Nazarov also studied art and design for five years, which explains his particularly aesthetic approach to sailing. A keen sailor (sail and motor), he has a yacht captain's licence and a skipper certificate for IYT Bareboat. He is manager of Albatros Marine Design (located in Thailand), and has designed some 50 catamarans and fast launches for the Asian market. He also designed the XP980, the press boat for the finish of the Volvo Ocean Race in Stockholm.



SPECIFICATIONS AMASEA 84FT/25M

- LENGTH (EXCLUDING HULL)** 25.45m
- LENGTH OF HULL** 23.76m
- LENGTH** 10.98m
- DRAUGHT** 1.79m
- AIR DRAFT** 12.31m
- WEIGHT** 130 tonnes
- ENGINES** 2x 1920hp MTU 10V2000 M96
- PASSENGERS/CREW** 20
- PRICE** from €7.5m





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◀ Stephen Heese at the Chris-Craft helm

President and CEO Stephen Heese remains firmly at the helm of the company that he and partner Stephen Julius rescued from the ashes of the Outboard Marine Corporation bankruptcy 18 years ago. He spoke with *IBI* in early July as Chris-Craft unveiled its 2020 model year lineup and prepared to celebrate 145 years in the recreational boating business.

It's been 13 months since the acquisition by Winnebago. How are things progressing? Winnebago have proven to be a wonderful parent company. They're passionate about quality and service, and with an equal emphasis on building win-win relationships with their dealers and end-users. That's something which fits very closely with our own core values.

When we negotiated the acquisition, we felt that Winnebago would be a very strong steward of our brand and people, and that they would continue to build on the company's reputation and legacy. They've demonstrated their track record in doing that, and it's been wonderful. Our whole management team remains in place, and we're accelerating our product development plan as scheduled.

Chris-Craft wasn't for sale. But we got to know the senior management team at Winnebago, and we came to realise that both our companies were essentially in the same business, building positive relationships with dealers, building great products, looking after the retail customer, looking after our people, looking after the environment and the communities where we operate.

Having built our company out of the OMC bankruptcy in 2001, Chris-Craft is something that we continue to hold near and dear. But the simple fact is, none of us are getting any younger and even if your company is your family, you know that one day you're going to have to sell it. You can't just auction it off to the highest bidder, because it is your family, and you're making a decision that will impact your entire team. We felt that the leaders at Winnebago shared our values so closely that they would look after our people, our customers, and our brand just as we have. We felt there was a natural fit,

"I'm fairly obsessed by how consumer tastes are evolving"

CHRIS-CRAFT'S PRESIDENT AND CEO SPEAKS WITH *IBI* ABOUT SALES TRENDS, WORKING WITH WINNEBAGO AND WHAT THE FUTURE HOLDS AS THE ICONIC US BOATBUILDER CELEBRATES 145 YEARS IN BUSINESS

WORDS: CRAIG RITCHIE

Celebrating its 145th anniversary with the 2020 model year, the senior management team at Chris-Craft Boats was in a particularly festive mood in early July as the company welcomed dealers, VIP customers and media to its Summer Showcase buying event in Sarasota, Florida. It's been a little over a full year since the iconic US fibreglass boat builder came under new ownership, following its June 2018 acquisition by recreational vehicle manufacturer Winnebago Inc.

At the time of the acquisition Winnebago, which is publicly traded on the New York Stock Exchange, committed to investing in Chris-Craft with a view to making the premium brand more accessible, including a commitment to broaden the scope of its product portfolio to include more small boats. Fittingly, new models for Chris-Craft's 2020 model year include a 25ft Launch GT model with outboard power and, perhaps even more surprisingly, a Launch 28 GT Surf Edition – the first Chris-Craft designed specifically with wakesurfing in mind.

and that was really the compelling reason for doing the transaction. Because you get to a point in your life where it's not only about making money. You want to do the right thing by the people that have worked so hard with you to build the company. Boat building is a team sport.

How involved is Winnebago in the day-to-day operation of Chris-Craft?

I think they've determined where they can add value to the business. They've helped us with our production, they've helped us with our capacity planning. We're building a new facility on our property, and they've helped with that design. They've brought another level of professionalism to the table. We could have done these jobs, but we couldn't have done them as professionally nor in the same timeframe. Having Winnebago as a parent company allowed us to stay focused on what we do best, which is designing and building boats.

You mentioned a facility expansion. Can you tell us a bit more about that?

We have site plan approval to build 80,000ft² of manufacturing space in the back yard of our property. We already have planning permission from our county, and we're now just in the design and planning phase. We're probably going to break ground in January. The existing plant, including movable tents in the back yard, is about 200,000ft² so it's a big jump. Construction should take around eight months, and we're targeting having the expansion up and running for August or September of 2020. As that unfolds, we'll need to add another 100 to 120 employees over the next couple of years.

We build four product lines and each of line has open spaces, so we're going to be able to fill gaps in the lines with new models that we don't presently offer. Having the backing of Winnebago means we're going to be able to do that faster than we otherwise could have, so that's obviously a big positive. We need the manufacturing space if we're going to meet our future growth targets.

Are Chris-Craft's current sales being driven by domestic or international markets?

Tariffs have significantly impacted our international sales, as they have for every

US boatbuilder. Canada dropped its 10% tariff on US boats in May, but that timing wasn't especially helpful for this year since it was already so far into the boating season by then. Europe has historically been a big part of our business and that has been negatively impacted by the 25% tariff in place there. We're still making sales in Europe on the strength of the product design and quality, but obviously at a reduced level. Fortunately the rest of the world, and particularly the US domestic market, have picked up the slack so we're still growing nicely.

Is that strong domestic business being driven by the new outboard-powered models?

The US and Canada are countries that have long traditions of fresh-water boating. The fresh-water boaters still prefer sterndrive power, where the salt-water boaters have largely preferred outboards. There's a little bit of crossover but by and large, fresh-water markets are mostly sterndrive, and the salt-water market has gone primarily outboard.

Does that split also hold true for Chris-Craft's export sales?

Not at all, our international buyers mainly want sterndrives. My sense is that outboard power is viewed differently in global markets. In many places they're most commonly seen on RIBs. Few other countries have a tradition of outboard-powered fiberglass center consoles the way we do in the US, so the association between outboards and other styles of boats may not be so well-established outside of North America.

That would certainly be the case for the yacht tender market that Chris-Craft has been so successful in.

That's a fun part of our business because unlike making a traditional retail sale through a dealer, there's almost always some amount of additional engineering required in a tender, incorporating elements like special lifting rings, fold-down windshields, or things like special steps, hand rails or boarding rails. We recently sold a 30-footer as a tender for a customer's 300ft superyacht, which included provisions so it could be lifted from and lowered to the water from a

deck crane. Watching that boat get launched from the yacht was one of the coolest things I've ever seen in my life. The yacht captain set a marble on the tender's deck, and as this 11,000-pound boat got cantilevered out over the water, the marble didn't even move. It was just an amazing thing to watch.

It sounds like you're still having a lot of fun at this.

I'm still enjoying every moment. I'm in the office at seven and I can't imagine not being here. There's honestly no place I'd rather be.

There's still a lot of 50-, 60-, even 70- and 80-year old Chris-Craft boats out there on the water. With that kind of heritage, you really feel a sense of responsibility to the brand. We take that sense of stewardship very seriously and we want to leave our mark, so that 80 years from now the boats that we're building today are equally cherished and lovingly maintained.

We live in a particularly dynamic time and from a product standpoint, I'm fairly obsessed with how consumer tastes and shopping habits are evolving. We're seeing people spending more and more hours on our website, shopping. Not that long ago, even 10 years ago, they spent the day at the boat show talking to manufacturers, talking to sales people, talking to the engine companies, talking to the electronics companies, talking to the navigation companies and putting it all together in their minds. Today, while they still come to shows, we're seeing a lot more engagement on our website. That's how today's consumers want to learn and to do things – on their schedule, and on their time.

Last year I bought a new truck, and I did all of my homework online. I called the dealer, he gave me a price, and I bought the truck. And I did almost all of that when I wanted to do it, which was in the evenings after everyone was in bed. So, this is the world we're living in today. We are all striving to better serve the customer's needs, whether that's in the form of innovative designs and appealing new models, or adding value by making it easy for the customer to find the information they need to buy their boat. **IBI**



◀ Automatic docking has arrived, as demonstrated on this 68ft Azimut equipped by Volvo Penta. The systems are now being refined as part of Volvo's 'easy boating' philosophy ready for a first phase launch in 2020

▼ Joystick controls, as seen here with Mercury Marine's Skyhook-equipped version, are now available for nearly all types of steerable propulsion, including large outboards



STEERING & TRANSMISSION

WITH A HUGE RISE IN THE POPULARITY OF STEER-BY-WIRE, DIRECTIONAL PODS AND THE ARRIVAL OF ALL-ELECTRIC ENGINE ROOMS, WE LOOK AT THE MOST RECENT DEVELOPMENTS IN THE DRIVE TRAIN, INCLUDING THE ABILITY TO AUTO-DOCK

WORDS: JAKE KAVANAGH

MACHINERY IN EVERY APPLICATION is becoming smarter, more fuel efficient and easier to use, and steering and transmission systems are no exception. At this year's round of Autumn boat and trade shows, visitors will have a feast of new systems available to make their boats even easier to handle.

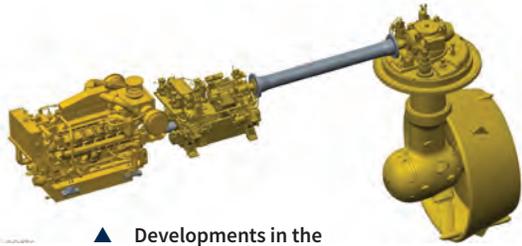
Whether the application is leisure, commercial or sub-sea, in recent years there have been a number of significant developments to convert more energy into thrust – especially for precision manoeuvres. Not only are gearboxes, propellers and rudders being improved in themselves, but also in the way they are used. Thanks to advances in positional electronics, boats can be easily controlled by simple joystick or handed over to a computer for auto-docking. Whilst some

may think this takes some of the fun out of boating, others believe it greatly increases safety and opens the pastime up to a whole new audience.

Many of the innovations *IBI* has witnessed have filtered down from the merchant marine, defence and energy sectors, where there is a constant crusade to cut costs, particularly when it comes to fuel consumption and maintenance stops. Companies are at pains to maximise efficiency at the propeller, whilst the big move towards electric and fully-autonomous ships has focussed research on steerable pods and long-range batteries. Some relatively simple modifications to a ship's stern gear, for example, can return energy savings of up to 20%, paying back the investment within a few months of service.

For the leisure sector, a greater use of electric steering and a quantum leap in sensor technology has allowed for autodocking systems that not only sense the boats position, but also cross-check visually between land and water using 3D cameras. Propulsion and steering are also merging in the form of an increasing range of steerable pods, all of which add greatly to precision manoeuvres by computer.

ULTRAFLEX soon introducing Integra EPS



▲ Developments in the commercial sector, such as this new Advanced Variable Drive from Caterpillar, usually find their way into leisure marine. The new hydraulic gearbox can be switched between different energy sources to become ‘a highly optimised, lower-cost alternative to conventional electric hybrid systems. It has similar benefits such as improved performance, lower noise and lower emissions

Here are some of the developments you will be seeing at the forthcoming shows, with insight from leading industry professionals as to what the future may hold.

IMPROVING THE GEAR CHANGE

Engines themselves have become far more efficient thanks to computer control and common rail injection, and marine hybrids are also making an impact in the commercial sector. But any engine is only as good as its drive train, and here there have been some exciting developments in transferring more power into the water and using it for steering.

With the exception of a water jet, which uses a bucket system for reverse, a marine combustion engine will require some kind of gearbox, either attached to the engine itself, or located within the drive leg or pod.

The big problem with marine engines, especially as they get larger, is how to smoothly engage the power at tick-over, especially if swinging a large and heavy propeller. Also, how do you bleed off revs to run at very low speed?

Several companies have been very active recently in making this power transfer not only very smooth, but also available at very low speeds to greatly aid close quarters boat handling or trolling. This has partly been encouraged by auto docking, which needs seamless gear changes and an unstressed drive train.

One solution has come from Germany-based ZF, a leader in the field of marine gearboxes, which launched its new ZF 400 family of transmissions for seagoing vessels at last year’s METSTRADE. At this year’s event, it will be revealing the latest



▲ Adding to its 100 years of transmission manufacture, ZF will be revealing its new ZF400 IV generation of marine transmissions at METSTRADE. The new gearbox features Supershift 2 technology for seamless gear changes in commercial and leisure applications

generation, the ZF 400 IV, which features Supershift 2 gear change technology. This is described as an ‘improved clutch pack design which negates the need for an additional hydraulic circuit and is available for all ZF gearboxes. This results in fast shifting response and smooth gear changes even at low speed.’

ZF says the new 400 model system is rated up to 735kW (1,000hp) and covers a wide range of ratios and configurations.

“Since it can be installed in either a down-angle, integrated V, remote V or parallel configuration (also available for work vessels) customers enjoy great flexibility when designing or retrofitting motorized vessels, such as yachts or fishing boats,” ZF told *IBI*. “With a power density of up to 0.3195kW/rpm (0.4282hp/rpm), the ZF 400 is the perfect fit for a broad range of recreational and commercial applications. The Supershift 2 system returns a 35% faster clutch disengagement with 30% less peak torque. It can also be combined with ZF’s standard trolling valve options, such as Autotroll.”

Perhaps the most striking feature, as demonstrated in a video recorded at the test lab, is the lack of the heavy ‘clunk’ that a traditional transmission makes when engaged. The ZF 400 is silky smooth.

Volvo Penta has also developed a ‘clunkless’ gearbox for its new electro-hydraulically steered DPI outdrives, again with an eye on the needs of the computer-driven boat. At Gothenburg this year, the company unveiled its re-engineered diesels and drives, which have together logged over 40,000 hours of testing.

“We identified a number of customer values, critical to success,” said Volvo ➔

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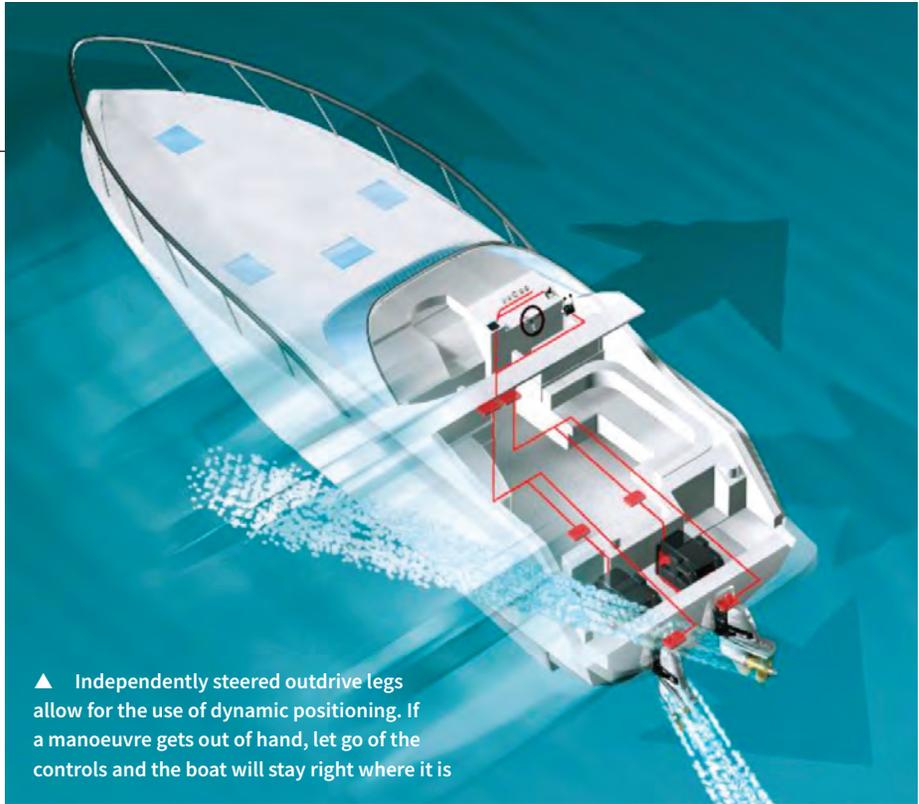
▲ Volvo Penta's new DPI drive can now move independently of its partner in dual installations, thanks to electro-hydraulic steering

Penta's sterndrive specialist Jacob Claesson. "These included total cost of ownership, a high degree of comfort and what we call 'easy boating'. When you drive via a DPI outdrive leg it should be smooth and silent from forward to reverse. The old characteristic 'clunk' is now history. This was made possible by taking out the cone clutch and replacing it with a well-proven hydraulic disc clutch from the IPS systems. The result is silent shifting and a low speed mode for manoeuvring. By pushing a button on the joystick, you now have a low-speed mode offering 50% of idle rpm speed."

The lifecycle of the leg has been improved by adding a gearbox oil filter, but the most significant change is the

JEAN-BAPTISTE POUSSEZ, SNR LECTURER
SOLENT UNIVERSITY

There is a greater need now to reduce man-made underwater noise as the impact it has on marine ecosystems is just being realised



▲ Independently steered outdrive legs allow for the use of dynamic positioning. If a manoeuvre gets out of hand, let go of the controls and the boat will stay right where it is

steer-by-wire facility, now standard on each new unit. "This is a completely new electro-hydraulic steering system," Claesson explained. "The pump unit, ancillary hardware and software are now part of the transom assembly – purged and ready to install. There is no need to run hoses from pumps at the helm. It is literally plug and play. Because of the hydraulic clutch and independent movement of each leg, dual or triple installations can now be used with the Dynamic Positioning System (DPS). This allows the boat to be held over an exact spot irrespective of wind and tide and is a key component of auto-docking."

THE QUIET REVOLUTION

The comfort factor promoted by Volvo Penta is increasingly important when designing transmissions. Nobody wants a noisy boat.

"The marine industry is under great pressure to reduce pollution, which most people would associate with exhaust gasses," said Jean-Baptiste Poussez, a senior lecturer in yacht design at Southampton's Solent University. "In fact, an underestimated and overlooked polluter is the noise and vibration from a boat's power train. There is a greater need now to reduce man-made underwater noise as the impact it has on marine ecosystems is now only just being realised. A noisy commercial installation can drive a species out of an area, affecting their ability to communicate

and locate food, threatening entire ecosystems. In Canada, they refer to 'whale-friendly' equipment, as these creatures are very sensitive to underwater noise."

Noise can also be transmitted into the boat via poor engine mounts or gear couplings, setting up invasive resonance that is wearing on the crew. In the superyacht sector especially, the emphasis on a quiet ship is now paramount. At last year's Cannes Yacht Festival, for example, Turkey-based Numarine proudly described their latest 40m yacht as being 'quieter than a public library when underway'.

Research continues into how to cut vibration and noise to a minimum, and there are already several cost-effective ways to do this. The first is to put a flexible coupling between the shaft and the gearbox, such as those provided by R&D Marine, Vetus, Aquadrive, Macour and SPW (GmbH) to name but a few. These absorb small misalignments between the engine and shaft and also allow for temporary distortion due to changes in loading.

"Flexible couplings not only reduce vibration, but they also act as a kind of safety system," explained Alex Frith, the MD of R&D Marine. His UK-based company specialises almost exclusively in this field.

"If you hit a submerged object, the impact will be taken mostly by the coupling, rather than the gearbox. Two steel straps continue to hold the coupling together ➡

ULTRAFLEX soon introducing Integra EPS

INTEGRA EPS

Next season Ultraflex® is going to release its ultimate steering systems featuring better performance greater reliability and a lot of new features.

Integra EPS satisfies, increasing horse power and higher torque, solving current issues of power consumption, noise, thermal overload and allowing autopilot integration.

Integra EPS highly simplifies installations, most notably multiple engine ones and dual stations which remain a concern at the boat builder level.

Integra EPS is the next generation of steering allowing user to define steering parameters to enhance power efficiency using a brushless motor and to support the end user with real time diagnostic feedback integrated with the smart ecosystem of the boat.



afterwards, so the boat can still make a safe port under reduced power. As such, we sell a lot of units to commercial fishermen. They often get ropes around their propellers and these couplings help prevent damage to the transmission. Many carry a spare coupling as they are relatively easy to swap out.”

The coupling itself is made from a time-proven elastic polymer, which Frith explains is more effective than rubber. “Rubber is more prone to heat and solvents, which is why our material meets all commercial standards such as DNV-GL and Lloyds,” he said.

Another advantage of the flexible coupling is the effect on noise pollution.

“A flexible coupling also helps to reduce resonance. No two production boats are the same when it comes to harmonics – there will be different vibrations at different speeds. Recently, when the tolerances on shafts and gearboxes became much more precise, builders began to dispense with flexible couplings and other anti-vibration devices. However, they soon

realised that this simply increased noise within the hull.”

CONVENTIONAL SYSTEMS

There are a lot of internal forces acting on a boat’s engine. The three main vibrations are described as longitudinal, axial and torsional, all the result of the rotating forces within the engine itself. Big ship

engines have to use a hydraulic ram to push against the twisting (torsional) forces as the engine accelerates. In addition, there is the movement of the hull in a seaway, which has its own inertia, and finally the effects of the thrust of the propeller pushing or pulling the engine on its flexible feet.

“The all-in one system has opened builders’ eyes as to what is available as an alternative to a pod drive or conventional shafting”

One solution has been to transfer this push and pull onto a separate thrust plate, so the hull takes the power and not the gearbox. This has been pioneered by the Aquadrive assembly distributed by Halyard Marine, where a thrust plate works in conjunction with a flexible coupling.

A more recent innovation for shaft drives has been the US-based Seatorque Propulsion System, which provides an

entire drive train including a built-in bearing housing as a single, easy-to-install unit. The assembly also removes the need for dripless seals, stuffing boxes and cutlass bearings, and in some cases the need for an intermediate P-bracket. Everything is pre-packaged and ready to fit.

“We hit the market at about the same time as the arrival of pod drives,” said Jana Stolper, Seatorque’s vice president. “We actually market our product along much the same lines. The all-in-one system has opened boatbuilder’s eyes as to what is available as an alternative to a pod drive or conventional shafting. A lot of noise in a standard shaft system comes from the interconnected parts – different bits of equipment from various manufacturers all added to the mix. But our system is efficient because it is one unit that is fully encapsulated, eliminating the causes of driveline noise and vibration rather than just placating them. We often hear OEMs tell us how quiet their boats have become.”

Stolper accepts that her encapsulated system is more expensive than an assembly of various off-the-shelf products, but soon pays back in fewer man hours needed for an installation and the ongoing fuel savings due to mechanical efficiency.

“The shaft is supported longitudinally in a non-rotating outer casing and mounted to the hull using bushings, which are soft but still fully watertight,” she explained. “The shaft casing is oil-filled and only needs a seal and oil change every 5 years or 3,000 hours. For an OEM, a Seatorque assembly can save up to 2/3rds of the engineering production time, whilst also eliminating the alignment issues seen during a standard shaft system installation. We also offer a full international warranty and support.”

The Seatorque system is hybrid compatible and Stolper says the company has already completed some electric boat conversions.

“The system is also joystick ready

◀ The US Seatorque system is claimed to save up to two-thirds of installation hours by providing the whole shaft assembly as one complete piece of equipment. Note the gold-coloured housing which minimises noise and vibration and also helps with fuel economy



ULTRAFLEX soon introducing Integra EPS

► Italy-based Transfluid leverages its expertise in complex mining and commercial installations to provide highly-dependable transmission system. It recently acquired Bellmarine to supply ultra-silent electric propulsion systems to the tripping boats of Amsterdam, where marine combustion engines are banned

and offers superb handling,” she said. “A Seatorque is a whole package, from transmission to propeller and can include optional engine mounts. We are finding a strong market in larger yachts, especially superyachts and the explorer types, mainly due to the low noise, better fuel consumption and total reliability.”

Another company with a foot in both the traditional and advanced transmission camps is Italy-based Transfluid.

“At the core of what we produce are highly dependable transmissions,” said CEO Ugo Pavesi. “For example, we supply fluid couplings to the tourist boats in Venice. These have to be very robust and they mechanically engage and disengage in both forward and reverse hundreds of times a day. We also have a lot of expertise from the wind energy market, where fluid couplings are used to dampen the sudden acceleration from wind gusts.”

Pavesi is convinced that solutions needed in other industries, especially those where failure is not an option, such as deep core mining, can greatly benefit the marine industry.

“Because we also supply heavy industry, we are able to easily adapt other types of electro, hydraulic and mechanical machinery. The marine sector accounts for no more than 15% of our total sales but is relatively easy for us to address. The mechanics needed to drive a propeller are far more straight forward than a complex set of conveyor belts, articulating arms and caterpillar tracks. However, we are also able to pass on the same level of reliability to our marine customers that is demanded by operators using our machinery in a hard-to-access working environment, such as deep underground. This is why we supply drive systems to top brands such as Royal Huisman.”

ELECTRIC STEERING FOR OUTBOARDS

There has been something of a blurring of the lines between propulsion and steering as some pods are now able to turn through a full 360 degrees. In addition, rudders ➡



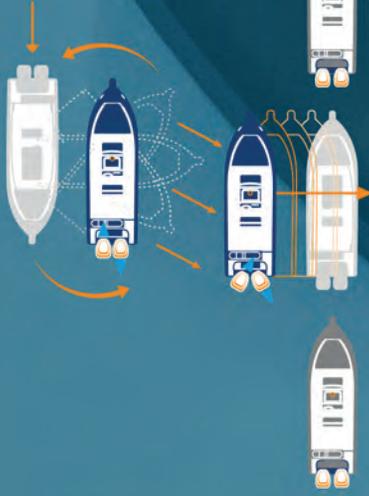
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▲ Ultraflex has developed a new steer-by-wire system to complement its successful range of outboard steering rams

have also become more flexible, articulated and able to operate independently when installed as a pair.

This has encouraged several marine companies who specialise in more traditional cable and hydraulic systems to explore the possibilities of switching to electric actuation, safe in the knowledge that they can retrofit onto existing hydraulic installations.

Ultraflex, a European leader in this field, is a good example. “We have been working on a number of new products, most notably our new steer-by-wire system,” said Ultraflex’s CEO Piero Gai. “The system will be electronic and work via CAN bus communication. Our solution, named Integra, certainly suits the outboard market, especially above 175hp. Outboards continue to grow in size, and now 450hp are becoming more and more frequent installations.”

Gai sees the main challenge for OEMs is to create high-end solutions that offer something ‘new and feature-packed’ whilst also remaining affordable.

“We are currently working with engine manufacturers to develop our systems to fully interface with all types of installations on the market,” he said. “The marine industry needs to emulate the car industry where products can connect seamlessly with other protocols. This is what we have done in our steering systems, including the

▼ Seastar’s new Optimus steering system is designed to replace existing hydraulic rams with a completely integral plug and play unit. Power comes from a brushless DC motor whilst an electronic brain allows the steering to be fully customised



ability to remote connect via an app. This is our main message to the market – we can offer a personalised system that will be fully compatible with an OEMs own protocols to provide a seamless package for full electronic control.

“Our new system will be able to compete with the best of them, and will be exhibited this autumn at IBEX, Genoa and METSTRADE.”

Also addressing the burgeoning market for outboard-powered boats is US-based Seastar, part of the giant Dometic Group, which introduced its new Optimus Steering Actuator in February of this year. The new unit is an electro-hydraulic ram assembly that is designed to directly replace the existing Seastar hydraulic cylinder to give a

steer-by-wire response that is ‘immediate, smooth and precise – and customisable’. The Electronic Control Module (ECM) has been transplanted onto the housing itself so the new unit is essentially ‘plug and play’ with Seastar’s Seaways autopilot and Seastation GPS anchoring facility built in. Seastar says the new model ‘eliminates the need for separately-mounted hydraulic actuators used in the Optimus Joystick and EPS systems. This means no more Pump Control Module, no more hydraulic pump, no more hoses, hydraulic cylinders and fluid, and no more purging the system.’

ELECTRIC STEERING FOR SUPERYACHTS

CMC, a major Italian manufacturer of stabilisers and thrusters for the superyacht market has developed its own fully electric steering system called Directa, which is also designed to work with all the main protocols in the marine market.

CEO Alessandro Capiello told *IBI* that he could see the world becoming increasingly electric, with the main indicator being the automotive sector.

“About 10 years ago we decided to move from using hydraulic systems to electric,” he said. “We began with our stabiliser units and then moved to electric thrusters. We have long had the idea for integrated system control, where all the underwater foiling surfaces work together to give a comfortable ride. Around 5 years ago we had an idea for electric steering, with very specific applications. During the R&D phase, we moved from DC power to AC. On board larger yachts and ships, AC is ➔



▲ Even the smallest engines can be catered for. Garmin’s Reactor 40 Kicker autopilot allows the owners of gasoline outboards up to 20hp to have full autopilot functions, including access via a floating handheld wireless remote. The system can also be inked to Garmin or other compatible chartplotters via an NMEA2000 interface

ULTRAFLEX soon introducing Integra EPS



YACHTING FESTIVAL CANNES 10-15 September Stand PAN 359	Boat Show Southampton SOUTHAMPTON 13-22 September Stand J359	Sint GENOVA - ITALY 18-24 September B - Stand P16-015 and Superyacht Area	IBEX TAMPA FL - USA 1-3 October Stand 3-1547
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MC² Quick Gyro stabilizer, developed by Quick, can reduce the boat roll up to 95%. As result of great experience, research and technological innovation, it is equipped with a mass revolving around a horizontal axis. This solution results in lower mechanical stress, less friction and therefore lower heat output.



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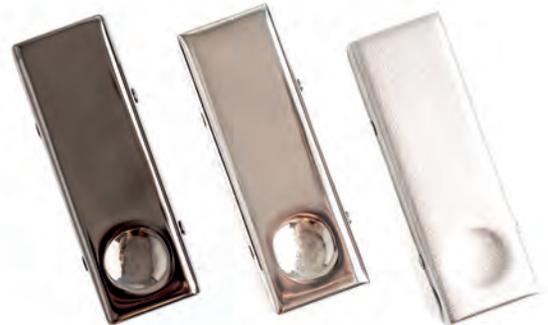
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▲ CMC's CEO Alessandro Capiello predicted the move towards all-electric marine systems

a better power source, but we kept a DC option for emergencies."

CMC was approached by a major customer, San Lorenzo Yachts, and the collaboration resulted in Directa being able to run two rudders independently and in a way that greatly enhanced docking. The company has now supplied the Directa system to hundreds of yachts, including a 50m superyacht along with all of San Lorenzo's GRP models from 72ft-126ft.

"Oddly, the biggest challenge for us was the lack of regulation for class approval," Capiello said. "Electric steering had no comparisons, so the rules didn't exist. We worked with RINA and ABS to actual make



▲ CMC's all-electric steering runs from an AC source with DC capability for emergencies. The system allows twin rudders to be worked independently, providing a far greater range of docking options

▼ Ultraflex responded to the trend for ever larger outboards and the need for independent steering when they designed their new system



the rules so compliance would be possible. We have also ensured that our protocols can communicate with all the main players, such as Raymarine, Furuno, Garmin and so on. The key is how quickly the system can refresh the data from the various inputs, so we have put a lot of research into the refresh-rate time factor. This has made the system as responsive as possible."

CABLE STILL HAS A ROLE

Whilst electric steering a joystick control is enjoying a greater market share, many OEMs are still more comfortable with the tried and trusted cable and hydraulic systems. Companies like US-based Edison, Sweden-based Jefa, UK-based Lewmar and the Italian companies of Transfluid and Ultraflex still supply efficient mechanical and hydraulic steering systems, although most also offer electronic alternatives.

"We've noticed that mechanical systems are now making a much lower percentage of our sales, whereas our share of hydraulic electronic systems is growing," said Ultraflex's CEO Piero Gai.

"However, many boatbuilders still want steering cables that are low maintenance and yet highly flexible, and able to take tight corners. Our Fourtech system is a typical example, and a great performer."

Armein Heisler, who has worked in the steering industry for 27 years, primarily with US-based Whitlock and then with Norway-based Jefa, agrees that for some OEMs, a simple mechanical system is preferred.



▲ A conventional twin wheel cable steering system from Jefa, which the company says 'gives far greater feedback at the wheel for serious sailors.' Note the autopilot drive, which is a major part of Jefa's business

"Whilst hydraulic steering is very effective in powerboats, we see that yachtsmen prefer mechanical linkages, as you get to feel every drop of water that flows past the rudder," he told *IBI*. "At night, you can't see the wind effects or the wave patterns, so you rely heavily on the feedback through the wheel. I explain to customers that it's like driving a car at 150mph on the Autobahn. All cars have mechanical steering, albeit power assisted, so you can feel every twitch and bump in the road and correct accordingly. This keeps you safe. But if you drove a car with hydraulic steering, with its 'dead' feel at that speed, you would soon lose control and crash."

Jefa supplies most of the sailing yacht OEMs on the market, with a third of their turnover in autopilot drives. The company has proactively responded to the trend for wide transoms and twin rudder set-ups in cruising yachts. "We have also seen a steady increase in catamarans sales," said factory manager Stig Jensen. "These boats require long cable and rod runs, where we have seen a big leap in demand."

Hydraulic systems continue to be favoured by powerboat enthusiasts and have become even more compact, dependable and responsive.

"We have recently launched Navitech, an electromechanical system that makes steering very precise and easy to set," said Ultraflex's Piero Gai. "We have had a lot of interest from the ski boat market. Other developments include a new design of hydraulic cylinder, the UC130SVS,

ULTRAFLEX soon introducing Integra EPS

which provides OEMs with a very clean installation. The system has been designed for the most demanding applications, particularly when coupled with our new family of tie bars. Despite the big advances in steer-by-wire, we are still developing the basic mechanical and hydraulic versions of steering cable. The new T91 and T93 remain at the top of the range, offering 4.2 turns lock-to-lock, and offers an inexpensive steering solution.”

Whilst cable steering systems remain fairly simple in their design, the autopilot systems that bolt to the mechanisms are increasingly more powerful and responsive. A major manufacturer is CMP (Canada Metal Pacific Ltd) whose Octopus and Intellisteer brands provide most of the marine industry’s leading autopilot manufacturers with drives.

“Autopilot drives can be considered the ‘dumb’ muscles,” said Octopus’s Gary Notembomer. “We hold patents on several unique devices that enhance drive performance. In all instances, they are subject to wear over time, and the frequency of the service or replacement depends on the kind of use they get and the environment they are working in.”

THE IMPACT OF HYBRID

Hybrid systems are making their presence felt in the leisure industry and come in two forms. A serial system has the electric motor located separately from a generator, whereas parallel piggy backs the motor onto the engine via a clutch. The big advantage of a hybrid system is the way the propulsion can be harnessed into the drive train. As reported in last month’s issue, a great example is ZF’s new S2-E electric sail drive, with a full 360-degree arc of rotation and very low speed capability. In some hybrid installations, the combustion engine can also be disengaged, and docking done gently by spinning the prop electrically.

A company that has successfully supplied several hybrid options to its transmissions, most notably in two pilot boats and in the Bavaria E40 project, is Italy-based Transfluid. The company recently acquired Netherlands-based electric motor company Bellmarine, and has invested heavily in hybrid transmissions, mainly for commercial applications.

“We are following with great interest how boatbuilders are addressing the electric market,” said CEO Ugo Pavesi. “There ➔

“Autopilot drives can be considered the ‘dumb’ muscles. We hold patents on several unique devices that enhance drive performance”



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is a big difference between pleasure and commercial applications. The pleasure boat owner will go electric mainly due to their concern for the environment. However, the commercial customer uses it to save money, reduce pollution, and give the vessel a degree of redundancy. There is also the safety aspect of having an entirely separate energy source to fall back on.”

COMPUTER AS HELMSMAN

The ability to hand the steering and transmission over to a cool-headed computer has appealed to many potential boat owners especially those with self-parking cars. They have no wish to compete with a cross wind and tidal rip whilst also avoiding damage to other boats.

Coming to their rescue are a range of projects that can now harness the gentle gear changes and low power thrust of electric motors or by-passed hydraulic gearboxes to nudge the boat alongside.

Already ahead of the curve is Volvo Penta, which bravely launched its self-docking system to a large audience during the Gothenburg stop of the 2018 Volvo Ocean Race. The 68ft test boat made an accurate, if highly cautious, approach into a narrow gap between two £ multi-million yachts and docked successfully stern-to. Since then Volvo has been refining the system and adding additional cameras and sensors so that the computer can distinguish between soft water and hard land.

IBI had another impressive demonstration at the Volvo test facility near Gothenburg this year. The same IPS equipped 30-ton Azimut – now with upgraded sensors – backed itself successfully alongside despite a brisk cross wind.

The man in charge of the self-docking programme, Anders Thorin, explained that Volvo has approached the challenge in a series of achievable steps, the first being to assist the driver with docking. The final step will be handing over complete control to AI.

“The self-docking demo gave us an opportunity to engage with a wide array of stakeholders,” explained Thorin. “Reflecting on their input strengthened our convictions that there is a big interested in functions



▲ Modern 3D ‘stereo’ cameras are key to allowing auto-docking to visualise and identify its surroundings. They have been specially adapted to cope with a saltwater environment

that assist boaters, not only fully automated docking but also driver assistance for all kinds of situations such as lock queues or restricted passages.”

The stepwise approach is mainly to allow sensor technology to mature sufficiently to build complete trust between the customer and the interface. These include the Dynamic Positioning System, available since 2009 but now being refined to better help with close quarters handling. The use of cameras and sensors will then lead to the second stage, which is hazard avoidance. The third phase will be fully automatic docking without the need for shore-based transponders, so in theory any quayside or dock will be accessible, rather than those specially equipped by participating marinas.

However, Volvo Penta is already facing competition from other concepts, such



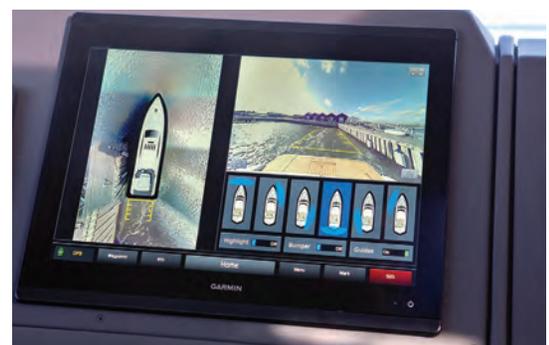
▲ Raymarine’s Jim Hands likens joystick control to drone flying. Intuitive – with good visual feedback

as the new DockSense system from Raymarine. “Autopilots nowadays are what we call ‘mature tech’,” explained Jim Hands, Raymarine’s director of marketing. “The technology is well proven and dependable. However, autopilots are being

‘re-evolved’ to be even more sensitive and intuitive. The most recent development for us has been the new Attitude Heading Reference Sensor, or AHRS. Basically, this uses solid state gyros, similar to those in current mobile phone technology. We have incorporated this into our new system called Raymarine Evolution. This employs advanced gyro tech coupled to a lot of very clever software. This allows the helmsman – or autopilot – to steer more efficiently.

“Evolution not only monitors the heading, but also the yaw and pitch. The system can also compensate for torque and prop walk, particularly noticeable on a single-outboard set up. The result is much sharper steering, with no need for a separate rudder sensor. Evolution can work with either steer-by-wire or a more traditional hydraulic system.”

Both Volvo and Raymarine have used rugged marine versions of stereo vision cameras to determine a targets size, distance and type (land or water) with great accuracy. These cameras are positioned strategically around the boat and are equipped with automatic covers to protect the lenses.



▲ Volvo’s use of high quality cameras around the boat can give an accurate and measured view to either a human helmsman – or a docking computer

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Auto-docking systems are intended to be highly intuitive to use. You won't need to be a skilled helmsman to gently berth 20 tons of powerboat, and if things start to go wrong, let go of the controls and the system will quickly hold station.

"I've never piloted an aircraft or helicopter," Raymarine's Jim Hands explained. "But when I had the chance to fly a domestic drone, all it took was a little familiarisation with the twin joysticks. If you let go of them, the drone just stays where it is, and that is the same concept with DockSense. Let go, and dynamic positioning kicks in so the boat immediately stops moving. Then you – or the computer – can work out which way to go next."

DockSense was introduced at the Düsseldorf and Miami boat shows this year, where it has been trialled on a Prestige Yacht and a Boston Whaler. The system is currently being readied for market with additional partners to make it available on as many types of vessel as possible. Meanwhile, step 1 of the Volvo Penta programme, the 'Assist' stage, is set to be launched in 2020, and will involve some new components and software upgrades to allow existing systems to work in a more integrated way.

Both systems will operate through a multi-function display in the wheelhouse and could also be monitored from a tablet or phone.

LOOKING AHEAD

Marine electronics is a fast-moving market but the traditional methods of steering and transmission remain strong. Flexible cables and hydraulic pumps are also being improved as new materials and mechanisms become available, but most of the development work is heading towards joystick steering for everything from the smallest cruisers to the largest outboard-driven boats.

"Regardless of whatever type or number of drives you have and what kind of engines, the technology to harness them must be understandable for the user," said Volvo Penta's Product Manager Johan Wasterang. "The owner, whether highly experienced or a total novice, must be able to handle the boat in a good way. That is what the 'electronic vessel' system is all about. Our target is to offer a solution that is the same for every installation. So if you can drive one type of Penta boat, you can



▲ Although joystick stations can be placed anywhere on board, such as beside the aft cockpit, and is all that is needed for pilotage, steering wheel manufacturer Schmitt & Ongaro thinks the wheel will always be a major feature aboard. "It is the focus of the whole boat – an instrument emoting pride of ownership."

pretty much drive them all. That has been a major focus for us."

One technician even went as far as to say that future boats won't need a wheelhouse at all, as the whole boat could be controlled and monitored via a mobile device. Boats can already be docked via a wireless fob system such as produced by Sidepower. But Schmitt and Ongano, the makers of high-quality steering wheels, beg to differ.

"A boat's steering wheel is much more than just an implement to navigate with," the brochure suggests. "It is the helms focal point, the embodiment of personality. It is the interface between seafaring owners and their true passion in life. Potential boat buyers base their decisions largely on the tactile experience and aesthetic of where they will be spending most of their time – the wheelhouse."

As for where pleasure boating will be in ten year's time, industry specialists are fairly united around the theme of greater electrification, which in turns leads to more options for assisted pilotage and auto docking.

"We can see huge development in the systems that control a boat," said CMC's Allesandro Capiello. "There will be more remote operation, greater integration of all the boats systems and more reliance on auto-dock.

"However, we have decided to move away from hydraulics as we saw some time back that fully-electric systems were the future. They can save a lot of energy and offer a much better solution." **IBI** ➔

OUR THANKS TO: Key movers and shakers

STEERING SYSTEMS

CMC

Italian-based manufacturer of electric stabilisers, thrusters and steering systems, primarily for the large yacht and superyacht sectors, with a strong emphasis on R&D. Founded in 2005.
cmcmarine.com

Edson Marine

Established in Boston, USA in 1858, Edson manufactures complete steering systems including wheels and pedestals. It has a dedicated 'tiller to wheel' department to 'fit every sailboat ever made.'
edsonmarine.com

Jefa

Established in Copenhagen in 1980, Jefa provides complete steering systems, cable and hydraulic, for most of the major OEMs. It also manufactures rudders, replacement bearings and supplies autopilot installations.
jefa.com

Lewmar

UK-based manufacturer of steering systems established in 1946. Provides pedestals and pre-assembled cassette units for OEMs.
lewmar.com

Mavimare & Mancini

Italian manufacturer of hydraulic steering systems, established in Rozzano in 1968 and currently specialising in large outboard installations.
mavimare.com

Schmitt & Ongaro

Makers of a wide range of steering wheels and other steering accessories. Specialises in stainless steel. Founded in 1968 and based in the US with warehouses in Europe.
schmittongaromarine.com

Ultraflex

Italian-based manufacturer of steering systems, including cable, hydraulic and electro-hydraulic. Also manufactures steering wheels and controls. A US branch was established in 1989.
ultraflexgroup.com

Vetus

Dutch-based manufacturer of cable and hydraulic steering systems. Established in Rotterdam in 1964
vetus.com

AUTOPILOTS & AUTO DOCKING

CMP /Octopus

Octopus is a subsidiary of Canada Metal Pacific (CMP) Ltd and provides autopilot drive systems to most of the leading autopilot manufacturers. The company was founded in 2000 and is based in Vancouver.
octopusdrives.com

Garmin

US-based multinational technology company founded in 1989 with headquarters in Switzerland. Specialises in GPS technology for marine, automotive and aviation with an emphasis on wearable equipment.
garmin.com

Raymarine

Major manufacturer of marine electronics for the recreational and light commercial markets. Headquartered in the UK and a division of FLIR Systems thermal imaging.
raymarine.co.uk

Seastar Solutions

US-based company manufacturing electronic, hydraulic and cable steering systems with subsidiaries specialising in engine heating systems. Established in 1943.
seastarsolutions.com

TRANSMISSION

Caterpillar

Based in the US, Caterpillar is a major producer of marine engines and transmissions, along with other industrial engines and machinery. In 2018, sales and revenues were USD 54.7 billion.
caterpillar.com

Halyard Marine

UK-based company supplying a wide range of anti-vibration products for drive trains, including the

Aquadrive model. Founded in 1979.
halyard.eu.com

R&D

UK-based family business producing flexible couplings for marine transmissions. Founded in 1973.
randdmarine.com

Seatorque

Based in Florida, USA, Seatorque is a manufacturer of propulsive and fluid dynamic systems for the marine industry. The main product is the Seatorque Enclosed Shaft System, but the company also makes power steering systems and bespoke hydraulic cylinders. Established in 1994.
seatorque.com

Transfluid

Italian based specialist in heavy industrial transmissions, with 15% of its production in the marine sector. Recently acquired Bellmarine as part of a large electrification portfolio. Established in 1957 in Gallarate.
transfluid.eu

Twin Disc

Major US-based supplier of transmissions, steering systems and a host of ancillary products, Twin Disc has a dedicated marine sector in addition to a wide range of land-based markets. Established in 1918 and trades under the banner 'we put horsepower to work.'
twindisc.com

Volvo Penta

Part of the giant Swedish Volvo automotive group, Volvo Penta manufactures a range of marine diesel engines and drive systems for leisure and commercial operations. Origins can be traced back to 1868.
volvopenta.com

ZF Industrieantriebe Witten GmbH

Founded in Berlin in 1884, ZF has a long history of gearbox manufacture and now claims to provide around 80% of all transmissions to the leisure marine sector. In 2013 ZF delivered the largest wind turbine gearbox in the world and in 2015 acquired the gearbox business of Bosch Rexroth.
zf.com

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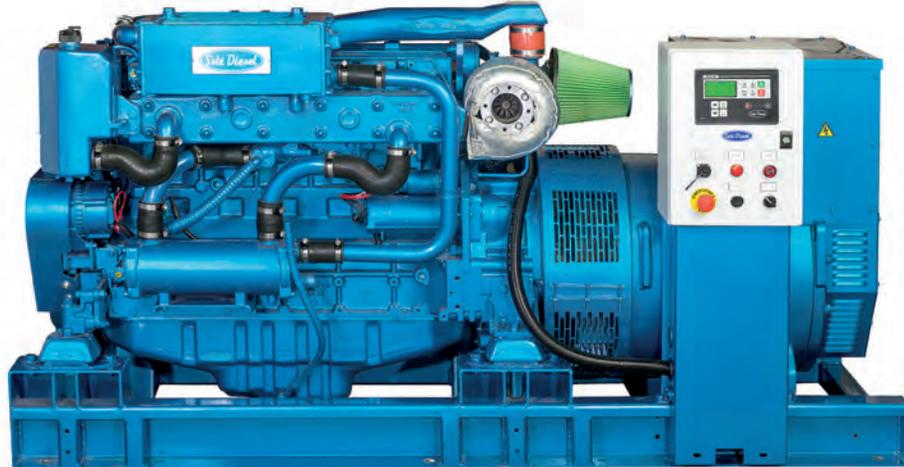
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CE RoHS



▲ The first Hull Vane on the 42m Heesen-built *Alive*

▼ Hull Vane BV's sales manager Bruno Bouckaert



HULL VANE COMES INTO ITS OWN AS NOVEL VERSIONS ARE DEPLOYED

ROOTED IN THE 'WINGED KEEL' THAT WON *AUSTRALIA II* THE AMERICA'S CUP IN 1983, THE HULL VANE MAKES BOATS PERFORM BETTER AND USE LESS FUEL. THAT'S WHY WE HAVEN'T HEARD THE LAST OF IT

WORDS: ROBERT WIELAARD

IN 1983, PIET VAN OOSANEN, helped *Australia II* win the America's Cup with a winged keel that riled AC egos and ended a 132-year US winning streak. The Dutch naval architect then worked for other AC campaigns into the early 2000s.

Today, all his early fluid dynamics research is trickling AC-inspired technology into yachts and commercial vessels under the patented brand name of Hull Vane.

The origins of the below-the-transom wing go

back to that winged keel research. And the Hull Vane will soon appear in two new versions: a semi-custom one for 10m-20m yachts and a 'dynamic' version for large yachts. The latter, a collaboration with Naiad Dynamics, will also be the world's first active pitch stabiliser.

Generating efficiency, speed and stability, the Hull Vane is marketed by Hull Vane BV, a company founded in 2014, a spin-off from Van Oossanen Naval Architects. ➔

“In working on the winged keel, that’s where the idea for the Hull Vane was born,” Hull Vane sales manager Bruno Bouckaert told *IBI*. “Fuel prices were high so there was an immediate potential to improve the efficiency of the performance of yachts and commercial vessels.”

To date, Hull Vane BV has delivered 21 units, more than half went on yachts. “The rest are coast guard and patrol vessels, ferries and offshore craft, says Bouckaert. “We now have orders for at least 20 more. Again, a yachts-commercial mix.”

The first Hull Vane went on the 42m Heesen-built *Alive*, launched in 2014. It makes the yacht as fast with twin 12V engines as with twin 16V ones and no Hull Vane. It also boosted *Alive*’s range by 23% to 4,000 miles. Net result: a smaller engine room, more onboard comfort. As in any vehicle, more efficiency also means less noise.

The Hull Vane is for medium-speed and fast displacement vessels, typically the ships that make waves, without being light enough to enter the planing speed range.

The Sunseeker 161 flagship Icon Yachts of the Netherlands is building, will have Van Oossanen’s Fast Displacement Hull Form which generates

efficiency over its entire speed range. Sunseeker CEO Andrea Frabetti says add a Hull Vane and combined fuel savings will rise up to 30%. “A truly remarkable result!”

The Hull Vane is an underwater wing that converts the stern wave into forward thrust. The lift’s vertical component raises the stern, keeping the bow down at high speed. It also acts as a passive motion damper for better seakeeping.

In his AC salad days, Van Oossanen experimented with rudder winglets “that created forward force,” says Bouckaert. In 2003, a Hull Vane went on the French AC entry *Le Defi Areva*. But held by a single strut, it bent badly and had to be removed.

Improving matters was the breakthrough of Computational Fluid Dynamics. “These let us better calculate currents around a ship,” says Bouckaert. “We could see much better the Hull Vane effect on the ship and its wake. It led to better designs at

lower costs. We look at a ship with and without a Hull Vane and run the software across dozens of versions, varying parameters which define the Hull Vane geometry and position. As every ship has a different hull, it also needs a different Hull Vane. ➔



▲ The winged keel of AC winner *Australia II* inspired the Hull Vane

▼ A Hull Vane on a 20m Jetten motoryacht



Hull Vane BV estimates it has invested at least €2 million in Hull Vane-related research.

This year the company will market a semi-custom Hull Vane for inland and offshore boaters. It has developed a standardised version for 10m-20m boats, based on common hull parameters for that length bracket. The semi-custom Hull Vane consists of aluminium extruded profiles, and is adapted by varying the size and position relative to the transom, while the profile shapes are always the same.

The 'dynamic' version may premier at Monaco. It rotates around an axis to vary the angle of attack and is for large yachts and naval ships. This Dynamic Hull Vane is billed as the world's first active pitch stabiliser for displacement ships. "We will have the only pitch stabiliser on the market," says Bouckaert. "We already have a patent."

BRUNO BOUCKAERT | SALES MANAGER
HULL VANE BV



◀ Its new Dynamic Hull Vane will be the world's first active pitch stabiliser for displacement vessels, Bouckaert claims

A Dynamic Hull Vane includes technologies we are unfamiliar with... We know underwater hardware. Naiad has much experience with hydraulics and stabiliser controls

To develop the dynamic Hull Vane, the company knocked on Naiad Dynamics' door. Bouckaert: "A Dynamic Hull Vane includes technologies we are unfamiliar with like mechanical pivot points and electronic and hydraulic control systems. We know underwater hardware. Naiad has much experience with hydraulics and stabiliser controls."

The Dynamic Hull Vane (shut it off and it is a fixed wing) also acts as a pitch stabiliser. That's novel. Boats have roll and zero-speed roll stabilisers but no pitch stabilisers. "We intend to change that, offering owners the ultimate in comfort and efficiency," says Bouckaert.

He says in principle just about all steel and aluminium yachts are Hull Vane candidates. That only about 5% of the world's 80,000 commercial ships qualify does not faze him. Tankers and bulk carriers are never in a hurry. "And 5% of 80,000 vessels is still 4,000 vessels, on which we can achieve extraordinary efficiency gains" he says. **IBI**

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The special material combination can be achieved by applying a custom carbon film onto the ceramic toilet, which is then treated with a special heat program in the oven.

The surface of the X-Compass is anti-scratch and resistant to any detergent.

The X-Compass has a narrow thermosetting seat and cover, featuring a soft-close motion that also increases the luxurious feeling on board.

www.thetfordmarine.com



Threaded Tubes

Designed for the secure routing of plumbing hoses or wiring through the bulkheads or internal cabinetry.

Features:

- Comes in two sizes – 1" and 1 1/2" BSP
- Total length 140mm (5 1/2")
- Comes complete with two nuts and two backing washers
- Eliminates chafing of plumbing hoses or wiring
- Connects with TRUDESIGN Female Hose Tails
- Can be cut to length

www.trudesignplastics.com

Sentinel Cam ‘plug & play’ camera

www.yacht-sentinel.com

YACHT SENTINEL’S ‘PLUG & play’ camera, Sentinel Cam, allows users to live stream what’s happening on their boat and receive a 30-second video if the camera detects an intrusion. The waterproof unit offers low-power (<400mA) and data (<100MB per month) consumption, but still sends high-definition 1080p videos. Sentinel Cam can be powered by any type of power socket, or directly wired to the boat’s battery. It works with both Wi-Fi and 3G/4G networks using the global roaming sim card provided – estimated cost is less than £9/€10/\$11 per month under normal usage – or the user’s own sim card.



Next gen ResQLink PLBs

www.acrartex.com

MADE IN THE US and now approved for sale in Europe, ACR Electronics’ next-generation ResQLink Personal Locator Beacons (PLBs) – the ResQLink 400 and ResQLink View PLBs – operate on the three Cospas-Sarsat satellite systems. This includes the new MEOSAR, ensuring they offer near-instantaneous signal detection and transmission enabled by the global MEOSAR satellites and upgraded ground-station components.



Using the next-gen network, anyone activating a ResQLink PLB can expect their beacon to be located within 100m (328ft), 95% of the time, within five minutes of the distress signal. The new ResQLink series also incorporate a multi-constellation receiver utilising both the Galileo Global Navigation Satellite System (GNSS) as well as the GPS Satellite network for faster location and improved accuracy. With built-in buoyancy, the ResQLink PLBs feature an operating life that exceeds 24 hours.

HoseCoil PRO

www.HoseCoil.com

THE HOSECOIL PRO Series provides all the functionality of the popular HoseCoil Standard Series self-coiling hose but with a larger, half-inch interior diameter for a 30% increase in flow rate. Available in 15ft, 20ft and 25ft lengths, HoseCoil PRO has a 4.75in diameter coil for better ease of handling and incorporates dual strain reliefs to reduce kinking on either end. It is also made with much thicker material for added strength and durability. All models include popular three-quarter-inch garden-style fittings made with brass alloy. Like all HoseCoil products, the PRO Series is made of top-of-the-line, high-performance polyether material that is built to withstand UV and saltwater exposure – making them perfect for cockpit washdown.



Standard Horizon expands Explorer Series

www.standardhorizon.co.uk

STANDARD HORIZON HAS expanded its Explorer Series of fixed-mount DSC VHF marine radios with the GX1800GPS/E and upgraded GX1850GPS/E. Both models carry the same features as the GX1700E, as well as an intuitive redesigned front panel for ease of use and an updated high-resolution display.

The GX1800GPS/E supports the NMEA 0183 protocol, while the GX1850GPS/E additionally carries the new and faster NMEA 2000 protocol. Both of these NMEA interfaces allow full connectivity with GPS and DSC data between compatible devices. To aid with use in the dark, both models feature a new selectable night-mode display on the 66mm x 36mm backlit dot matrix screen. The level of illumination can be changed to a soft muted white with the text in easy-to-read large black letters.

Both sets are second-station capable, allowing them to use Standard Horizon’s latest RAM4 microphone, the SSM-70H model.



SEND NEW PRODUCTS TO: belinda@ibiplus.co.uk

Bainbridge HXS-P sailcloth

www.bainbridgeint.com

BAINBRIDGE INTERNATIONAL'S LATEST range of woven sailcloth, HXS-P, brings the proven advantages of a double ripstop woven polyester sailcloth to the cruising/cruise race sailor.

HXS-P is a highly durable sailcloth with a visually clear strength and performance advantage over traditional plain weave products. It is competitively-priced and is easy to work and handle, enabling the production of high-quality finished sails.



Nevata HD from Nautic Alert

www.nauticalert.com

THE NAUTIC ALERT Nevata HD machine-learning bilge pump monitors and automatically controls bilge pumps intelligently, and also provides remote data that enables the Nautic Alert analytics team to analyse trending data that is helping to form the next generation of AI for pre-failure detection. Traditional technologies, such as float switches and high-water alarms, are limited in the data they can produce and analyse. With the Nevata HD controller, the float switch becomes the backup to a highly reliable bilge controller that can detect virtually any bilge issue and also intelligently auto-swap pumps.



Kiwi Rescue's Line Launcher

www.icbrindle.com

THE LINE LAUNCHER by Kiwi Rescue Ltd can propel a high-vis safety line and flotation pod 80m in just one powerful launch. It is made in New Zealand from 2.5mm polypropylene, which floats, and has a high breaking strain of 80kg. When necessary, it can also be used as a pilot to attach to a stronger line when more strength is required or replaced with a stronger line.

The Line Launcher is almost entirely reusable with easily replaceable CO2 cartridges. It is said to be the only product of its kind to use a 16g CO2, which is cost effective and easy to replace. Line Launcher can also be used in rescue situations where combustible equipment is banned for use in hazardous environments.

IC Brindle & Co Ltd recently signed a distributor deal to distribute the new safety product in the UK and further afield.



Delta "T" Systems' Louvered Closure

www.deltasystems.com

THE NEW LOUVERED Closure from Delta "T" Systems has the outward appearance of a traditional vent, but features an integrated, vertically oriented aluminium damper hidden within. Available in unlimited custom sizes, it is ideal for any size vessel, from small yachts to large ships. It's made in the US from fully welded marine-grade aluminium with a wide flange for easy installation and a clean appearance. The heavy-duty louver blades have rounded leading and trailing edges. It's available powder-coated to any colour, or with a paintable mill finish.

The Louvered Closure features a Belimo electric actuator that operates on 24V-240V AC or 24V-125V DC. It has absolute failsafe operation that uses power to open and spring-activated closing – guaranteed in the event of a power loss.

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EnCAPsure sound enclosure from Van Cappellen

www.vancappellensoundsolutions.com

VAN CAPPELLEN'S enCAPsure sound enclosure is fitted with purposely selected sound absorption materials, offering excellent sound absorption characteristics and increased overall noise reduction whilst meeting the test criteria of some of the highest fire-resistance testing standards, including EN 13501-1 B-s1, d0.

A key feature of the enCAPsure is the unique patented closure system which ensures tight fit closure along the perimeter of the panels.

The 22mm standard enCAPsure panels are tested at Van Cappellen's in-house test laboratory in the Netherlands in order to fine-tune the air-borne noise reduction. When the standard panels do not meet requirements, Van Cappellen can design panels with specific acoustic requirements and conduct test procedures at low cost. Acoustic scanning hardware enables the company to detect leaks, panel resonances and performance dips.



WiFi Gateway with data logging from Actisense

www.actisense.com

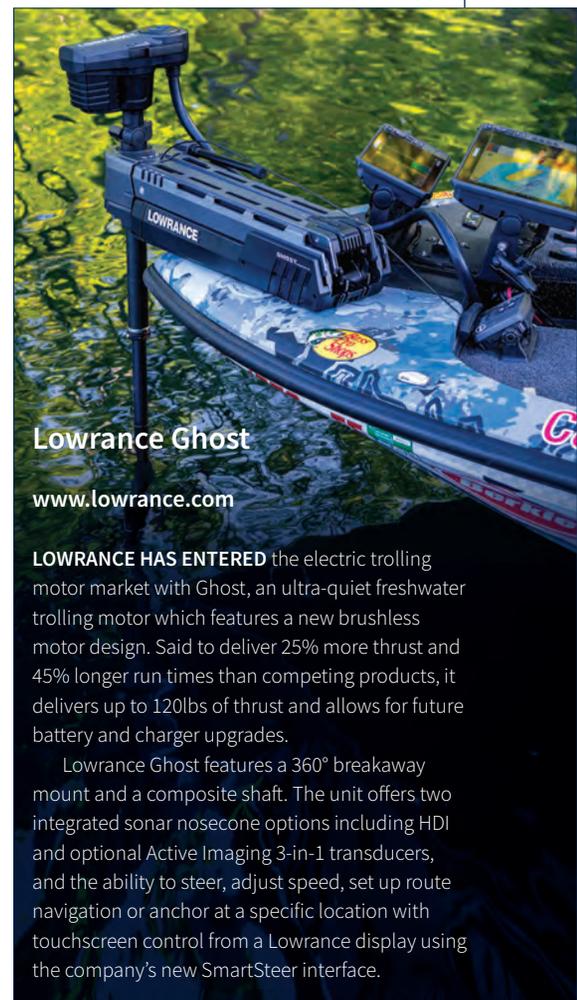
ACTISENSE'S W2K-1 IS an NMEA 2000 WiFi Gateway with data logging technology that has the ability to record navigational and engine data. The W2K-1 can transmit NMEA 2000 data using TCP and UDP while also offering support for conversion to NMEA 0183. However, what makes the W2K-1 stand out is the voyage data recorder (VDR). This means the device has the ability to log a wide variety of vessel data such as position, speed, course, depth, wind speed and engine data. No other product on the market can claim both of these features as part of the same device, Actisense claims. All data is logged on the W2K-1's internal micro SD card, which can hold approximately 16 days of data.

Dometic CoolFun SC30B

www.dometic.com

BILLED AS THE world's first bio-material cooler, Dometic's CoolFun SC30B is made from a biocomposite that contains bast fibers from the hemp plant, which is exceptionally good at sequestering carbon. Using this strong material also means less fossil-fuel plastic in the product without compromising performance. Fully recyclable, light and strong, its carbon footprint is said to be 26% lower than conventional coolers made from polypropylene.

The Dometic CoolFun SC30B can be operated by either 12V or 230V. It cools down to 18°C below the ambient temperature and has an additional warming function that heats the interior up to 65°C.



Lowrance Ghost

www.lowrance.com

LOWRANCE HAS ENTERED the electric trolling motor market with Ghost, an ultra-quiet freshwater trolling motor which features a new brushless motor design. Said to deliver 25% more thrust and 45% longer run times than competing products, it delivers up to 120lbs of thrust and allows for future battery and charger upgrades.

Lowrance Ghost features a 360° breakaway mount and a composite shaft. The unit offers two integrated sonar nosecone options including HDI and optional Active Imaging 3-in-1 transducers, and the ability to steer, adjust speed, set up route navigation or anchor at a specific location with touchscreen control from a Lowrance display using the company's new SmartSteer interface.

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Simrad RS40-B VHF marine radio

www.simrad-yachting.com

DESCRIBED AS THE “first VHF marine radio with AIS transmit and receive capability”, the new Simrad RS40-B features a sleek design with wireless handset capability, removable fist microphone, Class D DSC functionality, built-in GPS and a Class B AIS Transceiver.

The integrated Class B AIS transceiver in the RS40-B can receive position data from other vessels like the original RS40, but is the first VHF marine radio capable of sharing its position with nearby AIS-equipped vessels, improving collision avoidance in crowded waterways. Position data of other vessels is clearly viewable on the Simrad RS40-B screen or can be overlaid on top of a chart or radar through a compatible multifunction display over NMEA 0183 and NMEA 2000.



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We're focusing on a new motor range with 60, 70 and 80ft models

Francis Lapp, founder, Sunreef Yachts

Words: Jaroslaw Adamowski



FOUNDER OF SUNREEF

YACHTS, French businessman Francis Lapp, also serves as the president of its management board. He talked to *IBI* about the boatbuilder's foreign expansion strategy; its new facilities and offices in the United Arab Emirates and Montenegro; the company's increased presence in the Chinese market; and how Sunreef Yachts aims to adapt its product portfolio to the changing needs of its customers

Poland's luxury catamaran builder Sunreef Yachts has carved out a share of the global high-end leisure craft market by focusing on customisable sailing and motor catamarans. Based in Gdańsk on the Polish Baltic coast, the business says that, while it sees an increased interest from Polish customers, Sunreef Yachts continues to sell its craft almost exclusively abroad. Some of the boatbuilder's main export destinations include Western Europe, the Middle East, North America, Asia and Russia.

Your company recently appointed Speedo Marine as its exclusive representative for China, managing your marketing and sales activities there. Are you expecting a major hike in sales in relation to this cooperation?

The Chinese market has significant growth potential, but Sunreef Yachts is focused on the luxury segment of the boatbuilding industry. Our customers are interested in top quality and seek customised craft that respond to their most refined needs.

The Gdańsk shipyard's production capacity ranges between 30 and 35 craft per year, so we're far from mass production, and things will remain this way.

Our offer for the Chinese market will be focused on a new line of sailing yachts with a length of between 50ft and 80ft. But we will also offer larger

catamarans of more than 80ft. We've already built craft for customers from China.

Over the past months, you have also opened a new sales office in Tivat, on the Montenegrin Adriatic coast, at Porto Montenegro marina. Does your sales strategy for European customers differ from that of the Chinese market?

Montenegro is sometimes called the Monaco of the Adriatic Sea; we believe it's a great location to show our yachts to potential customers. We also have an office in Miami in the US, which covers North American markets.

Regarding the product range for the office in Montenegro, it's the same. We're currently focusing on introducing a new motor range with 60, 70 and 80ft models, and new sailing yachts in 50, 60, 70, and 80ft options. But we have even larger models in this category, up to 165ft in length.

As part of your international expansion in 2018, you opened a new shipyard in Dubai. Do you plan to produce catamarans at

this facility? Is it a joint venture, or are you the sole investor of this facility?

The shipyard in Dubai is currently focused on maintenance and servicing for our customers' craft. We have a growing customer base in the Middle East, and we believe this region has great potential. This facility also supports our sales across the region.

Have you noticed any market trends that are likely to shape your portfolio in the coming years? What is the structure of the demand for your catamarans? Sailing catamarans continue to be our bestselling craft, but motor catamarans are picking up in sales numbers. We're in the process of overhauling our product portfolio, and this process will take some time. I believe that in a year's time, about 60% to 65% of our sales will be generated by sailing catamarans, and the remaining 30% to 35% will be generated by motor catamarans. **IBI**

“ Our offer for the Chinese market will be focused on a new line of sailing yachts with a length of between 50ft and 80ft ”



▲ Tennis star Rafael Nadal's new 80ft Sunreef power catamaran will debut at Cannes 2019 and no doubt boost the builder's profile both in Spain and internationally



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