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CONNECTIVITY

Integration and the Internet of Things are transforming the boating experience
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The last three years have proven how resilient today's consumer can be

Ed Slack | Editor | IBI

A hard or soft landing? That seems to be the overriding question for those in the industry with one eye on the macro economics. Some indicators suggest we're due a recession, and that consumer confidence, so vital to our business, is ebbing away, deflating with a myriad of pin pricks from Brexit, trade wars, Donald Trump... It's easy to give in to the gloom, to fear the hangover as the party comes to an end.

However having just finished chairing the judging committee for the 2019 Boat Builder Awards and whittling down close to a hundred nomination entries (25% up on the number last year), I'm encouraged to feel a tad more optimistic. Innovation is rife, a fact that was abundantly clear given the quality of a lion's share of the nominations, which not only indicates an industry that's got its priorities right, but one that's looking to the future. From this angle the inevitability of a recession doesn't look so daunting

Writing this we're just weeks away from METSTRADE, the industry's showcase event where they'll be a glut of new, innovative product on display. The organisers tell me there's been a huge increase in new companies and start-ups attending that have 'sustainability' at the core of their product offering as well as a "remarkable" increase in new entries

for companies providing digital innovations such as monitoring systems, for marinas, charter fleets, and yachts as a whole. Fifty years ago, the industry was transformed by advances in GRP and production manufacturing that enabled boating to be cost-effectively brought to the masses. Could we be on the cusp of a technological revolution that brings new types of boating to the next generation? Our feature on Connectivity and the Internet of Things on p108, gives a forensic take on the latest developments and trends in marine electronics, but also offers an inspiring glimpse of what the future could hold. Such emerging trends should give industry confidence, while the last three years have proven just how resilient today's consumer can be. If we can inspire them, then the industry's future looks bright even if the historic cycle may suggest otherwise. **IBI**

• Check out the shortlist for the Boat Builder Awards 2019 in association with Raymarine, on pg16. To be inspired visit www.boatbuilderawards.com and pick up your tickets for the social event on the industry calendar

Ed Slack

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Dutch superyacht builders garner headlines, but the rest of the industry is doing well too **Page 82**



Jason Lippert reveals his strategic hand **Page 75**



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Connectivity is changing the way we use our boats **Page 108**



Innovation critical to US success **Page 44**

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- 2 Beneteau CEO points to new strategic direction** (Oct 14)
- 3 Sunseeker establishes superyacht division, confirms 60m funding** (Sep 27)
- 4 Cannes Yachting Festival a notable success** (Sep 16)
- 5 Seastar Solutions becomes Dometic Marine** (Oct 7)
- 6 Bavaria CEO on plans for 2020 and beyond** (Oct 9)
- 7 Ferretti announces jump in orders in midst of** (Oct 8)
- 8 MB92 sold to European investment firm** (Sep 25)
- 9 IBEX Innovation Awards recognise new product ingenuity** (Oct 2)
- 10 Cannes show management decision further delayed** (Oct 10)

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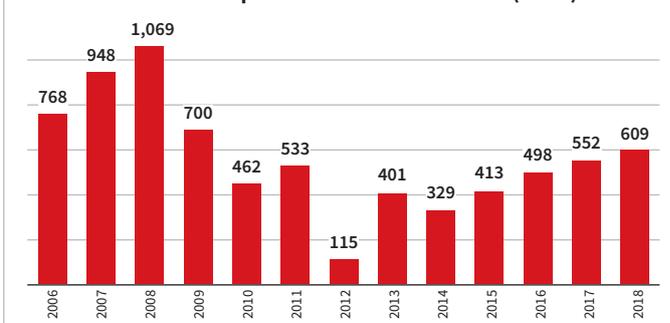
Ferretti Group cancels IPO

ITALY | Despite strong sales results and reported investor interest in an IPO offering 30% of the Italian yacht builder's shares, the Ferretti Group nevertheless decided to pull the plug on the public listing in the final hours of the offer period. The builder cited deteriorating conditions in the financial markets which prevented it from getting the valuation it was seeking.

The Offer Period opened on October 1 with an indicative share pricing of €2.50 and €3.70, which would have delivered a company valuation of between €727m and €1.08bn. The first day of active trading was initially set to begin on the Milan stock exchange on October 16.

In the midst of the Offer Period, Ferretti reported a strong order book which appeared to bode well for the public listing. The company said it had booked new orders totalling more than €465m for the first nine months of 2019, a gain of 18% over the same period last year. Consolidated

Ferretti Group evolution of turnover (€mil)



IBI has been tracking the Ferretti Group's turnover since 2006, detailing the highs and lows of the builder's fortunes from a peak of more than €1bn in sales in 2008, and to the lows of the industry's recession in 2012.

Group revenue for the whole of 2018 were also up nearly 10% over 2017, totalling €609 million for customer contracts. The company reported improved profitability as well, with a 29% jump in net income to €31 million.

Ferretti's IPO roadshow stretched from New York, across Europe and all the way to Hong Kong, supported by a prominent advertising campaign on several financial media websites. However, demand appeared to below

what shareholders and the collaborating banks were expecting, leading Ferretti to announce it was extending the offer period, as well as cutting the indicative price range down to €2.00-€2.50 – slashing the valuation to €580 million at the low end.

In the end, investors were only willing to pay €2.00 per share – a valuation the company's primary shareholders, the China-based Weichai Group, deemed was too low.

Cannes show: decision delayed

FRANCE | The three-year legal battle between the Fédération des Industries Nautique (FIN) and Reed Exhibitions France over the rights to organise one of the industry's most important shows – the Cannes Yachting Festival – is set to continue for at least another 18 months.

IBI learned the appeal lodged by Reed Exhibitions in response to a court decision earlier this year in favour of FIN's claims, will not be heard until December 2020, with a decision not likely to be made until the first quarter 2021. This implies



Reed appeal decision set for 2021

the next Cannes boat show will remain under the management of Reed Exhibitions next year and possibly longer.

As owner of the Paris and Cannes boat shows, FIN had previously contracted with

Reed to organise both shows since 1998 but terminated the contract in October 2016. Reed subsequently turned to the courts to enforce a clause in the contract ensuring its right to continue managing the show.

In January of this year, the Paris High Court issued a ruling in favour of FIN, but Reed filed an appeal – undoubtedly interested in preserving its considerable investment in the Cannes show, higher this year due to the relocation of the sailboat portion of the show to Port Pierre Canto.

Beneteau CEO points to new direction

FRANCE | Jérôme de Metz, who took over the helm of Groupe Beneteau as CEO in June, and Hervé Gastinel, the previous incumbent, have put forward conflicting views of the latter's time in office.

In an interview with French financial newspaper *Les Echos* published on 19 September, De Metz answered questions on his views of the company's structure and future direction. His remarks included direct and specific criticisms of his predecessor's management of the business, an analysis which two weeks later led to a measured but extensive public rebuttal from Gastinel on the grounds of reputational damage.

Although De Metz's initial remarks praised the growth achieved under Gastinel's four-year leadership, he went on to outline a number of areas where he felt the company had failed to make the most of its resources or was following a poorly defined strategy with far too many models and competing product launches. In particular, he noted poor utilisation and oversight in some of the company's 17 factories and his desire to make the plants more product

specific.

In response, Gastinel defended his management policies robustly, claiming that the proof was in the increase in turnover during his tenure from €970m to €1,287m as well as the turn-around in the company's financial position – from the net debt position of €51m he inherited into a net cash position of €162m on his departure. He also stated that the return on capital improvement from €34m to €87m illustrated the successful result of his time in office combined with an outstanding product development programme. Clearly stung into action by the *Les Echos* interview, Gastinel remained gracious towards his former employer and ended his statement by wishing De Metz and Beneteau all the best.

Company sources suggest that Jérôme de Metz, who now fills the twin roles of chairman and CEO following a recent restructuring of Beneteau's governing board, is expected to provide further details of the new strategy he will be setting for the company early in the new year. The company will release its latest year-end accounts on 29 October.

Fairline to build bigger

UK | Fairline Yachts has accelerated the development of its larger 80ft-plus boat range thanks to the strength of sales and customer interest at recent international boat shows. The UK builder says advanced plans are currently underway for the yard's first 80ft-plus flagship flybridge model, set to be built at its Hythe manufacturing plant.

Executive chairman, David Tydeman, who has stabilised boat production, and strengthened the senior management team over the last 12 months, will now concentrate his efforts on developing the large yacht range and assumes the title of non-executive chairman of Fairline Yachts.

APPOINTMENTS

In association with



ANYTEC BOATS

Thomas Jansson has been appointed CEO of Sweden's **Anytec Boats**, which includes the Anytec and Ockelbo brands. Jansson will continue the company's procedure to change economy and control. He will also oversee a new LEAN project at Anytec's factory in Riga, Lithuania.



Thomas Jansson

SYBASS

Michele Gavino, CEO of Italian superyacht builder **Baglietto**, was elected to the board of the Superyacht Builders Association (SYBAss) during its annual general assembly. The event was held at the Yacht Club de Monaco on the eve of the Monaco Yacht Show.



Michele Gavino

SPIRIT YACHTS

Spirit has promoted **Karen Underwood** to the role of operations director. Underwood has a wealth of experience, having worked for several high-profile boatbuilders for nearly 20 years. She joined Spirit as office manager and PA to the directors in 2015 following previous roles at Oyster Yachts and Fairline.



Karen Underwood

BERTHON SPAIN

Mike Barnes has joined **Berthon** Spain to head up the company's guardiennage services in Palma. Barnes previously worked for Oyster Yachts, where he spent the last four years in a similar role. Prior to Oyster he held the role of manager at Sunsail, served in HM Coastguard, and worked as a First Mate on superyachts.

CMP GROUP

Canadian anode and marine equipment manufacturer **CMP Global** has named **Don Hambly** as its president and CEO. He succeeds John Mitchell, who announced retirement plans in March. Hambly has considerable executive experience, including previous senior management roles at Cap Gemini and Ernst & Young.

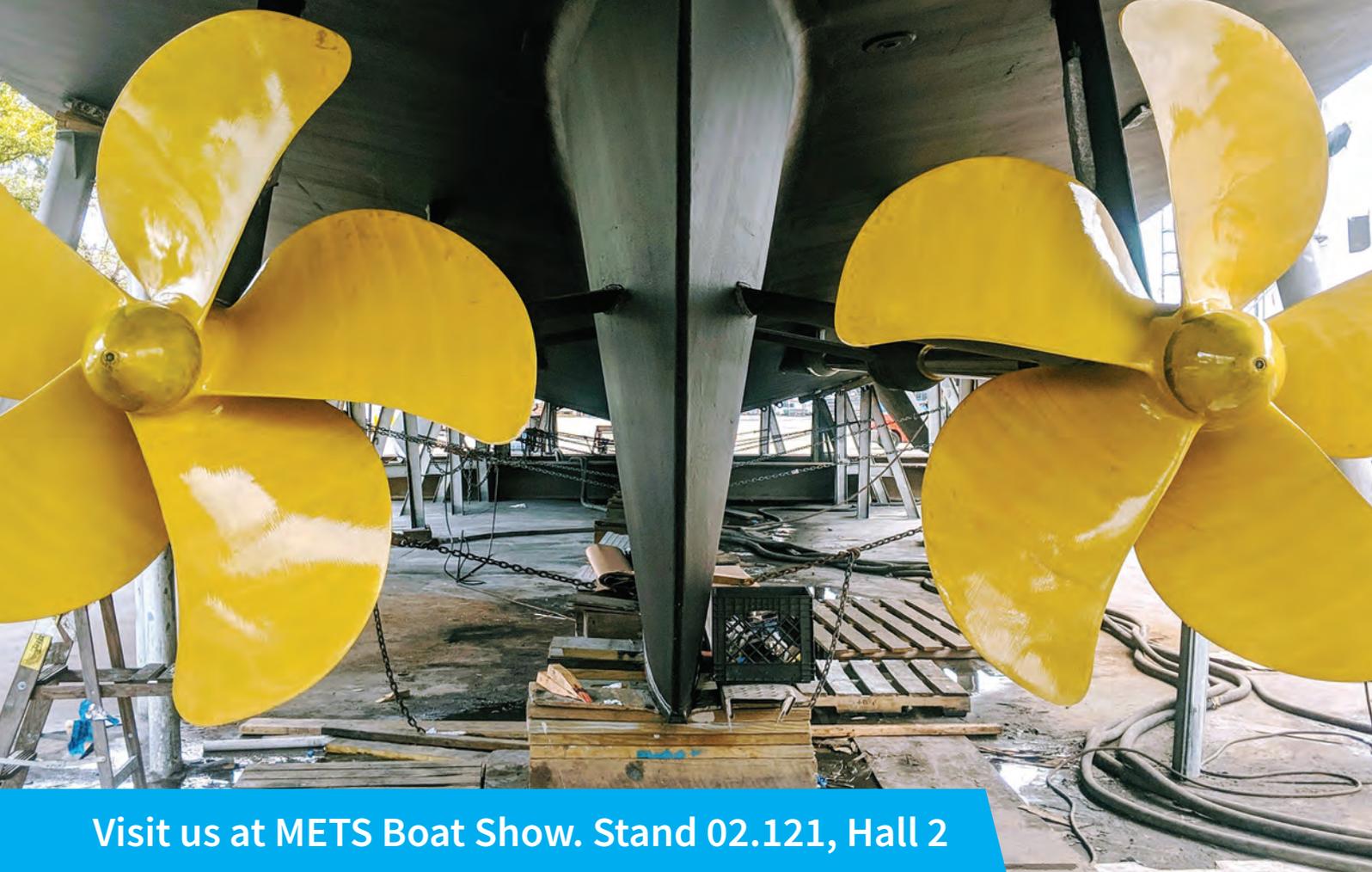
WINDY SCANDINAVIA

Trevor Fenlon, former COO of Windy and Draco, has been promoted to managing director and CEO of the boatbuilder. He reports directly to the Board of Directors of **Windy Scandinavia AB** and will work closely with the executive chairman on strategic planning.

BRUNSWICK BOAT GROUP

Jack Martin has been appointed general manager of the **Crestliner Boats** brand of aluminium fishing and pontoon boats. He assumes responsibility for growing the Crestliner brand and managing its entire product portfolio, including 26 series of aluminium fishing boats and four series of pontoons.

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IBEX ends on high

USA | The 29th International BoatBuilders' Exhibition and Conference (IBEX) closed on October 3 with attendance figures up from last year for the three-day event. IBEX was deemed a success with more than 700 exhibitors – 100-plus new to the show – from 25 countries filling the 138,000ft² of exhibit space.

The International Pavilions included exhibitors from Australia, France, Italy, Slovenia and South Korea, which accompanied the four Specialty Pavilions: the Compliance, Standards and Education Pavilion; Composites Pavilion; Marina & Yard Pavilion, and the NMEA Connected Boat Experience.

The IBEX Docks and expanded Outdoor Displays saw more traffic than in past years. With 30 boats in slips outside

the convention center, show visitors were able to participate in live product demonstrations. The recent renovation to the Sail Pavilion added more space for the Outdoor Displays.

The IBEX Education Conference was well attended with the pre-conference Super Sessions bringing in more than 300 participants before the exhibit halls opened. The Special Session: Return to Thunderboat Row kicked off the 60 session seminar series, which ran all three days of the event. The 2nd Annual Vacuum Bag Challenge was a popular attraction again this year, as were the models from the Design Challenge finalists, produced onsite with a 3D printer.

Two new additions to IBEX were also a success. The Digital Innovators Pop-Up Show had

standing room only as 10 start-up companies offering new technology for the industry pitched their products and met with press and other show attendees. And the Marinas of the Future presentation showcased the latest in marina product development in the Marina & Yard Pavilion.

"I've talked with many of our exhibitors and they are all saying the same thing, the quality of buyers this year at IBEX was the best it's ever been," said Anne Dunbar, IBEX show director. "The amount of business that took place in the exhibit halls this year was significant, more than in previous years. The positive energy throughout all three days was obvious, and if IBEX is the pulse of the marine industry, we are looking at a strong 2020, and beyond."

Sanlorenzo to implement IPO by year-end

ITALY | Sanlorenzo development continues apace. At its annual Cannes Yachting Festival press conference, the yard covered topics such as its upcoming IPO, new models in existing ranges, two new model ranges – one in the Yacht Division and the other in the Superyacht Division – and an ongoing high level of investment.

In respect of the IPO, Sanlorenzo owner and chairman Massimo Perotti said: "I cannot give exact details but we hope to complete the IPO by the end of the year. For the next two months we are working hard at shows but after that we will work on the IPO."

Perotti confirmed his intention to allow a 35% share of Sanlorenzo to be listed, but emphasised that he will retain a controlling 60% share.

Between 2018 and 2020, Sanlorenzo will invest around €150m, of which €78m or 52% is being spent on new facilities, 42% or €63m on new product, and 6% or €9m on R&D. Regarding the group's global sales, Sanlorenzo's latest figures show that Europe accounts for 57%, the Americas 20%, Asia Pacific 18%, and Middle East 5%.

In terms of new product investment and new model launches, Sanlorenzo's Yachts Division will have three new models. Two of these are the semi-displacement models – the SD96, which is debuting at CYF 2019, and the SD116 which will be at Cannes in 2020. The third model is the SX 112 which will be the largest model to date in this range, adding to the SX77 and SX88, and it will be launched in 2020.

The Yacht Division is also to develop a new series called the SP range. The first model currently under development is the SP108. This is due to be launched in 2020. The new range will comprise three models of 93ft, 108ft and 125ft. Tilli Antonelli is working on the design of this new range.

In Sanlorenzo's Superyacht Division, in the steel superyacht series the largest vessel built so far, the 64m *Attila*, was launched in May. This was built using Sanlorenzo's 64m-68m platform and this is now being extended up to 70m.

A new series called Espace is also being introduced to the Superyacht Division. This will comprise initially two models of 38m and 42m. The 42m is in build for a 2020 launch and the 38m is set to follow in 2021.

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Jetten Jachtbouw sold

NETHERLANDS | Jetten Jachtbouw of the Netherlands has been sold to MSAR, a Malta-based group of companies owned by Jack Wijnants.

MSAR builds 15m-42m patrol, rescue and multi-purpose boats. In addition, the group owns luxury catamarans brand AmaSea Yachts.

“The plan for Jetten Jachtbouw is to step away from the traditional Dutch building in steel and aluminium,” says Wijnants. “We are moving towards vacuum infused, carbon reinforced GRP, which is



Jetten's Jack Wijnants

unique for a Dutch shipyard.

“We have maintained five key Jetten employees for the restart,” he adds. “We already have a new strategy for the brand, which is going to be building luxurious, stylish

yachts up to 100ft with spacious interiors, top level finishing, and low fuel consumption and maintenance costs.”

The first model of the new Jetten Jachtbouw range features exterior and interior by famous Dutch designer Cor D Rover, who works with a number of high-profile shipyards, including Royal Huisman, Horizon, Sirena, Zeelander Yachts and Van der Valk.

Jetten Jachtbouw will reveal more details about the new boat at the Ft Lauderdale International Boat Show.

Sunseeker establishes Superyacht Division; confirms £60m funding

UK | Sunseeker International says it has progressed its superyacht ambitions further by setting up a dedicated Superyacht Division. As part of this plan, it has added Falmouth-based Pendennis Shipyard into the mix to work on its smaller superyachts between 120ft-159ft. Under this partnership with Pendennis, which has been negotiated over recent months, the Falmouth yard will complete the Sunseeker 131/133 models which will be constructed in Poole.

More significantly, Sunseeker will launch a new range of superyachts between 120ft-159ft that will be designed in Poole but built entirely by Pendennis. CEO Andrea Frabetti explained that this series would be based on three build platforms with three different types for each platform, making a total of six models. These will have both steel and aluminium hulls and aluminium superstructures and be designed by Sunseeker.



New CEO Andrea Frabetti

Pendennis will allocate a dedicated area of its Falmouth facility for Sunseeker work.

This new arrangement will underpin Sunseeker's expansion into the superyacht market and provide a complete line of smaller superyachts leading up to the new Sunseeker 161 that will be built in the Netherlands by ICON Yachts with completion due in 2021. Sunseeker's sales & marketing director, Sean Robertson, explained that negotiations were on-going with the first prospective buyer of a 161 and that once the contract was signed, the hull would be built.

Frabetti confirmed that its Chinese majority shareholder,

Dalian Wanda, had recently approved £60m of investment over the next five years to support the major product development plan. Asked if an IPO was planned, he said: “Anything is possible”.

Frabetti emphasised the strength of Sunseeker by referring to the company's increase in profit and the more than doubling of the EBITDA through 2018.

“With this support we will be spending £12m to £15m a year over the next three years,” Frabetti told *IBI*. This product development programme will see some 22 new models over the next three years. Sunseeker using its facilities in Poole and Portland will build all yachts in its model ranges up to 116ft. Above this to 159ft, Pendennis will share in the build and completion operations and over 160ft, will be handled by ICON Yachts in the Netherlands.

Sunseeker says it has built 137 superyachts over 100ft since 2000.

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Russia's boating scene ready for breakthrough in St Petersburg?



Photo: Gerdien E. Attach

This year's St Petersburg International Boat Show in September was one of the largest in terms of the number of visitors and participants. Some 65 boats and yachts of various lengths (primarily from 5m-25m) were displayed at the show.

RUSSIA | St Petersburg authorities have begun implementing earlier announced plans to turn the city into the center of yachting in Russia and the entire Baltic region.

At least three yachting marinas will be built within the boundaries of the city by the end of 2020 with a combined capacity of around 900 boats.

In addition to yachting infrastructure itself, the local

government, along with private investors, will be funding the building of hotels, restaurants and other similar entertainment infrastructure, close to the planned marinas.

Local authorities also plan to finally simplify the visa regime and to begin actively promoting the 'boating image' of St Petersburg internationally.

Plans to make St Petersburg a new center for yachting in Russia were first announced last summer. In addition to establishment of the necessary yachting infrastructure, they involve the attraction of approximately 8,000-10,000 foreign, and 3,000-4,500 domestic boaters over the next 4-5 years. According to calculations of St. Petersburg regional authorities, that would bring the city's economy more than RUB 3 billion (US\$50 million) of annual revenue a year.

The volume of investments in the project is estimated at RUB 3 billion, while its payback period will be eight years.

Spanish boat registrations up 9.1%

SPAIN | Spanish boating industry association ANEN has announced that the country's recreational boat registrations expanded by 9.1% year-on-year to 5,478 units in the first nine months of 2019.

Sailing boat registrations rose by a robust 35.5% in the first three quarters of this year, the Madrid-based association said in a statement.

From January to September 2019, registrations of craft up to 6m (20ft) in length rose to 3,829 units, up 9.2%

compared with the same period a year earlier. From 6m-8m (20ft-26ft), registrations stood at 990 which was the same level recorded for the January-September 2018 period.

“ The largest increase was in the segment comprising boats from 8m-12m with registrations increasing by 46.3% ”

The largest increase was reported in the segment comprising boats from 8m-12m (26ft-39ft), with registrations increasing by 46.3% year-on-year to 436 units.

Registrations of boats from 12m-16m (39ft-52ft) expanded by 2.4% in the first three quarters of 2019. The over 16m (52ft) segment was the only one to post a decrease, dropping by 14.8% year-on-year, as shown by data released by the Spanish association.



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TALKING POINT

CONSUMER SAFETY



Uli Heinemann



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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.

When I read for the first (and certainly not for the last) time the Recreational Craft Directive (RCD), I was struck by a very special term in Brussels' official English concerning consumer protection: "presumption of conformity".

Consumer safety is supposed to be based on a presumption? A great law! Hard to believe, isn't it? On closer look this seemed to make sense.

The RCD is one of the first "new approach directives". The 'old approach' reflected the traditional method, which consisted of many national authorities drafting their own legislation and going into great technical detail. As a result of different regulations, there was confusion within the EU regarding technical requirements. Watercraft registered in France, for example, were far from being considered safe in the UK, resulting in a major barrier to trade.

This should not be allowed to happen in the common EU market. Boats should be able to cross borders unhindered and all EU members should protect the consumer at the same level. That is how the New Approach directives were developed.

These Directives initially laid down (rather non-technically!) "essential requirements", which were formulated in quite general terms, such as "sufficient stability". For the technical fulfilment of the requirement, recognised standards were used from then on, of which there were already a number at the time. There were, for example, the different class rules of the classification societies and several national and international standards. It was therefore necessary to agree first of all on a set of standards that would be recognised by all EU members. The mandate to develop the new standards went to the International Standards Organisation (ISO) in Geneva and to the European Committee for Standardisation (CEN) in Brussels. The standards developed in this way were called "harmonized standards" (EN ISO).

Watercraft manufactured in accordance with EN ISO standards are supposed or "presumed" to be capable of meeting the relevant essential requirements of the RCD. The manufacturer only issues a "Declaration of Conformity" as proof.

However, the application of the harmonised or other standards remains voluntary and the manufacturer is always free to use other technical rules to comply with the RCD. So what now?

If the manufacturer uses EN ISO standards, he can make use of the presumption of conformity. In the event of a legal dispute, the burden of proof for possible product defects lies with the buyer.

However, if the manufacturer uses other standards, the burden of proof lies with the manufacturer in the event of a dispute. A significant difference!

Canadian firm unveils all-electric PWC

CANADA | Canadian snowmobile manufacturer Taiga Motors has introduced a new all-electric PWC that the company describes as "a new segment of personal watercraft, defined by conscious luxury, high performance, and connectivity."

Based on the electric snowmobile product line that the firm launched in 2015, the all-new Orca PWC features a full carbonfibre hull construction and a floating seat made possible by the absence of a combustion engine. Weighing less than 600lbs and able to generate the equivalent of 180hp, the Orca is said to offer an unrivaled power-to-weight ratio in a compact hull form that serves to differentiate it from competing high-power personal watercraft. Top speed is stated as 65 mph.

The Orca's 23kWh battery capacity provides energy

for up to two hours of drive time under typical operating conditions. The 275lb battery runs on a 400V automotive system, which the company claims offers greater efficiency, reliability and safety. The PWC can be charged from a regular outlet for convenient overnight charging, from standard automotive chargers at a rate of up to 10kW, or by DC fast charging to 80% in 20 minutes, making the units appealing for commercial rental operations. Data collected from companies operating Taiga's electric snowmobiles in fleet operations have shown fuel savings beyond US\$2,000 per sled per year.

Initial production will be limited to 500 units, which will be sold through certified dealerships beginning in summer 2020 at a retail price of between US\$24,000 and US\$28,000.

MB92 sold to European investment firm

SPAIN | Squirle Capital, a European alternative investment firm focused on private equity and value-add real estate investments, has acquired 77.5% of Spanish superyacht refit, repair and maintenance group, Marina Barcelona 92 (MB92). MB92 is widely recognised as one of the world's leading superyacht refit players, having consolidated its market leading position by expanding its operations and client base over a period of 25 years. In 2017, the company acquired a majority stake in Compositeworks and

Blohm+Voss La Ciotat, and subsequently merged these businesses to create MB92 La Ciotat in 2018.

Pepe García-Aubert, president and CEO of MB92 Group, says: "We are very pleased to welcome Squirle Capital as the new majority shareholder of MB92. They have an exciting long-term vision of how to further grow the group and consolidate our position as market leader and I have no doubt that we will benefit from their strategic expertise and broad experience."



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Interiors specialist merges with Italian SY yard

ITALY | Genesis Interiors, a US-based builder and installer of handmade luxury interiors for yachts and private homes, has merged with Italy's Cantiere Viareggio.

Cantiere Viareggio, which brings more than 50 years' experience in the construction, fitting-out and refit of yachts and superyachts up to 50m in length, is now part of the Genesis Yachts Group and will serve as Genesis Interiors' European headquarters, providing an ideal platform for the company to build and install custom superyacht interiors.

Ft Lauderdale-based Genesis has worked on some of the most exclusive yacht interior projects, such as the award-winning 348ft M/Y Dream.

"Thanks to this new partnership, Genesis now is able to provide our clients with the same superior level of service on both sides of the Atlantic," says Genesis founder and president Roberto Lottini.

"Cantiere Viareggio is where I started my career in the yachting industry in the 1980s. The shipyard's principals at the time, Antonio Francesconi and Giulio Pellegrini, were masters of their trade and helped me to gain the skills and experience that allowed me to start Genesis 25 years ago. Now, I am delighted to come full circle and bring Cantiere Viareggio into the Genesis Yachts Group."

The family-owned shipyard has a well-established reputation for providing new-build and fitting-out services for prestigious yacht brands, including Benetti, which is an ongoing customer.

Shortlist of 29 entries selected from largest yet entry field for Boat Builder Awards

A total of 36 companies from 15 countries have been named as potential winners of the Boat Builder Awards for Business Achievement 2019, in association with Raymarine. They were picked out as the best of the best from 82 nominations that were considered by the international panel of judges after a first round of assessment.

The Boat Builder Awards is jointly organised by IBI and METSTRADE. It recognises and rewards the outstanding business achievements of individuals and teams across key areas in the global leisure boatbuilding industry. More than 350 guests are expected to attend an extraordinary gala dinner celebration, which is held under the glittering dome of the National Maritime Museum on the first night of METSTRADE, 19 November.

The judges have also selected notable winners of the Rising Star category, for boat builder industry professionals up to age 35, plus the highly anticipated Lifetime Achievement Award.

Chair of the judging panel and IBI Editor, Ed Slack, commented: "The field of entries that the judges considered was 25% up on last year and our largest yet. Nominations spanned some of the smallest boats that our industry produces, right up to large superyachts. You could see real themes emerging that demonstrate the industry is responding to its current challenges, from finding new customers and responding to environmental concerns, to exploiting new technology. We were also pleased to see the strongest field yet of Rising Star nominations, which provides

great hope for the future that boat builders can nurture and retain brilliantly talented people. We are confident our announcements on the night will highlight many great achievements across the industry and look forward to celebrating those on 19 November."

SHORTLIST

Retail Marketing Initiative
Sponsored by Glomex

Azimut Yachts – Azimut S6 in NY Times Square
Gunboat – Rebuilding the company's reputation
Riva – Riva Lounges, Privées and Decks

International Distributor or Dealer Development
Sponsored by Volvo Penta

Aquila Catamarans – Creation of global distribution for brand
Galeon – North America, Australia and Asia growth
Highfield Boats – Growth of global distribution

Collaborative Solution between a production boat builder and its supply chain partner
Sponsored by Ultraflex

Aquila Power Catamarans and Opacmare – Aquila 32 SAFE wraparound platform
Hallberg-Rassy and Lewmar – Hallberg Rassy 340 steering system
Marquis Yachts and Toyota Motor Corporation – Co-development of Lexus LY 650
Numarine and Energy Solutions (UK) Ltd – XP Explorer interfaces and systems

Collaborative Solution between a superyacht builder and its supply chain partner
Sponsored by Lumishore

Azimut Yachts and Naviop-Simrad – Azimut Grande S10 Naviop screens/control systems
Benetti Yachts and ABA. Yacht – Hell Sea bulkhead watertight exhaust fitting
Royal Huisman, Rondal, Com&Sens and Gurit – Load sensing composite rudder
Spirit Yachts and Lewmar – Spirit 111 hydraulic system

Innovative On-board Design Solution

Sponsored by Fusion
Aquila Power Catamarans – Hydro Glide Foil
Benetti – Benetti FB272 propulsion system
Greenline – Greenline 48 Coupe solar power AC always on
Wettoncraft – Traile- free RIB

Innovation in a Production Process
Sponsored by Dometic

Classic Works – Efficient workshop layout for yacht refit
Paul Dijkstra Composites – Pre-preg manufacturing at low cost
Grand Banks – eight-axis mill

Environmental Initiative
Sponsored by UCINA

Amer Yachts – Adoption of GS4C and Filava
Spirit Yachts – Manufacturing processes and yacht designs
Vaan Yachts – Vaan R4 circular economy approach

Best Apprenticeship or Training Scheme

Sponsored by Marine Resources
Princess Yachts – Apprenticeship scheme
TaShing – Female apprenticeships and training

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*Source: DIBS Trade Visitor Survey

YPI sold to Singapore investment group

SINGAPORE | Superyacht services provider YPI (Yachting Partners International) has been bought from the French commercial shipping brokerage house, BRS, by Mercantile & Maritime Investments (M&MI), the investment division of the Singapore-headquartered group, for an undisclosed price.

For the Mercantile &

“With expertise in luxury and data-led intelligence... YPI is positioning itself at the forefront of next generation yachting”

Maritime Group (MMG), the acquisition marks an entry into the international yachting market. MMG is an experienced investor and operator in the maritime sector. Operating principally across the oil and gas value chain, it has made significant investments in a range of other sectors in recent years, including luxury, commercial and residential real estate, technology, transport and distribution. The group, also has branches in London, Netherlands, Turkey, Russia, Cyprus and Iraq.

Commenting on the acquisition, Simon Murray, chairman at M&MI, said: “We are excited to welcome YPI into the group. With expertise in

bespoke luxury and data-led intelligence and a client-first commitment, YPI is positioning itself at the forefront of next generation yachting.”

A YPI spokesperson commented: “This investment marks an exciting new chapter of growth for YPI. The Mercantile and Maritime Group has an extensive global network and a wealth of experience in the maritime sector and we look forward to developing the business together with them going forward.”

The global yacht industry is projected to reach US\$74.7bn by 2022, driven by the rising interest in luxury yachting experiences among high net worth and ultra-high net

worth individuals particularly in developing regions of Asia-Pacific and the Middle East. YPI is a boutique luxury yacht brokerage, offering personalised yacht sales, charter and management services to wealthy clients.

Late last year a majority stake in YPI Crew, based in Antibes, was sold by BRS to the world’s third-largest commercial ship manager Bernhard Schulte Group, a purchase that was arranged through its Singaporean affiliate, Schulte Maritime Services Pte Ltd. The sale of YPI sees it following in the wake of Camper & Nicholsons International in moving to Asian ownership.

■ IN BRIEF

SEASTAR REBRANDS

USA | SeaStar Solutions, the maker of vessel control, fuel systems and system integration components, has been renamed Dometic Marine in the parent company’s effort to consolidate more than 30 brands under the Dometic Marine umbrella. The 100-year-old Swedish company has doubled in size over the past five years, largely through acquisitions like SeaStar, with marine now representing about one-fourth of the company’s business. *IBInews.com October 7*

NEWPORT SHIPYARD SOLD

USA | Newport Shipyard in Newport, Rhode Island, has been purchased by Safe Harbor Marinas, becoming the 85th property for the Dallas, Texas-based owner operator, which has facilities in 19 states. The company has been on an acquisitions trail, adding 15 marinas to its portfolio since October of last year. *IBInews.com October 3*

ASEA Power Systems named winner of the 2019 IBI Export Excellence Award



ASEA accepting the award from IBI

USA | ASEA Power Systems has been named the winner of the 2019 IBI Export Excellence Award. The trophy was presented by IBI editorial director Ed Slack at yesterday’s Industry Breakfast that traditionally raises the curtain on the International Boatbuilders’ Exhibition and Conference (IBEX) that began its three day run yesterday in Tampa, Florida.

In praising Asea Power

Systems’ commitment to growing overseas markets – its export reach has grown to 41 countries worldwide, generating 65% of its annual revenues within a mere three years – IBI’s Ed Slack commented: “ASEA Power Systems could have written the playbook when it comes to developing a successful export strategy. Identifying the problem of ageing marina infrastructure around European islands, this manufacturer of power conversion equipment, spotted an opportunity. With electrical needs onboard ever increasing, and microgrids struggling to cope, ASEA took to developing specific new products to spearhead its growth into new markets.”

The judges were particularly impressed with ASEA’s 360°

approach that testifies to the fact that growing exports is not just about building distributor networks, but about developing a thorough understanding of individual market needs.

ASEA’s sales manager for the America, Joseph McCartney, accepted the crystal trophy recognising the firm’s success, as well as an advertising prize package worth in excess of US\$10,000 in *IBI* magazine.

Along with ASEA, the award judges also felt Dr Shrink’s modification of its shrink wrap covers and ventilation systems to boost sales in the Middle East was worthy of a highlight.

The *IBI* Export Excellence Award is now in its second year and was conceived to recognise US businesses that have a long-term strategy to growing their international business.

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All winners of the **Boat Builder Awards 2019** will be announced on **Tuesday 19 November** at the prestigious Awards Gala Dinner during **METSTRADE 2019** in the enchanting National Maritime Museum in Amsterdam.

The pre-dinner welcoming drinks will start at 19.30 hrs. and the festive program will commence at 20.00 hrs. All of our guests are invited to travel by boat to the National Maritime Museum at 18.30 hrs.

Ticket sales now open at www.boatbuilderawards.com

Why attend?

The Boat Builder Awards were initiated by **METSTRADE** and **International Boat Industry magazine (IBI)** in 2015, to recognise individual and team success within boat building companies globally. It has since then grown to become a prestigious and widely recognised awards programme.

Nominees are acknowledged across ten categories of business achievement and a number of outstanding initiatives and colleagues have already been rewarded in previous editions. However, the industry still offers many more admirable projects and people and so our search for inspiration continues.

**BOOK
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SAVE THE DATE: The 2019 Awards and Gala dinner will be held during METSTRADE on Tuesday the November 19th at the Amsterdam Maritime Museum .



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International distributor/dealer development



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Collaborative solution between a production boat builder and its supply chain partner
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Environmental initiative



Collaborative solution between a superyacht builder and its supply chain partner
(for vessels of over 24m)



Best apprenticeship or training scheme



Innovative on-board design solution



Rising star
(working for a boatbuilder and up to age 35)



Innovation in a production process



Lifetime achievement award



Pre-dinner drinks sponsor



After dinner drinks sponsor



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.

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SUSTAINABILITY

Spirit blazes way with 111 while APER leads the great clean-up



Installation of four BMW lithium battery banks on the 111 sloop

Trailblazers: Spirit Yachts and the flagship 111

Spirit Yachts, launched its flagship 111, a 34m Bermudan sloop, earlier this month, and it's the boldest symbol yet of the UK builder's eco ambition, it being one of the

most environmentally friendly sailing superyachts on the water today. Beneath is classic lines beats a very modern heart. Torqeedo electric propulsion system using a 100kW motor will propel the yacht silently for up to 40nm at eight knots from battery power. Whilst sailing, the propulsion system will regenerate the four BMW lithium battery banks by rotating the propeller shaft whilst the yacht is sailing. The Spirit 111 has a bespoke Lewmar system including the Vortex hydraulic reservoir. By reducing the amount of oil in the system by 90%, the Vortex save 53% weight compared to a traditional power pack and saves the amount of oil required for servicing. The yacht will have OneSails' 4T Forte sails, which are the only EU certified recyclable sails on the market. The air conditioning uses variable speeds with eco options. The fridge and freezer have Cryogel insulation to ensure minimal power consumption whilst holding low temperatures. Water is heated by a Webasto 5kW boiler or using the residual heat from the generators and stored in a high density insulated tank fitted with finned tubing for rapid heat transfer. The system only heats water on demand ensuring no wasted water or energy. Though the 111 may have taken its lead from its ecological owner, critically, learning from the project are being applied by the UK builder to yacht builds of all sizes, including an electric Spirit 44E with no hydrocarbons onboard. Two solar panels will be integrated into the deck to charge OceanVolt 48VDC batteries, which will power her Oceanvolt ServoProp15 sail drive.

The eco-credentials of the builder go way beyond product however and they've made the shortlist for the 2019 Boat Builder Awards in association with Raymarine, in the Environmental Initiative category. They'll find out if they've been successful or not at the Awards on Nov 19.

Clean-up underway

The industry's been wracking its collective brain for years to solve the growing problem of what to do with the increasing number of end-of-life boats cluttering up our waterways and marinas. Thankfully APER, a French eco-organization that was certified by the Ministry of Environment in March 2019, has been making some significant inroads into the problem. In just a few months the it has developed a network of 19 dismantling centres across France. Funding has obviously been critical – boatbuilders and boat importers



APER, getting to grips with ELBs

pay APER an 'eco-participation' for every boat sold in France, while the French state donates a share of the tax paid by owners when they register their boats

APER says it will tackle 1,800 boats in year one. The goal is to have up to 40 centres running by mid-2020 and to dismantle 20,000–25,000 boats by 2023.

ECO INNOVATION

Ecology takes centre stage at Barcelona show



The solar-powered La Belle Verde cat complete with 'net'

Sustainability was the key focus of the 2019 Barcelona Boat Show, which ran from October 9–13.

A conference called 'Let's take care of the Sea' addressed the impact of boating activity and the measures that can be employed to minimise the issue of waste in the world's oceans, while the show floor featured three 100% electric

boats: the X Shore Eelex 8000, which has a range of 100 nautical miles; the Naviwatt ZenPro 580, an electric RIB; and the Narke GT45, claimed as the world's first electric PWC. Other highlights included the first cat from La Bella Verde, which is propelled by sail and two solar-powered electric motors and features a net that can be lowered into the sea to collect solid objects it finds in its course, to a depth of half a metre. Additionally, the SB Buoy was unveiled, a submerged buoy, inspired by the manta ray and made from natural composite materials, that filters out microplastics but allows plankton to pass through.

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The boating world in focus

ICOMIA's Recreational Boating Industry Statistics 2018 book offers a pretty comprehensive one-stop data shop and a stepping stone for a fuller understanding of the global leisure marine market

WORDS: ED SLACK

Soft landing, or hard fall? That's the big question posed in the introduction to ICOMIA's Recreational Boating Industry Statistics 2018, and though of course it would be too much to expect a definitive answer in its 300-plus pages of comment, data and analysis, the book provides some keen insights into the prospects of the industry going in to 2020.

The introductory market overview examines primary boating markets and regions and flags some of the emerging trends, emphasising the somewhat conflicting state we now find ourselves in – a darkening global economic outlook is prompting a growing sense of caution, at odds with more positive evidence on the ground as global consumer demand remains robust, with rising employment and wage growth in recent years ensuring a solid foundation for high levels of spending in 2019.

According to ICOMIA's analysis, the industry thus far appears to have taken recent global economic challenges in its stride, but in highlighting the growing demand for boat clubs and peer to peer rental trends, spotlights a shift away from traditional boat ownership and business models. The current state of flux, coupled with generational social change, could present a potential perfect storm if consumer confidence wanes, or conversely a prize opportunity if our



The book includes a wealth of stats on key markets

industry can adapt, embrace change and tempt these emerging boaters, so the report determines. There can be no more opportune time it seems, to arm yourself with the data to help navigate this increasingly complex marketplace.

The book features national reports on the world's key leisure marine markets – including new entries from recently appointed ICOMIA members, Israel and Estonia – as well as global summaries of key product segments from 26 countries, export and import data for trade in boats for 42 countries, and the latest marine engine statistics. There's also a 2019 mid-year global data snapshot – a two-page 'at-a-glance' summary table of 30 key country markets determining whether they are up, down or on par in various segments

compared to the previous year, alongside a snapshot of whether their respective boating infrastructures pass muster.

In essence it's a pretty comprehensive 'one stop shop' for anyone wanting to gauge the state of the industry, however a caveat remains. ICOMIA itself acknowledges that in a small industry such as ours, operating on a global footprint with a myriad of laws concerning boat licensing and registration, the respective abilities of various associations to gather meaningful data varies significantly.

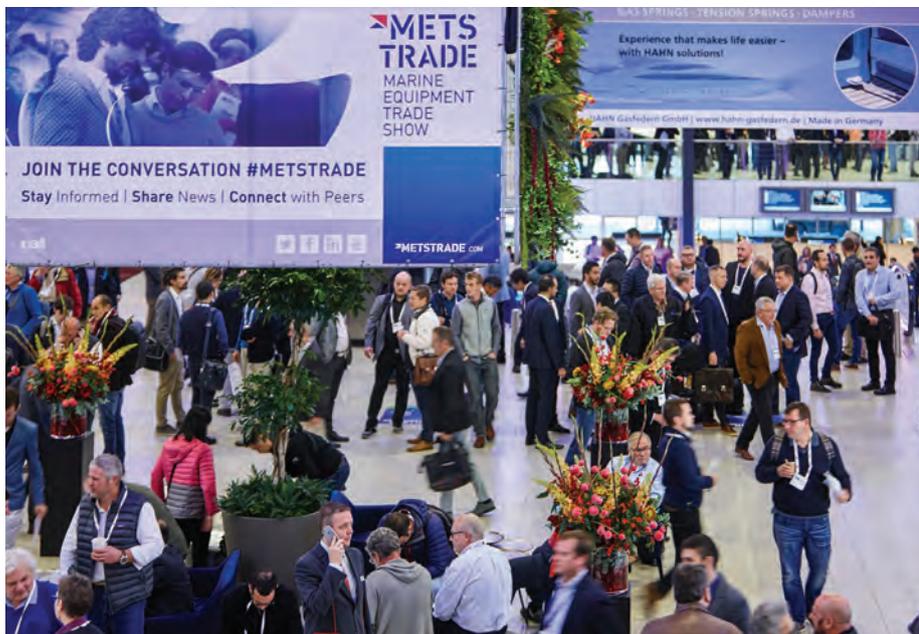
In light of this Recreational Boating Industry Statistics 2018 does a valiant job of consolidating what stats it can gather and trust into a user-friendly format – the download comes with raw data Excel spreadsheets making the book a potential godsend when it comes to creating business reports and presentations. It also provides a first port of call for anyone looking to export or enter into new geographical markets – there are a number of extended country reports, each of them giving top level stats and bullet point commentary to provide a solid, easily digestible, steppingstone from which to delve deeper.

Recreational Boating Industry Statistics 2018 is available for download at Icomia.com and is priced at €830. ICOMIA members are eligible for a 50% discount. **IBI**

Sustainability to take centre stage at METSTRADE 2019

With well over 1,600 exhibitors from 55 countries and a packed calendar of discussions, round tables and thought-provoking agendas, METSTRADE 2019 is a must-attend event

WORDS: BELINDA SNELL



The countdown to the leisure marine trade's most important event begins

This year's METSTRADE Show promises to be the biggest and most well-attended yet, and as usual there's a packed calendar of events. Centre stage this year is the environment and the concept of sustainability with three panel discussions on the subject on the InnovationLAB Stage.

"During the past five years we have been actively increasing the number of sustainability initiatives at three distinct levels. This includes reaching out, networking and sharing information about sustainability-driven initiatives at industry level, establishing the InnovationLAB and E-InnovationLAB concepts at show level, and leading by example with environmentally responsible facility management at venue level," says Irene Dros, maritime director at the RAI.

All registered visitors and exhibitors at METSTRADE 2019 are invited to attend and to join in with questions and comments on the following three sessions:

Day 1 (November 19 at 13:00) - The Challenge of Global Biofouling

Bio-fouling and biodiversity are the subjects of a global project task force called GloFouling, established under the auspices of the International Maritime Organisation (IMO). One of the project's main tasks over a five-year period will be to develop best practices that may address the transfer of invasive aquatic species through improved biofouling management; not just from shipping, but from all marine sectors.

Day 2 (November 20 at 13:15) - How Green Are We a Year

'How Green is Green in the Leisure Marine World?' was the theme of a

Record breakers

Record **1,635** exhibitors (at time of going to press), from **55** countries. **243** new companies signed up.

METSTRADE

1,148 exhibiting companies

- Marina & Yard Pavilion **71 exhibiting companies**
- Construction Material Pavilion **64 exhibiting companies**
- Super Yacht Pavilion **352 exhibiting companies**

Record numbers of speakers line up on all knowledge stages (Construction in Process Stage, Innovation Stage, E-Innovation Stage, Young Professional Club Stage)

Trending

Huge increase in new entries in digital innovations, e.g. monitoring systems for marinas, charters (fleets), and yachts as a whole

- High number of new companies/startups with a sustainable character, many new entries from Asia, but also Italy, France, Germany, UK, USA and Netherlands.
- All new entries are coming from 35 different countries



Gianneschi turns 50

It's been half a century since Luigi Gianneschi established Gianneschi Pumps & Blowers in the small, Italian town of Capezzano Pianore in Tuscany. Today the company is a leading supplier of pumps and blowers to some of the world's biggest yachts. Gianneschi is still in family hands, overseen by Luigi's two sons Alessandro and Cristiano. *IBI* talks to Alessandro about the company's rapid rise to success.

Q. You've come a long way since Gianneschi Pumps & Blowers was established in 1969. The company now turns over more than €13m per year and is growing at a rate of 7% annually. That's quite a remarkable journey. What is the secret of your success?

A. When Gianneschi first started, we focused on electric and mechanical engineering. These two components were developed over time to create products specifically for the marine environment. Our pumps, water pressure systems, fans, compressors, water heaters etc... they all have electric and mechanical parts that are marine-focused, so it really was a natural progression. Then, in 2010, the economic crisis allowed us to change our way of thinking and we started to focus more on markets outside of Italy. We enlarged our range, enlarged our markets, pushed hard at international boat shows, and invested heavily into the company. We've now reached a good level of turnover – €11m-€12m from manufacturing. Today we focus mainly on megayachts over 70m in length and they need specific parts from beginning to end.

Q. You recently expanded your facilities in Viareggio, investing in the latest generation equipment and machinery. How much do you typically spend on R&D?

A. In the last couple of years, we've spent around €300,000 to €500,000 annually. We invest practically everything into the company and we're always looking at what we can do, in addition to what we're already doing, to improve the business. We visit all the important boat shows, we invest in new products, and we invest in our people too. To give you an idea,



Gigaretta, a dual impeller pump for superyachts



L-R: Cristiano and Alessandro Gianneschi

we've spent over €300,000 in the last two months alone. We recently installed a new laser-cutting machine and in early September we installed a new automated welding machine for water heater tanks with over 1,500lt of capacity. That's in addition to what we already have. As for pumps, our core product, we've introduced several new models in recent years that are aimed at yachts of over 100m – including Gigaretta, a self-priming pump with dual impeller system for superyachts.

Q. How is Gianneschi different from its competitors? What sets it apart?

A. In life there are movers and there are followers. We have always been movers. Our competitors try hard to copy us, which only pushes us to speed up the pace of development and bring new products to market as quickly as possible. The range of products that we offer now is really large, and so is the capacity of the yachts that we cover – anywhere from 12m to 140m in length.

Q. As a business, what are your core values?

A. Gianneschi Pumps & Blowers is proud to be a family-run business and our employees are an important part of our family. We're also very proud to be a 'Made in Italy' company. We have a close relationship with our customers and suppliers, but we also look after the community and the people who work for us. These are values that we feel are important. We're a group of 45 people now and we look after our employees as we do our customers.

Q. Where do you see Gianneschi Pumps & Blowers in 10 years' time?

A. I think we have the potential to be an important presence in the workboat sector – powerboats, patrol vessels, tug boats... We would like to be a reference in that market, like we are now with yachts. We already have a presence in the commercial sector and this year we've signed some good contracts, so the future looks positive. ■

GIANNESCHI®
pumps and blowers

50
1969 | 2019

panel discussion which took place at the InnovationLAB Stage during last year's show. A panel of technical experts discussed the current situation and peeked into the future. They also answered several interesting questions from the audience, such as how we compare with other industries on environmental sustainability issues. The diversity of subjects ranged from design for disassembly, and recyclable materials, through to the status of electric and hybrid propulsion systems, and developments on eco-friendly energy storage solutions.

Because of the level of interest and engagement from the floor, it was decided to continue the theme in an updated status review 12 months later at METSTRADE 2019.

Day 3 (November 21 at 12:00) - End-of-Use Boats, an Update on Progress

METSTRADE has been raising

awareness about the increasing numbers of boats reaching the end of their useful lives around the world. Committing redundant GRP hulls to landfill is not an environmentally acceptable option. These hulls will still be there in hundreds of years' time. The challenge for our industry now is to create a new, commercially viable sub-sector which can responsibly dispose of them, in much the same way as the automotive industry have done for end-of-life cars.

There will be discussion too exploring how the boats of the future can be constructed in a way that will make them easier to disassemble.

This session will be followed by an 'invitation only' informal networking lunch, giving the opportunity for various players in this important developing sector to meet each other, swap notes and agree on future collaborations. **IBI**

FEADSHIP DIRECTOR TO DELIVER METSTRADE KEYNOTE ON OPENING MORNING

HENK DE VRIES WILL deliver the keynote speech at this year's Breakfast Briefing. De Vries will bring his inimitable style and decades of experience to the event as he speaks to an audience of 600 delegates on the subject of how to successfully grow a family company and make it sustainable for the future.

As one of the top superyacht builders in the world, Feadship is this year celebrating the 70th anniversary of its foundation in 1949.

Henk de Vries was among the fourth generation of his family to take a leading role in both the yard that carries his name and Feadship, joining the Aalsmeer facility in the 1980s and playing a key director's role alongside his cousin Tom de Vries. Since being appointed CEO in the early 2000s, Henk has overseen a constant growth in the Koninklijke De Vries Scheepsbouw operations, including the opening of a second facility in Makkum in 2005. This period has also seen ever-closer ties with Royal Van Lent yard as these giants of the superyacht sector have built ever more elaborate pure custom Feadships.

Henk is also actively involved with SYBAss, Young Professionals in Yachting, and the Water Revolution Foundation. His Breakfast Briefing will draw upon all these strands of experience to



share the various ways he and his colleagues are working to ensure the future success of Feadship and the wider yachting industry, Henk will examine vital issues that affect all stakeholders such as employment (how to find and retain the right people), Corporate Social Responsibility (including the renowned culture of community within Feadship) and sustainability.

The Breakfast Briefing will take place on the morning of Tuesday 19 November in the RAI Amsterdam Convention Centre and welcomes exhibitors and VIP guests.



A night to remember, the BBA 2019

TIME TO CELEBRATE INDUSTRY ACHIEVEMENT

THE SOCIAL HIGHLIGHT of METSTRADE

– the Boat Builder Awards for Business Achievement, held in association with Raymarine and jointly organised by the Rai and IBI – will take place on Tuesday evening, November 19, at the Maritime Museum in Amsterdam. The event promises to be the best attended yet. Close to 400 guests are expected for the gala dinner, which will feature high-end entertainment and a wealth of networking opportunities. Only a handful of tickets remain for the event and can be ordered online at www.boatbuilderawards.com

MATERIALDISTRICT POP-UP 'CIRCULAR BEAUTIES'



Recycled can be beautiful too

THE MATERIALDISTRICT Pop-up theme of 'Circular Beauties' is dedicated to materials that are biobased and/or recycled, avoiding the use of non-renewable material sources.

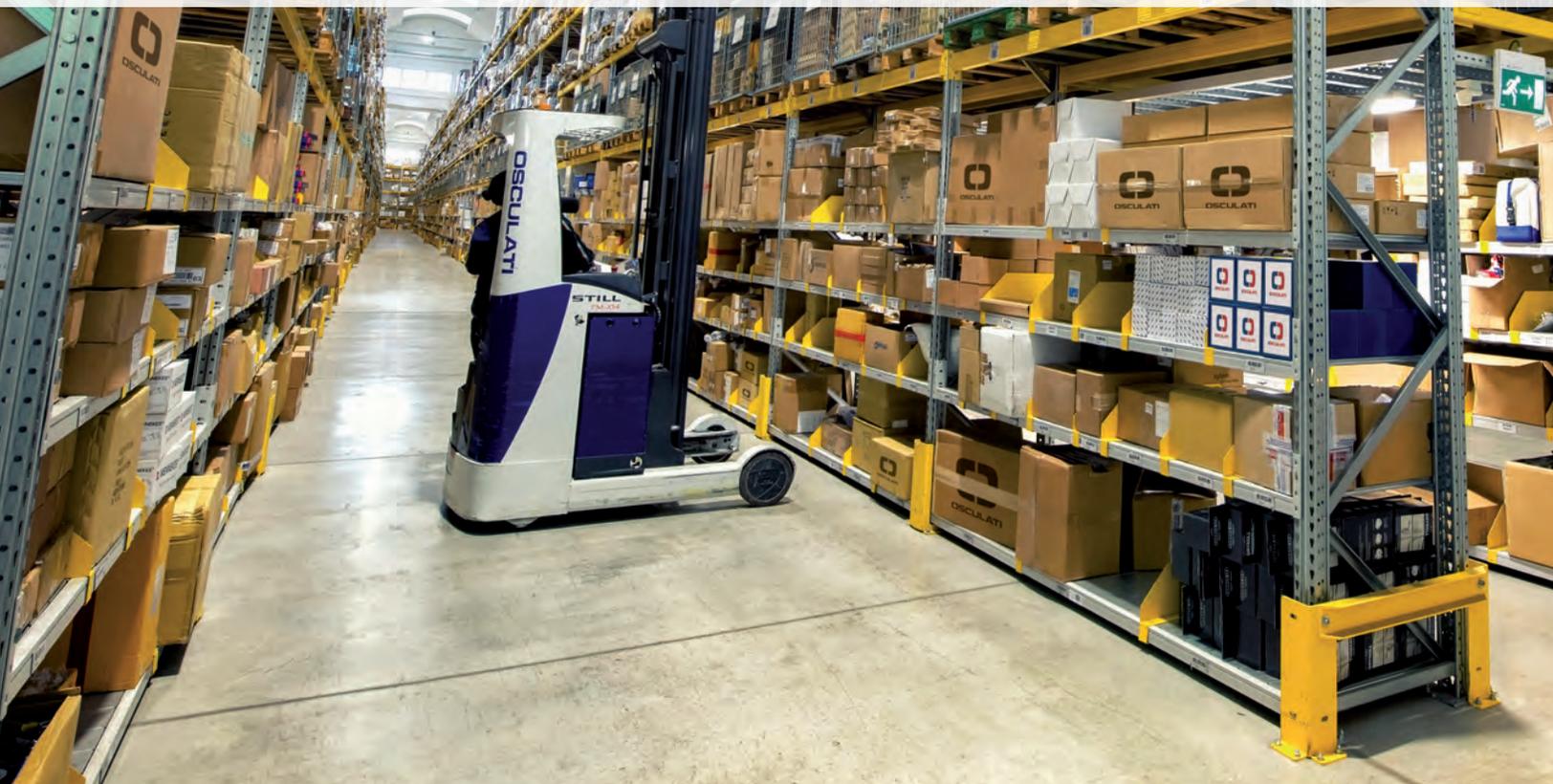
Located in the Holland Lounge of the exhibition, MaterialDistrict will show that intelligent, biobased and recycled materials can be beautiful and luxurious. Tiles with oyster shells, lightweight aluminium foam, translucent leather, recycled plastic tiles, 3D textiles, light-emitting fabrics, and materials made from waste are just some examples of what innovative 'good' materials you can expect at the 'Circular Beauties' exhibition.

There will also see a series of lectures and presentations organised on the InnovationLAB Stage in Hall 6 throughout the three days of the exhibition.

For details visit metstrade.com

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Vanquish's director of business development, Tijl Hetterschijt



The builder's VQ40 dayboat



Vanquish's unique take on a tender/PWC cross

Strong DNA and bold vision fuelling Vanquish growth

The niche Dutch builder is tapping into a hassle-free, fun 'n fast leisure boating formula, with designs bold enough to match its ambition

WORDS: ROBERT WIELAARD

Tom Steentjes once ran a company that makes food processing machines. When he sold it – less than a decade ago – a non-compete clause kept him away from lots of steel manufacturing. Making aluminium boats was OK, however.

In 2012, the Dutch welder founded Vanquish Yachts. Combining process efficiency expertise, business smarts and a knack for innovation, he quickly pushed his brand of superfast, edgy day boats center stage and launched his first boat, a 9.8m VQ32, in 2013.

Since then he has built 50 yachts in more than a dozen lengths. “We aim for an annual output of 20 to 25 aluminium yachts of 45 to 70ft (13.7 to 21.3m),” says Tijl Hetterschijt, Vanquish

Yachts’ director of Business Development. “Additionally, we count on making 12 to 15 polyester craft annually of up to about 40ft (12.2m).

Vanquish Yachts’ furious rise and hefty ambitions clicked with TransEquity Network, a Dutch investment company that targets small, profitable companies with good international growth potential. In 2018, it acquired a majority stake in Vanquish Yachts.

Steentjes reached out to private capital to facilitate growth and bring in corporate knowhow in a very competitive corner of luxury yachting. Hetterschijt says Vanquish’s financials “are healthy and our goal is to realise growth.”

So far, growth has been impressive. Vanquish makes superfast craft from

5m-30m for day boaters who prize luxury, comfort and speeds of at least 35kt. “Any slower and the boat won’t show our DNA,” says Hetterschijt tells *IBI*. “Our 58ft (17.7m) does about 50 knots.”

Speed and fun were key ingredients from the outset. Hetterschijt: “All around us, leisure patterns are changing. Increasingly, people want to make brief, no-hassle outings. Taking a yacht out requires a lot of preparation before you are finally moving. A day boat is an impulse hobby. And we see it appealing to both traditional boaters and beginners.”

Guido de Groot-designed Vanquish Yachts boast minimalist lines, plumb bows and a generous distribution of sun beds and seating areas for on-board socializing. Aluminum construction

makes the boats light and fast and customization a cinch. Vanquish recently worked on a 17.7m VQ58 with a hard top and not one cabin. "The NY client doesn't want to sleep onboard," says Hetterschijf.

The USA is a key market. In the Hamptons, the Long Island playground of the ultra-rich, Vanquish has a summer office. Its US subsidiary is based in Ft Lauderdale. Vanquish sold a dozen yachts in Florida alone in 2017 and 2018. Other markets are rising. Australia ("tough market now, but that'll change," says Hetterschijf), Singapore, Japan, Hong Kong, Thailand.

To maintain marketing momentum, Vanquish will be making GRP yachts of up to 45ft (13.7m) and aluminium ones above that length. Building under 45ft in aluminum raises unit costs too high making the boat uncompetitive. "Building smaller yachts in polyester means we can establish the Vanquish brand worldwide," says Hetterschijf. "A 40ft (12.2m) polyester boat sells better in new markets. We'll use that length to target new clients with polyester yachts and then use those sales to find clients for our longer, aluminium range," he explains.

He says growth occurs "at a manageable pace." Vanquish works with subcontractors: four make bare hulls, three do the painting and several make pre-fab interior units. Vanquish has also opened a second build facility.

Hetterschijf says Studio Delta's underwater hull design keeps Vanquish Yachts comfortable and dry at high speeds. The Dutch technical designer is doing more and more work for Vanquish Yachts at a time when the builder brims with projects that show the scope and ambition of its growth strategy: An 11ft GRP 'jet ski-tender' toy. Vanquish developed this 3.45m tender for the garage of its own 17.7m VQ58. "We see growing demand for yachts - Vanquish and other brands - of 58ft-80ft. A well-known problem in this range is that people want to bring a PWC and a tender. But there is not always room for that," says Hetterschijf. Vanquish offers a 2-in-1 solution and might just be creating a market for a new type of toy.

Other projects include a similar 16ft (5m) PWC for larger yachts, as well as a new 40ft dayboat with a choice of inboard or outboard engines. Europeans prefer the former.

Key to success is the fact that the builder keeps several bare hulls in stock to speed up delivery, especially of the popular 45ft Vanquish. It now takes Vanquish 6-7 months to build yachts to 45ft (13.7m) or so.

There are plans to build dayboats of 68 and even 88ft too. "We are in talks with several clients who are interested in these lengths," says Hetterschijf. "We may launch them as early as next year."

Wait a minute! A 27m day boat? "Well, these will be yachts that have three sleeping cabins, side and aft garages and lots of tenders and toys," says Hetterschijf. "We call it 'ultimate dayboat recreation.' Inside accommodation does not have the highest priority. We are not going to build cinemas. These are small-crew boats, suited for day trips and lots space for tender and toys and lots of access to the water." **IBI**



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Exceeding expectations

Two boatbuilders - Riviera and Maritimo - dominate the Australasian luxury motoryacht scene, with strong domestic and international markets. *IBI* investigates what lies behind their success

WORDS: BARRY THOMPSON



Maritimo's Tom Barry-Cotter (Left), Phil Candler (Middle) & Garth Corbitt in front of the enlarged manufacturing facility prior to its recent completion

Riviera has been operating for 39 years and has launched almost 5,600 boats in that time period. Maritimo has been operating for around 15 years and has built an estimated 514 boats. So it is fair to say that Riviera is clearly the market leader in Australia by a very sizeable and real factor and has dominated the Australasian luxury motoryacht market for almost four decades. Maritimo, which started as a boutique builder, has however grown in recent years to become a recognised brand in both the local and world markets. Barry Thompson spoke to the principals of both companies about their growth, current position and their plans for the future.

RIVIERA In pursuit of excellence

Riviera owner Rodney Longhurst is a man on a mission. A mission to take his brand to be the best at what it builds in the world and he appears to be on the right path.

In 1980 when Riviera launched its first boat, the company laid the foundations for what was to become Australia's largest premium luxury motoryacht builder, a position it has retained ever since. From that initial 38 MK1 model, almost 5,600 boats have followed, and Riviera has gone from a small Sydney, Australia-based production boatbuilder to one of the world's market leaders in the 10m-25m sector.

Very soon after that first boat left the factory, the company relocated to the Gold Coast, Queensland, with a staff of five building eight new boats in the year. During the 1980s a dozen new models were designed, built, launched and first exported to both the USA and Europe. A culture of excellence was beginning to flourish, and the Riviera brand was being recognised not just in Australia and New Zealand but also internationally.

To keep up with demand, in the late '90s, Riviera built a brand new 14-hectare state-of-the-art facility, the largest of its kind in the southern hemisphere, on the Coomera River, a venue it still operates from today.

NEW OWNER

In March 2012, Gold Coast business man and avid boating enthusiast Rodney Longhurst, acquired Riviera. Today, as chairman, Longhurst mixes business skills with his passion for boating, quality, creativity and the pursuit of excellence.

He maintains: "When I bought Riviera, my vision was to make it one of the great names in boating and to be outstanding in every aspect of the boating lifestyle."

During the GFC period, staff levels were around 200, and production had dropped from a record high of 421 boats in 2003 to just short of 50 in 2012, and only a fraction of the Coomera facility was being used.

Longhurst points out that back then Riviera was building a lot of smaller models, with an average size around

40ft, whereas today the average size is around 57ft and the boats are far more sophisticated in every respect. With a staff level today of about 600, Riviera produce more than 100 new boats a year, from the 39 Open Flybridge to the 72 Sport Motor Yacht and utilise every area of the facility. Riviera now has 48 dealers worldwide.

Under the new ownership the apprenticeship programme has been reignited, and today the company has 74 apprentices, who get to work with master craftsmen at the biggest boatbuilding company in the country. "There is a shortage of skilled labour in Australia, so it is vital we have a strong apprenticeship programme, and I am keen to support that as much as we can", says Longhurst.

Under Longhurst and chief executive officer Wes Moxey's leadership, the Riviera collections are continuously evolving and being refined to take their place among the world's finest.

"As we keep fine-tuning the business operation and our models, that vision has been accelerated, and the enthusiasm levels, not just mine but also that of our 600-strong team that build our boats, continues to grow. Everyone genuinely is excited to do their very best", says Longhurst.

Head of marketing and communications, Stephen Milne, added that when you look at the quality and the diversity of the designs and all of the intricate aspects that go into every boat, and then you have 600 people marching in the same direction to be the best they can, that is a very powerful philosophy.



Riviera's Coomera River factory covers 14 hectares and includes its own open and undercover marina

Since 2012, Riviera has embarked on an intensive new model programme, with a total collection now of 16 boats spread over five different Series, plus a further four models marketed under the Belize brand. Over 50% of those have been released in the past three years. What has been apparent is the company has not been afraid to diversify into different style sectors, and while they made their name in flybridge yachts, the

recent introduction of Sport Yachts and the SUV range have proven popular additions.

"The SUV range, which comprises five models, has seen over 120 sold since it was introduced in March 2012 and sales remain strong. With the 505 SUV to be added next year, I know this model range will continue to grow for us", said Longhurst.

Milne adds that the 'one level 

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market' has become popular in recent years and both its SUV and Sport Yacht range are perfectly designed for those buyers who do not require a flybridge. "The release of our new Sport Yacht Platinum Series at this year's SCIBS was unprecedented and all three models; 6000, 5400 and 4800 are selling well both locally and overseas".

Longhurst says that he is also especially proud of the larger Sport Motor Yacht range which now comprises three models, including the company's flagship 72 Sport Motor Yacht. Along with the 68 SMY and the 64 SMY, Riviera has established a growing global market, especially in the USA and New Zealand, with over 20 yachts sold to date.

Longhurst remarked that bringing the Belize brand in under the Riviera ownership was also a significant move and offered yet another range of boats to the fleet. These are built in Taiwan, and according to Longhurst, there are no plans to bring the manufacturing to Australia, adding that right now the 16 factories on-site at Coomera are approaching maximum capacity.

QUALITY, QUALITY, QUALITY

"For me it has always been about producing every model to the best of our ability, right from the design team to the finished product. Working with naval architects such as Dutch-based Frank Mulder, our boats are running better than ever, and the emphasis on the highest standards, right from the construction to every aspect of the finished boat is still to me the key factor. Quality, quality, quality, it is that simple", says Longhurst.

However, along with quality, as essential to Longhurst and the whole team at Riviera is customer care. "You don't have a business if you don't have a contented and strong customer base".

Backing up the customer care programme are 10 R Marine service centres employing 53 dedicated service staff in Australia and New Zealand.

Over 1,000 Riviera owners attended the Riviera evening events at the Sanctuary Cove and Sydney International boat shows, reflecting the strong bond between the company



Riviera's 54 Enclosed Flybridge

and its clients. There are more than 80 separate events that Riviera owners in Australia/New Zealand can attend locally. "Along with regular rendezvous, the Riviera Festival and factory tours, Riviera retains a long-term relationship with its owners, well after their purchase", says Milne. He adds: "Having such a diversity of design, with five model Series provides a great opportunity for people to move within the brand and stay in the Riviera family. Loyalty to any brand is vital, but you have to earn it and work hard every day to maintain loyalty. We are forever humbled by the loyalty shown from Riviera owners over the past 39 years".

EXPORT

Riviera's first export to the USA was 1982, with Europe not seeing its first Riviera for another three years. Today the export market accounts for over 50% of the business with the brand represented in more than 45 countries. The most active demand is The Americas, with New Zealand currently strong, especially in the Sport Motor Yacht and Sport Yacht segments. Europe is also showing signs of growth with plenty of positive response to Riviera's premiere models on the European show circuit.

"Competition", Milne says, "comes from any brand operating in the 40ft-80ft space but due to having such a diverse platform we are market leaders in our category, and it's more about others often copying us rather than the reverse.

"We continually analysis our sales trends so we can understand what the different markets want and put into practice what we have learnt from those almost 5,600 boat owners, to produce



Riviera's owner Rodney Longhurst and CEO Wes Moxey on the bow of one of the company's latest models

better and better motoryachts".

Riviera is represented at 35 boat shows around the world, either directly or in support of the local dealer network.

"We also have a new boat show running five days a week at the factory where there is always 12-15 completed boats, ready to be sent to owners and dealerships around the world. This gives potential owners a chance to see what the finished boats are like, compare with other models and be able to make a more informed purchase decision", added Milne.

Riviera is currently rolling out new models around the world, and that will continue right through to this year's Ft Lauderdale International boat show. The Belize 66 Daybridge will make its debut at FLIBS 19, and the 505 SUV will be unveiled at Miami in February 2020. Look also for the 64 SMY at SCIBS 2020.

Longhurst says that he works very hard to deliver the most authentic experience he can to help people with their purchase.

"I take the representation of our yachts and our yachting experience very seriously. I want every owner to know what we do and how well we do it. I am very proud of the yachts that we build today - the best in our 39-year heritage and every new model that we create carries my personal stamp of approval."

As for the future, Longhurst says he is even more excited now than he was when he first brought the business almost eight years ago. "There are so many opportunities available, and with plans for multiple new models, 2020 and beyond is exciting. I can't wait". ➡

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Maritimo recently extended its Coomera factory to cope with future growth

MARITIMO Family tradition

Founded 15 years ago by Australian marine industry icon, Bill Barry-Cotter, Maritimo has been a true Australian corporate success story. A proud family-owned Australian company, Maritimo still keeps all facets of its design, new product development and production within Australia.

Currently, the company is the most advanced in its history with the brand's global outreach strategy pushing actively throughout Australasia, The Americas, Europe, and the Middle East.

While Bill Barry-Cotter originally started Maritimo as a boutique boatbuilding company, as demand grew for the new brand, it very quickly grew into a full production boat business. Within three years it had grown into a boatbuilding powerhouse. While Barry-Cotter intended that once he released the right model, which turned out to be the M60, he would build around 10 boats a year and stay ultra-boutique. With the release of the M60 that changed very quickly, as demand outstripped supply.

From there the business grew organically with no acquisitive growth and by 2007 the company was building in the region of 70-80 boats a year, a production way beyond what was ever envisaged in such a short time from a zero-based start.



Maritimo Americas dealer, Dave Nothrop with Phil Candler

CEO Garth Corbitt, says that one of the main reasons was Bill Barry-Cotter's reputation that preceded him in his successful history, with firstly Mariner and then Riviera, which he eventually sold. "He had a track record of starting boatbuilding businesses from scratch and then building the brands to be market leaders, and people trusted him as a brand, his reputation and they continued their loyalty to him when he introduced Maritimo".

However, it didn't take long before the Maritimo brand developed its own momentum and a more formal structure was placed around it. This included a senior management team that would spearhead the growth and future development of the product.

Lead designer Tom Barry-Cotter adds that another reason for the rapid growth of the brand was Bill's ability to read the market with a global perspective and to produce a product, such as the M Series that was different to anything else, but not so radical as to alienate people.

"When he designed the Maritimo range of boats he knew he had a product that was going to fill a niche, that the market wanted without probably knowing it and gain a competitive advantage for at least a few years.

"When the first Maritimo 60 came out, the market was introduced to a long-range, offshore capable enclosed flybridge cruiser with internal stairs, aft galley and deep walk-around decks, which at the time, having an all in one package was not common", says Tom.

After the success of the M60, Maritimo expanded the model line to include the M52 and the M48. 110 M48s were sold, making this the most successful model ever produced by Maritimo. This has since been replaced by the M51, which joins the M54, M59, M64 and M70 in the Flybridge Motor Yacht Series. Apart from the M64, all models are also available as sedan motoryachts in the S Series, and they are joined by the recently added X50 and X60 sport coupes.

Maritimo's product line consists of 11 models from 50ft-70ft, across its M-Series Flybridge Motor Yacht, X-Series Sport Coupe and S-Series Sedan Motor Yacht ranges. While sales of the S-Series and the new X Series have been exceptional, this has been buoyed by an increase in flybridge sales in recent years.

"Right now, we see a real lift in the M Series, especially our larger models such as the M59, the new reconfigured M64 and the M70 both domestically and internationally.

"We gained our reputation with the flybridge style of boat, but with the development of the sport yachts, we have opened our brand up to a whole new set of buyers", added Tom.

EXPORT GROWTH

Maritimo now exports approximately half of its annual production around the world.

"Never before have we been so well established to take the brand forward and increase our awareness levels and ultimately sales in the most significant international markets," said Corbitt. "The senior management team has formulated this global expansion strategy over the years, and it has been necessary to get the foundations set correctly before embarking on that journey.

"Naturally you have to have the product and the capacity at the back end to achieve that and we are confident we have" he said. "Our product line is as diverse as it has ever been, and our investment into new product development has been extremely successful. Our physical production footprint has doubled in the past

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18 months providing the capacity for future expansion.”

He adds that the domestic market has been influenced by recent federal elections, which saw some nervousness by potential buyers. However, it seems that under the new political leadership in Australia, there is stability back in the market, and local sales have recovered to pre-election levels.

“In May 2018 we had a record Sanctuary Cove Show with AUD\$40 million in orders, and then pre-election a few months later the market started to stall. However, the confidence in the government has meant a much faster recovery and 2019 is shaping up to be another record year, with both this year’s SCIBS and SIBS our best ever. Sales are up 30%”, says Corbitt.

Corbitt adds that with a pick-up in the mining sector, Perth is generating increased sales and he sees this continuing for several years. New Zealand also remains an active market.

NEW PLANT

The company has just recently completed a AUD\$13 million expansion of its production facility at the Coomera Marine Precinct on Queensland’s Gold Coast and at the same time set in place the strongest global network of representatives in its 15-year history.

Maritimo general manager operations, Phil Candler, said the expansion enabled Maritimo to diversify its product range and ultimately increase the size of its vessels without interfering with current production.

“The new advanced facilities are capable of developing projects up to rooftop, which enables great flexibility of new product offerings for future product expansion,” he said.

“We now have Design and New Product Development divisions located together for better integration of design into new product prototypes and tooling, with a more productive flow of ideas and information between design and production.”

The total plan area now covers 4.664 hectares, and the expansion increased overall building area by 52%. The company employs more than 300 staff and contractors.



Maritimo founder Bill Barry-Cotter has built a strong management team around him to take the business forward

MARITIMO ONE

The recently announced Maritimo One custom division, enabling Maritimo owners to make significant changes to their base model vessels, is located in the new advanced facilities.

“Maritimo has been internationally renowned for the level in which it enables client customisation, where most other brands have set limitations,” said Tom Barry-Cotter.

“Due to the company’s sales success and subsequent growth of production in recent times, the need surfaced for a more systemised approach to the customisation of boats to maintain production efficiencies within the standard model range.”

“Maritimo One was established to uphold the brand’s identity and reputation for enabling customers to tailor a vessel to their specific needs or environment, whilst taking the potential degree of that customisation to new levels. It is all about one-on-one design and development time with customers and providing a personalised service that results in Maritimo One customers getting a boat that is a one-off and unlike any other vessel.”

Currently, there is a Maritimo M70, extended to 72ft, being custom-built for a repeat Maritimo owner, who plans to use the boat for sportfishing in New Zealand.

POSITIVE FUTURE

Maritimo Sales America’s president, Dave Northrop said Maritimo had been renowned for the quality of its engineering and



The new X60 with its ‘beach club’ has been an outstanding success for Maritimo

product since the brand’s inception, and it is because of brand’s like Maritimo that Australian-built products are considered among the best in the world.

He said ‘owner friendly systems and engineering’ which were simple and reliable for owner operation, family-friendly layouts, and the overall functionality of the Maritimo range were significant drawcards for customers in the Americas.

Corbit adds that its new business sales model, based around a combination of factory direct and dealers, has proven a winner and has certainly generated more leads and sales out of North America.

Maritimo sights are set on further expansion for the remainder of 2019 and into 2020, with recent new appointments in New Zealand, North America, and Europe and further representative appointments in negotiation in all new markets.

“Maritimo’s latest models within the M-Series Flybridge Motor Yacht and X-Series Sport Coupe lines have captured the attention of the markets globally with tremendous success, and with knowledge of what is on the horizon we are confident our design and new product developments will launch the brand to even further new heights in the near future,” said Corbitt.

He claims that all their previous growth forecasts for 2019 in both the local and international markets are being exceeded, with the US, for example, up more than 50% and climbing. **IBI**

Highs, lows and one regret

Through boom times and global recessions, labour challenges and tariff wars, former NMMA president Thom Dammrich, was front and centre as our industry experienced some of its highest highs and lowest lows. Looking back on his 20-year tenure, would he have done anything differently?

WORDS: CRAIG RITCHIE

If there's one familiar face in the global recreational boating industry, it is the perpetually smiling mug of Thom Dammrich, the newly retired president of the National Marine Manufacturers Association (NMMA), past president of ICOMIA, and long-serving member of multitude boards including the American Sportfishing Association and Centre for Sportfish Policy. For the past two decades Dammrich has fought tirelessly for the benefit of the international boat industry, navigating the US market through the toughest economic downturn since The Great Depression, moving and re-imagining NMMA's flagship Miami International Boat Show, leading consumer recruitment efforts through NMMA's Discover Boating outreach program, and directly helping countless NMMA member companies develop their export business and become truly global companies. And, along the way, earning a doctorate in business administration from DePaul University. Although he leads the US marine industry, the ripple effect of Thom Dammrich's decisions has genuine global reach; with the US boating market representing about 55% of the world market, few countries are unaffected by policy decisions he has championed, as either suppliers to or buyers of American-made boating products.

IBI caught up with Dammrich during his last week on the job as NMMA president in order to reflect on changes he has observed over the past 20 years, and to look ahead to the future.

You've been witness to some major changes in the industry over the past 20 years. What stands out?



The ripple effect of some of Dammrich's decisions have had global marine reach

Product quality today is significantly better today than it was 20 years ago. Some of that might have been a natural progression, but a big part of it, I believe, was the result of the NMMA certification program and the NMMA board of directors having the courage to say everybody needs to be certified to ABYC standards. And, if you're not, then you can't be a member of NMMA. We are, among other things, an association of certified boatbuilders.

There were many boatbuilders in NMMA who didn't want to do this, but they did and it's amazing how many of them came back to us later and said thank you, we are building a better boat today because of NMMA certification.

On the other side, we are also beginning to deliver a better customer experience at the dealer level. We still have a way to go in doing that more uniformly across the industry. There are some who are out there doing a great

job, but the whole industry is not there, and we've got more work to do on that front.

Overall, I think the industry is far more professional, more mature, today than it was 20 years ago.

The environment for the industry has changed too. It's a very different world today, with far more complex geopolitical challenges.

The definition of 'family' has a broader meaning today. It used to be a mother and a father who are married and had 2.5 kids and a floppy-eared dog. Today we have many more single parents than there were when I was growing up, just as today we have families with two men or two women that are raising the children. The core family is very different today than it was when we were all kids ourselves.

Demographics have changed dramatically as well. We as an industry always sold boats to a white male ➔

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baby boomer, and we still do that today. But 15 years from now there aren't going to be very many white male baby boomers still buying boats. Certainly in the US, but everywhere, the future buyers will be far more culturally diverse. This industry as a whole has to become more inclusive and more diverse itself in order to stay relevant.

There is going to be a lot of succession in the companies leading this industry over the next 10 years. There will be a lot of turnover at the senior leadership levels, so there is the opportunity to ensure the industry better reflects the consumers of tomorrow. In the US, NMMA was the first to sound the call that the makeup of our country was changing rapidly, and we needed to embrace that change. So far, baby boomers have kept buying boats, so there are some in the business who don't feel a sense of urgency. But I've talked to other boatbuilders who have no doubts about the growing diversity among the people buying their product. In my opinion, we as an industry still do a horrible job of reflecting that in our advertising, in our catalogs and making everyone feel welcome in the boating world.

20 years is a long time in the role. Did you do a good job?

Did I do a good job? (laughs) I can tell you that I gave it 120% every single day. I was here for 20 years, and I'm proud of what we achieved every single minute of it. I'm very fortunate in that I have a team of people behind me who are equally committed to delivering value to the industry. And I think we did a great job, I think we've delivered extraordinary value to the industry, both in terms of our public policy advocacy and what we stop from happening. That alone – the bad things we stopped from happening – are worth the price of membership alone. Now add to that the good things we make happen with regulators, the certification, the boat shows, the communications, the statistics, and yes, I think we did a good job. I certainly hope that we have.

Not everything has been easy though. If

you could turn back the clock, are there any things you wish you could go back and change?

I've never publicly admitted this, but there is one decision I made that I would like to go back in time and undo. By the time I started with NMMA, the old IMTEC show in Chicago was on its last legs. As the new guy I heard a ton of feedback about IMTEC, particularly from the boatbuilders, because they'd all started to doing dealer meetings and the dealers weren't coming to that show anymore. I actually had one boatbuilder call me and say, 'Hey Thom, I know NMMA needs the money from IMTEC, so can I just send you a check for my space but not come?' And I thought, okay, if that's the way it is then we really have a problem here. Long story short, after talking with the board and talking with

“Future buyers will be far more culturally diverse... This industry as a whole has to become more inclusive and more diverse to stay relevant”

the staff, we decided to cancel IMTEC – in spite of the fact that at the time that show was making a US\$1m profit for the NMMA. It was no small decision.

The mistake I made was this: the global boating industry is terribly complex, it's like a big elephant. And depending on where you stand, you can never see the whole elephant. You only ever see a part of it. And at that point in time, early in my tenure, I still hadn't seen the whole elephant yet. In hindsight, what I should have done was not to kill IMTEC, but to change it, cutting out the boat displays and keeping the accessory and marina component going. Because even though the boat builders had migrated to doing their own dealer meetings, there was a need for those two elements. That's demonstrated today by the fact we still have IBEX, and by the fact METS is the show it has become. So if I could turn back the clock, that's the only real regret, the only thing I would change.

Today is September 23 and it looks like you haven't even begun packing your office. When is your last day?

My last day as NMMA president was September 30. My last day working full time was October 15. My last day as an employee is sometime in January.

Although I won't be checking my email every day after mid-October. I'll still be available and there are a couple of things I'll be working on for Frank (incoming NMMA president Frank Hugelmeier). And I'm beginning to look outside NMMA for some things to do post-retirement. I may do some consulting with other associations, or possibly some mentoring of young adults early in their careers. I want to keep busy, but I want to keep busy doing what I want to do, and when I want to do it. I have nine grandchildren now, and most of all I look forward to spending more time with my family. Even when I'm with the family, I often find my mind is thinking about work. Enough of that. I'm looking forward to being able to being there 100%.

Are you going to buy a boat?

Well, that's very likely. We're talking about buying a home up in Wisconsin, possibly on Lake Geneva, Green Lake, or another of the lakes up there. And if we do, it's a good bet we'll have to have a boat. You can't have a dock and no boat.

What's the key?

I think it's to surround yourself with incredible people. I've been blessed with extremely talented executive committee, extremely talented board of directors, and we have the CEOs of the leading companies in the industry on our board. We have businesses of all sizes, covering all geographies, all market segments and they really are all exceptionally smart people who provide great guidance and great support. And without that guidance and support, we could not have accomplished half of what we have. These wonderful people, and their immense contributions, have made my 20 years at NMMA so much easier, and I'm extremely fortunate to have had the privilege of working with them. **IBI**

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An innovation-driven market

In spite of ongoing tariffs and trade disputes, the US marine equipment market continues to surge driven by unprecedented technological innovation

WORDS: CRAIG RITCHIE & TONY ESPOSITO

New technologies. New materials. New approaches to doing things. In spite of continuing tariff battles and general indications of a slowing economy, marine equipment manufacturers in the US continue to surge ahead, bringing unprecedented levels of innovation to market. From next-generation toilets to heads-up displays, technological advancements in materials and manufacturing techniques are rapidly changing the playing field for boatbuilders, allowing them to reduce production costs and installation complexities while simultaneously delivering ever more ways to stand out from the crowd.

With the US domestic market representing approximately 50% of the global leisure boat industry, we reached out to parts and accessory manufacturers to expose emerging trends in key industry sectors, and highlight the work of companies who have taken innovative and unique approaches to differentiating in a highly competitive market.

For example, lighting products continue to develop at an accelerated rate driven

by rapidly evolving control technologies. “That’s driven by the need to deliver greater value for boatbuilders,” says Lumishore CEO, Eiffrion Evans. “Value assumes a variety of forms – innovation on price, performance, installation time or reliability.”

None of this happens without a stable power supply, however, and the increasing electrification of boats overall is driving technology in power management systems. “There is an absolute barrage of technology coming out in the boating industry and it is completely changing the playing field,” notes Power Products marketing manager, Dave Maryanov. “Rapid developments in batteries, solar systems and power management capabilities are enabling wholesale advances across the entire boat.”

Dashboard gauges and displays is another sector experiencing rapid change. “The gauges are basically the eyes of the vessel,” says Veratron US president and CEO, Tony McLachlan. “The technological capabilities are incredible, but the challenge is to keep it easy to use so boaters can operate it without feeling intimidated.

The human-machine interface is absolutely the critical part.”

Even well-established equipment categories like trim tabs have seen wholesale changes over the past year, with new technologies allowing manufacturers to bring heretofore unseen levels of innovation and integration to market. “Today’s modern vessels are becoming smarter and more connected,” says Dometic Marine Americas president, Eric Fetchko. “Smart tab systems that can connect to electric steering controls, joysticks and shift-throttle systems represent a game-changer for the industry by opening up all sorts of possibilities for boatbuilders.”

Make no mistake, the changes currently taking place in the leisure boat equipment sector are substantial by every measure, as the industry begins to transition the user experience toward a new generation that grew up with smartphones in hand and who come to boating with different expectations than their parents brought. The challenge will be to appeal to that future buyer without losing touch of the ones the industry has today. **IBI**



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ECONOMIC INDICATORS

GDP growth (2019)
+ 2.2%

GDP growth (2019)
+ 1.6% est.

High Net Worth Individuals (2018)
5.3 mil (+0.7%)

US Retail Spending (Sep '19)
- 0.3%

Consumer Confidence (Sep '19)
125.1 (-9.1 pts)

Unemployment (Sep '19)
3.5%

New Car Sales (Sep YTD '19)
12.7mil (-2.2%)



BOATING MARKET INDICATORS

2018 Retail Spending on Boating*
\$41.2 billion (+5%)

Boating participants
140 million

Boat Owning Households
1 in 10

Boats in use*
15.8 million

New Powerboat Sales
(12 mo rolling to Aug '19)*
274,200 units
(-0.9% yoy)

RV Wholesale Shipments (Aug 2019, YTD)
278,299 (-20.0%)



MARINE CEO SENTIMENT (Q2 2019) *

Current conditions
33% - Expanding

Sales
23% - Modest to substantial growth

Hiring
49% - Modest to substantial hiring

Capital Expenditures
68% - Modest to substantial investment

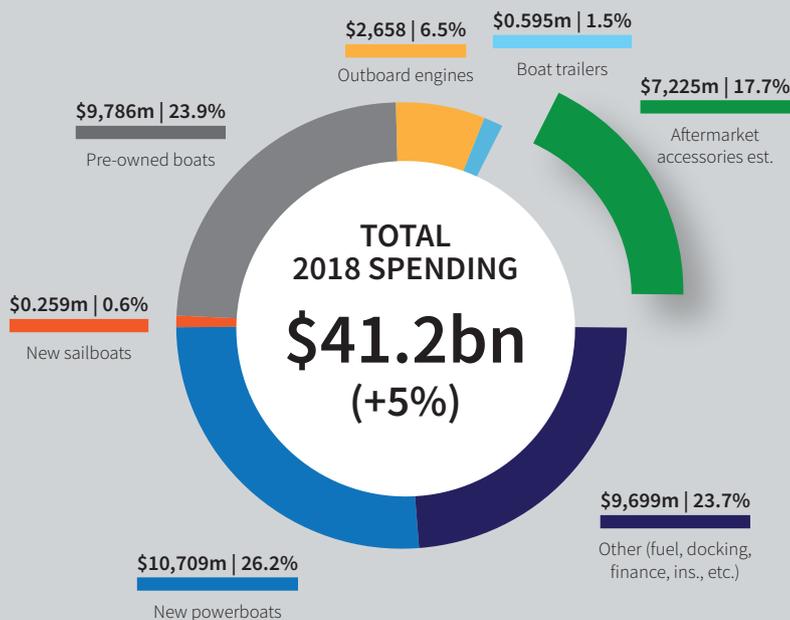
Raw Material Costs
77% Modest to substantial increases

Expectations (next 6 months)
31% - Improving

* Source: NMMA

* Source: NMMA

2018 US retail spending on boating* by segment (\$mil)



* Source: NMMA

US EQUIPMENT & ACCESSORIES MARKET

\$7.225 billion
est. US retail sales*

4.0%
20017-18 growth*

3,850
Equipment manufacturers*

Source: National Marine Manufacturers Association (NMMA).
For additional US market data, visit: www.nmma.org/statistics

US MARKET LEADERS IN P&A

\$1.2 million
Brunswick P&A product sales
(75% aftermarket, 25% OEM)

\$390 million
Dometic USA (marine sales)

\$350 million (est)
Patrick Industries (marine sales)

\$169 million
LCI (marine sales)

ElectroSea: A different kind of anti-scaler



Clearline uses chlorine to prevent growths

While anti-fouling treatments for interior components such as raw water lines for air conditioners, refrigeration units and hydraulic components may not be new, concerns about the incidental discharge of acids or other descaling agents are driving interest toward more eco-friendly systems that can effectively prevent the buildup of marine growths without running afoul of discharge regulations. Minneapolis, Minnesota-based ElectroSea is aiming to capture market share in this segment with its newly-introduced Clearline system, which uses chlorine to keep lines clear.

“The level of chlorine is extremely low, comparable to what one finds in tap water,” says Bryan Billic, national account sales director for ElectroSea. “As water passes through our cell, the flow rate is then calculated inside our control unit box, which sends a direct amount of power to the cell and generates a low level of chlorine. It’s a continuous flush so the lines stay clean, strainers require less maintenance, and everything works as it should.”

Billic notes that the company has entered into supply agreements with five boatbuilders since January 2019, including Viking Yachts and Princess Yachts America.

ElectroSea has more recently begun building an export business, with distribution in Costa Rica, Panama and the Caribbean. The firm will exhibit at METSTRADE this year as part of its strategy to establish global distribution links and develop relationships with boatbuilders outside of the US.



Scout Boats' 420 LXF

Seakeeper: Spin doctors

Stabilisers were once found only on cruise ships and very large yachts. Today you’re just as likely to find one aboard a centre console or RIB. The advent of lightweight, compact gyro systems has enabled stabilisation to go mainstream, to the point that dozens of boatbuilders worldwide now offer the systems.

California, Maryland-based Seakeeper revolutionized boating by bringing stabilisation to the masses with its computer-controlled gyro system. Originally targeting smaller yachts, the company has been steadily growing its product line and presently offers units designed for boats from 27 to more than 100ft in length, and weighing from 7 to 100 tons. “As we grow, not only are we entering new boat size markets, but we’re also adding more options,” says Seakeeper communication manager, Kelsey Albina. “Part of that is reflected by different boat types and purposes, and part by geography. We’re based in the US but we have a substantial presence in Europe as well as distribution in Brazil, Australia and South Africa, so we’re really touching kind of all corners of the globe. Right now, we’ve got more than 9,000 units installed worldwide.”

TREND 1 – STABILISATION IN SMALLER BOATS

For years a cruel irony hung over stabilisers, in that they were generally too big and heavy to fit aboard the smaller boats that would benefit from them the most. With the introduction of its Seakeeper

3 product for boats under 40ft at the 2016 Ft Lauderdale Boat Show, and the subsequent launch of the Seakeeper 2 for boats under 30ft at the Miami show two years later, Seakeeper has successively made stabilisation possible in progressively smaller vessels.

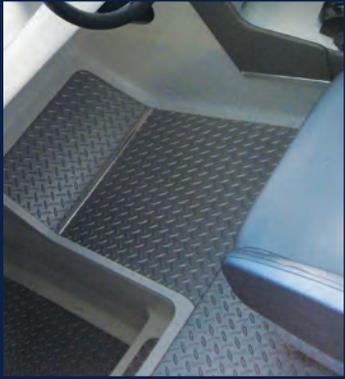
Compact designs are part of the reason these devices can be installed in smaller boats, but so too is their all-electric 12-volt DC design. With no companion hydraulic systems, installation is greatly facilitated – especially in the confined spaces of a smaller centre console fishing boat.

TREND 2 – STABILISERS ARE BECOMING TABLE STAKES

Where Seakeeper’s initial business was driven by end-users who requested the product from boat dealers, today the bulk of the company’s sales are driven from the top down by boatbuilders who want their latest models to offer every modern innovation. Albina notes that OEM channels represent about 75% of Seakeeper’s revenues, with the balance earned through aftermarket sales to dealers and the refit business. “We work with nearly 200 different boatbuilders,” she says. “It started out that boaters were our biggest advocates, and they were helping us convince the boat dealers or the builders that they need to put this product in their boats. Customers would come into the dealership and say, ‘Well, if you don’t offer it, I’m going to go to your competitor who does.’ It was boaters who helped forge those initial OEM relationships, and show the demand that existed for the product.

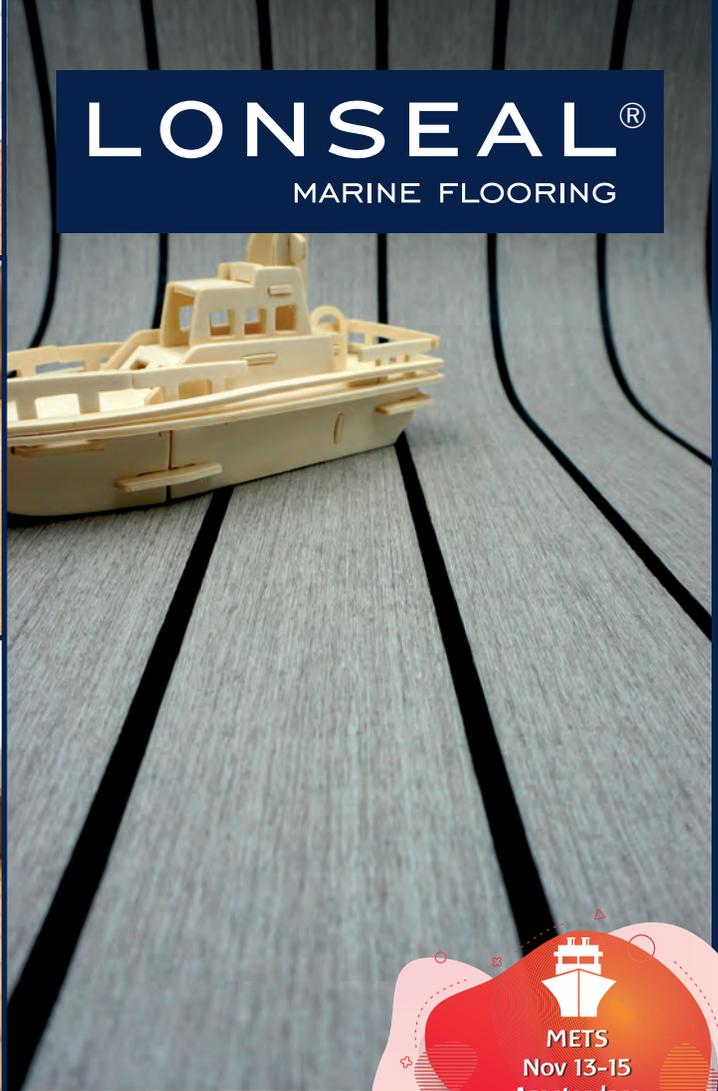
“Today, it’s the boatbuilders who are the primary drivers because they have seen first-hand what a difference stabilization makes to their customers. Their clients are going to be more comfortable, and ultimately, it’s going to be better for them.”

Where some boatbuilders once hesitated to put Seakeeper in their boats because they feared it could be taken as an admission that their product was somehow flawed, today continued high demand from buyers has changed that view. Albina says that while the market hasn’t quite yet reached the point where a stabilizer of some kind has become table stakes for boatbuilders, the day isn’t far off. “When you’re looking at luxury boats like Viking and Azimut, today there are very few going out now that don’t have a Seakeeper. Scout just standardized Seakeeper across a range of their models. More and more, it is becoming an expectation and definitely among families.” ➔

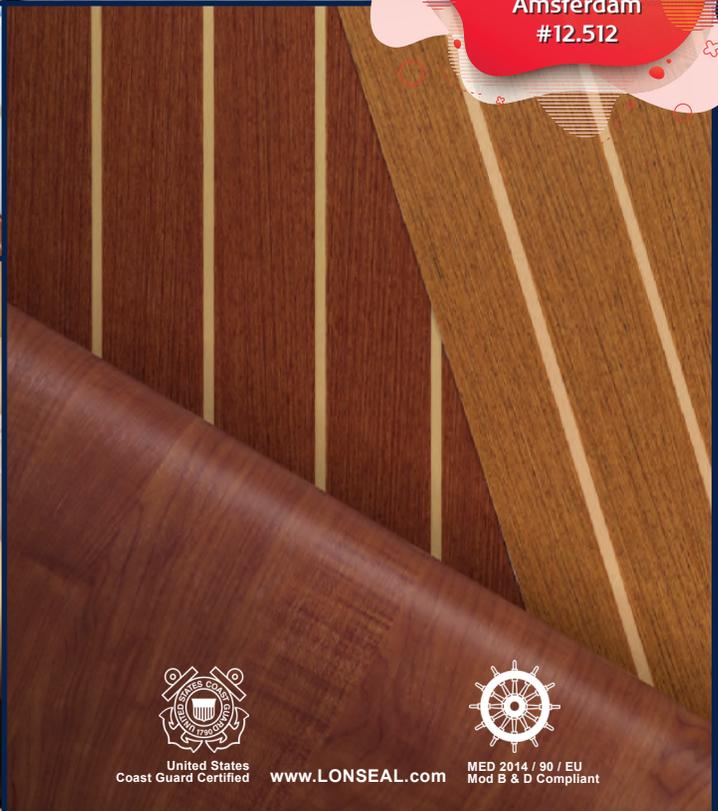


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Ritchie Navigation: Ready to sell

For compass manufacturer Ritchie Navigation, the path to selling more marine compasses is directly linked to getting more people involved in boating. Toward that end, the company has made a significant investment in developing a new program called Ready to Boat that aims to prepare new boaters and ensure they're properly equipped to venture out on the water.

"We've been working for the last four years looking for opportunities and products that complement our business, which if you're going to put it in a nutshell, is safety," says Ritchie Navigation vice president of sales and marketing, Watson 'Robie' Holland.

Because the safest boater is the one that is well prepared, Holland has been championing a new initiative called Ready To Boat – an inexpensive safety kit designed to give new boaters a single point of reference and instill greater confidence. "We feel we have a very unique position within the marine industry in that we work with 95% of the boat builders in the US already," explains Holland. "We committed to develop Ready to Boat and partner with boat builders to create more awareness and better, more informed boaters."

Part of the problem, Holland says, is that boaters are being sold a "blue sky" view of boating with an exaggerated reliance on GPS and the sense that they can't possibly get lost. "Which is

fine as long as the GPS works," he notes. "One big problem is we're seeing boat builders put inappropriate compasses on boats. People buy a \$100,000 or \$200,000 boat and get a \$39 compass. So they head offshore, and run into some trouble. Now, instead of having a wonderful day on the water, they're ticked off. The wife is ticked because they got fined for not having the flotation devices that they needed to have per the Coast Guard regs. They didn't understand the way tides and currents worked. They didn't have the ropes to tie up to the dock out at Martha's Vineyard, so they weren't able to leave their boat there to go enjoy the afternoon lunch that they had planned all week. Now these new boaters are very much at risk of becoming former boaters. None of us can afford that, so we started thinking, how do we make sure this doesn't happen?"

The answer came from following the lead of the motorcycle industry, where dealer handoff to the customer often involves taking short rides to ensure the buyer is properly equipped and knows how to correctly operate all equipment. "That's where we thought by having this checklist, it enabled the dealers to say 'Look, your boat comes with a Ready to Boat wallet. Let me take you through some of the things that you should have on board.' And that's where the dealers make the money. So the customer goes out the door with



Ritchie's Ready to Boat kit

everything they really need, and the dealer now has a sales tool that they can use to boost add-on sales"

Ritchie's end goal is obviously to sell more compasses, and is discussing an incentive scheme with partner boat builders as part of its Ready To Boat initiative. "We've invested a lot of money into this," notes Holland. "Frankly, we're not looking to make money off of Ready to Boat, as far as the OEM side of the business is concerned. But we recognize a need. People need to be properly prepared, because the last thing anyone wants is for someone to buy a boat, go out there and get scared then jump on Facebook and tell all their friends what a miserable experience they had." ➔

Boat Fix: Subscription model

A proliferation of remote monitoring systems underscores consumer demand for increased levels of connectivity in recreational boating, but creates cloudy waters for equipment manufacturers looking to differentiate in a highly competitive sector – and especially in the under 26ft segment that dominates the North American boating landscape. For Connecticut, US-based Boat Fix, the adoption of a subscription-based business model not unlike that used by satellite radio



The Boat Fix app has an emergency contact line for immediate help

providers provides a distinct market position.

"It's not dissimilar to SiriusXM, in a way, where you buy the radio and have the monthly subscription," says Boat Fix CEO, Alistair Crawford. "We differentiate from our 25 or so competitors in three important aspects – retail price, service, and offering a lifetime warranty which no one else does."

Boat Fix sells its monitoring hardware directly to boatbuilders as an OEM, allowing the builder to include the service as a value-add on its product line. Consumers who purchase the boat get the Boat Fix device factory-installed on the boat and a 12-month service subscription, similar to the way satellite radio service is typically handled in the

auto sector. Ongoing service subscription fees to the end-user are \$199 per year, or \$20 per month.

"What makes us completely unique is that we operate as a service business. We're there to help the boat owner 24/7," says Crawford. "So while our product will monitor the boat systems, we also have a button the owner can push if something just stops working and they don't know what to do. When a consumer calls, they get a live operator right away. We have invested in retaining a team of trained mechanics who will take those calls around the clock. A significant proportion of the calls we receive aren't involving old boats that have broken down, they're new boats and most of the time it involves operator error. We provide a way for boatbuilders to give their customer a level of assurance that if they have a problem, someone will be there to help 24/7."



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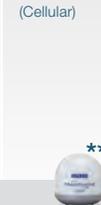
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Traditional Sunbrella woven fabric

Sunbrella: New horizon

For years automakers have led a steady transition from cloth seats to leather upholstery. Increasingly, consumers have come to expect similar comfort when they're aboard their boats.

North Carolina-based Glen Raven Inc, better known as the manufacturer of Sunbrella premium woven fabrics, is targeting the customer who wants leather in their day boat with an all-new line of synthetic leather that's designed to deliver the comfort of the real thing but with greater capacity to absorb daily exposure to UV and harsh marine environments.

"We introduced our Horizon line at IBEX," says Glen Raven marine marketing manager, Bill McDaniel. "It's a premium material that is soft to the touch and extremely durable. Because it uses the same colour pigment as we use in our Sunbrella woven fabric, a boatbuilder can perfectly colour-match the seat upholstery to the sunshade, for example, to maintain a completely integrated look on the boat."

Horizon is a significant launch for Glen Raven, as the company's first branded non-woven product line. McDaniel says Horizon will be marketed as a premium product in both the OEM and aftermarket sectors. "We've had some interesting reactions when we presented the product to major customers, sort of a 'wait a minute Sunbrella doesn't do that' type of thing. Well, we haven't in the past but we do now. We're addressing a need in the market, and that's something we've always done."

Smart Plug: Push strategy

For years Seattle, US-based Smart Plug Systems has used safety as a key point of differentiation in its efforts to gain market share in the shore power sector. Touting its unique locking connector as being safer than competing products, the company has been successful in nurturing OEM partnerships with major boat builders and has developed a significant aftermarket sales network. Now, the firm is adding a new push strategy to its mix, targeting marinas as a means of growing its global market share.

Founded in 2007, Smart Plug developed from a previous business venture which refurbished fire-damaged boats that had been written off by insurance companies. Examination of the burnt-out vessels revealed the fires frequently began at the inlet connector of the boat's shore power receptacle. Recognising what appeared to be a consistent pattern, company founder Ken Smith began developing a new locking shore power connector with an eye to eliminating the corrosion and overheating issues that were identified as the primary cause of connector fires. Smart Plug was the result.

Initially coming to market with a line of receptacles for use on boats and a line of matching adapter cords with a Smart Plug on one end and a traditional twist-lock connector on the other, the company says it was able to reduce the risk of fire caused by corrosion or overheating but not eliminate it entirely. "You still had the old twist-lock connection at the pedestal," says Smart Plug CEO, Tony Barber. "So while a Smart Plug connector would reduce the risk of fire on the boat, the risk at the pedestal was still there."

Toward that, the company has recently embarked on a new push strategy to have Smart Plug offered as the default connector on marina power pedestals. "The idea is to have a Smart Plug connector on the boat and a Smart Plug connector on the pedestal so we can eliminate the twist-lock connector altogether," explains Barber.

Known within the company as the Dockside

Project, the new venture will see Smart Plug collaborate with Williamsburg, Virginia-based Eaton Industries to offer its proprietary connectors on Eaton's Lighthouse and Hatteras power pedestals beginning in Q1 2020. Eaton has also committed to make conversion kits available to retrofit existing Lighthouse and Hatteras units in the field. "We can now provide a receptacle, a weather door and the mounting brackets that marina operators can use to convert existing pedestals that are already installed on marina docks," says Barber. "It's not a difficult conversion, and the end result is a pedestal that has a male Smart Plug connector built into it, allowing an end-user to use a power cord that has a Smart Plug on both ends."

The new partnership represents years of technical development and time invested in achieving requisite safety certifications.

"The approval process was fairly complicated," says Barber.

"Because we're putting multiple components on a pedestal we had to deal with multiple certifications ... UL 817 for cords, UL 498 for the receptacle, and others for the mounting brackets and the weather-proof door.

Then we had to go through CSA and do the same thing all over again."

Certifications didn't end with the pedestals – additional cord sets to fit them also required their own testing. "There are multiple combinations of possible cord sets spanning different plugs and voltages, and different cord lengths, each of which required its own testing and certification," notes Barber. "While that was all happening we were working closely with Eaton, and we will be ready to launch in the new year."

Barber is optimistic that the company's new strategy as an OEM to a major pedestal manufacturer will match its past success working as an OEM to boatbuilders. "We supply more than 50 different boatbuilders today," he says. "I think that when the industry sees a matching pedestal produced by a company like Eaton come to market, we will be able to grow that number even further."



Smart Plus aims to have new pedestals replace the need for adapter cords



Glomex: The little things

For years antenna manufacturers have faced a simple dilemma – while long, one-piece stick antennas are known to deliver the strongest signal reception, they’re also known for being costly to ship.

Eight-foot antennas have long been the most commonly used size in the US boating market. But when major shipping companies began implementing significant surcharges for packages over eight feet in length, many antenna manufacturers responded by shortening their antennas to ensure they would meet new size limits and avoid incurring higher delivery fees. Columbia, South Carolina-based Glomex Marine Antennas USA took a different approach by simply redesigning its packaging. “We did not want to change the product itself because doing so would

force distributors and dealers to change item codes, incur higher costs and in the end have an inferior antenna,” says CEO Raffaele Fabbri. “So instead we re-engineered the cardboard tubes for packaging the antennas, finding ways to save space on the package so we would continue to meet the shipping size limitations while keeping exactly the same antenna, with the same length, with the same price.”

With aftermarket sales representing nearly 50% of total antenna revenues for Glomex, being able to simultaneously avoid product changes and higher shipping costs represents a clear point of differentiation.

“This was a different form of innovation,” says Fabbri. “Sometimes it is the little things that make a difference.”

Sea Sucker: Made in America

Long before tariffs became a daily reality in the recreational boating industry one small Florida company began slowly returning its manufacturing from China to the US. The results of its onshoring effort were a savings of as much as US\$500,000 per year, a doubling of its workforce, and the ability to grow at its own pace.

Founded in 2005, SeaSucker produces nearly 200 products from relocatable beverage, fishing rod and accessories holders for boats to a wide range of non-boating products like bicycle and kayak racks for automobiles. About six years ago, the company began the slow, expensive process of returning its manufacturing from China to its

30,000ft² facility in Bradenton, Florida.

“I have only one regret since starting the company,” said CEO and founder Chuck Casagrande. “And that is that I went to China, even for that short period of time.”

Casagrande claims to have had a catalogue of issues from theft of intellectual property to delayed shipments, indifferent quality, to out-of-spec parts delivery.

Casagrande’s daughter Genevieve, who took over as company president and COO in January, said bringing manufacturing back to the US cost millions of dollars, but is now saving the company about US\$500,000 annually.

“It’s less about even the money that’s saved, it’s just allowed us to grow at the rate that we’ve needed,” the younger Casagrande explained. “We really control what’s going on. It means that if there’s a demand for something, the supply chain isn’t going to be an issue. It’s allowed us to generate a profit more quickly.”

Casagrande the elder says for a start-up company it’s easy to become enamored with foreign pricing, but warns against the hidden costs. “If you look at just that number, your eyes light up and you’re not thinking about the cash flow part of it, or of paying for it up front and the shipping. Then you don’t have enough product.”



Casagrande family: Gregg, Joyce, Anna, Genevieve, Chuck



Prototype heads-up display

Taylor Made: Heads up

Heads-up displays have their roots in modern jet fighters, and have more recently made their way into luxury sports cars. It was only a matter of time till they began to appear in boats.

Gloversville, New York-based Taylor Made Systems aims to become the leader in marketing the technology in marine applications, unveiling a prototype at IBEX. Developed in collaboration with Lumineq Displays, the new transparent display uses a transparent film that displays critical data such as boat speed, engine speed, fuel levels, engine temperature at eye-level for the driver. “You can laminate it right into the glass of the windshield, so the driver never needs to look down when running at high speed or in areas with a lot of traffic,” says Lumineq’s Anthony Uhrick. “It is something you can see in full sunlight, and you can see it wearing polarized sunglasses. It’s not a projected display, so there’s no fear of glare impairing performance.”

By being laminated directly into the windshield, the display is highly resilient to harsh environments tolerating moisture, pressure, shock, vibrations and extreme temperatures. It is also fully customisable, allowing the look, interface, cover glass, type and size of the display to be modified to suit an individual boat builder’s requirements.

“We’re trying to create unique experiences for people,” says Jeff Smith, marketing manager, marine products, for Taylor Made. “We’ve done windshields for years, and this is another option we can make available to boatbuilders who want to differentiate in the market.”



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Trim tabs: Tabs go high-tech

Between heavy offshore day boats and the continued growth of wakesurfing, the demand for trim tabs has been growing exponentially.

The trends toward generating the largest wake for riding, or hanging multiple high-horsepower outboards on all style of hulls has created a new need for trim tab innovation, and particularly in the areas of beefier components, easier controls and user-programmability. While they may seem like fairly simple devices, the recent innovation in trim tab technology has been nothing short of remarkable.

TREND 1: The Shape Of Things To Come

In theory the bigger, heavier, faster the boat, the larger the trim tab. But with three or more large outboards hanging on the transom, the amount of real estate available for mounting trim tabs shrinks. Compounding mounting challenges is the requirement that the tabs must deploy without cavitating the propellers - no easy task when dealing with a boat that has restricted mounting options.

“Our new 1025 tab is specifically for triples or quads [outboard boats],” explains Mike Livorsi, president of Livorsi Marine, which provides custom tabs to the US Coast Guard and for 11-meter rigid hull inflatables (RIBs) used by other branches of the military. “We made a more severe cut on the inside of the tab. We offset the sender by three inches, so you can move the tab out three inches on each side, away from the props, to maximize water cooling and minimize prop aeration.”

At Bennett Marine, sales director David Rose notes that trim tab designs have evolved to reflect the changing boat market. That includes a shift toward electric operation, eliminating the need for bulky hydraulic pumps in the confined spaces of contemporary day boats. “The new tabs that we offer are more of a tapered, high-performance system,” he says. “We’re filling what we saw as a gap in our product line. When enough customers ask for something, we become that vendor



Livorsi 1025 tab

partner that goes ahead and co-develops.”

Lenco Marine also customizes for its OEM wake boat builders. “They design it, but we build different blades that basically take that water that the boat displaces and funnel it to make a nice wave to surf, a nice clean wave,” says sales manager, Ryan Taffet.

TREND 2: Beefier Actuators

Taffet notes that Lenco also offers tapered tabs for multi-outboard boats, reflecting the growth in that segment. With their greater power and weight, these products demand more robust hardware, starting with the actuators that actually operate the trim tabs. “The blades kept getting bigger and bigger,” he says. “With more outboards hanging on the back of these boats, we’re seeing a lot more load on the trim tab blades so they have to be beefed up. The load on the actuators kept getting greater and greater, in terms of pound force. So, we reached a point where our standard line of actuators just wasn’t cutting it on every application anymore.” Taffet notes that Lenco’s new actuators double capacity, pushing up to 1,000 pounds of pressure in a more robust housing with a redesigned seal stack to keep the cylinder dry inside.

TREND 3: More Intuitive Controls

Automatic trim tabs are becoming more widely available on “smart” systems from a number of manufacturers. In addition to



Dometic rotary control

leveling the boat for optimum performance (with easy manual override), automatic tabs allow the boater to pre-set various modes for different performance conditions.

Dometic Marine used the recent IBEX show in Tampa to introduce what it calls the “next generation Smart Trim Tab (STT) system” based on a CAN-based heavy-duty smart actuator that can integrate with the boat’s control system. When fully integrated, STT can be programmed by the operator for automatic tab positioning. The system can also be set to automatically respond to changes in boat speed and attitude.

Where joystick controls have become an integral part of next-generation engine controls, a joystick-type of control interface also has applications in the trim tab market. One unique feature of Dometic’s SST system is the adoption of a simple horizontal control wheel in place of the traditional up/down switches that regulate each tab independently. “This is super intuitive,” explains Eric Fetchko, President of Dometic Marine Americas. “You just turn the control wheel in the direction you want the tabs to go. If you want the boat to go down on the right, you rotate the wheel so the right side goes down. If you want to raise the right side a bit, you rotate the wheel the other way, so the right side comes up. It’s very, very intuitive and controls both tabs to easily attain the desired result.” **IBI**

Galley: Home away from home



Kenyon integrated cockpit grill



Induction stoves are gaining ground



Digital controls provide a smooth, finished look

It doesn't take long for home design and interior style trends to migrate into boating décor and technology, particularly in the case of food preparation and galley equipment. From exotic stone and carbon fiber looks – both faux and real – to healthier cooking methods and easier clean-ups, if it's in your kitchen at home you could likely find it onboard a modern boat.

"In the marine market, the most important thing to remember is that form cannot trump function," said Brad Clark, vice president with Eno/Force 10. "Function, ease of use, safety and quality all have to be there, and in equipment that typically has to fit in a much smaller space than in a home kitchen."

Manufacturers of galley equipment show consensus on accenting marine equipment with residential touches. That includes greater degrees of integration, and clean, custom-installation looks according to Nigel Jones, an export distributor for Kenyon Manufacturing.

TREND 1: Integration and induction

Integration is often used to suggest a built-in rather than add-on look, and that's particularly true of the growing number of flat-top cooking surfaces finding their way into galleys and cockpit spaces, as they allow more versatile use of space in tight quarters.

"We have made custom glass tops to match countertops. The route out a recess

and the glass top drops in so it's completely flush, and then the edges are sealed with a colored sealant so that there is virtually no change in the surface," Jones said. "It's almost indistinguishable by eye and certainly for cleaning. That's really what interior yacht interiors have been doing, is getting more and more like residential spaces, but within the confines of a typical day boat or yacht."

While Kenyon has been making electric induction cooktops for some time, it's a new venture for Eno/Force 10, which has historically focused on gas devices – a reflection of its heavy concentration in the sail and catamaran markets, where owners tend to shy away from generators, Clark explained.

"We are just going into induction for the powerboats, so that's a new trend in induction cooking, because of the quick heat up time. We're trying to follow some of the trends in home [décor]; we have a new flush line of gas-cooking cooktops that allow for a more contemporary look," he said.

The flush-fit trend in cooktops is finding its way on deck as well. "We have a new product called the Antigua Compact," says Clark. "It's an outdoor built-in barbecue grill, that goes into a wet bar or an entertainment island on power boats or pontoon boats. We're focusing on that outdoor lifestyle, outside of the galley range, cooking outside and enjoying the weather."

TREND 2: Healthier cooking, easier cleanups

As consumers embrace healthier diets at home, they expect to be able to produce similar meals on the water. That includes eliminating unnecessary ingredients like oils and sugars where possible. Eno/Force 10's Antigua Compact is available in a 'Plancha' model that is essentially a non-stick, ceramic-coated shallow pan, providing a griddle-style flat cooktop that uses the natural juices of meats to cook, requiring no added oil or fat. The Plancha simply lifts out of the unit for easy cleaning.

TREND 3: Digital controls

One clear trend in galley equipment is the proliferation of digital controls. Improved LED readouts and displays that are visible from anywhere in the galley are rapidly growing in popularity among consumers, who have become accustomed to similar controls at home. In view of the marine environment, automatic safety shutoffs and on-board remote burner controls are also growing in popularity.

But in spite of the growing popularity of digital controls in galley gear, don't go thinking there's an app for that. Being able to control galley equipment from a smartphone or tablet might not be the best approach, according to Jones. "We accidentally dial our phones all the time," he said "Can you imagine accidentally dialing your stove?" **IBI**

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We live in an increasingly connected world dominated by electronic devices, whether they're hard-wired into the boat and draw power directly from its electrical power system, or just tap into it periodically to recharge their own internal batteries. These increased demands for power have put a new strain on marine electrical systems. "When people leave home and get on their boat, their expectation is they can charge their computers, make a cup of coffee, pop some popcorn and blend a margarita," says Dave Maryanov, marketing manager at Power Products. "Whatever it is that they're doing, their expectation is they're going to have an unlimited power supply just like they do at home."

This increased demand for electrical power has led to significant changes in onboard power management systems. "Individual products are now more energy efficient, but we have more and more devices onboard all the time," says CDI Electronics president, Tim Bock. "LED lights don't draw as much power

as incandescent bulbs did, for example, but now we have many, many more lights on the boat. Overall, power demand has steadily increased."

TREND 1: Shift toward Lithium-Ion

The demand for greater power levels has been driving the growing implementation of Lithium-Ion batteries and solar panels in boats. Lithium-Ion batteries outperform traditional AGM/lead acid cells in several significant ways, including a run time up to twice that of comparable AGM/lead acid cells, a significantly longer service life – up to six times as long as comparable batteries – and a steady power drain, delivering 12.1 volts, all the time. That voltage stability ensures that electrical appliances operate as they should, and are not handicapped by low power supply.

"Lithium-Ion is better technology. It does have a much higher sticker price, but over the life of the battery it is a less expensive option, so people are working lithium-Ion into their systems," says



CDI Electronics president, Tim Bock

Maryanov. "And it has to be thought of as a system. Beyond the battery you'll also need battery chargers that are able to charge lithium-Ion and that have that charge profile built in. You need inverters that are able to handle the kind of steady high output that a lithium-Ion battery gets, and you need a way to monitor those batteries."

Perhaps the greatest benefit of Li-Ion batteries is the ability to access and use the battery's entire charge. Xantrex strategic account manager, Donald Hasler, notes that the maximum discharge for a traditional lead acid battery is to a level of about 50% of its total capacity where a comparable lithium-ion battery can be run all the way to a zero % state of charge. The ability to access far more of the battery's actual capacity results in a substantially greater run time, enabling Lithium-Ion batteries to power loads for far longer than traditional cells. In practical use, swapping 400 amp hours of AGM/lead acid for 400 amp hours of Li-Ion would double the available run time for loads such as ➔

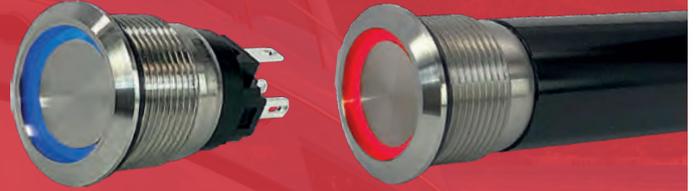
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Another significant advantage of Lithium-Ion batteries is their longer life cycle. Where a traditional battery might deliver anywhere from 500 to 900 charging cycles and may require replacement every year, a Lithium-Ion battery can provide a service life from 3,000 to 5,000 charging cycles. In spite of their higher initial cost, Lithium-Ion batteries provide superior ROI by offering up to six times more charging cycles than a traditional battery, and thereby requiring less frequent replacement.

TREND 2: Adoption of solar

Where Lithium-Ion batteries represent a quantum leap forward in managing electrical loads, they work even better when combined with solar panels that can maintain a constant trickle charge and offset parasitic losses. With five to six hours of daily sunlight, a pair of 100W solar panels can generate from 60 to 72 amp hours' worth of power per day. That represents an extra hour or two of



Xantrex solar panel and controller

air-conditioning or heating, along with power left over to microwave some popcorn and enjoy a movie on DVD. Solar reduces the depth of discharge on batteries, resulting in extended battery life.

TREND 3: Adoption of power management systems

As power systems grow more complex, keeping batteries properly charged becomes a greater concern. Beyond adding a high-power alternator with a steep power curve that will charge the batteries at idle speed, battery regulator systems that condition the power to the battery can help maximise charging performance. "Every one of these different battery chemistries has different charging requirements, so optimising the power to specifically match the chemistry of the battery you're charging will not only allow it to charge 30% to 50% faster, but it will last two to three, even five times as long as it would without smart charging system in place," says Tim Bock.

TREND 4: More sophisticated shore power systems

Many boaters will rely on shore power connections to fully recharge their onboard batteries, and the push to greater power demands is being felt in that category. Joe DiMaria, director, marine and wirecon marketing & sales for Hubbell Inc, says increased onboard power demands are driving significant changes in the shore power segment. "There are two things that we're seeing," he says. "The biggest thing is that as boats require more power, we're seeing an upward migration in shore power systems, with builders either doubling up or moving up to the next size. Where it used to be that 80% of the boats were 30 amp, that's not the case anymore. Now there are quite a few built in the 50 amp category and even more at 100 amps."

Apart from larger capacity shore power systems, DiMaria says more extensive electrical systems are also driving a demand for isolation transformers. "If a boat goes into a marina and the power is not adequate or the voltage is low, then an isolation transformer can pick that voltage up," he explains. "We call it boosting to get the voltage to a level where everything on the boat can function properly. If you have a low voltage, your electronics are at risk. And low voltage is a common issue at marinas, particularly with the boats in slips at the end of a long pier or at the head of a dock where the power supply has a long run to get there."

As onboard electrical systems grow in complexity, boats require greater protection against power faults, including polarity issues, miswiring issues and poor connections. California-based ASEA Power Systems includes an isolation transformer into all of its shore power converters as a safety consideration. "Without an isolation transformer, there is a direct connection between the earth ground of the dock and the vessel's electrical system," notes ASEA director of engineering, Eric Herman. "A loose wire on the boat may cause fault current to flow through the hull to the water, and back to the shore supply. That current flowing through the water is what makes swimming in the marina so dangerous." **IBI**

Flooring: On solid footing



Tow boats were early adopters of foam decking



Syntec president Bill Watters

Clearly one of the most active categories in marine equipment is flooring, with multiple competitors vying for share in a highly dynamic market.

Until about 10 years ago the leisure marine flooring market in North America was almost equally split between molded-in non-skid on fiberglass boats, and carpet on everything else. But the arrival of woven PVC and foam alternatives, with their fast-drying, low maintenance qualities, quickly changed the flooring landscape – and nowhere more dramatically than on the under 26ft models that represent 95% of the US boating market. “Marine carpet went from being a \$40m product for us to about \$5m today,” says Syntec Industries president, Bill Watters. “We probably had close to 80% of the carpet market then. Today, we still exhibit carpet at trade shows like IBEX, where we had it on some endcap displays. But I can’t say we had more than one or two people come into the booth to talk about it. Woven PVC and foam have replaced it in most segments, with bass boats being about the only exception.”

TREND 1 – Woven PVC owns the pontoon segment

Watters notes that where Syntec initially sourced woven PVC product from another supplier, the industry shift toward the

product was so clear that the company soon invested in its own fabrication equipment. “We do three metre-wide and four metre-wide, which allows us to do one-piece floors on pontoon boats, and they are obviously a huge part of the US market” says Watters. “PVC is comfortable, it looks really good, it dries quickly and its fully UV-stabilised. It’s also versatile, in that it works equally well as a glue-in floor or as a snap-in product, and that’s what has really allowed it to replace carpet in so many applications.”

Syntec also offers a foam flooring product based on a polyethylene foam. “It has a higher melting temperature, it wears well and it has extremely low shrinkage, less than 0.02%,” says Watters. “It’s amazing what you can do with that material, so it opens up a lot of options for a boatbuilder.”

TREND 2 – Foam continues gaining share

Originally found on high-end watersports tow boats where its soft-touch and quick drying characteristics made it an immediate hit with wakeboarders, foam continues to gain ground in the flooring sector across a growing range of watercraft, from kayaks to sailboats. Its adaptability and durability have made it a new champion in the booming centre

console market, where it is fast replacing traditional molded-in non-skid – not just on swim platforms, but throughout the entire vessel. “One of the real benefits to foam is its ability to dissipate heat so well,” says MarineMat general manager, John Salvatore. “Beyond that, it offers really incredible design capabilities. You can get different colors, different looks, you can incorporate logos and graphics, and do it easily and cost-effectively. You can’t really do that quite the same way with any other flooring product.”

Salvatore notes that although OEM contracts represent up to 75% of MarineMat’s business, it has more recently been enjoying strong growth in the aftermarket as a direct-replacement product for snap-in carpet. “Every Sea Ray/Rinker/Chaparral, whatever, that’s been made for the last 40 years has had a snap-in floor of some sort so the snaps are already there,” he says. “We can use that carpet as a pattern to remake their floor and update them to something fresh and modern.”

For Rockledge, Florida-based SeaDek, the appearance of competitors in the foam flooring space was inevitable. “We were alone in the market for almost a decade,” says Jason Gardner, vice president of marketing and advertising at Hyperform Inc. “That doesn’t happen very often. ➔

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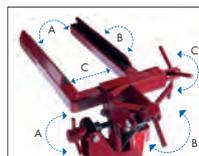
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But that gave us a lot of advantages. It allowed us to become ISO-certified very early on, develop our supply chain and establish a strong presence in the OEM, custom aftermarket and retail sectors simultaneously. A lot of our competitors, because they are new to the market, have to focus on one piece of the puzzle. We don't have that limitation and that really is something that speaks to large boatbuilders."

It has also given SeaDek a leg up on establishing itself as a global company, with a growing network of certified installers and fabricators worldwide. "The decision to diversify internationally was one that we debated internally quite a bit, because it could have been seen as distracting from our domestic operations," says Gardner. "But we didn't see it that way. We knew we had the capacity to grow internationally. The plan we put in place with our certified fabricators didn't subtract from our domestic production capacity. It simply added capacity regionally and around the world."

Launching its export business at METSTRADE in 2014, the company's decision has paid off handsomely with exports today to more than 40 countries. Through its certified installer and certified fabricator initiatives, SeaDek's export sales have grown by 82% since 2016, earning the company Global Star recognition from the National Marine Manufacturers Association earlier this year.

"We developed strong relationships with the early adopters, primarily tow boats for watersports, but now we're seeing SeaDek go into just about every type of boat out there," says Gardner. "Bass boats still largely use carpet but we're working with some builders who appreciate the lighter weight and greater durability they get with SeaDek. If you're fishing in the rain all day that carpeted deck is going to soak up a ton of water, and that's a lot of extra weight. With our product the water just runs off, so the boater doesn't have that issue."

Gardner notes that foam flooring has also found a growing market in aluminium fishing boats.

"We've spent a lot of time in New Zealand and Australia in the past year or so, where heavy aluminium boats are widely used. Our clients there like it for its sound-dampening qualities, which is particularly appreciated by fishermen." **IBI**



SeaDek has greatly expanded its aftermarket footprint



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SeaStar Solutions is introducing a new foot throttle, the Pro-Pedal, that provides a more comfortable operating experience for the driver and incorporates components that will greatly improve durability and reliability.



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Sanitation: Taking care of business

Ask anyone in the business and they'll tell you on-board sanitation is the butt of all the jokes. But in a highly competitive market, the business of taking care of 'business' is serious business indeed.

Toilets are hardly new – their use dates to the third millennium BC. But technology in marine sanitation continues to evolve at a rapid pace, driven by user expectation and regulatory considerations.

TREND 1: Enhanced user experiences

Mirroring décor from upscale homes and luxury hotels, the yacht market is gaining interest in multi-function toilets, with built-in, omni-directional bidet functions and air-dry nozzles, all activated by remote control according to Gianluca Silvestri, business unit manager of Thetford Marine. "It was introduced two years ago and is really becoming extremely popular in the Middle East, in the Far East, but also in the US. We have a lot of customers that want to have this special experience on board their boats," Silvestri said.

When it comes to enjoying that special experience, the buzzword today is carbon fibre. Thetford's Tecma X-Compass is a hybrid design that blends the beauty of carbon fiber and the hygiene of ceramic designs. "We see a growing interest on the X-Light and X-Light S toilets, our macerator toilets made of full carbon," says Silvestri. "There is a global trend where carbon fibre is appealing to the high-quality and luxury sector."

TREND 2: Adapting to changing regulations

While enhancing the user experience is a desire of toilet manufacturers, ensuring compliance with future regulations is a must. Thetford Marine field service engineer Richard Brunson, who is participating in a review of marine sanitation regulations as a member of the American Boat and Yacht Council (ABYC),



Multi-function toilets are growing in popularity

says regulation is the future and predicts a growing number of No Discharge Zones (NDZs) in response to the inconsistent treatment of waste dumped overboard. "The Coast Guard is not liking the fact that people treat and pump overboard because it's not consistent. It might work on one vessel, may not work on another," he says. "There are only two devices for this, one uses a chemical, the other heat."

Environmental regulations require that Type I sanitation devices discharge fecal coliform at less than 1,000 ppm per 100ml. As a result, Type I device discharge is prohibited in NDZs.

But Kimberly Carrell, CFO for Raritan Engineering, points out that the company's LectraSan technology produces only 20 ppm per 100ml. One argument is with today's achievable low level of discharge there is a safe solution in areas that might otherwise be NDZs. "Just to put the numbers in perspective, they close the beaches when fecal coliform reaches 200 ppm; so, they'll let you swim in it up to 200 and we're putting out less than 20," Carrell said, suggesting further the regulations should be changed to reflect technology.

"There are certain low tidal flushing areas where you don't want to be discharging anything at all, but there are a lot of bodies of water where it makes sense while underway to treat one flush at a time."

TREND 3: Adoption of advanced technologies

Daniel Smith, a sanitation product manager for Dometic, suggests that regulation will likely drive technological advancement in waste treatment. "I think a lot of that technology is available today. Let's just say that that technology might be more expensive and not fully utilised. So, it's optional now and I think in the future there will be a trend to where that becomes mandatory."

Dometic's top-of-the-line VacuFlush technology is similar to systems used on commercial airliners, using minimal water and a negative vacuum to draw waste completely from the plumbing lines to a holding tank for treatment, which Smith believes will remain the standard method of dealing with on-board waste for some time to come.

"I think there's a slow trend towards something like incinerating toilets. I think we are more likely to solve sanitary issues with waste treatment devices and just increasing the cleanliness that we discharge, [rather] than completely eliminating holding tanks, for example." **IBI**



Tecma X-Compass set

Instruments: Mission control

Many would have thought that the arrival of the glass cockpit would have spelled the end for dedicated engine gauges, but that hasn't been the case. While gauge manufacturers have clearly seen changes to the business as boats grow increasingly electronic and integrated, demand for stand-alone engine data independent of the multi-function display (MFD) remains as strong as ever.



Mercury multi-function speedometer

With baby boomers still representing the majority of boat buyers in key markets world-wide, stand-alone gauges continue to enjoy a place of prominence on the helm. The ability to see critical information at a glance without having to scroll through pages of menus offers a legitimate user benefit. "MFDs are expensive and they're hard to read in sunlight or when wearing polarized glasses," says Livorsi Marine president, Mike Livorsi. "You can get the same information such as fuel flow, remaining fuel and warnings off our Vantage View gauges. MFD's have their place in the market, but we believe that dedicated gauges will also continue to be part of that mix in the future, for a variety of reasons."

That's an opinion shared by Mercury Marine, which provides boatbuilders with multiple ways of viewing its engine data - with traditional dial gauges, through dedicated SmartCraft displays, via MFD links and through mobile links to smartphones and tablets. "Our gauge business is very healthy and it continues to increase," says Walter Ross, senior product manager, controls and rigging for Mercury Marine. "We continue to update those with software releases. Our latest version 9.0 incorporates some of our new 175 to 300 V6 and V8 four-stroke functionalities such as advanced sound control and the oil status monitoring. And along with that we also added in active trim control to those gauges as well."

Ross notes, however, that in spite of strong support for gauges, the market is clearly shifting toward displays -



Livorsi gauge set in custom finish

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Multi-function dial gauges remain popular

MFDs or dedicated, stand-alone displays like the Mercury VesselView line which display SmartCraft engine data. “Those are still independent of the MFD so the information is always available at a glance,” says Ross. “The operator can be using the MFD in full-screen mode to display their fishfinder or radar and still have the engine data available at all times.”

TREND 1: Information prioritisation

The whole point of gauges is to present critical information to the boat operator. But at any given time, only certain data will be needed. A dashboard lined with dials looks impressive, but represents a poor use of space when only two or three of them may be required at any given time. Similarly, the sleek glass dash can prove frustrating to operate when accessing required information necessitates navigating through multiple menu screens.

“Boatbuilders want to use their space on the dash in a multi-function purpose. The challenge is to have the appropriate data available to the user at the appropriate time,” says Tony McLaughlan, president and CEO, marine and powersports accessories for Veratron US Inc. “A pontoon boat owner parked on the sandbar may want their dash to be primarily entertainment, whether it be audio or playing movies for the kids. They’re going to use that space in a different way than an offshore fisherman will, or someone operating a bass boat. And in most cases, the engine information becomes secondary until there’s a problem. And then you want

to be alerted that there’s an issue, or that you have to take charge of something.”

TREND 2: Buttons are back

One of the most striking visual aspects of the glass cockpit when it first appeared was not just the lack of traditional dial gauges, but also the distinct lack of buttons, with all functions controlled via flat touch-screen displays. While it’s an approach that works just fine in the cozy confines of a protected pilothouse, some touch-screens have proven troublesome to operate in more exposed environments like sailboat cockpits and fishing boats, where they may not respond properly to wet fingers.

“Our strategy is we offer both buttons and touch-screen control,” says McLachlan. “For the smaller displays we have buttons, primarily because if you notice those buttons on the four inch OceanLink, they’re quite large. It’s one thing to be operating a display when you’re sitting in a showroom, but it’s quite something else when you’re offshore and you’re bouncing around. We’ve done extensive interviews with our OE customers, especially the engine builders, and because these engines get used not only for recreation but also for commercial, there’s a large preference to have buttons as well.”

TREND 3: Custom colours

One challenge to the glass helm look is similarity – an expanse of glass screens looks similar from one boat to the next, making it more difficult for boatbuilders to differentiate and establish their own brand values. That’s precisely why custom gauges and controls continue to dominate highly competitive segments like tow boats for watersports. “The OEM tow boat market is very strong, and they demand custom colors, private labeling and a different style or look almost every model year,” says Livorsi. “With that comes demand for new features like dual trim switches to activate various plates or wedges, or smoother electronic shifting and throttling.”

TREND 4: Instant on

Turn the key in your car and the dashboard springs to life immediately. Turn the key in most boats and you have to

wait for the MFD to boot up, as if cold-starting a cell phone or a laptop.

“With traditional gauges a customer’s been able to go up to the boat, turn the key and have information with their engine available immediately, just like they do in their car,” says McLaughlan. “That’s not the case with some of the big screens, and there’s a lag of a minute or two where it wakes up. One of the things that we pride ourselves on, especially even with the displays we make, is that we’re using real time operating systems that have a much quicker boot time, and that critical data is available at that turn of key. It’s far more familiar to the end-user and less like they’re using dial-up internet.”

TREND 5: Data collection

Devices that display engine data are in the prime position to collect and store it, or share it with a servicing dealer as a means of tracking engine performance or diagnosing problems. Mercury Marine’s VesselView system allows the user to opt-in to share engine data with their dealer, enabling them to see any fault codes, overall hours and monitor any maintenance that may be coming due. “It allows the dealer to really work with the customer very closely to maintain and nurture that relationship,” explains Ross. “We’re trying to be very clear with our consumers and saying, ‘Hey, just because this data is going out to the cloud doesn’t mean your dealer is sitting there watching your boat.’ But that said, a good dealer is going to understand the power of that data. A group here actually took some customers, took all of their connected boats, and then rolled up what a service schedule or what their aftermarket purchase or sales could be to these customers to show them what kind of business they can drive by being more proactive with these customers. So once the dealers understand that and get into this mindset, I think they will gladly adopt it. Right now it’s just all about communication and making them aware that it’s out there and available to them for free.” **IBI**

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Switching: The switch to digital



Power Products Contact 6 Plus

Digital switching is hardly new, it has been around for a generation or better – both in automobiles and in larger yachts. But as the technology has grown less expensive and more compact, digital switching is being rapidly adopted among builders of smaller boats for controlling increasingly complex systems – and providing entirely new capabilities.

Where a traditional mechanical switch is set on or off, a digital switch can be operated remotely, providing opportunities to automate and control a wide range of electrical devices from the boat's multi-function display (MFD) or even a smartphone. Because they allow for control from a familiar, mobile phone-like graphic user interface, digital systems tend to be easier for consumers to operate. They're also faster and easier for builders to install on the production line, and they tend to be more reliable in operation and easier to troubleshoot – reducing headaches for end-users, and potential warranty claims for boatbuilders. "It's the demand that we're hearing from the smaller boat builders," said Dave Maryanov, marketing manager for Brunswick's Power Products division. "Digital switching has been around for going on 15 years now in the big boat market, and now the smaller boats are saying hey, we want in on this too."

SIMPLE CUSTOMISATION

One key attraction to digital switching is the ability to combine separate functions into a single action. That's a key design feature of Power Products' new Contact 6 Plus, an affordable digital switching system designed specifically for smaller

boats under 30ft. The system consists of a six-output module that connects directly to a six-position keypad, providing a self-connected, free-standing system that offers a variety of programming options and doesn't depend upon an NMEA connection. "You can combine different circuits onto the same switch to set up custom modes," explains Maryanov. "So if you want to put your boat into fishing mode, for example, you place control of all the circuits that make your boat 'fishable' onto a single switch. You press one button and your trolling motor circuit turns on, your live well pump starts to circulate water, temperature monitoring starts to activate, and everything that you need to be out fishing happens with just that single button push."

By simplifying boat operation and combining circuits most likely to be used, the Contact 6 Plus allows boaters to custom-configure their boat for a wide variety of activities. "You can set up a party mode, or a relaxing at the sandbar mode, or a docking mode," says Maryanov.

PROGRAMMABILITY SELLS

E-Plex Ltd has also embraced programmability in its new 826QRM Quad Relay Module, part of the company's growing system designed to monitor and control non-critical systems on yachts, larger boats and specialty vehicles. "Our system is programmable, unlike competing equipment which comes pre-configured to perform specific functions," explains master dealer Laurent Bruinier, at Nauti-Tech. "The only limitations are whatever the programmer can do."

Bruinier notes that boatbuilders appreciate the versatility of the module. "It allows us to design the system around the customer," he says. "We can literally do anything that the customer wants us to, it just takes X-amount of time to set up because everything needs to be programmed." **TBI**

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Lighting: Get smart



Lumishore Lumi-Link colour palette



Innovative Lighting's Roger Handsaker

Only a few years ago the term “smart lighting” might have drawn blank stares from most in the recreational boating industry. But today, it's one of the hottest segments in the boat equipment sector.

As residential lighting has evolved from a functional necessity to an integral part of home design, so too has it followed a similar migration on the water. Extensive research has shown that lighting has a significant impact on human emotional response, bringing demand for greater controllability of light quality into the fore. In the marine space, the meteoric rise of fully controllable smart lighting systems has mirrored that of residential demand, with lighting manufacturers making tremendous strides in developing systems that suit marine applications.

TREND 1: Colour tuning

LED manufacturer Lumishore used the recent IBEX trade show in Florida to unveil its Lux Lighting Collection, which it describes as the world's first and only marine-grade, fully colour-tunable, DC smart lighting, developed specifically for the marine environment.

Consisting of strip, neon flex, down and courtesy fixtures that are fully compatible with the company's existing line of underwater lights, the new Lux line can be centrally controlled from an MFD, a Lumishore touch-screen display, or a smartphone to deliver full spectrum,

colour-tunable and white temperature tunable lighting all in the same DC fixture for an unlimited combination of colours and intensity. The centrally controlled nature of LUX ensures colour consistency throughout the entire vessel for a balanced and unified look. It also allows end-users to choose from a complete colour palette to suit both mood and preference. Each fixture has five-channel CRGBW (cold-white/red/green/blue/warm-white) LEDs with a high colour rendition index, to ensure colours remain faithful to the way the human eye sees them in natural sunlight. By integrating these LEDs directly into the fixture, Lumishore lights are able to produce an almost infinite combination of hues, saturation and temperature, which has never been done before in a DC-powered LED light. In addition, all units are designed for both interior and exterior installation, even in the harshest marine environment.

“We have short- and long-term plans to expand the Lumishore Lux Collection,” said Lumishore CEO, Eifrion Evans. “In last quarter of 2019 we'll be launching some revolutionary products utilising wireless technology to assist the installation industry, saving time and money. We also have patented anti-glare technology to further enhance the onboard experience.”

TREND 2: Whole boat control

The move toward MFD-controllable

whole-boat lighting systems has its roots in the rise of the glass cockpit, says Lumitec's Mick McDonald. “What we are seeing is a move towards whole boat control, particularly with companies like Garmin and their OneHelm system and the third-party manufacturers creating applications that will work with it,” notes McDonald. “At IBEX we launched our own OneHelm integration, allowing the MFD to control our Poco digital lighting control system. It gives a used complete boat-wide lighting control over Lumitec PLI enabled lights, utilising the technology and the backbone of the system for complete above and below the waterline.”

McDonald notes that Lumitec has currently partnered with Garmin and Simrad on the product, and is engaged in talks with other manufacturers of MFDs to extend its footprint. The system also allows control through Wi-Fi.

THE GREY AREA

While the ability to dial in infinite colours and have lights pulse in time to the music gives the latest lighting systems tremendous appeal, lighting manufacturers note that end-users must still respect boating regulations with respect to basic navigational lighting. “While the coloured lights look impressive, one thing the operator has to be careful of is that the lights on the boat are legal,” cautions Innovative Lighting vice president of sales, Roger Handsaker. “Technically, the lights cannot be visible outside the boat, there shouldn't be any other colour other than white, red and green.”

An informal poll of lighting manufacturers exhibiting at the IBEX trade show in Tampa found consensus that external lighting patterns could be a bit of a grey area for law enforcement, some arguing that a brightly-lit boat is far more likely to be seen regardless of what colour lights is shows. “It comes down to common sense,” notes Evans. “Flashing blue lights could be mistaken for police, so that's definitely going to raise flags.” **IBI**

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Jason Lippert is looking to leverage the firm's RV manufacturing experience to further extend its reach into marine

More acquisitions on the cards as Lippert reveals hand

With six major acquisitions in the past five years, Lippert Components Inc has become a major player in the leisure boat industry. *IBI* recently caught up with CEO Jason Lippert, who spoke candidly about what lies next as it builds its marine portfolio

WORDS: CRAIG RITCHIE

Few in the recreational boating industry even batted an eye in 2015 when Indiana, US-based Lippert Components Inc (LCI) announced its intention to expand into the recreational boating market. But following six significant acquisitions in just five years – the purchase of Signature Seating in August 2015; the furniture business of Highwater Marine in January 2016; Lexington Seating in May 2017; Taylor Made Systems, in January 2018; Smoker Craft's furniture business, in December 2018; and UK-based equipment

manufacturer Lewmar in June 2019 – LCI has indeed become a big fish in the leisure boat industry pond. It's a growth spurt, and a major success story, that lies squarely at the feet of LCI chief executive, Jason D Lippert.

CEO of Lippert Components since February 2003, Lippert is the driving force behind his company's strategic decision to expand beyond its dominant position in the recreational vehicle (RV) industry and into leisure marine. Where the company's 2018 annual report still shows its RV component ➔

business representing approximately 66% of LCI's total revenues, that figure is down significantly from a level of over 90% shortly after the last recession, and well on the way to Jason Lippert's stated target of 40% of total revenues by 2022. A good part of that shift is directly attributable to the company's growing clout in the boating industry.

IBI recently enjoyed an early morning coffee with Lippert at the Barletta Boats manufacturing plant in northern Indiana, where LCI and Barletta are collaborating on a venture to build an expandable pontoon boat that uses RV-like slides to extend its beam from 8ft,6in to 14ft at just the push of a button.

You seem to be very pleased with the progress of the new boat. How is that project coming along?

It's looking very good, really. It's taken a year of prototyping with Barletta, and a lot of testing, but we're now at the point where it's going into production. Barletta is only starting to retail so we'll have to see. I think that it's a really cool concept, and to give the customer another five or six feet of deck space throughout the entire boat is an enticing proposition. It certainly doesn't lend itself to all applications of a pontoon boat, obviously, but there's certainly a market and people who could make great use of that capability. So, fingers crossed.

People know Lippert Components as a major equipment manufacturer serving the recreational vehicle industry, rather than as a supplier to the recreational boating industry. Can you tell us a bit about the decision to strategically expand into the leisure marine category?

Coming out of 2008 or 2009, we made a strategic decision as a company that with the RV business representing something like 92% of our revenues, and with that industry being as cyclical as it

is, it was in our interest to diversify and reduce our exposure. We basically just came to the recognition that it was far too traumatic to our business when the downturn arrived and RV took a really big dip. So we began to think about all sorts of different areas with respect to their opportunity and risk. In the end, we felt it made the most sense to stick close to our core, in the sense of what we do best, what products we manufacture, the customers we do business with and the geographies that we're in. The recreational boat industry made a lot of



Lippert's experience told him growth through acquisition was the way forward in marine

sense because boatbuilders use a lot of similar products to RV manufacturers. They're building entirely different products of course, but they use seating, they use metal, they use aluminium, they use control systems. As we looked further, it became clear that the boatbuilders use a lot of the things that we make, and they're in our backyard. There's a lot of boat manufacturers located locally, right here in Elkhart County where we have 30 facilities.

We already know a lot of the prospective customers. We go to the same churches, and our kids go to the same schools. We go eat dinner with them. And so there was almost perfect alignment

in terms of geographies, people and products. It all lined up and made far more sense than any other industry we could have jumped into. So part of it was a diversification strategy, and the other piece of it was that we could stay adjacent to the existing business of RV, so the risk was really minimal.

Six acquisitions in five years is a brisk pace by any measure. Can you speak a little bit about the growth-by-acquisition strategy?

I started the RV business with my team from scratch. It was 100% organic growth, really throughout the last 20 years. There have been some acquisitions, to be sure, but they haven't been huge by most standards. But the point is, it took 20 years.

That growth represented a lot of investment and a lot of time. A lot of us were sleeping at the facilities, getting them started as we learned the customers and the business and the products all at once. And I just didn't want to have to do that all over again. I felt that where our venture into the marine business was concerned, the best thing to do was to study the supply base. We knew that it was very fragmented, which was interesting to us. Because we know, and believe firmly, that if we could put a big company with big company thinking and big company strategy, big company resources, into that fragmented market we could be a better supplier to the boatbuilders than anything they had prior.

A bigger company with bigger resources can commit more capital to R&D. It can leverage a bigger business strategy and a better component supply strategy, and together that ultimately yields more innovation. It's just better for the industry than what could ever be achieved by a small, fragmented supply base.

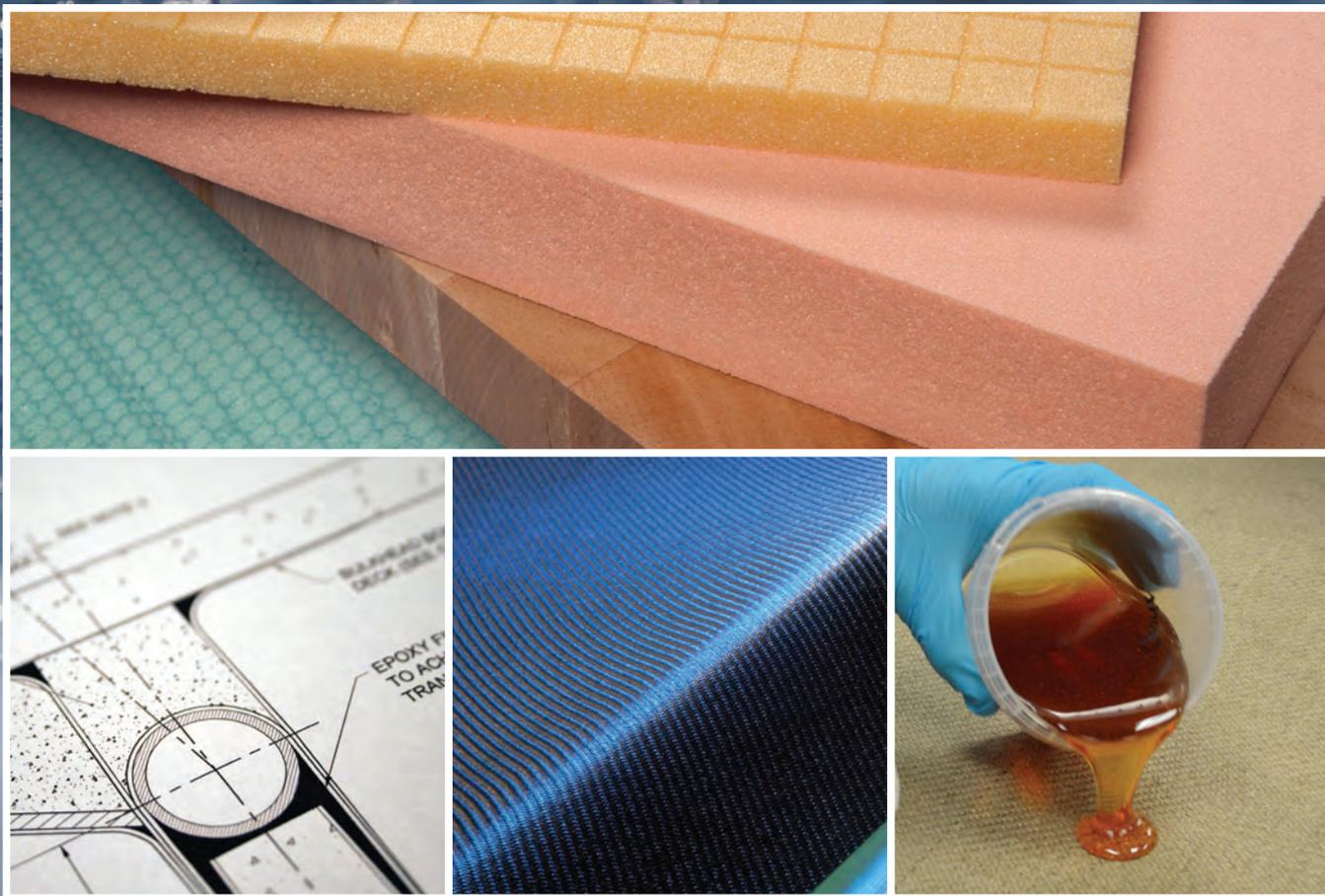
Was it a conscious decision to start in the furniture segment specifically, or was that just where the initial opportunity lay?

When we looked at the boat industry we focused on what was right here in our backyard, which is largely pontoon boats. So we looked at all the

“If we could put a big company with big company thinking... into that fragmented market we could be a better supplier”

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products and said, okay, what's the easiest entry point? What area will we understand the best? And there's a lot of things on a boat, but the seats were right there. Building seats for a boat is obviously different than building seats for a trailer. But we build US\$200m in seating for RVs, so we do understand the upholstery business, the sewing business, the different types of seating fabrics and all of that. So it just was an obvious first move to make, to enter the segment from a position of strength.

Are there other sectors that you're thinking are obvious jumps for LCI? Our next big move was Taylor Made, the 110 year-old brand name in the business. We process a lot of glass for RVs. We build something like 13,000 windows a day, so moving into a glass windshield and side glass for boats made sense, it was also moving from a position of relative strength.

Glass is a focus for us, and we're trying to get windshields onto pontoon boats right now. When we say innovation, that's one area that we're looking at really pushing because a lot of these US\$60,000 or US\$70,000 pontoon boats come with these plastic windshields that just don't do the boat justice. Someone spends US\$60,000 for a new boat and it comes with an US\$8 piece of plastic for a windshield... you've got to be kidding me! So those are the ways we're going to innovate, by taking the products that we know and innovate out. Like seating, glass was an obvious opportunity.

We build some control systems for RVs, so any kind of similar system in boats could represent an opportunity. We do a lot of steel and aluminium fabrication for the RV business, so there may be steel and aluminium opportunities in marine. We introduced a slide-out this year with the Barletta, which I think is extremely innovative for boating. I hope people just look at what we're doing and say,

“Someone spends US\$60,000 for a new boat and it comes with a US\$8 piece of plastic for a windshield... you've got to be kidding me!”

'Hey look, they might be a big company and trying to put a bigger supplier component strategy and business together, but they're going to bring innovation in the industry.' We need innovation to bring people to boating.

With all this activity what proportion of LCI's business does marine represent at this point, and what's the target?

The truth is that right now, we don't have a concrete target. We're going to continue to innovate. Today our big products are our canvas, windshields and seating. As

It's a big business for us, and we know that we can continue to grow it.

Europe is interesting. When we acquired Taylor Made they had about US\$140m in revenues, and they had two businesses – Trend Marine and Taylor Made – that supplied glass to the marine industry in the UK. Of course now we also have Lewmar, and they have an exceptional name in the European boating community. So we not only got a great brand, we got a lot of great products with Lewmar. They do all sorts of creative solutions



Lippert is keen for the manufacturer to be seen as an industry innovator

you know in Europe we bought Lewmar, which makes a lot of components for bigger boats in that market, including glass. So ours is a global marine strategy, not just a North American strategy. I need to emphasise that.

I can't tell you what the total runway is because we're still trying to piece together what a proper content strategy looks like for boats. I can tell you that we believe we can continue to grow it steadily, probably over the next 10 years

through organic growth and further acquisitions. We've got some really good new product ideas that we want to launch next year, and more acquisitions in mind.

So as I think about this, I think we're probably in the range of US\$300m today.

for all types of builders, so growth opportunities in that market alone are exciting.

Most of the activity so far seems to be focused on building OEM business. What about the aftermarket?

2020 will be our year to really move bigger into the aftermarket. We've got some major plans. Taylor Made has an aftermarket business – it's comparatively small, but it's still meaningful. They supply a lot of aftermarket-only products that they don't supply to the OEMs, so they're focused on that business. Lewmar also has a little bit of an aftermarket business. So without getting into specifics, there are opportunities to use our resources, and our customer base, and distribution channels, and help grow that aftermarket business.

I certainly look forward to it. **I BI**

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One of Rose Damen's goals is to create more diversity within the builder's workforce

Rose's revolution

Exploiting the unmatched synergy between the Damen and Amels brands: Rose Damen markets crossovers that are rocking the global yachting sector

WORDS: ROBERT WIELAARD

Damen Shipyards Group is no stranger to winning awards and contracts for its tugs, barges, dredgers, crew suppliers, pontoons and a lot of other high seas heavy metal.

They always put a big spring in Rose Damen's step.

Heading the group's yachting unit, she straddles the cultural gap between yacht and ship building. At the giant Dutch shipbuilder, she has access to its

massive reservoir of expertise and R&D making Amels a formidable player in yacht building.

At the shipyards group, Rose Damen is a member of the third generation Damens. Today, three of Kommer Damen's four children work at the global shipyard company. "The family is really committed to the company, really driven," says a long-time industry insider. "It is said Damens don't have red blood cells coursing in their veins, but tiny boats."

A non-executive board member of Damen Shipyards Group since 2008, Rose Damen took charge of the company's yachting business in 2014, armed with an MBA from INSEAD and work experience at a London investment house, an NGO in Sri Lanka and an ABN AMRO bank in Jakarta.

She recently consolidated the unit by folding into it superyacht builder Amels – which turns out spectacularly successful Limited Editions superyachts – and Damen's Yacht Support and SeaXplorer luxury expedition yachts.

The Yacht Supports and SeaExplorers were introduced in 2009 and 2015, respectively, and have revolutionised high-end yachting.

The Damen-branded SeaExplorers target new, young owners, keen to skip the Mediterranean cocktail circuit in favour of exploring faraway destinations. Damen is now building three SeaExplorers, the first Polar Code-compliant superyachts of up to 105m. They can stay at sea for 40 days with all provisions, equipment, extra crew, pilot and expedition guides.

"The first will be launched next year, a 62m project of 1900GT," says Rose Damen.

At the same time, Damen has delivered 14 Yacht Supports so far and has several more in build. Yacht Supports carry a mother yacht's toys, tenders, subs, helicopters, provisions, extra crew and staff. It is a cheaper solution than buying a larger mother yacht which is why Damen calls it the "smart stretch."

R&D SUSTAINABILITY

To develop yachts this capable, this ambitious, requires significant R&D spending. "Annually, the Damen group spends €30 to €40 million in R&D," says Rose Damen. "Over the next three years, the group plans to spend more than €100 million on R&D, in the area of sustainability alone."

This financial heft is a very powerful leg-up for the Damen and Amels yachts. The Yacht Supports and SeaExplorers are "crossovers," says Rose Damen. "We combine Damen's technical knowhow and Amels' experience in the yachting market."

The Damen Group is very successful

at building standard platforms for commercial vessels to cut costs and accelerate delivery times. It does the same for the SeaXplorers, the Yacht Supports and Amels' Limited Editions.

Rose Damen has kept the Amels and Damen brands intact within the group's yachting branch. "It's like the Volkswagen Group that also sells Audis. You'll continue to see one company, two brands," she says.

Damen operates in at least 17 maritime sectors. From workboats to cargo vessels, from patrol craft to dredgers to superyachts. The yachting business accounts for 10% to 15% of Damen's turnover.

People who know Rose Damen say she has endless people skills, a useful trait if you sell superyachts and abide by the old saw that people don't buy superyachts. They buy a lifestyle, they buy emotion. "And Rose really gets that," says the industry insider *IBI* talked to.

The Damen Group operates in 28 nations, employs 12,000 people, runs 35 yards, builds 200 ships a year. It posted a net loss of €17 million in 2018, the first reported loss in 15 years. The company cited a "sustained period of difficulty in a number of maritime sectors and investments it has made in its future."

"It is important to understand we are a business with very diversified divisions," says Rose Damen. "We'll continue to focus on what we are good at. Our strength is in developing standardised technical platforms."

Damen acquired Amels in 1991. Amels' yachting roots date back to 1918 when Kees Amels started a boat yard in northern Holland. Today, the superyacht maker is the gift that keeps on giving. It has already delivered more than 40 Limited Editions (55m-83m/180ft-272ft) since 2004.

"We have 15 in build now. That's a record," says Rose Damen. Recently, Amels resumed building one-off, full custom yachts. "We have a 77m in build now," says Rose Damen. "We see a lot of



An Espen Oeino-designed Amels 60



SeaXplorers are targeting new, more adventurous owners



Yacht Supports are seen as a 'cheaper' alternative to investing in a larger mother ship

“ We have an agreement that none of us of the third generation will sell the company but look after it and hand it over to the next generation ”

repeat clients. People who started out with a 55m Amels yacht and now want a 75 to 80m," says Rose Damen.

"I know I'm not alone," she says when asked what it is like to be a young woman in an industry that remains something of a menfest.

"It would be great if we saw more women in this

business. My focus for the next two or so years is to create more diversity in our workforce," she adds. "Not just based on men or women, but also on background, character, experience, nationality, etc. Teams become stronger

when they are more diverse. Yes, you may initially create friction, but the result is better."

At work, Rose Damen likes to ask "why?" because, she says, "it's important to keep each other challenged and sharp in the organisation." That organisation is unlikely to slip from the Damen grip soon. Chief Operating Officer Arnout Damen is on track to succeed his father Kommer soon. Aged 75, Kommer Damen, chairman of Damen Shipyards Group, has not set a formal retirement date.

"This is a family business and I just love that," says Rose Damen. "It means we can really focus on the long-term. Besides, we have an agreement that none of us of the third generation will sell the company but look after it and hand it over to the next generation." **IBI**

Overview: Dutch growth but sales hard won

It's no longer just the superyacht sector grabbing headlines; the Dutch market is back, with most sectors enjoying solid growth, though economic uncertainty continues to make sales hard won

WORDS: BELINDA SNELL

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Holland is renowned for its steel-hulled yachts

Dutch leisure marine firms are generally upbeat about 2019, particularly those that offer charter services, boat maintenance and refit. Builders of large, 12m-plus yachts for export are also enjoying good times, as are the equipment and accessories firms that supply them. In the first six months of 2019, total industry sales were up 3.5% compared to the corresponding period in 2018 – putting the sector on course to repeat last year's growth of 4.9%. National watersports association HISWA says that two-thirds of its 900 or so members expect 2019 to be at least as good as 2018. The rest expect it to be better.

But there are big variations in performance across the different segments. Boat rental companies, for instance, have been benefiting from unusually warm weather with turnover up by 10% in 2018,

and sales of new boats climbed by roughly 7%. Marinas, yacht-builders and yacht service providers, however, all reported another year of declining sales, while boat dealers and marine retailers experienced marginal improvements.

But things are picking up. Retail and maintenance firms are reporting good growth in 2019, and occupancy rates at marinas are said to be stabilising. "After years of shrinking, the rate is now steady at around 86%," HISWA's Stijn Boode told *IBI*.

"The yacht-builders and importers indicate that sales are picking up too and we're seeing lots 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."

Klaas Schiphof of Aquatec Industries, builder of the Antaris, Maril and Makma range of sloops, tenders and weekend cabin cruisers, told *IBI* that 2018 and 2019 were both good years. "This was partly due to the great weather we've been having as well as increased consumer confidence," he says.

Holland is also a major producer of steel-hulled motoryachts typically built for export. At Linssen Yachts, builder of the Grand Sturdy range of steel displacement vessels from 10m-15m, around 85% of production is exported. "I don't think the Dutch boatbuilding market in general is growing," says Yvonne Linssen, yard owner. "The used boat market, however, is booming. There simply aren't enough second-hand boats available.

"The most popular size and model really depends on the market," she adds. "The luxury tender market is growing, but other segments are slowing down."

Melle Klazinga at marine equipment distributor Belship told *IBI* that many new companies are developing small aluminium boats that are either aimed at being true superyacht tenders or just small yachts in their own right. At the same time, these boats are quickly growing larger, up to 50ft-60ft in length.

But it's not all rosy. "With the population generally growing older and uncertain economic times ahead, the number of new-builds is not expected to rise," Klazinga says. "We're seeing fewer boats on the water, and marinas are letting berths to houseboats that are rented out as holiday homes."

Michelle van den Hoven at Van den Hoven Jachtbouw agrees. "We have many leads and interested customers, but the process of actually buying is slow," she says. "But our suppliers, such as Volvo Penta, tell us it's not just the case in the Netherlands; it's all of Europe."

Still, almost one-third of HISWA's member companies are reportedly looking for staff. That group includes almost half of all yacht-builders, but yacht importers and service companies are also reporting vacancies. **IBI**

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ECONOMIC INDICATORS

GDP growth (2018)	+ 2.5%
GDP growth (2019 est.)	+ 1.7%
Number of adults (2018)	13.3 million
High Net Worth Individuals (2018)	477k (+ 42%)
Housing Index (2Q '19)	132.5 pts (+0.5 pts - record high)
New car sales (Jan-Aug 2019)	-11%
Consumer Confidence (Sep '19)	-2.0 (down 2 pts from Aug)

BOAT MARKET INDICATORS (2018)

Industry turnover	€2.5 billion (+5%) <i>2019 est. (+5%)</i>
Boat Exports	€2.1 billion (+41%)
Marine Companies	4,020
Marine Employees	22,500
Marinas	1,157
Boat Park	501,000

SUPERYACHT STATISTICS (2018)

Number of deliveries (over 30m)	18 yachts (-17%)
Value of deliveries	€1.5 bn (+25%)
Global Superyacht Market Share	15% in units; 30% in value
Average yacht price	€86 bn (+51%)
Number of yards making deliveries	6
New Orders	17 motoryachts; 2 sailing yacht
2019 projects under construction	60

(Sources: EIU, Credit Suisse, HISWA, Eurostat, IB)

TOP EXPORT DESTINATIONS

(in units)



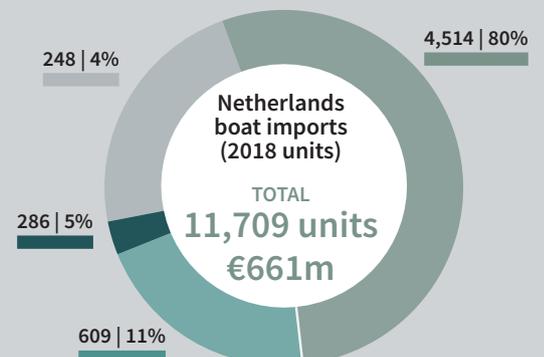
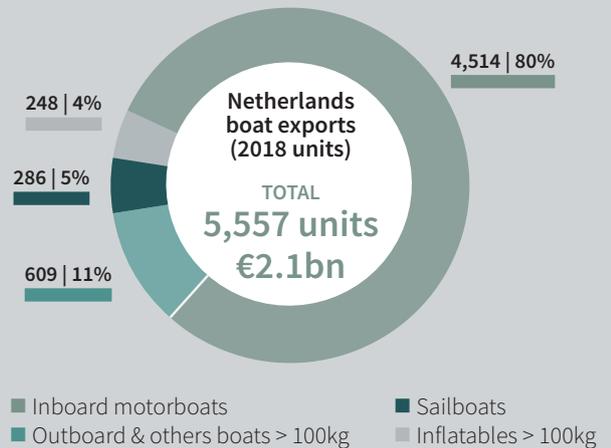
- GERMANY
- FRANCE
- SPAIN
- MALTA
- SWEDEN
- UNITED STATES
- BELGIUM & LUXEMBOURG
- POLAND
- SWITZERLAND
- UNITED KINGDOM

TOP IMPORT SOURCES

(in units)

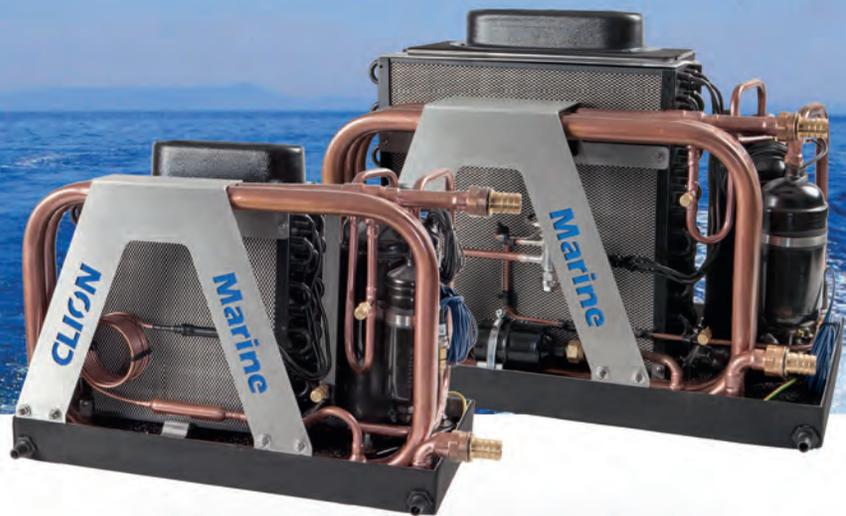


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Boatbuilders: Increasing demand for onboard luxury driving the market

Boaters want luxury and the bigger the boat, the greater desire for customisation; and of course, buyers want their dreams realised ‘today’

WORDS: BELINDA SNELL



The 10m Antarix X from Aquatec Industries is the epitome of Dutch style and design

Dutch boaters took to the water in record droves this year, thanks to a long, hot summer that extended well into September. A stable economy gave consumer confidence an added lift, boosting local demand for small sloops, tenders and weekend cruisers. And while steel-hulled yachts below 12m are still difficult to sell, those that offer something new and innovative still manage to find the occasional buyer, whereas the larger steel-hulled models for which Holland is globally renowned continue to do well on export markets.

At Interboat, sales of new and used sloops, tenders and cabin cruisers are up by 25% compared to last year's levels.

A high degree of onboard comfort and faster speeds helped propel sales forward. Interboat is now casting its net wider and building bigger. At the recent HISWA In-Water Boat Show, held in Lelystad in September, the company launched its biggest tender yet – the 9.5m Intender 950. Sporty yet elegant, it's a mix between a tender and a cruiser with plenty of outdoor space.

“For 2020 we're forecasting another 15% growth,” says Jerry Schuiten, company director. “This is due to the Intender 950, which we've just introduced, and the new Intender 780 introduced last year.”

The Intender 950 claims to be the ultimate in luxury boating with outdoor

bar and cooking facilities, luxurious sofa, a choice of helm position (midships or to stern) and a comfortable cabin with double bed and wet room. Inboard diesel engine options range from 65hp-320hp, giving speeds of up to 48km/h. It is rated RCD Category B for offshore cruising.

“Less maintenance, more comfort. These are ongoing trends,” says Schuiten.

Interboat employs around 50 people at its 7,000m² yard in Zwartsluis, located 85km northeast of Amsterdam. The company has a strong forward order book with around 12-14 models currently in build. “For us, the biggest challenge is to find enough employees to meet growing demand,” says Schuiten.

At Aquatec Industries, requests for ever-larger boats led to the development of its latest model – the 10m Antarix X. The CE Category B sloop has four berths and a separate toilet and shower facility, making it suitable for offshore cruising. It is the epitome of style and design. “We have high expectations for this new model and several potential customers,” Aquatec owner Klaas Schiphof told *IBI*.

Aquatec Industries is one of Holland's leading sloop producers, responsible for the Antarix, Maril and Makma brands. At the time of going to press, the company had eight boats in build at its facility in Woudsend, Friesland. Its most popular models are the Antarix Fifty5, Sixty6 and Seventy7 and the Maril 6NXT and 7NXT. “Boats are becoming more luxurious,” says Schiphof. “Design is also important. ➔



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Van den Hoven Jachtbouw in Waspik

Customers are willing to spend money but they want value for money.”

In addition to the Antaris X, which is due for launch by year-end, Aquatec is also planning to launch two high-end Makma day cruisers of 27ft and 28ft. More details will be revealed soon.

In the meantime, Aquatec is on course to sell around 190 units in 2019 – roughly the same as the year before. “Our forecast for 2020 is good too,” says Schiphof. But there are challenges ahead. “Based on today’s order intake, demand in 2020 will be greater than what we can build. This is a great problem to have, but you don’t want to disappoint customers. I’m also very curious about the consequences of Brexit. In addition, I hope that economic growth figures aren’t too disappointing, leading to a drop in consumer confidence.”

Sloops and tenders aside, Holland is also a major producer of aluminium and steel-hulled motoryachts. Most are exported to neighbouring Germany, Belgium and nearby France, although Spain, Sweden, the UK, and increasingly the US are popular destinations too. In the Netherlands, most Dutch clients are keen to grab a bargain and are more likely than not to buy second-hand.

Linssen Yachts claims to be the European market leader in its niche segment of steel displacement motoryachts from 8m-15m. Yvonne Linssen, yard owner, told *IBI* that sales of new and used boats



Linssen is always busy at its Maasbracht yard

are slightly up in 2019, but the market is still tough. “Our forward order book is not as strong as we would like it to be,” she admits. “We see a changing market in terms of ‘buy now, cruise now’. People no longer want to wait for their boat.”

Linssen has spent the last 12 months optimising production at its 45,000m² yard in Maasbracht, where 30 boats are usually in build at any given time. Later this year, three new models will have their world premiere – the Grand Sturdy 35.0

“We see a changing market in terms of ‘buy now, cruise now’. People no longer want to wait for their boat”

AC and Sedan, and the Grand Sturdy 480 AC Variotop. “The unique feature of the Variotop is its hydraulic cabriolet and fully adapted steering position,” Linssen explains. “You have your inside and outside helmsman position in one, saving a tremendous amount of space inside the boat. Plus there’s no need for canvas covers.

“Customers are increasingly asking for more luxury on board,” she adds. “They

want all the comforts they have at home, so we try to provide that. Another frequent request is for solar panels. People want to be independent and we offer different solutions for that too.”

Linssen delivered 87 yachts in the first half of 2019, including its entire fleet of pre-owned vessels. The deliveries comprised 61 new and 26 used motoryachts. Exports, which account for around 85% of production, are stable. “Germany is still our most important market,” says Linssen. “However, demand from further away – Ukraine and the US, for instance – is increasing. Domestic sales are better in used boats than new.”

Another family-run builder of steel-hulled boats is Van den Hoven Jachtbouw in Waspik. Late last year, the company launched a campaign to promote a new line of aluminium motoryachts designed by René van der Velden, a leading Dutch designer known for his work at Moonen Shipyards. The first unit in the new series – a Voyager 61 flybridge – is currently in build and due for delivery in the summer of 2020. The hull has been completed and the yard is now working on the superstructure.

FROM STEEL TO ALUMINIUM

“Unique to this ship are the large windows in the saloon, modern lines, and what we find very important is that with this ship, in addition to a maximum speed of 21.5kt, you can also sail calmly,” Michelle van den Hoven told *IBI*. The new Voyager line of all-aluminium, fast displacement vessels will eventually comprise three models in lengths of 61ft, 70ft and 79ft.

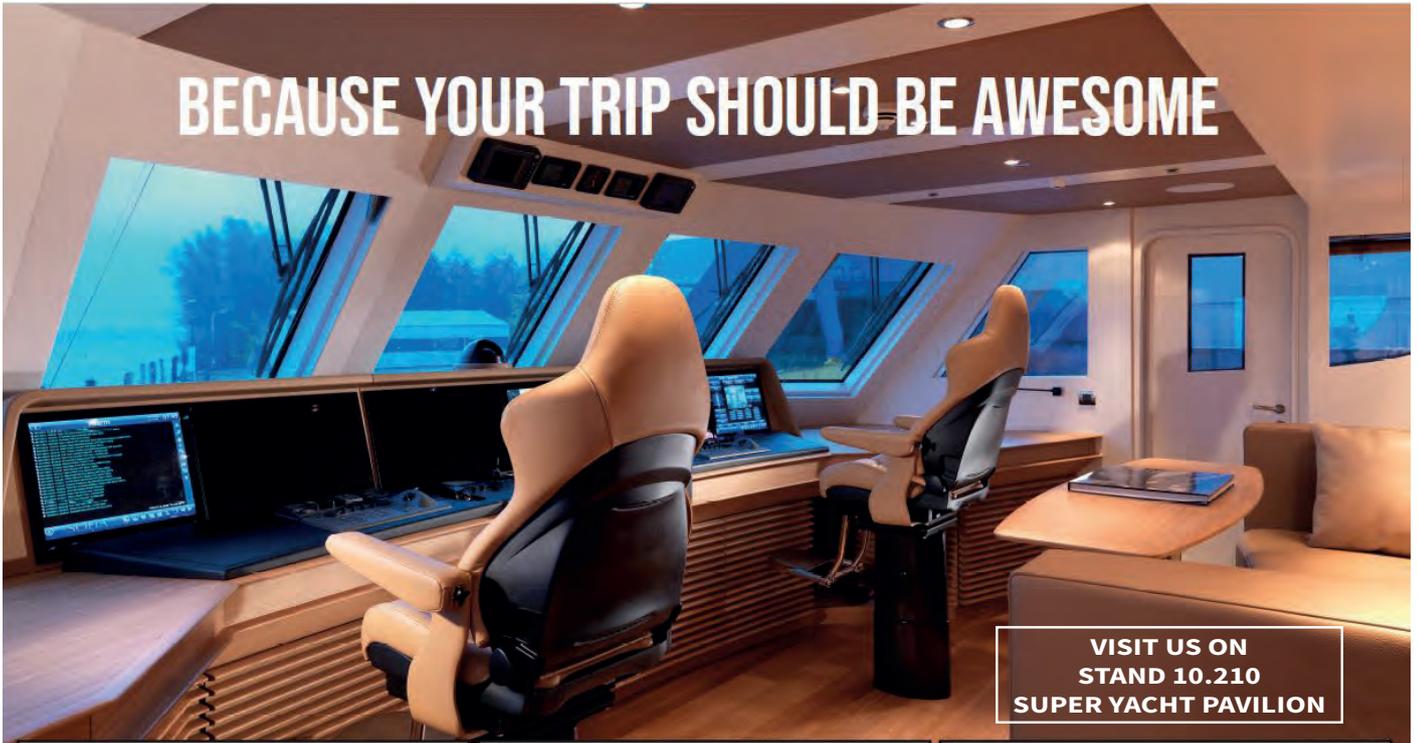
“Unlike series builders, we offer customers the opportunity to be fully involved in the entire build process, and we will custom-build the new Voyager line just as we do our steel Executive line.”

Van den Hoven told *IBI* that customers are becoming increasingly demanding in terms of design. “We jump in on this, as we have done for years, by discussing with the customer what their dream ship looks like, coming up with examples, and adjusting things until it is completely satisfactory.

“In principle, we do not want to cross the 24m limit. But for a great project that goes a little beyond that, we naturally ➔

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A Bestevaer 72 from KM Yachtbuilders

would not immediately say no,” she adds.

In 2019, Van den Hoven Jachtbouw delivered a Van den Hoven Executive 1700 Mk2 and an Executive 2100. The company also built an additional Executive 1500 Mk2 on spec that was displayed at the HISWA In-Water Boat Show in September.

“We have more leads than we’ve ever experienced,” van den Hoven told *IBI*. “However, getting customers to make a decision takes a lot longer than before. But our expectations for the last quarter of 2019 are still high.

“We also have high expectations for 2020,” she adds. “With our new model, the Van den Hoven Voyager 61, we are expanding the markets where we largely operate – the Netherlands, Belgium and Germany – even further. In 2020 we plan to participate in Boot Düsseldorf for the first time.”

At KM Yachtbuilders, which is best-known for its Bestevaer line of custom-built aluminium sailing yachts from 48ft-100ft, demand is shifting away from smaller boats such as the Bestevaer PURE 45 in favour of larger, custom models.

“We started 2019 with a Bestevaer 72 and the new Pelagic 77 for Skip Novak, designed by Tony Castro. This meant fewer units sold, but higher turnover as custom explorer yachts are more expensive compared to our standard Bestevaer PURE yachts,” KM owner Eeuwe Kooi explains.

HIGH LATITUDE SAILING

“We’re still seeing increased requests and orders for high latitude yachts, which has become our specialty and the main reason people contact us,” Kooi adds. “For 2020 we expect to sell one or two units over 70ft for high latitudes as well as one or two of the smaller Bestevaer yachts – a PURE 45 or 49.”

Besides new-build yachts, KM Yachtbuilders also has a presence in the refit market. The yard is currently working with the new owner of America’s Cup yacht *Il Moro di Venezia III* to get it back to its original state. “We’re working on the refit of a 30m aluminium catamaran too,” says Kooi.

While KM Yachtbuilders has been building aluminium sailing yachts from its shipyard in Makkum for 20 years, next year will see the delivery of its first-ever motoryacht. Developed in partnership with Dykstra Naval Architects, the Bestevaer 53 motoryacht is currently under construction and due for delivery in September 2020.

“It’s a motoryacht with the DNA of a Bestevaer sailing yacht and is designed for those who no longer want to sail but still want to be on the water and explore in comfort,” Kooi explains.

“We’ve also just launched the extreme expedition yacht *Nanuq*. She’s 78ft-long but weighs 85 tonnes due to her thick alu hull of 25mm (7mm-10mm is the standard) – extreme outfitting for harsh conditions up North and down South.

“*Nanuq* can take 15,000 litres of diesel for propulsion and heating. Her keel, drivetrain including propeller and rudder can be retracted all the way into the hull so the ice doesn’t damage anything when the yacht is frozen in. Her two masts are from carbon and are free rotating (no standing rigging) and are clad with solar panels on the sides.”

As *IBI* went to press, KM Yachtbuilders was building a custom 12m River Tender motoryacht, a Pelagic 77, Bestevaer 72, Bestevaer 53 motoryacht, and *Nanuq*, which was due for imminent delivery to its new owner, had just launched.

“In December we will start with an Ed Joy 56 model and we’re currently discussing the contract for a Bestevaer 45 to also be built this year. For next year we expect a Bestevaer 45 and 49 PURE to be ordered, as well as a custom Bestevaer 55 and a custom 24m sailing yacht for a Norwegian owner.”

At the moment, all of the yachts that KM Yachtbuilders has under construction are designed to be sailed in high latitudes. “This is definitely our strength as a yard,” Kooi says. “Our facilities limit us at around 30m length, but this is a nice maximum length to be in – just below the superyacht builders who start at 30m. There are not many aluminium custom yacht-builders that operate in that market.” **IBI**

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Superyachts: Records, edgy initiatives and a natural transition

2019 was another banner year for Dutch superyacht builders and their suppliers, and one that led them to join a maritime technology lobby to tap into new markets with high-tech services and products

WORDS: ROBERT WIELAARD



Damen Yacht Support's *Joy Rider* (foreground) with Amels' *Aurora Borealis*

At the 2019 Monaco Yacht show, Dutch superyacht builders and suppliers capped a year of dizzying records and edgy initiatives. Global superyacht construction reached its highest level since 2011 and the Dutch were a key factor in that.

At Monaco, almost a quarter of the 125 superyachts (average price: €37.8 million) that bobbed cheek by jowl in Port Hercule were Dutch-built.

In 2019, the Dutch were on a spec-building spree. Heesen Yachts worked on 12 yachts and CEO Arthur Brouwer says he sees turnover rising by 40% in the next two years. Amels worked on 15 superyachts and its parent, Damen Shipyards Group, sold a 75m Yacht Support vessel.

It'll be ready in 2022 and will be Damen's 17th yacht support delivery since

2009. At Monaco, Damen showed the 49m *Joy Rider*, the shortest in the series.

MOONEN RESCUED

Ending years of woe under Mexican ownership, 30m-50m (98ft-164ft) specialist Moonen Yachts emerged from bankruptcy, landing in the arms of Louise and Matthew Baxter. The latter is founder of Australia's AM Group, a global, privately-owned group of manufacturing companies. Plans are to soon start two projects – a 36m and a 44m.

At Monaco, Heesen Yachts said it has a buyer for its Project *Skyfall*, a 59m (194ft) all-aluminium 22,000hp yacht with a 37kt top speed. "It's the most powerful craft we have ever worked on," says Sales and Marketing director Mark Cavendish. Oceanco showed 90m *DreAMBoat*. At close to 3,000 GT, it can host 23 guests and up to

33 crew members.

Across the Dutch flatlands in 2019, 60 semi and full-custom superyachts were being built, 13 of them longer than 80m (262ft). Most were speculation projects, begun with no buyer in sight. And capacity expansions, that began a few years back, continued apace.

FACILITY INVESTMENTS

In May, Queen Maxima of the Netherlands opened Feadship's Port of Amsterdam yard – its 4th site where it can build to 160m. Feadship marked its 70th anniversary in 2019 and will soon add a 2nd hall at an existing yard in the north of Holland.

At Monaco, refit specialist Balk Shipyard told *IBI* it has hired a COO and unveiled some sleek 50m yacht concepts. Balk is also ramping up bare-hull building and tripling build capacity in the years ahead.

Oceanco acquired two vast halls covering 28 acres near its main yard on the southern rim of the Port of Rotterdam. A legacy of a defunct maritime service company, the new halls boast hundreds of meters in all directions – space for construction, offices, storage, outfitting, painting and sandblasting. Good times also at Mulder Shipyard, now working on its 3rd Mulder ThirtySix and soon on its 4th.

In its 50th anniversary year, HISWA Holland Yachting Group, the Dutch superyacht lobby (11 builders, 15 suppliers), signaled at Monaco it was folding its tent. Its members were about to join the 400-member Netherlands Maritime Technology trade group.

What triggered that was the decision of the umbrella HISWA watersports ➔

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association to merge with the Netherlands' largest leisure industry lobby.

The move is a logical step, says HHYG president and Esthec co-founder Marcel van der Spek. "Netherlands Maritime Technology has a great track record when it comes to creating new business opportunities for its members worldwide," he told *IBI* at Monaco.

Amels, Damen, Feadship and Heesen became a key force in 2019 for a more sustainable global industry. With Abeking & Rasmussen, Alexseal, Benetti, Lürssen, MB92 Group and Rybovich they formed the non-profit Water Revolution Foundation and pledged to reduce their ecological footprint.

BIGGER, BETTER, GREENER

Dutch superyachts grow larger, more luxurious, more complex. In 2019, they averaged €88 million and packed hybrid propulsion, peak shaving, zero emission, shaft-generated and other power solutions.

To keep up with the march of technology, the Dutch industry widened its access to high-tech partners.

Royal Huisman's current refit of *Juliet*, a 44m (143ft) custom sail yacht, involves 3D scanning to rework the engine room and its components. Oceanco's 109m *Bravo Eugenia* is an energy-frugal yacht with hybrid power that slashes energy use by up to 30%. The yacht is the first fruit of Oceanco's one-year-old strategic partnership with British engineering giant BMT.

Dutch suppliers report good growth as well with several opening sites in the Med, the Caribbean and the USA to step up service provision.

Electrotechnical systems integrator De Keizer Marine Engineering saw its 2018 turnover balloon by 45% to €50m. Edwin Nieuwenhuys, head of sales and customer service, credited the growing "size of yachts, the number of projects and their complexity and client expectations."

“Amels, Damen, Feadship and Heesen Yachts became a key force in 2019 for a more sustainable global industry”

Royal Huisman showed a 55m (180.4ft) motoryacht concept that has Van Oossanen's Fast-Displacement XL hull.

Dutch builders, in alliance with the Port of Amsterdam, make good tracks lobbying seven ports in Britain, Germany and Scandinavia to craft, to build, together with Amsterdam, a Northern European Superyacht Route. The goal

Hull Vane BV and Naiad Dynamics of the US jointly unveiled a digitally controlled, below-the-transom wing for superyachts. It cuts pitch and improves the overall performance of medium-speed displacement yachts and ships.

Van Oossanen Naval Architects' Fast Displacement Hull Form goes on most Heesen yachts. And, soon, on the first Sunseeker 161 flagship that Icon Yachts of the Netherlands will build. Royal Huisman unit Rondal has in the past two years sold 50 high-load, captive winches to motor yacht makers.

Systems Integrator Van Berge Henegouwen and Atlas Cybersecurity of the US have teamed up to boost cyber-security aboard superyachts. And the Maritime Research Institute of the Netherlands announced a two-year foils research project, asking yacht and ship building parties to join.

On the canvas side, Vitters Shipyard, maker of high-performance sailing yachts opened a service facility in Palma de Mallorca. Vitters, and rival Royal Huisman, are increasingly pursuing high-end motor-powered projects to broaden their bases. At Monaco,



Damen Yacht Support's 45m Joy Rider



The 56m (185ft) new-build project from refit specialists Balk

is to lure yachts away from the crowded Med and send them to more adventurous points north. Royal Huisman, Feadship and Damen recently opened yards in Amsterdam, boosting maintenance and refit capacity there. The port itself has designated four large superyacht berths near Amsterdam's canal-laced center, Schiphol Airport and the open sea.

It wasn't a year of perfect blue skies, though. One cloud hovering over the Dutch industry "is a growing skills gap, says Sirag. "There is a consensus in the Dutch industry that creating a pool of talent is increasingly urgent."

Help is on the way. Feadship partner De Vries Shipbuilding and other yards have opened their wallets to groom yacht building talent at the Netherlands' Yacht Builders Academy, launched in 2018.

The €2.3 million academy will offer unique vocational training in sector-specific disciplines. Its curricula have been developed in consultation with yacht builders and their suppliers.

It marks a major upgrade of existing vocational training programs in a bid to keep the Netherlands a global yacht building leader. The academy expects an enrolment by 360 by 2021, double the number of students now taking yacht sector vocational courses. **IBI**

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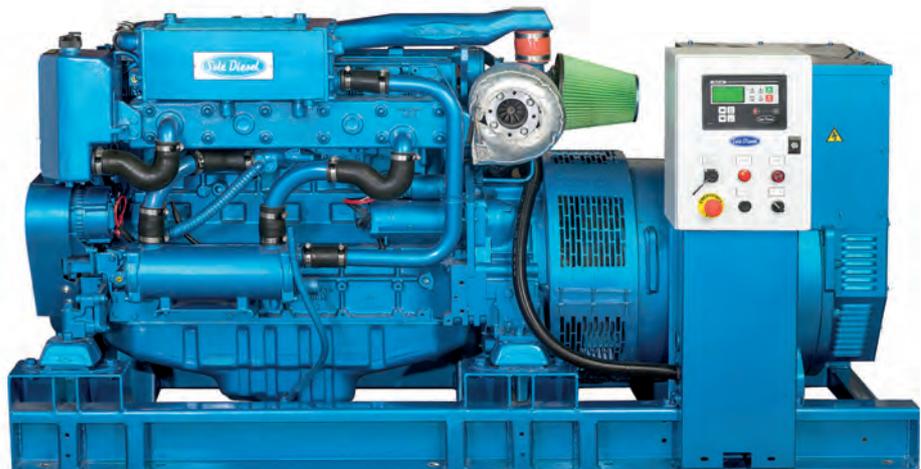
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Equipment: Solid growth through OEMs while summer sun warms up

OEM exports and the desire for increased luxury, convenience and functionality on board are providing rich pickings for Dutch equipment manufacturers

WORDS: BELINDA SNELL



The new CombiMaster 3000 inverter-charger from Mastervolt and its SmartRemote display

While the number of newcomers to boating remains low in Holland, the summer of 2019 was one of the hottest on records and boaters took every opportunity to get out on the water. Demand for cleverly designed, easy-to-use products that improve the overall boating experience were in clear demand, with marine equipment and accessories manufacturers, distributors and retailers across the country all reporting strong sales.

At Allpa Marine Equipment, business is performing well above average. “So far, we’re up 7% compared with 2018 and the outlook for the next three to four years is also very good,” says CEO Mark

Rutgers. “The aftermarket is performing well and many OEMs are now using Allpa as their supplier.”

Allpa is an independent wholesaler and distributor of technical marine products whose portfolio includes everything from steering controls, motor equipment, propellers, shafts and generators, to hatches, deck fittings, boat seats and other associated items. The company prides itself on its well-balanced range of stock, as shops – and OEMs in particular – require just-in-time delivery. Around 10,000 items are listed in the Allpa catalogue, and its warehouse in Nijmegen, near the German border, stocks more than 25,000 individual items.

“Allpa has serviced the aftermarket from the ➔



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Allpa prides itself on a well-balanced range of stock and fast delivery times

very beginning, so we're very strong there, but the last 10 years has seen more OEMs come on board," Rutgers claims. "Some engine manufacturers – inboard and outboard companies – are buying from us too." Allpa added more technical products to its catalogue last year, putting the company in good stead for the years ahead. "People in Nordic European countries like their boats to be 'tip top' and in perfect shape," says Rutgers, adding that technical equipment accounts for around 70% of the business. The rest is chandlery. "We've also noticed that people are moving towards smaller dayboats of around 8m or 10m. Allpa is strong in the small boat segment too."

Rutgers told *IBI* that appreciation is growing in the Netherlands for companies that can deliver quickly. "Since Allpa's ready-to-sell stock is huge, we have always been able to deliver much faster than any of our competition," he says. "This puts Allpa in a preferred supplier position for the coming years."

Accessories distributor Belship is also reporting strong sales in 2019, with turnover up by roughly 6% compared to the previous year – slightly above the industry average, says general manager Melle Klazinga. Belship represents around 50 brands of products, ranging from small retail items to bespoke hydraulic equipment. The company is well-known for its LED lighting solutions, which it was early

MARK RUTGERS, CEO
ALLPA MARINE EQUIPMENT

People in Nordic European countries like their boats to be 'tip top' and in perfect shape



Belship is known for its LED lighting solutions, including this LED navigation light from Lopolight

to adopt. "We're continuously looking for new products and new developments in equipment and technology," says Klazinga. "Our lighting department is kept busy by the continuous developments in LED technology and the increasingly complicated control systems requested by our superyacht clients."

"We also supply air-conditioning systems by Frigomar," he adds. "The latest self-contained, reversible aircon system they introduced this year is the only true variable capacity, inverter-controlled, self-contained air-conditioner on the market."

Meanwhile, Belship was recently appointed global sales partner for Ultramar, a producer of cleaning products for sails, canopies and awnings. "They are expanding their line of products to include general boat shampoos, and have developed a unique line of top quality brushes and brooms that will be manufactured completely out of recycled materials," says Klazinga. "As global sales partner, we will be responsible for assigning national distributors in each country and organising all deliveries."

The first presentation of the new products will be at the METSTRADE Show in November, where Belship traditionally hosts a group of its suppliers in a separate area known as Belship Boulevard.

As for trends, Klazinga says the number of online retail shops is growing. "Some of these start-ups have no stock and no knowledge of the products they sell, relying on a smoothly working 'webshop' and low prices," he says. "The traditional chandlery still attracts customers through product knowledge and stock position, but they're now expected to have a strong internet presence too."

Belship tries to support these groups with 24-hour delivery. The company also runs a web portal where dealers can log in and place their

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ASA Boot Electro is seeing an 8% rise in sales. The company represents around 30-35 brands of mostly electrical and hydraulic equipment



order at any time of the day or night, check their order status and past invoices, and download photos or graphics of the products to use on their websites.

“Our policy is to supply high-quality products that best meet the needs of the client, rather than offering the cheapest near alternative,” Klazinga says.

“Quality rather than numbers and price is what keeps this industry alive.”

ASA Boot Electro is a wholesaler of technical products, materials and systems for yacht-builders, installers, service centres and watersport retailers. The company focuses on advice, sales and support for electrical and hydraulic systems onboard motor and sailing boats, superyachts and small commercial vessels.

“Dutch steel and aluminium yacht-builders are increasingly moving into the high-end custom yacht market, so we’re focusing more on exclusive products such as Vimar switches and exclusive lighting fixtures,” says CEO Twan Bogert. “So far this year our sales are up by 8%.”

In 2019, ASA Boot Electro also began selling the Dockmate wireless remote-control docking system for boats. “It’s a win-win,” says Bogert. “It allows yacht owners to flawlessly operate two

motors, a horn, bow thruster, stern thruster and windlass – all at the touch of a fingertip. The full control of a yacht with engines and thrusters for single-handed docking is becoming more and more popular.”

ASA Boot Electro also picked up a HISWA Innovation Award this year for a new inflatable VHF emergency VHF antenna from Shakespeare in the US. The Galaxy-INFL8 is a 3dB VHF antenna packed in just 250mm of space. It rapidly inflates to 1.6m in length via an included canister or manual tube.

“We represent around 30-35 different brands of mostly electrical and hydraulic equipment,” says Bogert. He says the company is getting more requests for bigger-sized AC and hydraulic thrusters from Side-Power and Vector fin stabilisers.

“The Dutch yacht-building market is clearly on a path to growth,” he adds. “We expect the high-end custom builders that focus on exports to prosper. The domestic market is still a challenge and a large number of the used yachts that are sold in Holland at the moment are for buyers from abroad.”

“Our policy is to supply high-quality products that best meet the needs of the client, rather than offering the cheapest near alternative”



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ROEL TER HEIDE, OWNER
WHISPERPOWER

After the establishment of branch offices in Australia and New Zealand, we are now setting up WhisperPower North America

Power and propulsion specialist WhisperPower claims to be growing in all markets that it operates in, including recreational marine. "The aftermarket is strong and we're seeing lots of retrofits," says Roel ter Heide, company owner and director.

Sales, however, are slightly lower than expected due to sluggish demand for steel boats in the Benelux region. "We are selling more into North America and Asia Pacific," ter Heide says. "After the establishment of branch offices in Australia and New Zealand, we are now setting up WhisperPower North America, headquartered in New York."

In 2018, WhisperPower formed an important strategic alliance with German electric propulsion specialist Torqeedo. Together the two companies developed the Range Extender – a 25kW, 350V DC variable-speed diesel generator to extend the range of a yacht equipped with a Torqeedo Deep Blue Hybrid electric propulsion system. "The generator was specifically designed for recreational and commercial applications as a back-up battery charger for the Torqeedo-BMW battery pack which supplies the energy for the propulsion engines (from 60kW) and the onboard consumption," ter Heide explains.

Its best-selling products, however, are still the Genverter Piccolo range of 4kVA-15kVA diesel generators for small boats. "All our multi-cylinder generators meet Stage V and Tier 4 emission requirements," says ter Heide. "Furthermore, our Orange Range of inverter/charger combinations are very popular. All AC devices can be connected and work without issue such as a coffee machine, kettle, kitchen appliances, TV, computer etc without shore power and/or running a generator."

Apart from the launch of a super-silent version of its Genverter products, now fitted with an



WhisperPower's Piccolo 8, 10 and 12 kVA diesel generators are among its best-selling products

optional GRP sound shield and also available with parallel option, WhisperPower has also added a wide range of solar panels and accessories including installation material which can be integrated into the WhisperPower systems – an effective way of charging a battery at anchorage or moored outside a harbour on buoys.

Earlier this year, WhisperPower also introduced its latest Lithium Iron Phosphate (LiFePO₄) battery, the Ion Power Basic. Designed as a suitable alternative to the conventional lead-acid battery, it has a lifespan that is up to three times longer. It is also 50% lighter and more compact. "The Ion Power Basic is an addition to our existing product range of industrial Ion Power batteries of 90 and 160 Ah with which larger systems of up to 100 kWh can be built," says ter Heide. "In the coming years, we will be expanding the range further so we can also deliver larger energy storage capacities."

Babette van Waes at Vetus told *IBI* that demand is coming from new boat owners as well as customers wanting to refit their existing boats. "We've noticed a growing charter market too – boat 'users' instead of 'owners'. We think the rental market is growing, and this has called for more 'sturdy' products. There's also an increased demand for electric propulsion."

Business at Vetus is currently up by 5% compared to last year, but almost 10% corrected for one-off projects. "Our sales are over €50m and approaching all-time highs. March and April were the best months ever in the history of the company."

Vetus supplies boatbuilders, retailers and dealers with technical equipment for boats from 6m-25m, with subsidiaries in 17 countries. There are roughly 4,000 technical items in its portfolio, most of which are designed by its own engineering team.

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Vetus FGHG hatches are built and designed for modern boats

Innovation has always been at the forefront of new product development at Vetus. Its new BOW PRO Boosted thrusters, for instance, use proven induction motors without carbon brushes. As a result, the bow thruster is very quiet and has unlimited run-time. The induction motor is controlled by the Vetus motor controller. This intelligent, in-house-engineered, patent-pending motor controller is easy to connect to 12V, 24V or 48V power supplies, making the new BOW PRO Boosted thruster suitable for almost every type of boat.

“The BOW PRO Boosted thruster is controlled by a proprietary CANBUS protocol,” van Waes explains. “There are two different panels available for the BOW PRO Boosted thruster series: one fully-proportional basic panel (BPPPA) and one fully-proportional panel with lock and hold function for easy docking (BPPJA). This allows the boat to be held against the dock. Letting passengers board your vessel has never been this easy. Docking without crew members is also possible, with the ‘lock & hold’ function allowing you to tie the ropes yourself.”

The BOW PRO Boosted thrusters also use the same streamlined tailpieces and propellers as many conventional Vetus thrusters, making it suitable as a replacement.

“The BOW PRO Boosted thruster is an innovative and completely different

product compared to existing thrusters available in the market,” van Waes maintains. “On the motor a third connection is present. This leads the power to the internal charger and boosts the output up to double the voltage. In practice, this means you are able to connect the 24V BOW PRO Boosted to a 12V power supply and run it without any problems. Connecting the BOW PRO Boosted directly to a 24V power supply is also possible, of course. The built-in charger recharges your battery when the thruster is not in use, doubling the value of the BOW PRO Boosted on board.”

At Mastervolt, a Dutch subsidiary of Power Products LLC in the US, business is up by roughly 9% year-on-year. “The ongoing increased demand for less weight and excellent performance is making our Lithium Ion batteries very popular in the leisure marine market. The product is sold to customers who are willing to invest in saving energy [less fuel] and safe operations,” says Mastervolt’s Marian de Groes, adding that a new range with higher performance and power is due to launch soon.

Mastervolt offers integrated electrical systems that generate, store, convert or manage alternating and direct current. This includes digital switching products, energy storage by means of Lithium Ion batteries, and chargers/inverters that are both efficient and user-friendly. The company also handles distribution in the EMEA for Power

Products Marine Solutions, offering a range of brands like Ancor, BEP, Blue Sea Systems, CZone, Lenco, Marincio and ProMariner.

Earlier this year, Mastervolt launched initiatives to expand its presence in the aftermarket and retail channels across Europe. “During the year we also started a pilot with Power Products System Integrators (PPSI), a concept that provides complete system solutions,” says de Groes. “Customer needs are different when it comes to electrical systems. Power Products System Integrators can guide from design to implementation, for the simplest or the most complex electrical

“The rental market is growing, so we’re getting more requests for ‘sturdy’ products. Demand for electric propulsion is also growing”

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“Innovation has been always in our DNA and will remain,” she adds. “The product I personally really like is the new CombiMaster 3000 – a new inverter-charger to provide nonstop power supply. Available in both 12V and 24V models, it delivers unmatched performance at an unprecedented price.”

As expected from Mastervolt, the CombiMaster is completed with MasterBus, CZone and NMEA2000 compatible communication, allowing for a broad range of monitoring and system integration options.

“With the introduction of the earlier mentioned PPSI, we believe we can solve the needs due to the lack of availability of technical know-how at some boatbuilders.

“We also experience requests from customers to offer integrated charger/inverter (Combi) technology. The CombiMaster with its continuous power of 3000 VA also answers the trend for increasing power demands from the market.”

According to de Groes, the Benelux marine market is not growing compared to other European

regions. “Small steel boats under 12m in length are hardly being sold at all,” she says. “We do, however, see a growing trend. The more luxurious boats from 12m are being sold more and more, but only internationally. This group of customers onboard luxury throughout, and this is only possible with a large electrical system with, for example, Li-Ion batteries. The market in the Benelux is therefore stable for us; fewer small boats but larger, more luxurious yachts for the international market.”

Vyva Fabrics is a wholesaler that specialises in the distribution and production of high-quality vinyls, artificial leather and fabrics for indoor and outdoor use. Its marine collection includes Silverguard vinyls, Sunbrella and 40outdoor fabrics, Majilite and Ultraleather, and around 15% of the group’s total sales are derived from leisure marine clients – boatbuilders, installers and upholsterers.

Carol Driessen, company owner, told *IBI* that sales to the leisure marine sector are up in 2019 due to the diversity of product that the company offers. “Many combinations can be made,” she says, adding that sales in the Netherlands are ‘strong and steady’. “Dutch builders are more inspired by colours and materials,” she says.

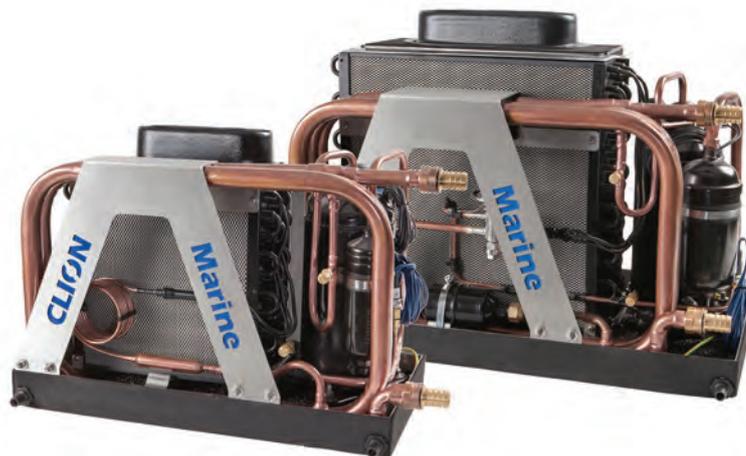
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Over the last 12 months, Vyva Fabrics moved to new premises in the Amsterdam Harbour area. "From here we can inspire our clients and offer them excellent service," says Driessen, who names Feadship, Wajer Yachts and Vanquich Yachts as some of the company's biggest Dutch clients. "We have noticed a new trend for vinyls that look like textiles," she says, although we're also seeing a slow change towards luxurious outdoor fabrics."

Vyva Fabrics introduced four new collections in recent months: Glade, a selection of soft velvet fabrics ideal for furniture upholstery, the trendy Segu-Freckle-Pukka collection of artificial leather, Maglia, which boasts an 'Oxford' yarn pattern for a classy yet comfortable feel, and Soda & Straw – a collection of burlap-like textures – some delicate, others a bit coarser – that all share a natural, textile look.

Air-conditioning specialist Clion Marine makes reverse cycle inverter-driven chillers that produce cooling and heating from one machine. With no peak load during start-up, the chillers have a low power consumption and automatic capacity modulation that minimises the amount of energy used.



Clion Marine's self-contained 12/24V DC aircon systems are ideal for small boats

"We are growing," says Othni Rigot, sales engineer. "More and more yards are getting familiar with our brand and our quality, and they're hearing positive feedback about our performance."

Clion Marine recently launched a new CMM monitoring system that allows users to control the air-con on their yacht remotely from a desktop, smartphone or tablet. With the appropriate authorisation, Clion's technical specialists can investigate the system anywhere in the world and ➔



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Customers expect a silent, easy-to-install and easy-to-control climate system, and they want remote control by phone or tablet

check and diagnose the status of equipment. “We have extended our monitoring system to expand our technical support. With our CMM monitoring system we can overview a system from remote with a history log.

“Customers expect a silent, easy-to-install and easy-to-control climate system, and they want remote control by Phone or tablet,” he adds.

Clion’s best-selling products include chilled water systems that are popular with boats from 15m-30m. Owners expect a good climate system when they sail in warm areas.

Mienco Dijkstra at marine lighting specialist NauticLED told *IBI* that the company’s goal is to make its LED solutions as durable as possible and to improve their energy efficiency even more. “Our new G4 premium LED bulbs are a good example of this vision as they produce up to 50% more light output with the same power consumption,” he says.

NauticLED’s latest products can be used from 10V-36V DC and some have been optimised to 10V-40V DC. “We’ve developed new RGBW down lights and launched several new bulb models,” says Dijkstra. “We’re constantly improving our electronics and upgrading our listed products.”

NauticLED’s retrofit bulbs are increasingly used in bigger boats and superyachts. “Most ships have a 24V AC board system, which make the transition to LED more complicated. Our bulbs contain an internal rectifier which rectifies the AC to a DC power.”

The biggest advantage of the use of LED retrofit lights is an instant saving of 80-90% in energy costs. Because LED lights produce almost no heat, the effect on energy consumption is significant. The aircon, for example, does not need to cool the 90% heat production coming from old halogen lights, resulting in lower maintenance costs and fuel consumption.

At Thetford Marine, a global supplier of cooking, cooling and sanitation products under the

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PRESENTING





The Tecma X-Compass macerator toilet

Thetford, Norcold and Tecma brands, 2019 has so far been a positive year. Thetford is based in Otricoli, Italy, not far from Rome, but its European headquarters are in Etten-Leur in the Netherlands.

“We exceeded last year’s performance, but 2020 is expected to be flat,” says Gianluca Silvestri, business unit manager. “There are several market uncertainties driven by commercial trade between the US and China and the unpredictable outcome of Brexit. OEMs are still reporting solid order books, but distributors are likely to keep their stock of spare parts under control and reduce investments.”

Silvestri told *IBI* that although the Dutch leisure marine market is still growing, the rate of growth in 2019 is not as strong as in previous years. “After the double-digit growth trend of the past three years, now is the time for consolidation,” he says. “The Netherlands represents an important market for superyachts and continues to produce smaller boats too, with several applications for our Business Unit. Growth continues in terms of new-builds and the aftermarket is also showing increased demand from consumers wanting to improve their existing boats with new equipment.”

In the last two years, Thetford introduced the X-Light S, a macerator toilet made of a special custom carbon fiber, and the X-Compass, a ceramic toilet wrapped with a special carbon-look layer.

“Carbon toilets are appreciated for their low weight, while carbon-looking toilets are appreciated because of their aesthetics,” Silvestri explains. “Both developments are very interesting because they match the growing focus for carbon fiber application in the global yacht industry.”

This year Thetford will focus on a

‘nature theme’ and will present some new ideas at the METSTRADE Show in Amsterdam in November.

Thetford Marine is a global brand that is recognised as one of the best suppliers of sanitation and refrigeration solutions worldwide. The market for Thetford Marine and Tecma is equally divided between OEM and aftermarket. North America represents half of the business, and the rest is divided between Europe, the Middle East and Far East, including Australia and New Zealand. Tecma’s signature product is the Silence Plus 2G toilet, which claims to be the best macerating toilet in the world, awarded by owners, captains, dealers and shipyards.

“The best fit of the 2G is on boats from 50ft and above,” says Silvestri. “For smaller boats, the Tecma Compass is the alternative solution. We have also a very thin and miniature toilet for challenging installations, the Nano by Tecma. It’s the smallest toilet in the world with a self-contained macerator pump.”

Thetford’s customer base is said to be stable, having served both OEMs and distributors for many years. “But the market is changing because the old owners and the Baby Boomers have not been completely replaced by X-Gen and Millennials,” Silvestri says.

“Life on water will still remain a great value for many people and this will continue to generate demand for new boats and spare parts.”

As for trends, Silvestri says product innovation, reliability and global aftersales support are critical to Thetford’s customers. “We at Thetford Marine care a lot about all those key success factors. We continue to think of solutions that will reduce complexity in maintenance and installation of our products, and we invest in training our distributors and dealers around the world to keep our service level at the top.” **IBI**

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CONNECTIVITY AND THE INTERNET OF THINGS



So much equipment can now be accessed via the internet that on larger yachts satellite comms are the norm, rather than the exception

the ability of the equipment itself, or the boat that is carrying it, to log securely into the internet. Ideally, this should be through a connection fast enough to be useful. When a boat is berthed in a busy, urbanised harbour, this is rarely a problem, but once out at sea, land-based connectivity can quickly fall away. “Many people compare today’s boat to a modern car,” says Bruno Simons, senior vice president for Navico’s Smart Boat programme. A lifelong boater himself, Simons has also spent 30 years in the French automotive sector, so has a unique insight.

“It’s true that many of the components and systems are the same,” he said, “but actually a boat has far more in common with a space capsule than with a car. This is mainly because it is operating in a hostile environment where you cannot live for long if you step ‘outside’ the vehicle. The chances of you being found in the water and picked up aren’t great. When away from towns or cities, connectivity drops in and out and can often be lost when a mile or so offshore. For the average boat owner, navigation electronics tend to be ‘mission critical’, rather than just ‘nice to have.’”

Simons groups the key elements of marine electronics into three main categories: integration, connectivity and something he calls ‘simplicity’.

Integration is the harnessing of all the ship’s functions into one centralised operating system, so gone are the round dials, big switches and chunky throttles. The industry is rapidly adopting flush fitting multi-function displays (MFDs) and fly-by-wire joysticks. Many larger boats also have a remote-control system, allowing the captain to move freely around the boat, or even along the nearby shoreline, whilst simultaneously working the helm, engines and thrusters.

Connectivity is the ability to link the boat to the Internet in order to take advantage of the wide range of services available via

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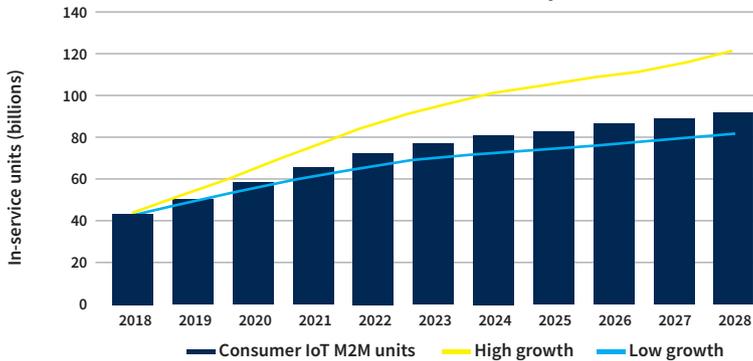
Internet access is becoming a major driver in how marine equipment is installed, operated and maintained – the so-called M2M (machine-to-machine) revolution. So how is our industry responding?

WORDS: JAKE KAVANAGH

ACCORDING TO THE GIANT IT firm Cisco, by 2020 some 50 billion ‘things’ will be connected to the internet. These will range from photocopiers to coffee machines, drilling rigs to jets – and literally millions of boats. Often heralded as ‘the fourth industrial revolution’ the ‘IoT’ (Internet of Things) allows for the monitoring, updating and downloading of data from any piece of equipment that is connected to the web and ‘digitally coherent’. This is known as M2M, or Machine-to-Machine communication.

However, IoT and M2M depend on one basic function, connectivity. This means

Consumer IoT in-service units by scenario



Cisco suggests that the connection of domestic equipment will be the main driver in the M2M/IoT revolution, mainly via vehicles and smart homes

M2M, from downloading charts to uploading data. As the GSM (Global System for Mobile) networks get more sophisticated, particularly with the arrival of the fifth generation (5G) so the ranges are getting shorter and the concentration of mast towers is changing.

Meanwhile, the cost-effective 'bundling' of satellite call time packages and services means that more long-distance cruisers are supplementing their connectivity with satellite comms, where tariffs continue to fall and technology becomes more powerful.

For example, the global mobile communications company Iridium began trials of its new Certus transceiver in August 2019. This compact and highly portable device is claimed to have a data transfer rate 35 times higher than its predecessor whilst also supporting high quality voice transmissions. It is intended to expand satellite services into new markets, ranging from personal communicators to remotely-deployed IoT devices, all operating via Iridium's L-band connectivity.

The final category, 'Simplexity' is a phrase Simons first heard from his mentor Patrick Lequermont in the automotive sector. "This is the process by which you make complex functions very simple to access and use," he explained. "Simplexity is critical when designing for the end user. Our glass bridge systems, with split screen functionality, have proved very successful in the superyacht and commercial sectors, so we are launching smaller versions for the mass market. To use them to their full potential, simplexity is key."

A Dutch company that is in full agreement is NauticSupport, which aims to bring hi tech interfaces to the boating public in an easy-to-use 'turnkey' format.

"Sailors must have knowledge of many things," their latest release advises. "With the current rate of progress, it is difficult to completely learn about all the possibilities of onboard computers and navigation. It is quite a task to set up all the peripherals, and this only works if all the components interact with each other, like a 'TomTom' on the water. At NauticSupport you can buy, rent or lease an onboard computer which will supply a system that will always work." With boats more integrated than ever before, and increasingly better connected, we asked key players for the major trends within the marine electronics markets. ➔

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Raymarine's Docksense Alert system uses special 3D cameras to give visual and range-finding feedback to the helm, paving the way for a fully automatic system

TRENDS WITHIN INTEGRATION

TREND 1: More sensors

Sensors have become far more compact, less power hungry and more reliable in recent years. They are also far more specialised. Some can be used either directly by the boater, or via an automated system.

A typical example would be FLIR Systems Raymarine Docksense Alert, described as a new addition to Raymarine's intelligent docking technology. Using a series of either one, three or five strategically placed 3D cameras around the boat, Docksense Alert works in much the same way as the proximity alarms on a car. This gives the helmsman a 360° view of the dock and any obstacles he may not have seen from the helm. This type of system is designed to work with an Axiom multi-function Display, and – as with Volvo Penta's Autodocking system and



Digital yacht's Seacosense system allows for the sampling of seawater via standard strainer. The data could be uploaded to allow climate research organisations to tap into the feedback from a global fleet of leisure users

Mercury Marine's Zeus joystick control for outboards, is a forerunner to a completely automatic berthing facility. These systems can use either sensors ashore, sensors on the boat, or a combination of both, and are designed to deal with the vagaries of wind and tide.

Modern engines are also able to support a number of sensors that can upload their performance once a link is established, and some new systems can be retrofitted to existing CAN-bus enabled engines.

Recently joining this trend is Fiat Power Train (FPT). The new product, branded Red Horizon, is a collaboration with German-based ZF (transmissions) and Navico. The system is described as an integration of the most advanced marine electronics to give full navigation, safety, driving comfort and docking. Red Horizon is compatible with all of FPT Industrial's Cursor and NEF families of engines via a plug and play module.

"The marine market now requires a Smart Hub that controls and communicates with all key areas of a boat," explained Fabio Rigoni, vice president for FPT Industrial Europe. "Our collaboration with these two leading players, ZF and Navico, gives us the possibility to build outstanding tailor-made solutions."

But it isn't just the internals of the boat that need monitoring – the outside conditions are also of interest, especially to those that want to fish or dive. Addressing this is UK-based Digital Yacht, a major exporter of marine technology.

"We will be introducing our new range of Seacosense environmental monitoring sensors at METS 2019," said CEO Nick Heyes. "They're designed to monitor water salinity, temperature, pH and turbidity. They have an NMEA 2000 output for multi-function displays as well as a wireless output for tablets and iPads. Stored data can be forwarded to the cloud for analysis by universities and authorities. The sensors fit to a standard cooling water strainer so don't need expensive through-hull fittings."

TREND 2: Larger, neater displays

Touch screens are an integral part of most people's lives nowadays, but how do you make a sheet of glass look attractive? This challenge has been met by many OEMs, including the ability to swap out older style displays for more modern versions without making a mess of the dashboard.

At the Genoa Boat Show IBI saw an example of Navico's new glass bridge type



Emanuelle Di Bartolo of Naviop (the Italian subsidiary of Navico) poses with an exhibit of the new glass bridge concept. The main screen is for display only, whereas the actual commands are entered by the smaller screens next to the helm

display, where a large screen dominates the console.

"We had a request from the market to clean up the dashboard," explained Emmanuelle Di Bartolo, who works for the Italian subsidiary Naviop. "The first job was to remove absolutely everything that wasn't necessary and then build a graphic user interface. The smaller touch screens are specified for the marine environment, so saltwater, sun cream or sand doesn't affect them at all. We see automotive as our inspiration as everyone has a car, but not everyone has a boat. People with an integrated car expect the same level of access both at home and afloat, and whilst there is a lot more functionality, we are aiming for access in much the same way. This includes the screens being replicated in real time on a smart phone or tablet via a WiFi link."

TREND 3: Connecting the basics

As more and more internet-capable equipment is added to the boat, it needs to communicate in a common electronic language, or 'protocol.' The giant tech company Garmin recently won the coveted NMEA (National Marine Electronics Association) Manufacturer of the Year (2019) in recognition of its 'support in the field for OEMs who want to supply equipment that will connect to a multi-function display.'

This year alone, Garmin has enabled nine major OEMs to integrate their products into its OneHelm operating

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Sparkling mineral water from the sea? All kinds of equipment can now be connected, monitored and remotely controlled via Garmin's OneHelm system, such as this fully automated Genius unit from HP (High Pressure) Watermakers. Posing with this compact unit is co-founder Gianni Zucco. "We can check all functionalities from any Internet connection in real time and change any parameters" he said. "This machine can produce 4 types of filtered freshwater from the sea, including fresh, cold, and mineralised sparkling. Our BiBi operating system will also be compatible with Raymarine and Simrad MFDs, which we will be announcing at METSTRADE" The sparkling water function alone - which IBI sampled and enjoyed - will eliminate the need for hundreds of plastic bottles per month on larger charter vessels

system, where all the control and monitoring functions are accessed via a single touch screen MFD. This has been achieved with the HTML5 protocol, now more widely used throughout the industry. Newly compatible equipment ranges from domestic appliances such as Groco toilets and HP watermakers right through to power systems from Scheiber and gyro stabilisers from Quick Spa.

TREND 4: More remote control

However elegant a bridge station, or however many cameras you have, there is still the need to get a direct visual on some situations. The mobile control unit is now so sophisticated that a huge number of ships systems can be operated simultaneously via a portable controller.

For a simple and straight forward version, there are some excellent offerings from companies such as Yacht Controller,



Integration of a yachts systems, from navigation lights to engines, means that the whole vessel can be operated remotely. Here are two systems, both highly intuitive and packed with safety features. Yacht Controller (left) seen here with its receiver gives access to main systems such as engines, helm, anchor and thrusters. The IMET Wave Marine console (right) is custom designed for yachts and commercial vessels that will have differing operating modes

now providing remote controls for over 200 brands of boat. For larger or more sophisticated vessels, there is the Wave Marine system that IBI saw at the Cannes boat show. Units like this are often purpose-built and feature colour-coded controls in an anti-knock casing.

"This is a niche market and gaining more interest, as you can now control anything that has an electric or electro-hydraulic interface," explained IMET Wave Marine's Alessandro Busetto. "We are getting more requests from captains who want to be in close proximity to their personnel, but with full access to the boat's systems. Remote control gives you this possibility in a very safe way."

The system wirelessly taps into the boats CANbus network, allowing full control in several modes, including day cruising, night cruising, port operations and docking. But is it safe from jamming?

"We work on 2.4 GHz internationally and in the EU on 434MHz, which is an industry standard," Busetto said. "Our systems have a proven safety feature using 'automatic frequency agility', which is seamless. This prevents any mistakes, because if a frequency is corrupted the unit automatically switches to a better one. All commands have safety validation, to prevent any erratic signal being used,



and there are dual processors for full redundancy."

TREND 5: Delivering a package

IBI has noticed a rise in exclusive deals between electronics suppliers and boat builders. Previously, this type of equipment choice was left to the end user, who often had their own preference. This was usually for kit they had got used to on previous boats. But with marine electronics reaching increasingly high standards of build quality, and with similar functionality, intuitive access and compatible protocols, brand tie-ins are now more common. Recent examples would be the 'standard equipment' deals between Raymarine

and Group Beneteau's Excess catamarans, Garmin and Sea Hunt Boat Company and Navico (Simrad) and Axopar.

So what clinches the deal? In many cases, it seems that style and ease of use are the two major factors.

For Sea Hunt boats, Company president

Bubba Roof explained that increasing orders specifying Garmin products led to the deal. "Garmin provide the perfect combination of leading technology with user friendliness that our customers desire," he said. For Axopar, it's all about the future. The first model in the co-operation, the Axopar 37, will feature the new range of ➔

“ We are getting more requests from captains who want to work in close proximity to their personnel, but with full access to the boat's systems ”

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We are proud to inform you about MZ Electronic takeover of Officina Navale Nanni S.r.l. (O.N.N). O.N.N. was born in 1950 in Viareggio; it is specialized in creating vertical and horizontal windlasses, chain stoppers, capstans and deck equipments for boats up to 90 meters (diameter of the chain 32 mm with stud-link). All the products support electric, hydraulic and pneumatic supplies and can be certified with the most important naval registers (RINA, BV, LR, RMRS, ABS, etc.).

The factory has a big experience in carrying out custom products, in order to meet any need encountered during planning stage.

glass bridge concepts previously only found on superyachts. This boat will be exhibited at the Dusseldorf show in January 2020.

“We want to provide our customers with a new driving experience that starts at the helm,” said Axopar’s co-founder Jan-Erik Viitala. “New technology enables us to develop new functions and greater interactivity between the driver and the boat.”

TREND 6: Better Future proofing

Moore’s First Law states that the number of transistors within a dense integrated circuit will double every two years, giving ever-greater computational power. This has been more or less true until quite recently, by which time the transistors were becoming so small as to challenge the laws of physics. Even so, in 2017 Intel broke the ionanometre milestone to place 100 million transistors into every 1mm² of silicon chip.

Meanwhile, Moore’s second law states that this advance will come at a cost to the manufacturer. Research, testing and production costs have risen with each new breakthrough, whereas the retail consumer price has steadily fallen. This has made electronics a highly competitive market.

“When a new mobile phone is launched, there is a great deal of redundancy built into its circuitry,” said Navico’s Bruno Simons. “This is to allow the phone to absorb updates for greater functionality throughout its lifespan.”

A problem for boat owners is that ‘legacy’ devices may still work, but to swap them out would mean rebuilding the dashboard. As such, companies are at pains

to ensure that many of their upgrades are backwards compatible. In the commercial sector, legacy is even more of an issue, as ships are in operation almost 24/7 and downtime for refits is costly.

Fully aware of this situation is Boning Ship Automation, which supplies a number of monitoring and control systems for the superyacht industry. Not only is the company able to upgrade software remotely via the web, it can also supply a comprehensive set of spares, however old the kit. This means that Boning customers

are automatically future-proofed.

“Boning has been around for 40 years,” said head of Sales Marinko Vukancic. “We manufacture everything in house, so have a full stock of spare parts for every piece of equipment we have ever made. If the component isn’t in stock, then within 48 hours we will have made another one and had it despatched. As a ship owner, you depend on your suppliers. If you have to replace an entire system because one unit has failed, then you will never use that supplier again.”



Bonings Head of Sales, Marinko Vukancic, says that supporting legacy equipment is vital for future sales, as it proves the company is dependable. His company can still manufacture spares for “every piece of equipment we have ever made”



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Belts and braces: Even traditionally styled yachts pack the latest equipment. This beautiful cutter has both satellite connectivity (radome) and a boosted 4G (starboard side on pole) to allow for signal reception wherever it is sailing. A smartbox will compare reception strength and switch automatically to the best signal at the best tariff

TRENDS WITHIN CONNECTIVITY

For many boat owners on vacation, staying in touch with their business or loved ones via social media is essential. For professional users, the management of the vessel itself may depend heavily on an internet link for routing information, weather and logistics.

“There are three ways to connect to the Internet,” explained Mail-A-Sail’s Ed Wildegoose. “The first is via WiFi to shore. It is short-range technology and marina WiFi gateways are often saturated, but with the right equipment and conditions you can make it work at

anything up to a mile. The next option is data over the mobile phone. You put a SIM (service identity module) card in your phone, and another in a booster box. This has electronics that can increase the signal strength by a factor of 1,000 and occasionally as high 10,000. The result is a working range of up to 20Nm from a coastal network.

“Once out of GSM range, you need to switch to a satellite service. These are generally global, but not priced to replace typical leisure use, so they tend to be



The HybridOne system from OceanSat BV allows for the ‘aggregation’ of several providers into one solution

the domain of charter, commercial and business users. Low end sat phones start at around £1,000 but the dial up speeds are very low. For better access, you need to spend around £3,000 to £6,000 for the hardware, with airtime packages of maybe a few hundred pounds a month, but this is nice equipment and able to give you weather forecasts and text messaging. Spend £15,000, and you can have a system that will provide speeds of around 5mbs, so you can download Netflix from it.”

With more connectivity available at ports around the world, most boat owners tend to stay in touch via GSM links. This has led to a proliferation of boosted devices that allow external providers to log in and interrogate the boats systems. One of these is Digital Yacht’s 4G Connect bundle.

“Our product range focuses heavily on wireless connectivity and networking solutions for NMEA data – bridging old and new systems,” said Nick Heyes. “4G Connect, which offers fast internet access up to 20Nm from the shore, has been popular with boatbuilders wanting a low-cost solution for internet access afloat. It even offers Alexa (Amazon’s voice activated assistant) connectivity so users can check their boat’s location from home. 4G data costs have plummeted and speeds now allow reliable media and TV streaming.”

Thanks to the European’s love affair with offshore energy, 4G connectivity is now reaching further out to sea, mainly due to 4G repeaters on wind turbines. An expert in this field is Fred Maartens of the Dutch-based specialist OceanSat BV.

“We service both sectors, terrestrial and satellite connectivity, and have seen that 4G coverage is getting better and better,” Maartens told *IBI*. “The main reason is the proliferation of offshore wind farms. They are all connected by 4G, so this greatly increases offshore coverage. Many of our customers only need coastal connectivity, so 4G proves ideal for that. Usually, this type of connection is much faster than a satellite link, but for those vessels that do go out of GSM range, we can offer 4G as a back-up to sat comms.”

OceanSat also offers something it calls ‘HybridOne Connect,’ addressing a growing trend for equipment that is able to hunt for the best signal and lock on. The literature explains that this hybrid system ‘aggregates multiple communication channels like 4G, L-band and VSAT into one solution.’

Meet and greet Spanish marine products at Hall 1

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“The best thing is that our software automatically changes the Wide-Area Network (WAN) connection for you,” Maartens said. “You can decide if this connection is based on availability, cost or priority. HybridOne is ideal for vessels that do not have the budget for a dedicated VSAT terminal, but where the crew still want to have access to emails and calls at sea. When in coastal areas, they can stream their favourite websites and entertainment channels.”

We asked key players how the industry is adapting to bridge the GSM/satellite gap.

TREND 1: The rise of the satellite

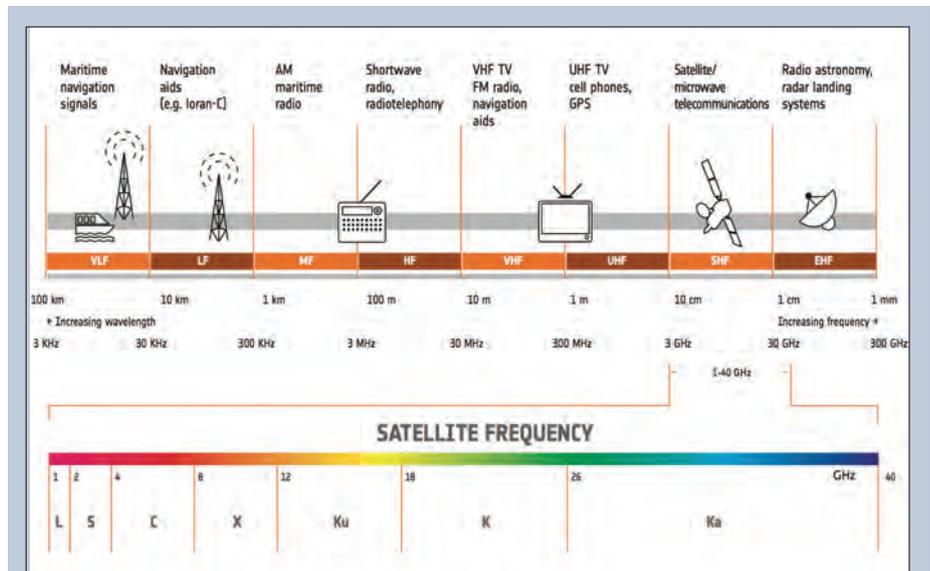
There seems little end to the race for space, but both manufacturers and launch providers are working hard to reduce their costs as competition heats up.

The US-based consultancy Northern Sky Research has recently published the 9th edition of its Satellite Manufacturing and Launch Services report, and it makes for sobering reading. “Despite a few slow years, 1,285 satellites of over 500kg are expected to be launched in the next 10 years,” NSR writes. “Both GEO (Geo-synchronous orbiting satellites) and non-GEO markets will remain stable, with the latter expected to dominate. Increase in manufacturing efficiencies and highly competitive launch prices are opening up new opportunities.”

In a separate report, NSR speculates that this new swarm of satellites will generate US\$11.6 billion over the next decade. “All M2M and IoT applications will grow,” the report states. “Transport and cargo has been the main market driver traditionally, but there will be a change in the mix of applications driving revenue as new technologies enter the market. These will include Iridium Certus, new flat panel antennas, and most crucially small satellite constellations.”

However, it is not just the big names providing more coverage. Some unsung heroes are also making space easier to access from afloat, even for just the basics.

“It’s one of the World’s best kept secrets that the EU has funded and fully developed the €10 billion Galileo satellite navigation system,” commented Nick Heyes, CEO of Digital Yacht. “Mariners now have a free to use, 3rd reliable satellite network to gather accurate positioning data. We’ve made our low cost TriNav GPS160 sensor compatible with legacy systems too, so everyone can benefit.”



Satellite frequencies

LETTER-DESIGNATIONS HAVE been developed for the satellite frequency spectrum. Although the higher frequency bands typically give access to wider bandwidths, they are also more susceptible to signal degradation. This is mainly due to ‘rain fade’, where the signals are absorbed by rain, snow or ice. Snow is the worst offender.

Due to the increase in the number of satellites, and the huge demand for airtime, congestion in the lower frequency bands has become a serious issue. As such, new technologies are being investigated so that higher bands can be used in tandem with lower frequencies in times of interference from weather.

L-BAND (1–2 GHZ)

Used by Global Positioning System (GPS) carriers and also satellite mobile phones, such as Iridium and Inmarsat. Also used by WorldSpace satellite radio.

S-BAND (2–4 GHZ)

Terrestrially used for weather radar, surface ship radar, and some communications satellites, especially those of NASA for talking to the International Space Station (ISS). In May 2009, Inmarsat and Solaris mobile (a joint venture between Eutelsat and Astra) were each given a 2x15 MHz portion of the S-band by the European Commission.

C-BAND (4–8 GHZ)

Commonly used in areas that are subject to tropical rainfall, as C band is less susceptible to rainfade than Ku band. In 1962, the first live transatlantic TV signal was beamed in this band by the Telstar satellite. Primarily used for satellite communications, for full-

time satellite TV networks or for raw satellite feeds.

X-BAND (8–12 GHZ)

Primarily used by the military in radar applications including continuous-wave, pulsed, single-polarisation, dual-polarisation, synthetic aperture and phased arrays. X-band radar frequency sub-bands are used by civil and government bodies for weather monitoring, air traffic control, maritime vessel traffic control, and the dreaded police radar guns.

KU-BAND (12–18 GHZ)

In Europe, Ku-band downlink is used from 10.7 GHz to 12.75 GHz for direct broadcast satellite services, such as Astra.

KA-BAND (26–40 GHZ)

Communications satellites uplink in either the 27.5 GHz and 31 GHz bands. Also used in high-resolution, close-range targeting radars on military aircraft.

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Harnessing this system is the next generation of personal locator beacons (PLB) from ACR Electronics, the ResQLink View. The name derives from the reassuring operating messages displayed on its screen. The compact and buoyant PLB uses a multi-constellation receiver which can tap in to both the Galileo and GPS satellite services for a quicker response and rescue.

TREND 2: Removing ‘bill shock’

Traditionally, satellite airtime has been seen as very expensive, with some horror stories of users forgetting to disconnect and running up bills of tens of thousands over a weekend. All that has now changed, with the operators keen to offer fixed price packages.

“Bill shock is something we are very conscious of, so we have a lot of on-line tools to help the customer,” explained Andrew Bush of KVH. His company has recently launched its HTS (High Throughput Service) global network and HTS satellite terminals, including the V3HTS, claimed to be the smallest VSAT in the world.

“We are very proactive in monitoring the system and the airtime because we don’t want people to overspend. If they get scared of the system, they won’t use it, so it is essential to allow customers to have complete control. We have a portal called mini-VSAT Manager. The customer dictates what goes through the terminal so they can switch off certain functions when guests are aboard. For example, parents can lock their kids out of social media.”

KVH offers a dual band system on its larger VSAT receivers, such as the 67cm V7 and the 1m V11. “The V7 and



KVH’s Andrew Bush with the latest high throughput satellite (HTS) radomes behind him. The V3, seen with a transparent dome to view the workings, is claimed to be the smallest VSAT in the world

V11HTS are unique in that they offer two channels,” Bush explained. “The unlimited channel is for background tasks that are less dependent of high data throughput, whereas the High-Speed Channel is where you need speeds as fast as 20Mbps. Data is paramount, as systems become increasingly automated and require an internet link for system monitoring and tracking.”

TREND 3: Greater security

Security issues have been rife in the shipping industry recently, the most

damaging attack coming from the Ukrainian NotPetya ransomware virus in 2017. The freezing of software forced 76 international shipping terminals to shut down, costing companies such as Mears and Damco around US\$300 million. During the ‘hijack’, staff had to resort to using social media on private phones just to keep the business running. Now, huge efforts have been put into place to prevent a similar attack.

However, judging from the Inmarsat report, security remains quite low on a ➔

boat owner's list of priorities. Only 17% of respondents knew the difference between Anti-virus software and the more secure endpoint protection, 7.5% said that no-one oversees cyber security on board, and more than 80% showed a lack of awareness about effective measures against hacking.

Fortunately, there is plenty of help at hand. For example, the AV specialist VBH has teamed up with Atlas Cybersecurity to offer a 'high-end superyacht cyber security solution.' This partnership will provide yacht owners with the means to identify and thwart any cyber-attacks whenever the yacht connects to the Internet. A free five-day cybersecurity assessment is being offered to yacht owners to help them be compliant with the International Maritime Organisations (IMO) risk management resolutions.

For Mail-a-Sail's Ed Wildegoose, securing access is an ongoing issue. "The challenge of cyber security is that no-one knows they need it, no-one wants to pay for it, and they only realise they do need it when it's far too late. Then they grumble if it wasn't included in the package."

Wildegoose points out that however sophisticated the security system, the crew needs to be trained in how to use it and avoid potential weaknesses. "There is little point in having 'password' as your secret password," he said. "Also, posting Facebook selfies that mentions the name of the yacht and shows security information pinned to the cabin bulkhead. Along with poor security installed in some equipment,

NICK HEYES, CEO
DIGITAL YACHT

There are nearly 20 million recreational boats in the world that could be treated as mobile capture devices and many global institutions are keen to work with open source data



A glimpse of the future. Arksen, a new marine company launched at the 2019 Dusseldorf Boat Show, is building a series of semi-autonomous explorer yachts designed to access some of the remotest areas on earth. Part of the green credentials includes future owners donating 10% of seagoing time to the Arksen foundation to facilitate cutting-edge scientific research. Data will be uploaded from sensors on board via satellite connectivity as the yachts travel widely

particularly cheaper cameras, these are just some of the weaknesses that hackers exploit but are easily avoided."

THE FUTURE

The US-based satellite consultancy Northern Sky Research says that M2M and IoT via satellite has traditionally been dominated by industrial applications, typically within the transportation and energy sectors, but now the domestic markets are emerging in force.

"We're seeing an explosion of the growth in the consumer handheld sector in terms of subscribers and revenues," their October 7th 2019 bulletin explains. Under the title 'Consumer IoT - A Vast Untapped Satcom Opportunity' the report suggests that a large number of new products are coming onto the market that will connect with satellite networks. This naturally includes leisure marine systems, from simple handheld 'panic button' devices that send minimal information to the live streaming of media and operational diagnostics.

However, NSR also warns that unlike the industrial users of sat comms, the leisure market is far fickle. Whilst the numbers may be impressive, the actual usage will be patchy. This is particularly true of the boat-based Eco tourist.

"Consumer IoT device usage is inherently irregular and occasional. This leads to high levels of churn, which is typical across this segment. Consumers and eco-tourism users subscribe for short periods when travelling and then almost immediately cancel their service afterwards. As such, consumer IoT, with its billions of devices, for the most part will remain with terrestrial connections."

The marine industry can be assured that as new constellations go into orbit, and with more powerful and adjustable spot beam technology, connectivity will be ramped up. Before too long, nowhere on earth will be beyond reach of a secure connection - and with a pricing package to keep it affordable. **IBI**

Defeating the drone

WITH 21 MILLION drones due to be shipped next year alone, many with advanced cameras and better handling, the problems of invasion of privacy are becoming increasingly common. One company that can help keep them away from your yacht is Martek Counter UAS.

"Our system can detect, track and defeat drone activity," says technical manager Alex Roskoss. The full marinised version is available in a standard radome, but Martek also has land-based equipment for homes, factories and airfields.

"It is easy for a drone to get quite close to a yacht and collect videos and stills. Other threats include aerial hacking and even airborne attack.

"Our counter UAV system detects the radio signature of the drone/controller link. That link is then displayed on screen to show the drone's location along with its vector. We can provide a system that is purely for detection, to warn you your security or privacy is about to be compromised, or systems to defeat the threat. Drones are a broad market, but almost all have a 'return to home' protocol to cope with a loss of signal. We can usually detect them at 5 kilometres, and certainly at 2km, where it is still difficult for a drone to get a clear picture. Breaking the controller link will send the drone back to its base."



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TOP VIEW

Widening the customer base



Peter Broadhurst has 25 years' experience in the maritime industry and is a former ship's radio officer. He is now senior vice president for Inmarsat's Maritime Safety, Security, Yachting and Passenger business

“The yachting industry is a good platform for new products,” says Peter Broadhurst, a senior vice president within the mobile satellite company Inmarsat. “It is not as conservative as the commercial shipping sector. Yachtsmen feel that if a product is shiny and new, they'll have one, whereas the shipping sector has to justify the expense. So yachting is a great place to launch new products, get some traction and then encourage some useful market feedback.”

Inmarsat is one of several companies offering boat owners the ability to connect to the internet from some of the remotest places on earth. “The market is certainly heading towards the Internet of Things,” Broadhurst said. “There are a lot more sensors, cameras and processors on the average boat now, all designed to make life simpler. But this requires an equally simple interface. Boat owners don't want to be IT experts just to make it all work.”

Business is booming for Inmarsat as more boatowners go ‘off the beaten track’ and join a growing trend for explorer-type vacations. Figures released in its 2019 Superyacht Connectivity Report suggests there will be a surge in VSAT (Very Small Aperture Terminal) usage in the next five years. Around 80% of the superyacht professionals questioned expect to use VSAT for more than half the time they are aboard by 2024. The figure is currently around 46%. Other findings suggest that average spending of between €5,000 - €20,000 will also increase from 34% to 57% by the same time. Of particular interest is how access to the Internet of Things for operational connectivity will increase from 6.2% to 24%. Basically, a quarter of satellite time will be used to run a yacht's systems.

As such, Inmarsat sees a bright future for the yachting market, with over 7,000 vessels equipped with the new Fleet Xpress services since 2017.

“We are looking at anything that floats and carries people,” Broadhurst said. “We have already started trial collaborations with boatbuilders, where we offer sat comms as an option with a fixed-price package. It's great for the boatbuilder, because they can pre-install all the necessary hardware, and great for the customer because they have a set price for a fixed term. This is a business sector in which we increased our focus last year, when we began trials to create a standard fit with a leading French OEM.”

Broadhurst is seeing the business as more service based rather than tariff driven. “We're moving away from being just a pipe,” he said. “We are now more applications orientated. We offer extra services such as Fleet Data, and an ECDIS solution from where you can download charts. You pay for a flexible, bundled service package with unlimited data, with subscription costs based on MIR and CIR plans. This is far less complicated for the user and the way the market is going.”

These bundled packages should also prevent the customer from overspending, the so-called ‘Bill Shock’. Traditionally, Broadhurst explained, the satellite link was used sparingly until there was a problem, and then the airtime would tend to run away. Not anymore.

“Even in the L-band, with Fleet One for the



The space industry is working hard to put more satellites into orbit, and IBI was invited to see several of them in build at the Thales Alenia facility near Cannes. Inmarsat is a major customer, and the visitors are posing in front of the latest GX5 satellite, due to enter service late in 2019

smallest leisure craft, we have US and EU leisure plans with a fixed price,” he said. “If you suddenly begin to use a lot of data, we throttle it down to 32kbs so you can still make voice over IP calls and still get a connection, but you're not going to have high speed because we want to keep the price flat. That seems to be what customers want. If they ask for more, we can move them to a different plan, or they can extend their current one, but the customer is in control.”

Inmarsat will be exhibiting its propositions at METSTRADE this year, and Broadhurst told IBI that it is very much in ‘listening mode’ to help it better understand the wide-ranging needs of the leisure market.



Inmarsat plans to increase the number of satellites in its Global Xpress (GX) constellation from the current four to a total of 12 by 2023. The GX10A and GX10B designates are scheduled for polar orbits, mainly to service the aviation industry on great circle routes.

The real breakthrough is with the upcoming GX7, GX8 and GX9 models, which will use ‘dynamic beam forming’ technology to create thousands of different data-carrying beams of different sizes and power. These beams can be repositioned across the globe to track demand and will literally double the capacity of the current GX network. They should be available in two years' time.

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Manufacturer of mobile connectivity and inertial navigation systems
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Mail-a-sail

UK based consultancy founded in 2001 to supply GSM and sat comms to yachtsmen.
mailasail.com

NauticSupport

Dutch specialist in navigation and safety system peripheral connectivity
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navico.com

Northern Sky Research

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Martek Counter UAS

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Euro Style Axial Replacement Fan

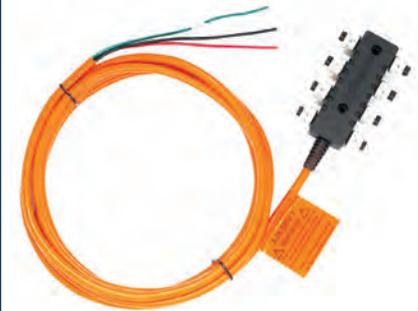
www.deltasystems.com

DELTA "T" SYSTEMS' Euro Style Axial Replacement Fan is designed for vessels made outside North America, whether for new construction or refit. It is available in custom diameters from 315mm-800mm. Unlike common European steel models, the fan's housing is welded marine-grade aluminium that's powder-coated for corrosion resistance and a high-end appearance. It matches original metric fan sizes and flange bolt patterns for easy installation. The fan also has high-efficiency composite blades. Powerful, quiet and replaceable, they are said to deliver improved performance over European fans in both airflow and power draw. The Euro Style Axial Replacement Fan is available with single or three-phase motors, in 50Hz and 60Hz and in a range of voltages, to fit any application for worldwide use.



Actisense SBN-2

www.actisense.com



THE SBN-2 BY UK-based marine electronics specialist Actisense is a larger version of its Self-Contained Boat Network. The device gives boat owners and installers the ability to set up a Plug & Play NMEA2000 network with a complete NMEA2000 backbone in a single device, simply requiring a power connection. With built-in termination resistors, the SBN-2 provides eight NMEA2000 drops, meaning that up to eight NMEA2000 devices can be connected. The SBN-2 is manufactured using ruggedised, watertight and flame-retardant over-moulded housing, making it ideal for potentially wet and harsh marine environments. It comes with an integrated EMI shield and a 3m UL-Rated power cable.

Hybrid DC Generator from Fischer Panda

www.fischerpanda.de

FISCHER PANDA'S NEW range of variable-speed Hybrid DC Generators for battery-charging are available in various output voltages up to a current of 300A and an output power of up to 100kW. They come with a new control system that allows various set-ups as well as the connection to a CAN BUS system.



The control system monitors the variable-speed Hybrid DC Generator and provides information on the generator as well as the connected drive system and batteries. The operator receives information about overall power being drawn, power supplied for battery charging and the electric drive system. When using batteries only, the battery-charging status as well as the remaining driving time are also displayed.

The new generator will make its global premiere at the METSTRADe Show in November.

Lifos 105 lithium battery

www.lifos.co.uk

IDEAL FOR BOATS with electric propulsion or as a leisure battery on a yacht connected to a solar panel, the lightweight Lifos 105 lithium battery has the equivalent power of a 200Ah lead acid battery and a life expectancy that is seven times longer. As a result, the cost per charging cycle is up to 40% lower than a traditional battery. At just 11.9kg, it is also a quarter of the weight and a third smaller in size. Using LiFePO4, Lifos is safe and clean with no risk of gassing so it can even be used on its side. Up to four Lifos batteries can be connected together in parallel or series to increase current or voltage.



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FITT Diamond anti-odour hose

www.fitt.com

THE FLAGSHIP OF the FITT Marine range, FITT Diamond is an anti-odour hose for waste-water drains that also remains flexible at sub-zero temperatures. It features a solid metal-free spiral core, which combined with special elastomer materials makes the hose extremely light, strong and easy to install.

With FITT Diamond, the installation process becomes quick and safe: the extreme bending radius and the absence of metal reduce cutting times by four – with less risk of injury – in addition to allowing easy disposal and recycling of any waste. The pale FITT Diamond colour, due to the mother of pearl rigid helicoid spiral combined with the white flexible element, is perfectly suited to the interiors of boats, and also makes the hose suitable for exposed installation.



Osculati's telescopic ladder

www.osculati.com

MADE FROM MIRROR-POLISHED AISI 316 stainless steel, Osculati's patent-pending telescopic ladder for installation above a gangplank comes with holding handles that rise and lower automatically to extend/retract the ladder. The handles are placed up high to enable safe and easy use, and the steps are extra large at 52.5mm.



Schenker ZEN 100

www.schenkerwatermakers.com

THE ZEN 100 from Schenker Watermakers is highly efficient, thanks to the latest generation energy recovery system. It can produce 100 litres of fresh water per hour with a consumption of just 400W – around 80% less power consumption than conventional systems. Like all units in the ZEN range, it can be powered directly from 12V or 24V DC service batteries. As a result, no AC generator is required for installation.



Lowrance PSI-1 Performance Sonar Interface

www.lowrance.com

THE PSI-1 PERFORMANCE Sonar Interface from Lowrance is a sonar module that brings LiveSight Sonar capability to HDS Carbon fishfinder/chartplotters. With the PSI-1 and a LiveSight transducer installed on an HDS Carbon system, anglers can track lure and fish movements in real time with wider coverage and at greater range. LiveSight Sonar helps anglers pinpoint fish locations and know if they are actively feeding. The PSI-1 module can be connected directly to the display via its sonar port and Ethernet connection.

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www.hosestech.it



MC² Quick Gyro X2

www.quickitaly.com

THE MC² QUICK Gyro X2 from Italy's Quick Spa is designed to be installed on smaller size boats compared to the ones already 'stabilised' by the wide Quick gyro stabilisers range. It is perfect for centre console or small size day cruisers, offered as a 12V DC battery-powered unit – eliminating the need for a generator to operate. The MC² Quick Gyro X2 is extremely light weight complimented by a compact design.

SuproFlex Rub Rail from TACO Marine

www.tacomarine.com

AVAILABLE NOW TO boatbuilders and repairers, TACO Marine's SuproFlex Rub Rail has higher impact resistance, requires minimal heating, is super flexible, easier to install, requires less manpower and reduces materials cost. Designed for boats up to 65ft, SuproFlex comes in a variety of sizes and colours and pairs with TACO's patented Flex Chrome Insert, which can also be customised to any colour preference.



Icom's IC-M37E VHF radio

www.icomuk.co.uk

THE IC-M37E VHF Buoyant Marine Radio from Icom has large keys and a big LCD that displays channel numbers and status icons in an easy-to-grip design. The radio is rugged enough for commercial use yet is suited to leisure users too.

With 6W of transmit output power, it is ideal for long distance communication. The supplied Li-Ion battery can provide more than 12 hours of operating time.

The IC-M37E is built to IP57 dust and waterproof protection rating (1m for 30 minutes). The radio also features an AquaQuake draining function to clear water away from the speaker grill and Icom's own Float'n Flash, which allows the radio to float and be located with a flashing red LED light and LCD/key backlight.



Griffin MicroPure

www.griffinfilter.com

THE GRIFFIN MICROPURE system improves fuel quality and kills diesel bugs by taking D-grade diesel fuel through cleaning, sterilisation and filtration to remove any contaminants, reducing the moisture content to produce genuine A-grade fuel. The product claims to be a "world first" and laboratory tests results have proven its effectiveness and reliability. Griffin MicroPure units are available in all fuel hose sizes.



Lalizas ISO RACING liferaft

www.lalizas.com

THE LALIZAS ISO RACING liferaft is ideal for racing sailing boats and anyone who wishes to save weight and space onboard. Designed to meet ISO 9650-1 standards and certified by Bureau Veritas, it comes in four versions to accommodate six, eight, 10 or 12 people. It can be stowed in a canister or valise that is easily manageable by one person, as it is 25% lighter than similar liferafts.



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BIO-SEA Easy-To-Fit BWTS

www.bio-uv.com

THE BIO-SEA EASY-TO-FIT skid from BIO-UV Group is a modified version of its small flow rate range of BIO-SEA 30, 60 and 90 ballast water treatment systems but incorporates a bolted frame. This allows the system to be delivered as a 'flat pack' solution and rebuilt onboard, making a skid version possible even for retrofit projects, reducing shipyard installation costs and time.

Where yacht machinery spaces are long and narrow, the dismantlable BIO-SEA Easy-to-Fit frames can also be split into two separate skids, with mechanical parts and pipework on one frame and electrical components on another. Everything is embedded onto the skid frame(s) with no need for an additional power cabinet.

Unlike other systems designed for low flow rates of between 10 to 90m³/h, BIO-SEA's filters and valves are designed specifically for the system's capacity. Competing systems often incorporate filters and pipework much larger than their flow rates actually require, resulting in an overall greater footprint.



STREX Fastener System for boat covers

www.strefasteners.com

THE STREX FASTENER System makes the process of covering a boat easier than ever. The IBEX Innovation Award-winning fastener attaches to an existing boat cover in minutes, providing strength and durability to prevent the boat's canvas from tearing, and ensures that fastening and removing the boat cover is hassle-free. Simply pull down the stretch fastener and attach the canvas to the provided anchor. The fasteners are easy to install with no special tools needed, saving time, energy and money.



Dometic Optimus E-Actuator

www.dometic.com

DESCRIBED AS THE marine industry's first all-electric steering actuator for outboard engines, Dometic's Optimus Electric Steering Actuator mounts directly on the motor in place of the existing hydraulic steering cylinder. With its powerful drive train, integrated proprietary position sensors and embedded electronics, it eliminates the need for separately mounted hydraulic actuators currently used. It can be paired with many of the most popular engine brands, including Yamaha, Mercury, Suzuki and Honda.



The CombiMaster 3000 from Mastervolt

www.mastervolt.com

BRIDGING THE GAP between the current Mastervolt Mass Combi and Mass Combi Pro/Ultra models, the CombiMaster 3000 inverter-charger has a high VA rating and >200% peak power to start even the heaviest and complex loads with ease. An automatic AC transfer system switches seamlessly between generator or mains and inverter output, ensuring a constant power supply. A Power Assist function prevents the main fuse tripping, should the boat or vehicle be connected to a weak shore power supply or small generator.

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Waveless from CMC Marine

www.cmcmarine.com

WAVELESS, CMC MARINE'S new family of ultra-compact electric stabilisers, solves the problem of yacht rolling and pitching caused by wave motion and moving weights, improving onboard comfort. Designed for mid to large-size boats of 12m in length and up, the Waveless family consists of four models of STAB stabilizers and four models of TRIM intruders. The smallest Waveless model has onboard dimensions of just 38cm in diameter and 22cm in height.



Seldén E40i electric winch

www.seldenmast.com

THE E40I ELECTRIC winch from Seldén is built up around an electric motor which is integrated in the drum. Only three thin cables protrude to lead through the coach roof or the deck, so no large cut-outs and no external motor or gearbox. This makes for uncompromised headroom down below, which is normally not the case with electric winches. Three-speed operation provides a high speed gear, a moderate gear and a low speed gear for fine tuning. It is a two-finger operation to start the winch and to switch gear, so a single-handed sailor can helm while operating the winch.

Fusion FM Series

www.fusionentertainment.com

Fusion's FM Series of flush-mount marine speakers and subwoofers are engineered to deliver high-quality acoustics and bass. The speakers feature a new mounting system for non-intrusive, easy installation. Simply place the unit in the cut-out, tighten the screws and the speaker legs will tighten against the panel, keeping it in place without creating any screw holes. The FM Series is designed to comply with ISO12216 – an industry first for marine speaker and subwoofer products, says Fusion. Available in either round or square models and white and black colour options, they come in two sizes – 7.7in 200W and 6.5in 120W. Matching 10in 400W FM Series subwoofers are also available.



Seakeeper 16

www.seakeeper.com

LAUNCHED TO PROVIDE more angular momentum without increasing weight, size or power, the Seakeeper 18 is a new option for boats from 20m-23m (65ft-75ft) or up to 56 tonnes. The Seakeeper 18 packs a punch with 18,000 Newton-meter-seconds (N-m-s) of angular momentum, the standard in measuring gyroscopic output, but in the same footprint as the Seakeeper 16 (16,000 N-m-s). "Customers are demanding the best performance possible," says Seakeeper CEO Andrew Semprevivo. "It's not about reducing the roll any more, we're regularly being asked to eliminate it completely. The Seakeeper 18 was developed as a response to that." The Seakeeper 18 will be available for shipment beginning late 2019 and will retail for US\$119,900.



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Fastmount LP-SMX clip

www.fastmount.com

THE LP-SMX FROM panel mounting systems specialist Fastmount is a low profile, screw fix male clip that offers an extra-heavy duty 15kg pull out load, making it ideal for both heavyweight and large thin interior panels on superyachts. The LP-SMX is the third clip across Fastmount's range of products that provides such a heavy-duty fixing. Fastmount recommends the LP-SMX to be used in conjunction with their LP-AF8A female, a clip that allows 8mm of supported panel adjustment.

Dimensions measure just 38cm in diameter and 22cm in height.



FLIR M300 Series Marine Cameras

www.flir.com

THE FLIR M300 Series is a new generation of maritime thermal cameras delivering advanced awareness-enhancing technologies, safer navigation, and seamless integration with onboard boat systems. The cameras are designed for professional mariners and first responders who operate in the harshest marine environments. There are five models featuring robust new pan and tilt housings, four models with the FLIR Boson 640 or 320 resolution thermal camera cores and various fixed field of view lenses, plus a visible-only model, the M300C, featuring a high-definition, colour, low-light camera with 30X zoom.

Vesper Marine Cortex

www.vespermarine.com

VESPER MARINE CLAIMS to have redefined the VHF experience with its latest launch, Cortex – a radio with wireless touchscreen handsets, built-in Class B SOTDMA smartAIS transponder and remote vessel monitoring. Cortex's touchscreen handset has been designed to be intuitive, making typically complicated functions easy to use. The Vesper system combines navigation and sensor data with intelligent alarms to prioritize voice alerts on wireless handsets or a connected speaker. With a free cellular connection, Cortex provides plug and play remote monitoring for a host of onboard systems.



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Lowrance Ghost Trolling Motor

www.lowrance.com

THE NEW ULTRA-QUIET Lowrance Ghost freshwater trolling motor helps anglers fish longer, run faster and get in closer without making a sound. Ghost has a newly designed brushless motor with the most thrust and the longest run time of any trolling motor on the market, plus other benefits including integrated Lowrance sonar options, waypoint anchoring and a three-year warranty.

Yanmar YD42 MFD

www.yanmarmarine.com

FEATURING A LOW-PROFILE glass helm design and a 4.1in full colour screen, the multi-purpose Yanmar YD42 reads and displays Yanmar engine alarm and diagnostic codes. Users can also view additional information from engine speed and load, oil pressure and coolant temperature, to wind, speed, depth and AIS data. Supporting eight languages, the YD42 is compatible with a wide range of NMEA 2000 devices and allows engine data to be easily transmitted to other multi-function displays. Its data screens are easy to configure based on preference.



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NICK HOPKINSON

2020 growth? Top CEOs discuss

As 1,645 equipment exhibitors prepare to descend on Amsterdam for METSTRADE 2019 it is timely to reflect on what really keeps this army of suppliers in business.

Obviously the flair and ingenuity boatbuilders are bringing to the launch of appealing new models in ever increasing numbers and frequency is the what draws the public's attention, but the sale of new boats requires other fundamentals – including financial health – to prosper.

Having recently interviewed one of the industry's major investors as well as a recently retired corporate CEO – both of whom have run boat manufacturing operations in Europe and the US – it is interesting to share their views on the key drivers in the boat business and what facilitates or inhibits the market.

Regulatory and tax regimes in the major markets clearly have to be reasonable, moorings and berthing facilities in accessible locations need to be available, local repair and service facilities are another necessity, but what of the operational conditions which should prevail for the industry to flourish? Our two commentators are generally in agreement about the likely structure of the business going forward but have some significant divergencies of opinion on the influences which bear on the business.

Our serial investor thinks the boatbuilding industry will ultimately remain fragmented. He believes this always tends to be the case in industries where the barriers to entry are low, and in the boat industry – especially from a design and tooling perspective – it doesn't take a big investment to create and assemble a new boat. If there is an aspect which creates higher entry barriers for new manufacturers, it is the need to have a viable distribution network. In his opinion, there are relatively few serious manufacturers with decent inventory-stocking dealer networks. However, he does see some interesting dealership roll-ups in the US with players such as One Water Marine and Marine Max which has already scaled-up.

As for external investor interest, the paucity of listed boat players puts a limit

Two key figures in the marine leisure industry who wish to remain anonymous discuss the structural and economic conditions which facilitate growth in the boating market

on M&A activity, although the recent listing of companies such as Mastercraft, Malibu and Ferretti's attempt at an IPO, is a step in the right direction. He is of the opinion that private equity will never really be interested in boatbuilding again given the poor experience of previous PE investors such as Bain, Candover, Better Capital, Rhone Capital, Oaktree, Anchorage and Balmoral. Primera is the one exception which did very well out of its initial 2002 investment in Ferretti.

HISTORY NOT REPEATING ITSELF

He believes the scenario of major engine manufacturers buying boatbuilders to benefit from vertical integration in the inboard and sterndrive markets won't repeat itself either, after the disastrous results of companies such as Outboard Marine Corporation. Once highly successful, OMC's investment program in inboard powered boatbuilders was one of the contributors to its eventual bankruptcy. On the other hand, we are still seeing Yamaha and BRP pursuing limited and very selective purchases of builders of outboard powered boats which appear to be a better match.

Our recently retired CEO, who managed a major international boatbuilding business, expressed the view that the consolidation in boatbuilding will be driven more by the technological changes in connectivity and the ability of the larger builders to apply expertise and financial resources to integrate new systems into their volume production lines. He foresaw that less well-resourced and financed builders would find it difficult to compete in adoption of the new technology. He noted that younger customers' fascination with speed and technology is leading to the revival of higher performance boats in both sail and power, and driving the demand for smart gadgets throughout the boat.

While acknowledging that one of the new drivers in the industry is the establishment of pay and play boat clubs – offering the consumer the opportunity to use his or her choice of boat at multiple locations – is a powerful new stimulant to the market. Our CEO's experience of these new initiatives, leads him to believe they will need careful management and nurturing until they can prove their full potential.

He also pointed to the consumer confidence indicators which in many countries are trending negatively and pointing to tougher times in 2020 and 2021. While global stock markets have held up reasonably well thus far, he believes any general weakening that reduces individual portfolio values will further weigh on confidence and lead to lower spending on discretionary consumer products. Our CEO also singles out the current situation of very low interest rates and easy access to consumer finance which has been a significant driver of boat sales in recent years – a situation which for the time being looks fairly stable.

HIGHS AND LOWS

Our investor similarly agrees that the boat industry is entirely predicated on consumer confidence which itself is dependent on the state of financial markets. After 10 years of GDP growth in major markets, "we are due a recession," he thinks, "and we know what that means for the boating industry." At the same time, he acknowledges that we may be witnessing a paradigm change in financial markets whereby unnaturally low to negative interest rates may prop up equity markets for years to come. Given those circumstances, the boat industry will continue to grow.

Both our interviewees were pleased to have enjoyed successful runs with their volume boatbuilding businesses in recent years but one senses they consider some underlying key market conditions and drivers are looking less promising in the near to medium term. **IBI**

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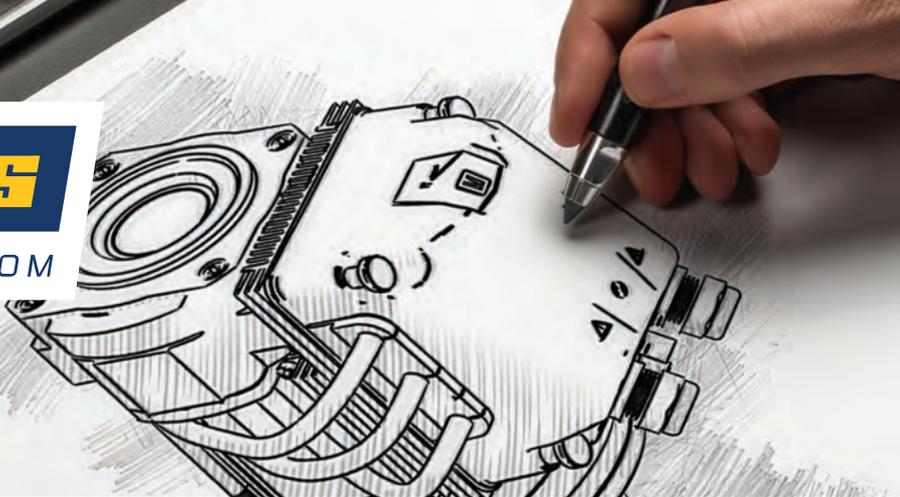


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