

IBI

INTERNATIONAL BOAT INDUSTRY

ISSUE 425 | APRIL-MAY 2018

The business of boating



GERMANY

Riding high, but challenges lie ahead [Page 20]



POLAND POWERHOUSE
R&D and investment boom as yards rush to meet increasing export demands [Page 34]

MATERIALS & MACHINERY
How the latest composites are changing the face of boatbuilding as we know it [Page 55]

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Despite trying to remain upbeat, it made at times for a sombre half hour

Ed Slack | Editor | IBI

A NUMBER OF years ago, in the teeth of the financial crisis, I was asked to present at the ASMEX conference in Australia on the state of the global boating industry, notably on the US and Europe. Despite trying to remain upbeat, it made at times for a sombre half hour (my presenting skills aside). At the end of April I'll be offering a similar state of the union address at the China International Boat Show in Shanghai, and once again will be looking in depth at the challenges and opportunities to marine businesses on either side of the Atlantic. Given the industry's new-found confidence on the back of a rising business tide – see the latest uplifting financials from Ferretti and Princess in our news pages – it's obvious that a few years on, this presentation will be distinctly different in tone: with relatively robust sales across the board – both power and to a lesser extent sail – and the significant headway made in grappling with structural deficits, means damage limitation has been replaced with healthier balance sheets and a desire to invest in new opportunities. R&D spend is booming, nowhere more so than in Poland (see p34). As well as a small number of global builders operating under their own brand, Poland is renowned as a major subcontractor, with the majority of those involved now rushing to increase capacity. Tellingly, however, in this growth

“Expansion goes beyond factory floor and head count, but extends to the development... of laboratories and research capabilities”

cycle, expansion goes beyond mere factory floor and head count, but extends to the development, in some cases, of laboratories and research capabilities, with builders reaching out to universities and other seats of learning, to give themselves a technical edge. It's a trend being

mirrored in other developed boat manufacturing markets.

The early fruits of such labours are already becoming self-evident to IBI as the first nominations trickle in for IBI and METSTRADE's annual Boat Builder Awards for Business Achievement in association with Raymarine, which take place in Amsterdam on November 13. In keeping with the

industry's new-found impetus, we're taking the awards to another level this year too, so get onboard and visit www.boatbuilderawards.com to learn more.

It all makes for an exciting time for our industry and, dare I say it, less sombre presentations.

If you're in Shanghai for the boat show, feel free to drop me a line to arrange a hook-up. 

Ed Slack




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BY THE INDUSTRY, FOR THE INDUSTRY

The **Boat Builder Awards for Business Achievement** were initiated by **International Boat Industry (IBI) magazine** and **METSTRADE** in 2015 and are designed to recognise individual and team success within boat building companies globally.

Nominations are invited across ten categories of business achievement and a number of outstanding initiatives and colleagues have been rewarded in previous years. However our search for admirable new projects and people continues. Individuals and teams can be nominated by professionals within the leisure marine business.

To make a nomination visit www.boatbuilderawards.com

SAVE THE DATE

This year's gala dinner and awards presentation will take place on the first day of **METSTRADE**, which is Tuesday the 13th November, at the National Maritime Museum in Amsterdam.

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- ★ Innovative on-board design solution
- ★ Innovation in a production process
- ★ Retail marketing initiative
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Europe

Princess Yachts reports best sales in its 53-year history

UK BRITISH YACHT BUILDER PRINCESS Yachts reported a record-breaking year at a press conference in London this week, citing the highest sales level in the company's 53-year history, and return to profitability, and advance orders totalling more than US\$1billion (£750 million).

According to Princess, results for the financial year ending 31 December 2017 reveal a 26.6% increase in turnover to £274.4 million. The company said Operating Profit before Exceptionals reached £7.9m (2.9% of sales), representing a turnaround of £15 million (6.1% points) on its 2016 results, delivering another year of growth. The breakdown of sales geographically was 50% achieved in Europe including the UK, 20% in the US, 10% in the Far East and 20% in the rest of the world

Princess executive chairman Antony Sheriff further noted that the company has reduced

stocks at dealer level from over 80 boats in January 2016 down to 20 currently. He added that 98% of 2018 production is already sold, as well as 66% of 2019 production. In 2017, Princess built 225 units and anticipates this will rise to around the 280 mark in 2018.

Employee numbers have risen from 2,000 in December 2016 to 2,700 in February 2018 and will likely increase to 2,800 in the next few months to meet the expanded production demand. The builder is also training 100 staff apprentices with good retention levels.

The company attributed its performance to an aggressive new development program that will see a total of nine model launches by year-end along with brisk order taking over the past six months at three of the industry's premiere boat shows for motoryachts – Cannes, Fort Lauderdale and Düsseldorf.

Apart from some small emerging markets, Sheriff told

IBI during the meeting that the company is now represented in all the significant boating markets with no serious gaps in its international coverage.

Princess announced in 2016 that it would invest £100m in product development over the next three years. A bullish Sheriff stated that the rate of new launches would increase in 2019 and that the company's return on turnover would likely rise from the figure of 2.9% recorded in 2017 to somewhere just shy of double figures in 2018.

One of the company's planned launches for this year – the new R35 – is currently the subject of a national TV advertising campaign, thought to be the first by a UK boatbuilder. The 35ft carbonfibre sports boat had design input from Pininfarina and will feature an active foiling system. It will be powered by twin Volvo Penta petrol V8 engines to retail at under £500,000.

Fountaine-Pajot in Dufour Yachts deal

FRANCE AS IBI WENT TO press, a merger between Fountaine-Pajot, one of the world's leading catamaran manufacturers, and Dufour Yachts, a specialist in monohull sailboats, was imminent. The alliance, if it goes ahead, would result in Fountaine-Pajot taking a majority stake in Dufour through financial support of Crédit Agricole Bank and UNEXO, Crédit Agricole Group's investment fund.

The merger between the two shipyards, both located

in La Rochelle on the French Atlantic coast, would give birth to a group with a turnover of €142m and 1,100 employees.

Dufour Yachts employs 500 people and generated turnover of €63.5m for the fiscal year ended July 31, 2017. Led by Salvatore Serio, the yard builds monohulls from 31ft-63ft.

Fountaine-Pajot reported turnover of €79m for the year ended August 31, 2017. Founded in 1976 by Jean-François Fountaine (the current mayor of La Rochelle), the yard is today led by Nicolas

Gardies and Romain Motteau and produces a full range of sailing catamarans from 40ft-58ft and motor cats from 37ft-44ft.

The two brands emphasised the commercial, strategic and industrial interest of this alliance in a joint press release. These include the strengthening of the commercial networks between Dufour, which is very present in Europe, and Fountaine-Pajot, which is very active in the US and the rest of the world.

Record profits at Ferretti

ITALY ITALY'S FERRETTI GROUP HAS reported a consolidated production value of €623m for fiscal 2017, up 10.8% compared to the same period a year ago. Its EBITDA rose 11.3% to €59m for the year. Net income was €24m, up 71% compared to the same period a year ago.

The company said that fiscal 2016 was its first profitable year since 2008 and last year's results confirms the "solidity" of the group. Ferretti's total assets were €971m. The Group expects its production value to rise to €704m in 2018.

Alberto Galassi, speaking in an exclusive interview with IBI, said the strong financial results reflect the commitment and hard work of the Ferretti Group over the past four years. Galassi took over as Ferretti CEO in May 2014. "Companies are made of people and we completely changed the management structure, going from 16 front-line managers of our different brands to seven," he said. "In 2014, the

fleet was also ageing. We didn't have the luxury of time, so our main priority was to invest in a completely new line of models."

Galassi went to the owners of the company, the Weichai Group, and requested funds for R&D and three years to break even. The plan was to launch 24 models in three years. "They gave us €110m and €50m of that was to invest in new models," says Galassi. "That was a very brave move because it was all or nothing. They also gave us the freedom to change management and time to repair our infrastructure."

Three years later, 70% of the Group's new-boat sales are from new models. Galassi expects that number to be 80% for fiscal year 2018.

The Ferretti chief says that the market is now positive for most yacht builders, but that Ferretti had the right models to sell as the market returned.

For 2018, the Group plans to recruit 80 more staff in all five shipyards.

Oyster owner confirmed

UK BRITISH GAMING - SOFTWARE entrepreneur Richard Hadida has acquired Oyster Yachts after Dutch company HTP Investments, which bought Oyster in 2012, withdrew its support for the Southampton-based builder in late January, forcing it to call in the administrators.

Hadida purchased Oyster through a new company, Richard Hadida Yachting Ltd (RHY), of which he will be the CEO. While Hadida is stated to be the only director of the company at this stage, it is known that he has appointed Kim Stubbs as COO, who has been seconded from PwC

where he is an operational restructuring expert. He has previous yachting experience reportedly helping Sunseeker move from loss to profit.

His management team also includes Paul Adamson, a former Oyster captain and an experienced skipper. As to three former Oyster executives including CEO David Tydeman, IBI understands they have been told that their services are no longer required.

Hadida is to resume boatbuilding immediately with plans that include a new smaller Oyster model below 14.3m (47ft), the current smallest model in the range.

Appointments

LUMITEC

LED lighting specialist **Lumitec** has appointed **Carmen Marchionni** as director of sales. Marchionni has more than 25 years' experience in the technology and manufacturing sectors, and a track record of delivering "explosive sales growth" at small and mid-sized companies.



Carmen Marchionni

NAUTOR'S SWAN

Giulio Bertani has rejoined **Nautor's Swan** as regional director for the Americas. In 1980, before funding his own yard constructing Star class keelboats and specialist carbon prototypes in epoxy resin, Bertani spent two years as Nautor's Swan service & warranty operations manager.



Giulio Bertani

EQUIOM

Isle of Man-based **Equiom Group** has expanded its yachting team with the appointment of **Geoff McCumesky** as a yachting consultant. McCumesky has nearly 15 years' experience with Burgess Yachts where he acted as chief yacht accountant, managing a portfolio of over 75 superyachts.



Geoff McCumesky

PETERS & MAY

UK yacht transporter **Peters & May** has promoted **Joshua Flavell** to the role of superyacht business manager. Flavell will head up the superyacht side of Peters & May, attending boat shows and key industry events. He was previously a partner at one of the world's largest international yacht brokerage firms.



Joshua Flavell

GAVIO GROUP

Italy's **Gavio Group** has chosen **Grant Colin Henderson** to head the group's Baglietto and CCN office in Ft Lauderdale, Florida as sales manager for the Americas. Henderson was formerly sales executive for Sanlorenzo of the Americas and, through YachtBlue, represented Marquis Yachts on the east coast of Florida for six years.

CAMPER & NICHOLSONS ASIA

Bart Kimman, former head of Northrop & Johnson Asia, has joined **Camper & Nicholson's Asia (CNA)** in the role of commercial director. CNA describes Kimman's appointment as a "major step forward in the restructuring of Camper & Nicholson's Asia and implementing the company's strategic plans".

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Americas

New Seakeeper owner



▲ New CEO Andrew Semprevivo (centre) with Rebecca Smitha and Bob Moser

USA CHICAGO-BASED MADISON INDUSTRIES HAS become the majority owner of Seakeeper Inc. Madison CEO Larry Gies called Seakeeper “innovative and customer-centric”, and said the new parent would work to preserve its culture. “We are honoured to be a part of transforming the boating experience,” Gies said.

Andrew Semprevivo, formerly Seakeeper’s chief operating officer, has been promoted to president and CEO. He will work with Seakeeper executives Bob Moser, vice president of manufacturing, and Rebecca Smitha, vice president of finance.

Seakeeper co-founders Shep McKenney and John Adams will remain as minority owners and be involved with product development. McKenney will be chairman of Seakeeper’s board of directors.

“Our vision, leadership and incredible worldwide team will remain unchanged,” said Semprevivo.

Outboards and navigational equipment on Trump’s tariff list

USA AMONGST THE 1,300 CHINESE products targeted for a 25% import tax by US President Trump are numerous leisure marine related products including outboard motors, propellers, a variety of electronic navigational equipment, flow meters, transceivers, stoves, non-powered capstans and winches, pulleys and pulley blocks, hydro-jet engines, fire extinguishers and depth sounders.

The proposed new tariffs will be applied on top of any existing duties on the 1,300 targeted products – announced by the Office of the US Trade Representative (USTR) on April 4 – accounting for US\$50bn worth of imported goods from China. The list of products is mainly focused on high-tech component and machinery sectors, in which China is pursuing a strong competitive advantage.

The latest volley in the

escalating trade tensions between the US and China comes on top of a 25% tariff on imported steel and 10% tariff on aluminium which the Trump administration formally imposed on March 8. Subsequent exemptions for Canada, Mexico, the EU and South Korea left the US steel and aluminium tariff primarily aimed at Chinese imports.

The proposed tariffs won’t go into effect until after a comment period.

Premier Pontoons exits bankruptcy

USA PREMIER MARINE HAS EXITED Chapter 11 bankruptcy with a new owner. The bankruptcy court in Minnesota approved a new owner called Premier Pontoon Holdings LLC. Rick Gallagher will serve as the company’s new CEO.

Premier is recognised as one of the North America’s leading pontoon boat builders, focusing on high-end models. It has been at the forefront

of the unusual growth in the pontoon boat segment in the US, but went into bankruptcy protection last June.

A company statement said the Minnesota builder will continue to build luxury pontoons to its national dealer network. The company will retain its current workforce and production facilities.

“The Premier team has worked tirelessly over the nine months to assure we continue

to build high-quality pontoon boats as an industry leader,” said Rick Gallagher, Premier’s new CEO, in a statement. “The reorganisation has Premier poised to increase production levels across each of our lines. We’ve been working with our vendors to plan for our increased capacity.”

Premier founders Bob and Betty Menne and Lori Melbostad will remain with the company.

BRP reports record annual sales

CANADA BRP HAS REPORTED SALES of C\$42.1m for its fourth quarter ended January 31, 2018, down 3.2% compared to a year ago. Net income declined to C\$115.1m compared to C\$136.4m a year ago. The company said that the drop came from lower wholesale sales in its Seasonal Products division and an unfavourable foreign exchange rate of C\$14m.

For the full year, revenues rose by 7.6% to C\$4.49bn thanks to higher sales in the

Year-Round Products and Seasonal Products divisions. Net income for the year was up to C\$274.5m, compared to US\$257.0m a year ago.

Its Seasonal Products division, which includes Sea-Doo watercraft, was down 9.4% to C\$443.3m for the quarter, because of a lower volume of snowmobiles sold. That was partially offset by a higher volume of PWC sold.

Sales in Propulsion Systems, which includes Evinrude outboards and Rotax engines, declined by 19.1% to C\$90.2m

for the quarter. The decrease came from a lower number of outboard and motorcycle engines sold.

“Model year 2018 products, including new Can-Am side-by-side platforms and a cutting-edge Sea-Doo platform, were well-received by consumers,” said Jose Boisjoli, president and CEO, in a statement.

The company said it plans to ramp up production for its Seasonal and Year-Round products at its facilities in Mexico.



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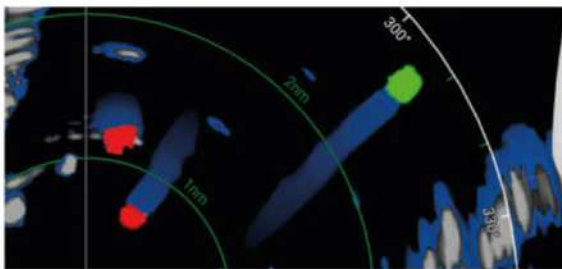
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Americas

Mercury to build 'noise' facility

USA MERCURY MARINE HAS BROKEN ground on a two-storey Noise, Vibration and Harshness (NVH) facility in Fond du Lac, Wisconsin. The company said that the US\$10m investment will be completed by the end of the year. It will add about 20,000ft².

NVH is the engineering practice of studying noise, vibration and harshness characteristics. The new technical centre will contain two marine-specific, hemi-

anechoic chambers, structural dynamic testing bays, listening rooms, offices and workspaces.

Tim Reid, vice president of product development and engineering, said Mercury's investment in every new engine class includes making sure it is the world's quietest and most reliable. "This new facility will allow us to continue to support NVH development and allow our engineers to study every noise, movement and performance indicator on every engine that

enters the market," said Reid in the statement.

Reid said that its 3.4L V6 200hp FourStroke outboard, launched in February 2018, is 15-30% quieter with 50% less vibration than the leading 200hp four-stroke competitor.

The NVH facility will be Mercury's third major expansion in 18 months. In early 2017, Mercury opened a US\$24m EDP paint plant and in April 2017 commissioned a 4,500-tonne high-pressure die-cast machine.

Equity firm ups marinas investment

USA WEATHERFORD CAPITAL HAS INVESTED an additional US\$10m in Safe Harbors Marina. The Florida-based private equity firm initially invested US\$40m in January 2017. Safe Harbor is its largest publicly disclosed investment to date, though the company also has holdings in health care and technology firms.

Safe Harbor owns and operates 67 marinas. In January it acquired Old Port Cove

Holdings in North Palm Beach, picking up three full-service marina properties.

"We believe the marina industry is quite compelling due to its fragmented nature," Weatherford told the *Tampa Bay Business Journal*. "There are thousands of marinas across the US, but the vast majority of marina owners only operate a single asset, so there is tremendous opportunity to consolidate and improve the overall boater experience.

There is a unique clientele that has been underserved in the past."

Weatherford said that the sector is "challenging" to enter because there is a limited supply of marinas. "It's extremely expensive and time consuming to build a new one," he told the Tampa newspaper.

Weatherford said his company plans to fund future acquisitions with Safe Harbor.

YATCO in expansion mode

USA YATCO HAS COMPLETED A major round of funding to accelerate its global expansion. The Fort Lauderdale-based company bills itself as the 'Official MLS of Yachting.'

"The increased capitalisation to YATCO will allow us to better reach the worldwide consumer marketplace as well as accelerate the introduction of our all new BOSS platform," says Steven Myers, founder

and CEO. Myers says the new platform would "revolutionise" the yachts for sale and charter marketing business by integrating all software into a "single back office solution."

In the last two years, Myers has increased its development and marketing team to 17 in Florida and Europe. The company also plans for further expansion of personnel in California, Annapolis, London, and the South of France by the end of 2018.

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Rest of the World

Are Chinese yachts making a comeback?

CHINA WHILE CHINESE COMPANIES MAINTAIN controlling interests in Sunseeker and Ferretti Group, and an ownership stake in Sanlorenzo, the anticorruption campaign of Chinese President Xi Jinping initiated in late 2012 has frozen domestic sales.

The yachting sector had been bullish up to that point, largely because builders in Europe and the US were hampered by the financial crisis. But the anticorruption laws, which targeted status symbols like yachts, hit the burgeoning boat sector hard.

"The China market is pretty much dead after more than three years of anti-graft policy," Gordon Hui of Sunseeker Asia told the *South China Morning Post*. Sunseeker Asia has struggled in China despite its Chinese ownership. China's 43.65% import tax on yachts also helped dampen enthusiasm for sales. Hui told the paper he is optimistic about emerging markets in Southeast Asia, but he does not expect any significant changes for the Chinese market.

"About 15 years ago, yacht

companies started flocking to China, but we didn't see growth happening in the same way – the infrastructure just isn't there," Jonathan Cannon of Cheoy Lee Shipyards told the paper. Cheoy Lee, established in Shanghai in 1870 and based in Hong Kong since 1936, was once China's largest yacht builder but most of its production in Guangdong is now in commercial vessels.

Some Chinese builders are seeing a brighter domestic market emerging. "There was no chance to sell anyone yachts [outside China] in 2008," says Yuan Fang, CEO of Heysea Yacht Group. The company had a breakthrough in 2010, with eight orders for the Heysea 82 model. Being able to offer its boats at about a third of European competitors, Heysea has an advantage. Fang says the company's order book is full for 2018 and nearly for 2019. For the first time last year, the builder made the top 20 list of the world's superyacht builders by *Boat International*.

"In China now, if you want to get the business, you only build big yachts," Fang says,

adding that the lack of public marinas means berthing fees are so high that most people just buy larger yachts.

Heysea also designs its boats to Chinese tastes, with galleys on the lower deck and staterooms converted to entertainment areas. Fang says the company has taken orders from the US and Australia, but building in China to meet the expectations of American and European owners has its challenges. Quality is an important issue that Chinese builders need to address.

There have been some breakthroughs on that front. UK yacht designer Evan K Marshall's 42.7m *King Baby*, built by IAG Yachts, was the largest GRP yacht built in China and was very well received at the Ft Lauderdale Boat Show in 2016.

Other Chinese firms have acquired non-Chinese builders. Last October, Zhongwang acquired a controlling interest in Silver Yachts, which builds aluminium superyachts. The company, currently building an 85m, is looking to acquire a yard in the Pearl River Delta.

Tohatsu targets next generation

JAPAN IN A BID TO reinforce the brand and engage with the next generation of consumers, Japanese outboard manufacturer Tohatsu has developed a global branding campaign incorporating a new brand logo and tagline. In the words of Tohatsu, the new logo, 'Tohatsu Blue Wings' is meant to evoke "the image of the sea hawk that flies over the oceans across the world", while with its associated tag line 'Feel the Wind', the company wants



people everywhere to "feel the exhilarating wind coming off the wings of Tohatsu," explained Kuniharu Maki,

general manager of Tohatsu's Marine Sales Department.

Maki added: "Our target customers are people in a category we call 'SMARTS'; these are boaters looking for a more refined, stimulating experience. They make up 18% of all owners of boats with engines in USA and Europe."

As part of the new branding campaign, Tohatsu launched its website at www.tohatsu.com featuring the new 'Blue Wings' logo.



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2018 TAIWAN INTERNATIONAL BOAT SHOW: Bringing boating to the masses

THIS FLEDGLING EVENT IS SLOWLY BUT SURELY HELPING TO BUILD TAIWAN'S INTERNATIONAL BOATING PROFILE WHILE SPREADING THE MARINE LIFESTYLE MESSAGE TO ITS DOMESTIC MARKET

WORDS: BELINDA SNELL



▲ More than 20,000 visitors attended the four-day show in Kaohsiung, where 65 yachts were unveiled to the public

There was a buzz of excitement in the halls of the Kaohsiung Exhibition Centre in March, when hordes of curious locals mingled with exhibitors for the third edition of the Taiwan International Boat Show (TIBS). The four-day biannual event (March 15-18) attracted just over 20,000 visitors and 726 foreign buyers from 31 countries – including China, the US, Japan, Korea and Singapore – with all of Taiwan's leading boatbuilders in attendance. In total, 28 yachts were displayed indoors and another 37 were moored outside in Horizon City Marina and the new Kha Shing Pier 22 Marina, which had its official opening just days before the show.

According to the Taiwan External Trade Development Council (TAITRA), 13 yachts were sold at TIBS and many exhibitors expect to close further deals in the months ahead. Kha Shing, whose 23m Monte Fino 76 Fly was the largest yacht displayed indoors, sold a Belize 54 Daybridge and other builders met with similar success. First-time exhibitor

Johnson Yachts sold two 70ft models, Novatec signed deals for three 58-footers, Shin Sheng Fa Boat Building Co Ltd sold four small vessels, Dyna Craft sold an entry-level Dyna 32, and Cadcam Marine, builder of the Morningstar range of aluminium alloy fishing boats, sold two small vessels.

“ Even though there are many potential buyers in Taiwan, it takes time to develop this kind of need among domestic clientele ”

EQUIPMENT DEMAND

Local equipment manufacturers and component suppliers were also out in force, generating more than US\$10m through a series of one-on-one procurement meetings arranged by TAITRA and designed to connect pre-screened buyers with local suppliers. Atech Composites, a Horizon Group subsidiary, welcomed visitors from South America, Europe, the Middle East and South East Asia

to its booth, where it held live demonstrations on advanced composites and their many applications. Other exhibitors included ANewPow, importer of the ePropulsion brand of electric outboards, God Power International and Hung Shen Propeller.

But TIBS wasn't just about business, which is why TAITRA placed greater emphasis this year on small, entry-level boats from 20ft-25ft – hoping they might appeal to a new generation of would-be boaters. While Taiwan is the fifth-largest producer of yachts over 24m (79ft) worldwide and the biggest in all of Asia, the country has yet to fully embrace the leisure marine lifestyle – a mindset that TIBS is trying hard to change. TAITRA project manager Sinny Chang told *IBI* that around 1,300 people pre-registered to take part in sea trials in Kaohsiung Harbour this year – a new addition to the show that proved immensely popular with locals and clear evidence that attitudes are slowly changing. The Taiwan government has also gone to great lengths in recent years to grow demand for boating at home, opening the country's territorial waters for recreational use in 2012 and abolishing a luxury tax, in 2014, on leisure boats sold on the domestic market. New marina projects are now springing up across the country, including the new 160-berth Love River marina in the heart of Kaohsiung that, when completed at the end of this year, will be Taiwan's largest marina for leisure yachts and a model for future development.


INFRASTRUCTURE CHALLENGE

"In Taiwan all of the marinas were originally designed for fishing boats and merchant vessels," says Howard Gung, Kha Shing's managing director and chairman of the Taiwan Yacht Industry Association (TYIA). "There is a lack of marinas for pleasure boats and this is one of the major reasons for slow development of the yacht industry in Taiwan. Without great marinas, potential boat owners are less willing to purchase yachts."

At Kha Shing, whose Pier 22 Marina offers 30 berths for boats of up to 50ft, domestic sales account for less than 2% of group turnover. "Looking at countries like Korea and the Philippines, their governments utilise their national resources, encouraging the building of yacht marinas, boat shows and marine tourism to assist in the development of the leisure marine industry," Gung adds. "Not only has this helped the marine industry to bloom, it has also helped the leisure services industry to grow, like diving and yacht chartering."

Gung estimates that Taiwan boatbuilders generate around US\$180m in annual output, with the production of yachts from 50ft-120ft supporting a workforce of 2,500. Local demand, however, is largely undeveloped. "Even though there are many potential buyers in Taiwan, it takes time to develop this kind of need amongst domestic clientele," he says. "What we need are better marinas and yacht management professionals so that potential boat owners have confidence that their yacht will be in good hands once they decide to buy one."

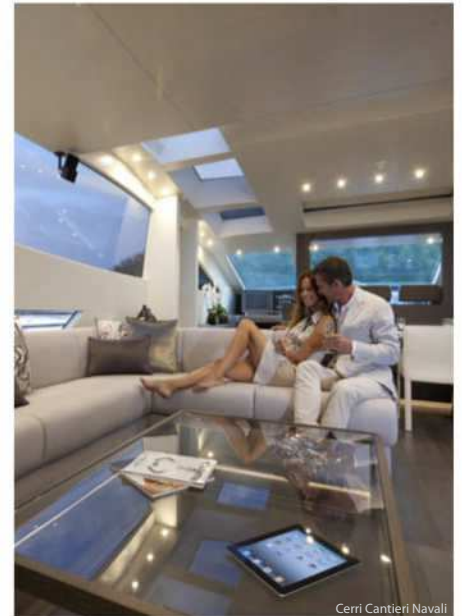
Kha Shing's Pier 22 Marina, says Gung, was built with this in mind. "As well as offering safe berthing for yachts, we also want to provide one-stop marina services for boat owners, increase sales of our yachts on the domestic market, and, most importantly, provide a place for all people to have the opportunity to be close to the water," says Gung, adding that he expects a big increase in local industry growth over the next three years.

Jointly organised by Taiwan's Ministry of Economic Affairs (MOEA), Bureau of Foreign Trade (BOFT) and Kaohsiung City Government, and implemented by TAITRA with the support of the TYIA and Taiwan International Ports Corp Ltd, TIBS will return to Kaohsiung for its fourth biannual edition in 2020. 



▲ TYIA chairman Howard Gung is a strong proponent of growing the local boating market

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ICOMIA TRADE MISSION: Argentina & Uruguay

WITH A NEW GOVERNMENT EMBRACING A PRO-INDUSTRY, PRO-TRADE AGENDA, THE FUTURE OF ARGENTINA'S MARINE INDUSTRY FINALLY LOOKS POSITIVE, WHILE URUGUAY'S RISE IN TOURISM AND INFRASTRUCTURE POTENTIAL PLACES IT ON THE 'ONE TO WATCH' LIST

WORDS: JULIE BALZANO & UDO KLEINITZ

Tasked to assess these blossoming market conditions and investigate potential opportunities, ICOMIA's secretary general, Udo Kleinitz, and NMMA's senior export director, Julie Balzano, led a week-long fact-finding mission to Argentina and Uruguay in March. Supported by CACEL's María Cuffia, Mariela Erricolo, Jorge Farré and Mercury Marine's Jorge Rota, the trip included a series of key stakeholder meetings and visits to a portfolio of companies operating in the region.

ARGENTINA

The Argentine Republic – famous for its wine, football and the tango – attracts year-round tourism, thanks to its climate diversity.

The boating season peaks between December and March (which coincides with summer in the Southern Hemisphere) and is centred near the capital Buenos Aires – comprising the open waters of Río de la Plata, a funnel-shaped, freshwater estuary of the Paraná and Uruguay rivers that boasts a maximum width of 220km and opens into the Atlantic. Navigation, however, primarily takes place in sheltered waters further upstream in the Paraná and Uruguay river delta and riverine network.

As a result, the majority of the fleet, boating facilities and businesses are concentrated in the San Fernando and San Isidro area north of Buenos Aires in the Paraná delta and serve 70,000 boats (almost half the national fleet of 150,000) over 70km of inland waters. Further hubs include lakes in the Cordoba area where water-skiing is popular. There is little boating in other areas; however, fishing is popular, as demonstrated by the existing 15 million sport fishing licenses.

Historically famous for world-class



sailboats and yacht designers such as Germán Frers, today's Argentinian nautical market consists primarily of power cruisers and motorboats. Local builders dominate the market and accordingly have the largest market share for boat sales, with new boat registrations at a five-year average of 7,000 per year.

TRADE

Argentina's tax regime and tariff structure have always been complicated and added significant cost to imports. For example, duties are applied differently by product category and taxes for boats are excessive, so local businesses have become very adept at mitigating imports. Local companies ➔

usually charge in US dollars, which allows compensation for heavy inflation accrued during extensive shipment periods (up to five months from China and one month from the US).

Whilst the new government is trying to set a new course, excessive internal taxation is still a problem, meaning imported boats are rare. This has unlocked a golden opportunity for local manufacturers. However, some attempts to duplicate foreign designs have resulted in lower quality products than those achieved by US, Australian and European high-value manufacturing.

Regardless, all manufactures in Argentina are still reliant on importing their raw materials, components and equipment; with many distributors sourcing their products at the Miami International Boat Show. As the domestic fleet ages and demand for repairs and maintenance grow, the need for quality equipment in Argentina is on the rise.

Other challenges include the rise of technical and environmental regulations and legislation, and there are difficulties sourcing skilled workers as manufacturing throughout the country is on the decline.

CONCLUSION

Excessive import duties, transportation costs, entrenched bureaucracy, corruption and business culture remain major barriers.

However, since the new Administration took office in 2015, the importation process is becoming more transparent and streamlined – albeit very slowly. Plus, the upcoming EU trade deal with the four founding Mercosur states – the trade bloc

consisting of Argentina, Brazil, Paraguay, and Uruguay – means steps are being taken to ensure leisure marine products are included in trade talks.

URUGUAY

Wedged between Brazil and Argentina, the Oriental Republic of Uruguay is South America's smallest country and is known for its political, economic and social stability, and a temperate climate free of natural disasters. Its capital, Montevideo, is vibrant, eclectic and culturally rich, featuring both an industrial port and exclusive beachside suburbs.

Uruguay has 675km of coastline running along the Río de la Plata and the Atlantic Ocean, as well as an extensive inland riverine network including the 580km border with Argentina.

Tourism is on the rise – with the 2016/17 season drawing a record-breaking four million visitors to the country, including many nautical tourists from neighbouring Argentina and Brazil. As a result, the market for pleasure boats – whilst relatively small – is expected to increase.

The current fleet is about 3,000 vessels with motorboats making up the majority, followed by sailboats. Also included in this figure are used boats from the US, which flooded the market after the global financial crisis.

Sources confirmed the demand for larger boats is increasing as wealth amongst the top tier of the population increases. Uruguayans prefer European design but American engineering, which manifests in clear tendencies for EU brands for cruisers and sailboats, and US brands for trailered boats.

TRADE

Export statistics only offer one side of the story, as most boats to Uruguay are imported under a “temporary importation law” that requires them to be foreign flagged. It was suggested by an industry stakeholder that this law was passed to ensure that Punta del Este (Uruguay's nautical industry ‘cash cow’) continues to thrive as a summer boating destination. In fact, most boats arriving under this temporary license are flagged in Delaware in the US.

There are no current plans for future marina development, but the demand is apparent as every industry contact noted “lack of infrastructure” as one of the biggest hurdles to growth in the market.

Uruguay currently has eight ports/ marinas for pleasure craft and there are plans for the enlargement of three of them (Colonia, Montevideo/Buceo, and Punta del Este), but slow response of government approval has halted plans for the moment. There is no full-service dry stack anywhere in the country and Punta del Este, the primary boating destination, has only a 500-boat capacity requiring slip reservation six months in advance for peak summer.

CONCLUSION

Whilst there are no plans yet to forge a national marine industry association, Uruguay's booming tourism industry means prospects for recreational boating over the next 5-10 years look promising. Being a small market, growth for boats, equipment and accessories will inevitably remain moderate, but industry players should keep an eye on this fledgling region. **IBI**

CACEL

A MEMBER OF ICOMIA, Camara Argentina de Constructores de Embarcaciones (CACEL) was originally formed by boatbuilders in 1969. Over the years it broadened its scope of interests and today it boasts 96 full members and 46 sustaining members, encompassing boatbuilding, boat maintenance and repair, brokerage, marinas and dry storage, boating insurance, marine engine service and distributors, marine retail stores, delta tourism infrastructure, and personnel training. CACEL's president is Jorge Farré with Mariela Erricolo as the newly appointed executive director. More information on CACEL's boat show can be found at www.salonnautico.cacel.com.ar



▲ ICOMIA's Udo Kleinitz (left front) and NMMA's Julie Balzano (centre back) with CACEL members

ICOMIA

A GLOBAL ADVOCATE, ICOMIA brings together 36 national boating federations in one global organisation and represents them at an international level. ICOMIA works with international authorities and major organisations, publishes documents and guidelines and produces tools to facilitate the growth of the industry. NMMA is the largest marine industry trade association in North America, representing nearly 1,400 boat, engine, trailer and accessory parts manufacturers.



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CONFIDENCE IS HIGH AND BUILDERS ARE BACK IN PROFIT AGAIN, BUT CHANGING BOAT USAGE, DATED BUSINESS MODELS, AND AN AGEING DEMOGRAPHIC PRESENT BOTH CHALLENGES AND OPPORTUNITIES

WORDS: BELINDA SNELL



► At 19.5m, the new Bavaria C65 sailing yacht is the biggest Bavaria yet

German leisure marine firms reported another year of moderate but steady growth in 2017, with sales of marine goods and services (excluding superyachts) up by 4% over the previous year to just over €2bn. Jürgen Tracht, managing director of national watersports association BVWW, told *IBI* that it was the best year since the financial crisis of 2008/09 – buoyed, in part, by a strong and stable economy.

“We’ve had growth in nearly all segments of the watersports industry,” he said. “The only exception was diving, which is not doing that well because of the political situation in Egypt and Turkey – especially Egypt, which is the most important diving spot for Europeans, Germans included.”

According to the BVWW’s annual year-end survey, 85.7% of respondent companies said that business was ‘better than’ or ‘equal to’ the year before – the highest

level of confidence since the global financial crisis. Private consumption was a strong contributor to German GDP growth of 2.5% in 2017, driven by record-low unemployment, rising wages and low interest rates. “People have money, they have it in their pockets, and they’re spending some of it on boating,” Tracht told *IBI* at the Düsseldorf boat show in January. “There is a lot of consumer satisfaction and trust. You can see that here in the halls of the show. When I talk to people, they are absolutely satisfied.”

Tracht notes a clear trend towards large sailing yachts as well as catamarans, both sail and power. “People want bigger, more expensive boats,” he says. “At the same time, there’s another trend towards small, outboard-powered motorboats that can be easily handled. People like them because they offer more onboard living space, less maintenance and lower fuel costs. These things are important to consumers.” ➔

STATS & FACTS

COMPILED BY ARLENE SLOAN

More than €2 billion

- 2017 industry turnover (excl superyachts)

€1.2 billion in superyacht value (est.); **6** deliveries in 2017

€200m New boat sales (est)

€425m Used boat sales (est)

€700m Aftermarket equipment (est)

900 Personal watercraft sales (2016); **6th** largest market in Europe

13,500 Outboard engine sales (2016); **5th** largest market in Europe



3,560 Companies

400 Boatbuilders

10 Engine Makers

200 Equipment & Accessory Mfg

2,950 Service Providers



20,000 Employees

7,000 Boatbuilding

3,000 Equipment & Accessories

10,000 Service providers

2,700 Marinas and yacht harbours

483,000 Boat park

PARTICIPATION

6 million Watersports enthusiasts

- Popular activities: small boat sailing, kayaking, angling, river cruising, holiday boat charters, diving holidays

30-50% Owners keep boats abroad

- Croatia, Slovenia, Spain, Holland, Italy, France, etc.

7,500 new owners/licenses annually (80% motorboat)

81,050 new boat licenses (2008-2017)



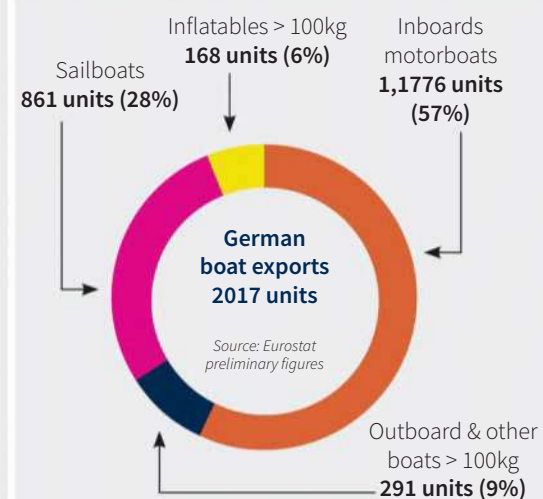
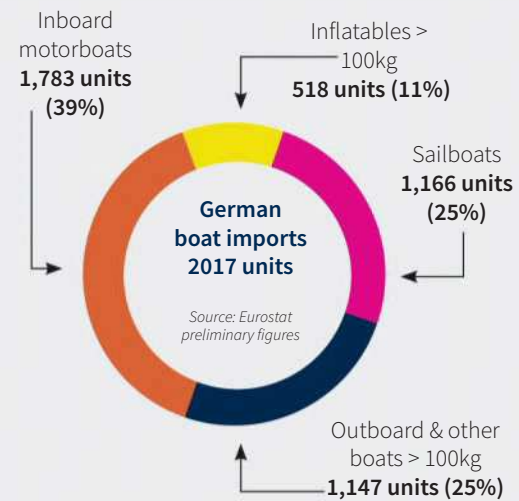
INTERNATIONAL TRADE

3,100 Boat export units

€1.88bn Boat export value

4,600 Boat import units

€184m Boat import value



BOAT IMPORTS/EXPORTS

Generating around €200m in sales last year was the new-boat sector, which continues its upward path. Statistics show that 4,614 boats valued at €183.98m were imported into Germany last year, with motorboats accounting for €126.2m (68.6%) of the total. Most came from Poland, Belgium, the US or France, particularly small outboard-powered boats, small and mid-sized inboard models, and sailboats.

Poland is by far the country's largest boat supplier, with more than 1,100 units worth €24.3m imported into Germany last year. These included the Brunswick and Beneteau brands, which are both built in Poland, and domestic brands such as Delphia, Balt and Galeon.

The next largest source of imported motorboats was the US and Belgium, accounting for around 1,000 units combined. Those figures include jetboats and PWCs, along with Brunswick brands coming through distribution hubs in Belgium.

France is the third largest source of imported boats, accounting for 350 outboard and inboard boats, sailboats and inflatables.

"Small trailerable boats from 5m-8m are very popular in Germany and we can see this from our engine statistics," says Tracht. "In the first 10 months of 2017, there was a 7.7% increase in sales of outboard engines over 60hp. And that's not the first time we've had this increase. It's been happening for at least five or six years.

"Boat exports are also doing really well because so many countries outside of Germany are doing well," Tracht explains. "The eurozone has just registered its fifth consecutive year of economic growth and our industry is benefitting from that because Germany is export-oriented."

Demand for German-built boats is mostly for large inboard motoryachts and sailboats. Domestic builders exported 3,096 boats worth €1.88bn in 2017, including 1,776 motorboats worth €1.75bn (a 93.2% share of total sales and a figure that includes the sale of six superyachts valued at €1.2bn).

Germany also claims to be the second-largest builder of sailboats worldwide, exporting 861 units worth €122.9m in 2017. Most are destined for the US, UK, France, Croatia, Italy and the Netherlands.

THE BIG TWO: HANSE AND BAVARIA

Dominating German boat exports are two of the country's biggest yacht producers, Bavaria and the Hanse Group. Both companies recently entered the

JÜRGEN TRACHT, MANAGING DIRECTOR
BVWW

Boat exports are doing really well. The eurozone has just registered its fifth consecutive year of economic growth and our industry is benefitting from that

catamaran market – Bavaria in 2014 when it acquired Nautitech's Rochefort yard on the French Atlantic coast, and Hanse, which took over the Privilège range of French catamarans in Les Sables d'Olonne last year – and both are now reaping the fruits of their labour.

Hanse, which claims to have overtaken Bavaria as the biggest German boat yard in terms of revenue, reported double-digit sales at the Düsseldorf show in January, with a high order intake across all of its brands. The Greifswald-based builder exhibited 17 different models across six stands, including a first-time presence of four Privilège catamarans.

The success comes not long after Hanse announced a return to profitability for the first time in eight years, with sales up by 12% to €129m for fiscal 2016/17 on the production of 590 yachts. Hanse says it has grown to become Germany's biggest boat yard in terms of revenue and the world's second-largest builder of sailing yachts after Groupe Beneteau. With the acquisition of Privilège, which builds premium catamarans from 12m-23m, Hanse now markets and sells seven brands – Hanse, Moody, Dehler and Varianta sailing yachts, Fjord and Sealine motoryachts, and Privilège catamarans. The group says it is seeing stronger growth in motoryacht sales for its Sealine and Fjord brands, which account for around 28% of overall sales. The Hanse sailboat brand currently accounts for about 50% of revenue.

New developments at Hanse include the launch of its first sailing catamaran, the Privilège Series 5, in March 2018, as well as a new electric drive for sailboats, and the adaptation of the Fjord 36 motorboat with outboards for the US and Australian markets. ➔



▲ BVWW MD Jürgen Tracht: People want bigger, more expensive boats

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▲ Hanse's Privilège Series 5 catamaran

Bavaria held eight world premieres at Düsseldorf this year, including the launch of its new flagship Bavaria C65 sailing yacht. At 19.5m, this is the biggest Bavaria ever built and proof of the yard's intention to move into bigger, semi-custom boats. Also on display was the flagship Bavaria E34 Fly motoryacht, the Bavaria R55 (its largest motorboat to date) and the Nautitech 47 Power catamaran. Bavaria entered the multihull market in 2014 when it acquired Nautitech's Rochefort yard on the French Atlantic coast, hoping to expand in this fast-growing sector. By 2017, the yard from Giebelstadt was producing around 90 cats annually. Bavaria claims to be the second-largest series boat producer in the world, building nearly 1,000 catamarans, sailing yachts and motorboats each year. The privately owned company's last reported turnover figures for 2015/16 was in the region of €112m.

USED BOATS, MAINTENANCE AND SERVICE

Despite a thriving market for new boats, Germany still has a large second-hand market that is of great value to the providers of marine equipment and the maintenance and service yards employed to maintain old vessels. The latest statistics show that €425m was generated from sales of used boats in 2017, with around 18,000 pre-owned vessels changing hands each year. Another €700m was spent on aftermarket equipment. "Boat services and maintenance are doing particularly well, but we now have a shortage of technical staff," says Jürgen Tracht of the BVWW. "That's a big problem for the industry because most of these companies are working at maximum capacity and it can have a negative effect on consumer satisfaction levels."

“ A lot of companies need to change their business model to online channels. All these small stores... it's just not working anymore ”

According to Tracht, the average age of boater in Germany is 61 – a demographic that tends to shy away from DIY, preferring to rely on specialists for repairs and upkeep instead. A rapidly ageing boating population also means that boaters are using their boats for longer periods of time, and are therefore spending money updating their vessels with the latest technology, onboard comfort items and safety equipment. Others still are looking to save money by doing up second-hand boats as an investment for the future.

Nevertheless, sales of marine equipment and accessories remained flat in 2017 – albeit at a very high level – with competition from online retailers eating into profits. "My feeling is that a lot of companies in Germany need to change their business model to online channels," says Tracht. "All these small stores... it's just not working anymore."

Meanwhile, a new generation of younger boaters with limited access to finance have helped boost sales at charter firms, as most opt to rent instead of buy. With 7,800km of inland waterways that are mostly drivers' license-free, Germany is a popular destination for local watersports enthusiasts.

According to the latest figures, German charter and rental companies reported growth of 5-8% in 2017 for both domestic and foreign destinations. "Our charter companies are doing really well," says Tracht. "They had a very successful season in 2017 and business was extremely good on the inland waterways. It's a trend for people to try boating on a houseboat. They're spending their holidays on the water – not sailing or motorboating, just being on the water."

OUTLOOK FOR 2018

With GDP expected to rise by 2.4% in 2018, Germany's leisure marine firms have entered the new boating season with a healthy dose of optimism. "We've just had the best year since the financial crisis of 2008/09 with turnover a little bit more than €2bn, which is 4% more than the year before. It's not that much, but it's nice to see and it's a good sign," says Tracht.

"There's no doubt about the future, from our point of view. Hanse has returned to profitability and I know that Bavaria is doing well too. The industry needed a few years to restructure and the yards had to reduce their capacities and get back in profit. Now this is done and they're doing well. It might be small profit, but it's still profit. That's different from the years before." **IBI**

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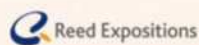


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In the comfort zone

WITH SALES STEADY AT HIGH LEVELS, GERMANY'S EQUIPMENT MAKERS ARE IN CONFIDENT MOOD

WORDS: BELINDA SNELL

Demand for ever-increasing levels of onboard comfort helped German suppliers of marine equipment and accessories maintain healthy sales in 2017. Despite limited growth, most companies continue to benefit from an older generation of boaters who are spending more time on the water and are therefore investing in everything from heating, air-conditioning and refrigeration units to the latest onboard entertainment systems and safety gear. According to German watersports association BVWW, boaters are also keeping their boats for longer periods of time, opting to modernise their existing vessels rather than buying new.

Most companies that *IBI* spoke to for this report are optimistic about the year ahead, hoping their appearance at the Düsseldorf boat show in January will lead to a pick-up in post-show trade. "The show was busy and boatbuilders reported good sales," says Andrew Winkley, managing director of equipment importer and distributor Bukh Bremen. "Our dealers were also happy with the results of the show. Attendance was up and it was a good start to the year."

Bukh Bremen has been supplying technical boat equipment to boatbuilders, yards and dealers since 1976. Recent additions to its portfolio include Sea Recovery, HRO and Village Marine watermakers from Parker, gasoline engines from Textron Motors and 3M Marine maintenance products.

MORE COMFORT ON BOARD

"Due to the ups and downs of projects, our sales were flat in 2017 but remained at a high level," says Winkley. "We're particularly happy with the performance of Textron Motors and Parker, both with strong sales in 2017 – and a sales award from Parker in our first year.

"We believe that 2018 will be similar and that we'll see a build-up of project-related work for 2019 and beyond," he adds.

Winkley told *IBI* that the trend towards bigger, more luxurious yachts and motorboats means that

“There’s a new group of owners entering the market that are in their late 30s to 40s, and they’re starting with larger boats”

consumers have become more demanding when sourcing products and expect a higher degree of sophistication onboard. "There's a new group of owners entering the market that are in their late 30s to 40s, and they're starting with larger boats."

While Winkley concedes that Germany's ageing boating population will eventually present problems, for now there are few challenges, thanks to the country's economic prowess.

At climate control specialist Webasto, demand for onboard comfort

led to a fifth consecutive year of double-digit growth in 2017. Denis Merle, director of Special Vehicles & Marine at Webasto Thermo & Comfort SE, told *IBI* that sales were supported by industry growth, market share gains at OEMs, and increased sales of innovative products that were introduced in the years before.

"We're very optimistic for 2018, as

▲ Webasto's Folding Shade 2500 can be customised to suit the style of any yacht

▼ Bukh Bremen: Textron engines are selling well



Complete Climate Solutions: Heating, Cooling & Roofs

we'll see the full benefits of contracts gained in 2017 and we don't foresee a slowdown in the market," says Merle. "In fact, we see fewer uncertainties than at this time last year and expect another year of double-digit growth in 2018."

As IBI went to press, Webasto had just unveiled two new shading systems – the Rolling Shade 2500 and Folding Shade 2500. The systems are designed for use above the cockpit, rear deck or flybridge, and can be operated with the touch of a button. Both products can be customised, says Merle, ensuring a "perfect match" with the styling of any boat.

RESPONDING TO OEM DEMANDS

"We developed these products after a strong push from our OEM roof customers who were looking for a high-quality shading solution," Merle explains. "They present many of the characteristics that have made the worldwide success of our marine roofs: customisable platforms, automotive quality standards, smooth operation and rattle-free kinematics, easy and quick installation thanks to, for example, smart self-adjustment fixation systems. They also propose integrated tension and locking mechanisms to keep a high-end appearance of the fabric in closed position."

At Fischer Panda, sales of marine diesel generators and electric drive systems for boats were up by around 12% last year – with strong demand coming from Germany, the US, France and Britain. The company makes marine diesel generators from 4kW-120kW, along with hybrid and drive systems that are praised for their low-fuel consumption, super-silent performance and reduced exhaust emissions.

► Fischer Panda generators are renowned for their super-silent performance and reduced emissions



“The impact of the changing exhaust emissions regulations for diesel engines will be tremendous. We're already working on alternatives”

"Skippers are asking for as much comfort on board as possible," says Stephan Backes, managing director. "This means that more small boats are being equipped with a generator. Our 'small' generators in the 4kW performance range are the perfect solution for these boats," he says.

"We're also experiencing strong demand from boat charter companies and manufacturers of houseboats."

At the same time, Backes told IBI that boatbuilders are extending their range with larger models so that even if the number of boats is not rising significantly, more generators – and bigger generators – are needed.

Last year Fisher Panda launched a 360V electric propulsion system that supplies up to 100kW of mechanical power. This means the company can now meet the demands of yacht owners with a

displacement of 40 tonnes or more when used as parallel electric drive in combination with a combustion engine. The motors and components are SI-certified and perfectly suited for bigger leisure yachts. All components are water-cooled.

Meanwhile, Backes says the impact of the changing exhaust emissions regulations for diesel engines will be tremendous. "We are already working on alternatives,

but this is definitely the biggest challenge in the years to come," he says.

QUICK AND EFFICIENT SERVICE

One of Germany's biggest importers and distributors of marine equipment is Lindemann, a third-generation, family owned business with more than 60 brands. "We had small growth in 2017," managing director Jan Lindemann told IBI. "It was less than expected."

This year Lindemann hopes to increase sales a few points above GDP growth forecasts. "The economy is doing well and unemployment is low," he says, "so there are many boat owners who are able to pay good money for maintenance, technical innovations, repair and refit."

Key to the company's success is its ability to respond to market needs. "No one is prepared to wait," says Lindemann. "Our trade customers expect complete and immediate shipments, high-quality products and a skilled sales team. We are prepared to do this, and that's why we're successful. We employ 18 sales staff and in late summer we will introduce new software in our warehouse that will enable us to become even more efficient and quicker. We will also increase our warehouse capacity."



► **CEO Christoph Ballin:** "2017 was another incredible year for Torqeedo"

While some companies reported flat sales, others bucked the trend. Christoph Ballin, CEO at Torqeedo, described 2017 as "another incredible year" for the electric propulsion specialist, with overall sales up by roughly 40%. "Our 3hp equivalent Travel motor is our best-seller," he says. "We improved the battery capacity last year and its lightweight, easy handling and high-tech features continue to win fans.

"Walking the shows, we see two things: bigger, faster, high-consumption boats and engines, and a competing trend toward foiling, sustainability and lighter, more efficient hull shapes.

"Boatbuilders are switching to more environmentally friendly construction practices, which influences how their vessels are powered," he says. "A light, modern, green design is perfect for electric propulsion and causes fewer emissions and less pollution if powered by fossil fuels. There will many more purpose-built electric boats over the coming year, but you'll also see established brands offering electric or hybrid options on existing models."

SEAMLESS INTEGRATION

As for trends, Ballin says that a turnkey system with strong applications engineering support is crucially important to new OEM partners. "Boatbuilders recognise the sustainability revolution that is affecting the marine market and society as a whole, but they need support and a complete solution to electrify their vessels," he says. "Most don't want the risk or the hassle of piecing a system together on their own."

Torqeedo's electric drives, batteries, generators, chargers, solar integration, inverters for AC loads, electronic controls and user interfaces are designed to work seamlessly together and are built specifically for marine applications.

Ballin told *IBI* that BMW's i3 batteries have been fully marinised and integrated into the safety and information systems of Torqeedo's Deep Blue systems. Now for 2018, the i8 battery offers the same reliability, safety and record-level energy density in a smaller package for boats with limited space.

"The new ISO 16315-compliant Power 48-5000 takes this technology and makes it available for our low-voltage systems, delivering a new class of lithium batteries to the market," says Ballin. "The Power 48-5000 has 70% higher energy density and a 50% longer cycle life than a typical lithium LiFePO4 battery. On top of all this, we are offering an eight-year limited capacity warranty, making AGM or gel batteries obsolete for electric boating."

Sales were steady at Allpa Marine Equipment's German subsidiary last year, the group's second largest market after the Netherlands. The Dutch wholesaler/distributor has around 10,000 items in its catalogue and stocks more than 25,000 individual items at a ➔



▲ BMW's i3 and i8 batteries have been marinised for Torqeedo's Deep Blue system

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JAN VOLK, DIRECTOR OF BUSINESS DEVELOPMENT
LIQUI MOLY

Diesel bug is a permanent issue for our industry. Many people are interested in additives and understand them as useful chemical tools in their toolbox

warehouse in Nijmegen, near the German border.

“We had a sales increase of around 9% last year, or 18% compared with 2007/08,” says Mark Rutgers, CEO and owner of Allpa GmbH.

Rutgers says a well-balanced range of stock that is constantly expanding, together with good service and the ability to provide shops and OEMs with just-in-time delivery is key to the company’s success.

“German customers are keen on quality and they love our catalogue,” he says. “Where the competition has abolished catalogues, Allpa sees this as an effective marketing tool.”

Rutgers told *IBI* that engines, steering products and other technical equipment are doing particularly



▲ Marine 4T Motor Oil from Liqui Moly

well. “In 2018 we will position ourselves more in the technical and professional segment,” he says, adding that sales to the professional market are growing at a faster rate than consumer sales.

“Our biggest challenge is the ongoing development of the product range, which we’ve perfected over the years - it’s almost a science now.”

Jan Olfenbüttel at H+B Technics told *IBI* that sales of its platform tender lifts grew by around 25% in 2017, as existing customers placed more orders and took on new projects. While much of the company’s custom work is confidential, Olfenbüttel named Ferretti, Beneteau and Sanlorenzo as three yards that are expanding their business with the firm.

“Fairline is also back on track and performed well last year,” he said, “and we expect a similar level of growth for 2018.”

ON TREND: LINEAR PLATFORM LIFTS

As for trends, Olfenbüttel says that demand for linear lifts as opposed to normal rotating lifts is growing every year. “A linear lift moves straight up and down, so there’s no gap between the platform and the transom and that’s a big advantage,” he says. “It looks very clean. You only see the stainless-steel cover and not the complete mechanics.”

In Germany, H+B works closely with Hanse and Bavaria. “The market for Hanse is really growing,” says Olfenbüttel. “We’ve expanded our business with them. But Italy, France, Poland, the UK... these are our main markets and they’re all doing well.”

Oil and additive specialist Liqui Moly entered the marine market in 2016 with a complete range of additives, engine oils, grease and maintenance products specifically for boats – and business has been growing ever since. “We increased our marine turnover by 35% in 2017 and we expect to see strong growth in 2018 ➔

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Image © Amalia Infante/Volvo Ocean Race. 8875/0218

too,” says Jan Volk, director of business development for the group’s marine line.

“We’ve just launched our Marine High Performance Gear Oil 85W-90 – a new transmission oil mainly designed for Mercury motors that protects the transmission from corrosion. We’ve also upgraded our Marine Multi Spray. It now comes with even better corrosion protection and we’ve added PTFE as a solid lubricant to further improve lubrication.”

Volk told *IBI* that ‘diesel bug’ is a permanent issue for the industry. “Many people are interested in additives and understand them as useful chemical tools in their toolbox,” he says. “At Liqui Moly we have the products to get rid of bacteria and fungi and to ‘immunize’ the diesel fuel in future. Keeping a boat clean and shiny is also important for many owners. Demand for our cleaners and wax has been greater than expected.”

This year Liqui Moly plans to launch its marine portfolio in the UK and Australia, with a separate portfolio for the US and Canada.

“Due to the strong position we already enjoy in Germany, it’s tougher to achieve the same high growth rates like in new markets,” says Volk. “Exports generate around 60% of our total marine turnover, so there’s tremendous potential for growth. We’re also growing in our home market, Germany. But given the fact that we already have a strong position there, we are able to grow way faster abroad,” he says.

Jörg Adamczyk, general manager of propeller specialist SPW GmbH, told *IBI* that business has picked up recently after a relatively lackluster 2017. “Düsseldorf was one of our best shows this year, resulting in good quality orders and interesting new contacts,” he says. “In 2017 there was not much difference to the previous year, but we had growth of around 8% in the first three months of 2018.”

SPW makes Variprop and Variprofile feathering propellers for cruising and racing sailors, Varifold folding propellers, and custom fixed-pitch propellers for motoryachts. The company also offers a range of shaft seals, propeller shafts, couplings, shaft bearings and stern tubes, and serves as a subcontractor for OceanVolt in Finland, producing parts for its ServoProp variable pitch propeller.

NOMEN WINS GERMAN DESIGN AWARD

THE NOMEN CLIP cleat, winner of a DAME Design Award back in 2013, continues to turn heads and win new fans – ever since its designer, Axel Hoppenhaus, brought the first cleat to market. “NOMEN was a trailblazer when we launched our first cleat in 2002 at METS in Amsterdam, and it seems like many imitators feel challenged to follow in the same direction,” Hoppenhaus told *IBI*. “This can be frustrating sometimes, but it also helps widen the market.”

In February this year, the NOMEN Clip cleat picked up a German Design Award in the ‘Sports, Outdoor and Leisure’ category at the 2018 Ambiente consumer goods fair in Frankfurt, where it was praised for bringing elegance and safety on deck. The movable end pieces of the NOMEN Clip cleat stop other lines from fouling on the cleat while also preventing accidental foot injuries. The cleat always remains closed, whether it’s belayed or not. When belaying, the flexible end pieces give way readily, as they do when the line is released. The cleat is available in various sizes and finishes.

Hoppenhaus told *IBI* that NOMEN Products grew sales by 10% last year and that 2018 looks even more promising. “The reason for our success seems to be our efforts to offer larger, more exclusive products for the superyacht industry,” he says.

In 2018, NOMEN will be bringing out bigger versions of its most popular products, which are now used by customers in 40 countries worldwide. “The reason? We’re receiving more inquiries for big boats of around 100m,” Hoppenhaus explains.

IMPROVING EFFICIENCIES

Adamczyk told *IBI* that the company has been busy improving production efficiencies at its facility in Bremerhaven and recently invested in a new propeller press made in the US. The Prop Straightener uses precisely controlled hydraulics and patented spindle mounting technology to manipulate and hold a propeller in place, allowing for accurate adjustment, gauging and repair.

“For this we ordered a second MRI for measure and control pitch setting and blade section of our own branded propellers and common fixed propellers,” says Adamczyk. “We’ve also improved our KUKA robotic grinding system with updated software.”

SPW has made a consistent push to expand its global presence in recent years. The company now has dealers in Central America, Canada, South Africa, Australia, Southeast Asia, the UK, France, the Netherlands, Italy, Spain and Sweden, with exports accounting for just under 50% of sales.

As for 2018, Adamczyk says it’s still too early to know how the year will unfold. “The political situation with US Customs regulations and the UK Brexit vote could have a detrimental effect on business, but then again it might not. Who knows? In general, SPW is looking positively to the future.” **IBI**





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Export-driven growth

THE POLISH INDUSTRY IS ENJOYING A STRONG GROWTH PHASE, BUOYED BY INCREASING EXPORTS AND A SMALL BUT GROWING DOMESTIC MARKET

WORDS: JAROSLAW ADAMOWSKI

Poland's boatbuilding industry relies heavily on exports that generate approximately 95% of sales, so it's not surprising that local players predominantly focus their efforts on securing new export markets and organic growth.

Due to the limited demand of the domestic market, the country's shipyards have adapted their business strategies to exports, with the majority of sales intended for Western European countries. Poland-based companies specialise in yachts and boats from 6m-9m (20ft-29.5ft), but major industry players also include producers of luxury catamarans, motorboats and superyachts.

Small and medium-sized family-owned companies comprise a significant share of the estimated 900 businesses that are active in the Polish sector, but the availability of skilled labour and the relatively low production costs have also attracted major international players to Poland, such as Parker, Beneteau, Jeanneau and others.

SALES ON THE RISE

Forecast data from the Polish Chamber of Marine Industry and Water Sports (Polboat) indicates that in 2017, local boatbuilders produced some 21,500 craft, up more than 13% from 19,000 craft a year earlier. This represented a near two-fold increase compared with 2009 when the Polish sector was hit hard by the global economic downturn, and its output fell to some 11,000 craft, according to data from the association.

Michał Bąk, secretary general of Warsaw-based Polboat, says that the value of yachts and boats produced by Polish manufacturers exceeded PLN 1bn (€237.5m) in 2016. With some 95% of the country's production intended for various foreign markets, this translates into annual exports in the range of PLN 950m (€225.5m). Polboat estimates that, in total, local boatbuilders have sufficient capacities to produce up to 22,000 craft per year.

"Every year we report a sales increase of between 10% and 15% compared with the preceding 12 months," Bąk says. "The main export destinations [for Polish boatbuilders] are Western Europe, Scandinavia, and the US."

Bąk said that the association's estimates for

2017 indicate that the increased production was particularly driven by motorboats. Polboat expects the industry's export sales for last year to be similar to the ones posted for 2016, according to its secretary general.

EXPORTS TO WESTERN EUROPE

The latest available figures show the structure of the industry's exports in 2016. That year, Polish boatbuilders exported around €70m worth of output to Norway.

While domestic data for 2017 is not available, Norway's recreational boat industry association Norboat recently announced that the Polish boatbuilding sector dominated the country's motorboat imports, with some 1,427 outboard-powered vessels with a length of more than 5.5m (18ft) imported into the Norwegian market. In terms of

export sales to Norway, in 2017 Polish boatbuilders preceded their Finnish counterparts which were ranked as second, strengthening Poland's position as the leading exporter to the Norwegian market within this segment.

France was the industry's second largest foreign market, with €46m, followed by Germany with €44m, and the US with €28m. Other major export destinations included the

Netherlands, Sweden and the UK, with €23m, €17m, and €16m, respectively.

In addition to these, other minor export markets for the Polish boatbuilding industry include Russia, Australia, and various countries in the Middle East.

YACHT REGISTRATIONS

Poland's boat market is responsible for a relatively minor share of domestic production, but local industry representatives consider the luxury segment of the market – yachts with a price tag of more than €200,000 – to have the best potential, and expect it to continue its growth by a robust 10% per year.

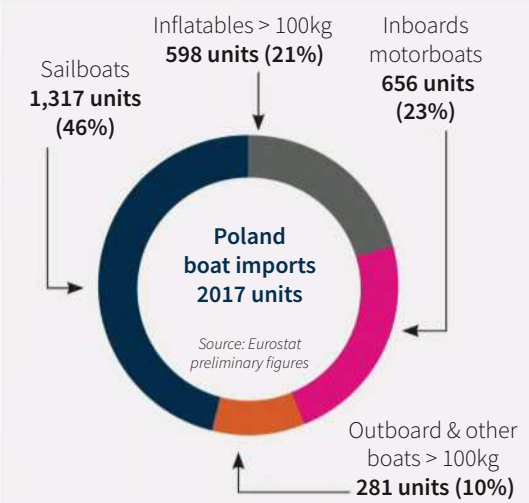
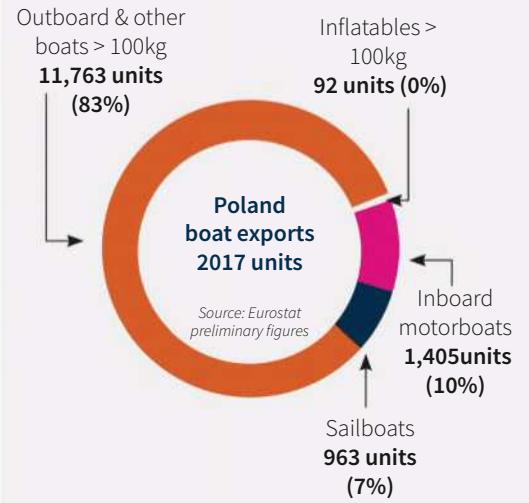
In 2017, the country's yacht registrations were down 6% to a total of 1,366 craft, which comprised mostly small and medium-sized yachts. Of these, 1,123 were new motoryacht registrations, and 243 sailing yachts, according to figures released by local consultancy firm KPMG Polska in its market report. ➔

“Every year, we report a sales increase of between 10% and 15% compared with the preceding 12 months”

STATS & FACTS

COMPILED BY POLBOAT & ARLENE SLOAN

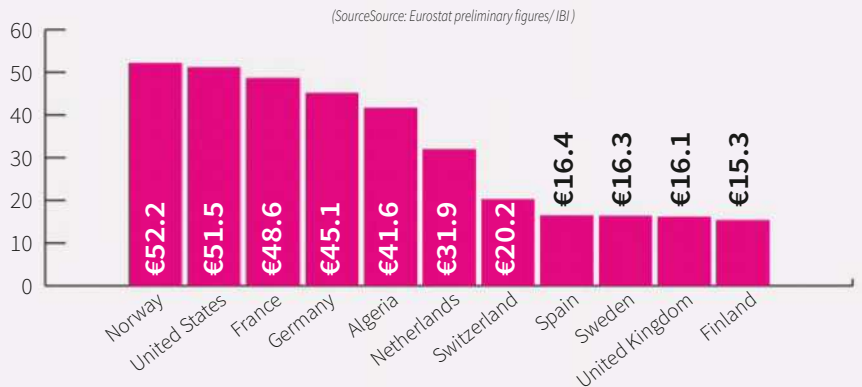
Polish company locations



Poland's annual boat and yacht production in units



Top destination for Polish exports* 2017 in €m



* Includes Inboard motorboats, outboard & other boats, sailboats & inflatables

OVERVIEW | POLAND

EASTERN EXPANSION

A significant share of Polish industry players operate yards in the north of the country, on Poland's Baltic Sea. The Pomeranian region is home to the facilities of numerous boatbuilders such as Sunreef Yachts, Galeon and others.

However, in recent years there has also been a rapid development of a boatbuilding cluster in the country's eastern part, the Warmia-Masuria and Podlasie regions. This enables boatbuilders easy access to not only the Baltic Sea shore, but also to the lake-rich Warmia-Masuria region and its several dozen marinas.

That region hosts the facilities of Delphia Yachts, Northman Shipyard and Ostróda Yacht, among others. Podlasie is home to boatbuilders such as Balt-Yacht,

with the city of Augustów (population 30,000), home to a major share of its boatbuilding activity.

Other locations for yacht and boat production in Poland include the Western Pomerania region, which borders Germany, and various cities in the country's central and southern regions which host several yards, such as Cobra Yachts and its shipyard in Radomsko.

It is noteworthy that many of the yards are located in Poland's special economic zones, providing both foreign and domestic investors with various benefits for their manufacturing projects. To benefit from the support scheme, investors declare the minimum amount of jobs they plan to create at their designated facilities, pledging to maintain them for a determined number of years, and the minimum amount they aim to invest. In return, companies can benefit from preferential tax treatment for their investments, and are eligible for financial support for projects.

Currently, 14 special economic zones operate in Poland, covering all of the country's regions. Under Polish law, the zones are scheduled to cease their operations in 2026, but the Polish authorities are drafting new legislation to extend the benefits they provide to local investors by up to 15 years.

EQUIPMENT MAKERS INVEST

With the country's yacht and boat production on the rise, both local and foreign equipment manufacturers are increasingly looking for opportunities to supply their output to Poland-based boatbuilders.

Some of the examples of companies that are raising their production capacities include Polish yacht parts maker Kotniz, which specialises in metal elements from steel and aluminium for sailing and motorboats. Its product range includes canopies, baskets, shields, steps, supports, railings, ladders and other components. The company owns a production facility in Podlasie, and, owing to its increased foreign sales, has launched a second plant in Gandra, in Portugal's northern Valença municipality.

Among foreign industry players, Finnish yacht components maker Va-Varuste invested more than PLN 6m (€1.4m) to launch a production facility in the Suwalska special economic zone (SSSE), in Poland's north-eastern region. The 2,000m² plant was launched last year, and is Va-Varuste's second Polish production facility. The firm's product range includes yacht canopies, seats, cushions, covers, repair patches, as well as various other accessories and spare parts.

Last year's increased sales, driven by exports, are fuelling optimism among Poland's boatbuilders and equipment manufacturers. Industry representatives suggest that, in the coming years, the Polish sector will continue to focus its efforts on securing new foreign markets and investing in brand recognition. **IBI**



▲ The Wind & Water show attracted 30,000 visitors over its four-day run

SHOW TIME: WIND IN THE INDUSTRY'S SAILS

THE MAIN EXHIBITION in Poland is held annually in Warsaw in March and is organised by exhibition management company Murator Expo in cooperation with marine industry association Polboat.

Known as the Wind & Water show, the event – which celebrated its 30th anniversary this year – returned to the Expo 111 centre following a previous move to the National Sporting Stadium which, despite having a sliding roof, proved to be too difficult to heat and thus unsuitable for a boat show held in March.

Murator and Polboat also run two other Wind & Waters – in Gdynia, which this year will be held from August 9-12, and the other in Katowice from October 12-14 at the Międzynarodowe Centrum Kongresowe.

The 2018 Warsaw show attracted around 30,000 visitors over its four-day run, with close to 200 direct exhibitors and more than 300 major brands represented.

IBI visited the show this year and the overall impression, when speaking to exhibitors, was of an industry and a market experiencing a strong growth

phase in OEM business and the domestic aftermarket.

As reported in the main body of this article, the investment in expanded boatbuilding facilities by many of the leading builders has been in response to the improvements in world markets, as more than 90% of production is exported.

However, there has also been a definite uplift in domestic demand for boats – both for use in Poland and for larger craft kept in the Adriatic and Mediterranean – and many exhibitors were very upbeat about the prospects for further growth during the next three years.

The fact that the show attracted several representatives from overseas component and equipment suppliers visiting importers and major OEM clients reflects how important the Polish industry has become to the international supply chain.

For a few years now Poland has been the European leader in the production of boats in the 5m-8m range and is now rapidly expanding production of larger models.

• For a current macroeconomic assessment of Poland, see IBI's Data Digest on page 80.



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Expansion and challenges

WITH EXPORTS AND R&D INVESTMENT HITTING NEW HIGHS, POLAND'S BOATBUILDERS ARE UPPING THE ANTE, BUT A LACK OF SKILLED LABOUR THREATENS POTENTIAL

WORDS: JAROSLAW ADAMOWSKI

► 2017 saw the construction of Sunreef's first 40ft fast day cruiser, unveiled at the Dubai boat show in March. The builder plans to start production of a 40 Open version in Dubai this year



With Polish boatbuilders orienting themselves toward increasing export sales and expanding to new markets, domestic sales play a relatively minor role in the companies' strategies. Local industry observers agree that the rising demand for their products spurs optimism, but the continuing workforce shortage and pressure on higher salaries remains one of the largest challenges they expect to face in 2018.

Representatives of both major and smaller boatbuilders say they posted higher sales last year, and in many cases, the increases were in the two-digit range. In response to the increased interest in Poland-built craft from abroad, local boatbuilders have invested to expand production capacities, and are making efforts to recruit qualified workers in an increasingly competitive job market. In November 2017, Poland's unemployment rate fell to 6.5% which was the lowest level recorded since March 1990. It was also less than a third of the country's record jobless rate of 20.7% that was posted in 2003.

Alongside efforts to raise the shipyards' capacities, a number of companies are also investing in building up their research and development capacities. New R&D centres are enabling Polish builders to boost the quality

of their products, introduce improved materials to the production process, and to attract the most demanding customers from the luxury segment.

SUNREEF YACHTS

Gdańsk-based luxury catamaran specialist Sunreef Yachts says 2017 marked a successful year, with 14 catamarans launched. Since the beginning of this year, the company has obtained 10 orders which translates into a yearly book order made within the first three months of 2018.

Sunreef sells its craft almost exclusively abroad, and some of its main markets include Western Europe, the Middle East, Asia, North America, as well as Russia.

"So far, we have had two customers from Poland, and one of them has two Sunreefs," says Karolina Paszkiewicz, Sunreef's PR and marketing director. "Over the past few years we have been seeing more and more interest from potential Polish buyers."

As part of its efforts to gain further recognition abroad, Sunreef Yachts participates in a number of shows worldwide, including shows in Miami, Düsseldorf, Dubai, Singapore, Cannes, Monaco and Fort Lauderdale.

"In late 2017, we completed the construction of our first 40ft fast day cruiser which was presented at this year's Dubai International Boat Show," Paszkiewicz says. "This year, we are also planning to start the

production of the 40 Open Sunreef Power in Dubai which will allow us to reduce the time of the delivery process to buyers in the Middle East and throughout Asia."

The launch in Dubai is part of the company's foreign expansion strategy in which the Middle East plays a significant role. In 2013, Sunreef Yachts opened its first foreign office in the UAE.

Plans for the first part of 2018 include launching a new hall in Gdańsk, equipped with a cutting-edge CNC system which will allow Sunreef Yachts to significantly enhance its shipyard's production capacity. In the second part of the year, the company is planning to complete the construction of new production halls, according to Paszkiewicz.

"From our perspective, the only difficulty that we are facing is [with recruiting further] employees. With the increase in production, we need more manpower to

“Continuing workforce shortage and pressure on higher salaries remains one of the largest challenges the industry expects to face”

build the yachts and there is a shortage at the moment," she says.

Sunreef Yachts was established by French businessman Francis Lapp, who also serves as president of the boatbuilder's management board. The company currently employs more than 500 at its shipyard and office in Gdańsk, on the shores of the Polish Baltic Sea.

OSTRÓDA YACHT

The Ostróda-based boatbuilder became part of France's Groupe Beneteau in 2001. In the 2017/18 financial year, Ostróda Yacht expects to sell a total of 4,200 craft – a 16.7% increase on the 3,600 craft sold in 2016-2017 – and a significant 31.7% increase on the sale of 3,190 craft posted the year before that.

The increased sales are to translate into revenues of about €105m in 2017/18, compared with €81m in the preceding financial year, and €66m in 2015/16, according to figures from Ostróda Yacht. The builder's financial year is from September 1-August 31.

Piotr Jasionowski, president of the Polish company's management board, says that within Groupe Beneteau, Ostróda Yacht is responsible for the production of yachts and motorboats fitted with outboards, up to 12m.

"The craft built by the shipyard in Ostróda are distributed worldwide under the commercial brands of Beneteau and Jeanneau," Jasionowski says. "The Polish market is responsible for about 2% of the craft produced at our shipyard. The remaining share of our production is intended for Europe and the United States."

In the 2017/18 season, Ostróda Yacht is planning to launch the serial production of 10 new models, according to the company's president.

"Every year, we develop between eight and 12 new models of boats and yachts," Jasionowski says.

To accommodate the increasing demand for its yachts and boats, Ostróda Yacht has launched a project to raise the output capacity of its shipyard.

"We're currently implementing an investment to expand our facility which, by the end of the current season, will increase the production capacity by 30%," Jasionowski says.

DELPHIA YACHTS

Set up by brothers Piotr and Wojciech Kot in 1990, Delphia Yachts has established itself as one of the largest boatbuilders in Poland, with more than 700 employees and over 40 models in its range. Until 2003, the boatbuilder operated under the name of Sportlake.

In 2017, the company built 250 sailing yachts and 1,300 motorboats, up 3% (+50 or so boats) compared to the year before. The sales increase translated into higher revenues which totalled PLN 120m (€28.4m) for 2017, up 10.6% from PLN 108.5m (€25.7m) a year earlier, according to figures from Delphia Yachts.

"Our export sales remain at the level of between 90% and 95% of the total," said Ewa Kot, the company's public relations manager. "Our main export markets include Germany, the Netherlands and France." ➔

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► Delphia Yachts' bestselling 40.3, a replacement of which is due to be unveiled this year



Photo: Balt-Yacht/SunCamper

While Western European markets remain the boatbuilder's main export destinations, Delphia Yachts maintains a global network of dealers on four other continents. These include dealerships in the US, Canada, Japan, China, Israel, Chile, Brazil and New Zealand.

"Most recently, we established cooperation with a dealer from Malta," Kot says.

The Polish builder is making efforts to increase its workforce at the shipyard in Olecko, in north-eastern Poland, to ensure a sufficient production capacity for export sales. In late 2017, Delphia Yachts also opened a new R&D centre under an investment worth about PLN 12.7m (€3m). The facility measures 3,000m², and will allow the builder and its partners to develop nanomaterials which are to be used in the production of yachts. The partnering institutions include a number of Polish higher education institutions, such as Warsaw University of Technology, Gdansk University of Technology, and the Industrial Chemistry Institute in Warsaw.

Among other plans this year, the builder is aiming to replace its best-selling 40.3 craft with a new model.

"In 2018, we plan to launch our Delphia 43 yacht designed by Tony Castro Design," Kot said.

The company says its portfolio includes sailing yachts such as the Delphia 16, 24, 29, 34, 40.3, 46 DS and 47, as well as motoryachts, marketed under the Escape and BluEscape product lines. As part of its international expansion, in 2012 the boatbuilder purchased Swedish brand Maxi Yachts. To date, Delphia Yachts has manufactured more than 25,000 craft of various types.

NORTHMAN SHIPYARD

Last year saw increased sales for Węgorzewo-based Northman Shipyard, the producer of Maxus sailing yachts, Northman, Nexus and Courier motoryachts. For 2017, the Polish shipyard reported sales of €5m, an increase of more than 11% compared with a year earlier.

As with many Polish boatbuilders, Northman is predominantly export-oriented, and foreign sales account for about 60% of its annual sales. Some of

► Northman's Maxus 33.1 RS

the company's major export markets include the UK, Denmark, Norway, Germany, the Czech Republic, Austria, Russia, Estonia, Switzerland, France, Spain, Chile, Israel, Japan, and the US, according to data from Northman.

"Our shipyard produces about 150 yachts per year," says Robert Stępnik, the company's owner.

With its sales on the rise, the boatbuilder is investing in expanding its R&D capacities. By the end of 2018, Northman aims to launch a new R&D centre under a project worth more than PLN 4.7m (€1.1m). Of this, the European Union is to provide co-funding of close to PLN 2.7m (€640,000) as part of its Smart Growth Operational Programme.

The investment follows earlier expansion projects at the company's yard. Work on upgrading and expanding the 5,000m² facility was completed in late 2012.

The company's portfolio includes its Maxus 21, 22, 24, 28, 33, and 33.1 RS sailing yachts, along with the two latest additions to the range, the Maxus evo 24 and 26. Northman's motoryachts include the Nexus 850 and 870 Revo, and the Courier 970.

In addition to opening the R&D facility, some of the shipyard's plans for 2018 include the forthcoming debut of its Northman 1200 motoryacht, which is to be launched this May.

BALT-YACHT

Specialised in building boats from 6m-12m, Balt-Yacht operates a shipyard in Augustów, in Poland's north-eastern region, where it produces craft for a number of major foreign customers, including Brunswick Marine and Goldfish, but also under its own brand. Some of its models include the SunCamper 35, SunCamper 30, Balt 818 Titanium, Balt 26, and the Balt 27.

About 50% of the boatbuilder's revenues are generated by production activities for Balt-Yacht's foreign partners. In the past, Balt-Yacht also cooperated with Mar-Import, Jeanneau, X-Yachts, and Hydro-Design.

Izabela Saczko-Chilicka, head of the company's Sales and Customer Service Department, says that Balt-Yacht posted a 5% increase in revenues for 2017, and produced around 200 large craft at its shipyard.

"Our shipyard has an extensive dealership network



Photo: Northman

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► A SunCamper 30 houseboat from Balt-Yacht. More than half of its houseboat sales are destined for the domestic market



Photo: Balt-Yacht/SunCamper

in countries such as Germany, the Netherlands, the Czech Republic, Hungary, Switzerland, Italy, Croatia and Latvia. However, the 18,000 craft that we have produced over the past 28 years are recognised worldwide, because they have been supplied to nearly all of the European countries, as well as Australia and Asia,” Saczko-Chilicka says. “In total, houseboats represent about 30% of our company’s sales, but the past few years have shown that the majority of these craft are sold in Poland. In the 2017/18 season, as much as 63% of our houseboats were sold in the domestic market. In contrast, about 90% of our sailing boats, the Balt 26 and 27, are intended for foreign sales.”

For Brunswick Marine, the company’s long-established partner, the shipyard produced a “large series of Quicksilver and Arvor motorboats with lengths of 6m to 8m” in 2017, according to Saczko-Chilicka.

Asked about the company’s plans for this year, its representative says that, after the debut of its SunCamper 35 houseboat at last March’s Wind & Water 2018 trade show in Warsaw, Balt-Yacht plans to launch production of at least two new motorboats for a foreign partner. The shipyard is also planning to expand its Titanium line and start the production of the Balt 918 Titanium and Balt 1018 Titanium semi-planing motoryachts.

“We expect that these activities will result with increased sales revenues in 2018,” Saczko-Chilicka says.

Balt-Yacht employs around 150 people, and its shipyard has a total surface area of about 8,000m².

GALEON

Motoryacht specialist Galeon says that last year brought a “major increase in both the turnover and units built”, encouraging the company to implement a number of investments to expand its infrastructure in Straszyn, in Poland’s northern Pomerania region.

In 2018, Galeon plans to complete the construction of its new main storage facility, with a surface area of 6,000m². This year, the boatbuilder is also proceeding with further stages of its project to build a laminating facility. Other investment plans include the construction of another assembly facility, according

to senior company representatives. As part of efforts to boost its R&D capacities, the boatbuilder is also planning to open a composite materials laboratory.

Maciej Samet, the marketing manager at Galeon, says that as much as 95% of the company’s output is intended for export sales.

“Our main markets include the US, Russia, France, Germany, Switzerland, and various member states of the EU. We also export to South-East Asia, including Thailand, Hong Kong, Korea, Japan, and Vietnam,” Samet says.

In addition to these countries, Galeon aims to expand its presence in new markets, including Australia and New Zealand, and further increase its presence in Asia.

Asked about the challenges faced by the Polish sector, Samet refers to the issues raised by other industry representatives, such as the limited availability of qualified workforce and insufficient logistic capacities.

Earlier this year, the boatbuilder introduced the Galeon 640 FLY, and plans for this year include the launch of the 650 Skydeck which the company describes as one of its most innovative motoryachts to date. The boat features Galeon’s distinctive ‘Beach Mode’ feature with 6m long balconies on either side of the boat dropping down to create partially glazed ‘floors’ to two breakfast bars. It also has a two-way stair system that enables a three full-beam cabin layout inside. Other projects that are scheduled to debut in early 2019 include the Galeon 425 HTS, 400 FLY, and the 680 FLY.

Set up in 1982, Galeon is operated by a workforce of around 1,200.


COBRA YACHTS

The boatbuilder produced 15 craft in its previous financial year, but in 2018/19, it plans to raise production to 40 craft. The expansion will be enabled by the building of a new yard in Radomsko, in Poland’s Łódzkie region.

“The new facility will comply with the top standards, and will be launched in August 2018,” says Sławomir Filiks, the company’s co-owner.

Located on a land plot of about 6,000m², the new facility will operate in the Radomsko subzone of the Łódź special economic zone (ŁSSE), providing the company with preferential tax treatment for its investment.

“Our annual revenues are about €1.8m. We sell about 40% of our production to various foreign markets. These include Germany, the Netherlands, Italy, Croatia, and this year also the UK,” Filiks said.

To expand its range, this season the family-owned business added two new models – the Cobra 38 sailing yacht and the Futura 40 Horizon motoryacht. The boatbuilder’s portfolio also includes the Cobra 24 and 33 sailing yachts, and the Futura 36 motoryacht, according to data from Cobra Yachts. 

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Building on a legacy

WITH A NEW CEO, AMBITIOUS SHAREHOLDERS AND A MARKET ON THE CUSP OF REALISING ITS HUGE POTENTIAL, THE FUTURE LOOKS BRIGHT FOR ASIA'S LEADING BOAT DEALER AND BROKERAGE OPERATION

WORDS: ED SLACK



▲ Mike Simpson has been a key driver of boating in Asia

One man and one company, it could be argued, are responsible more than any other for spreading the boating message in Asia. Simpson Marine, Asia's largest dealer network, and its founder, Mike Simpson, have been at the vanguard of the leisure boating sector in the region since the company began life in the Aberdeen Marina Club, Hong Kong, in 1984.

Represented today in seven countries and employing over 100 people, the business is emerging from a transitional phase, having taken on new investors, whilst bidding an amicable farewell to a long-standing relationship with Italian boatbuilder Azimut, to pursue a multi-brand strategy.

Sundiro Holdings Co Ltd acquired a 10% stake in Simpson Marine in 2015, upping that to 25% last year, helping drive expansion across its charter, brokerage and most significantly its superyacht operations. The Chinese conglomerate that among mining and logistics interests, manufactures Honda motorcycles under license, entered the marine business in 2013 when it bought a minority stake in Italian superyacht builder Sanlorenzo. In May 2015 the three pieces of the jigsaw were brought together when Simpson Marine secured the exclusive distribution rights for Sanlorenzo and Monte Carlo Yachts in Asia. Today, Simpson Marine represents a diverse brand portfolio comprising Sanlorenzo,

“Parting company with Azimut three years ago was one of the toughest decisions I've made, but then we were going different ways”

”

Monte Carlo Yachts, Lagoon power and sail catamarans, and Viking sportsfishers. It also remains one of the world's biggest dealers of Beneteau sail and power boats and further added to its portfolio in February this year by becoming the official representative throughout Asia for US brand Aquila Power Catamarans.

SHAPING A LEGACY

For Mike Simpson, the last 18 months have been about shaping a legacy. He is set to step up to the role of chairman soon following the appointment of a new CEO, heralding a new chapter for the firm. Robust growth and a potential future IPO remain the end goals, but delivering maximum returns in a notoriously volatile market will take a determined approach coupled with long-term vision.

We meet at Biggin Hill airport, 15 miles outside of London. At the perimeter of the airfield sits the Biggin Hill Heritage Hangar, home to the world's largest collection of restored Spitfires, one of which is owned by Mike Simpson. World War II aircraft and Spitfires in particular are Simpson's other passion. Whenever he returns to his native UK, the avid pilot makes a beeline for the hangar, taking the opportunity when he can to clock up some airtime. But over the last 18 months the planes have had to take a back seat.

“Parting company with Azimut three years ago was a challenge, but then we were going different ways. Azimut wanted us to become single brand dealer but our vision was always to multi-brand dealership, as introducing yachting in Asia must offer to clients a selection of choices depending on their needs,” says Simpson who, straight-backed and standing at well over six feet, casts a quietly imposing figure.

Against the backdrop of the fighter planes, Simpson relays something of Simpson Marine's transformation over the past two years. “Moving on from Azimut was a major upheaval. 2016 was a challenge. The first part of the year was OK as we had product in the pipeline, but the second half of the year we saw a drop in revenue cushioned by our first Sanlorenzo 46Steel shortly followed by the 500EXP super yacht. In the end, we realised a small profit for that year. 2017 came roaring back for the first two quarters,” he says, but, highlighting the vagaries of the Asian market, sales tailed off in the third quarter, only to pick up toward the end of the year. “December was very busy again,” he confirms.

2017 ultimately proved to be a year of consolidation for Simpson Marine, its territories performing with varying degrees of success

SIMPSON MARINE

ASIA'S LARGEST YACHT SALES, BROKERAGE AND SERVICE COMPANY

8

CHINA

THE NUMBER OF BOAT BRANDS THE FIRM REPRESENTS



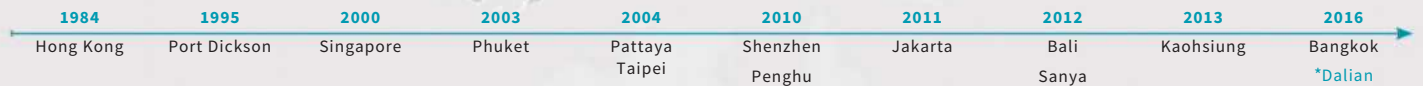
▲ The Simpson Marine team at the Singapore Yacht Show last year

100+

THE NUMBER OF PEOPLE NOW WORKING FOR SIMPSON MARINE

25%

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Simpson Marine now has an extensive sales and service network across Asia. From its foundation in Hong Kong in 1984, it now has 12 offices and sub dealers in seven countries

*subdealers

– Thailand saw rapid growth and it was a “pretty good year” for Singapore, a market that had been in the doldrums. Taiwan had been relatively quiet, though the firm did deliver a 46m Sanlorenzo to the region the previous year, and Malaysia was marginally down for what is traditionally a strong market, particularly for catamarans, but Simpson is already seeing signs of that market recovering this year.

BIG AMBITIONS

Hong Kong remains the firm’s strongest market by far, despite the ongoing problem of lack of berths, but business in mainland China softened a little – building up that market will be a key component to Simpson Marine realising its ambitious growth projections. The new CEO will be primarily focusing on China.

To spearhead its big yacht business, the company has set up a separate Sanlorenzo office in Hong Kong with the firm’s former manager in Singapore taking over Sanlorenzo sales in Asia. “Our general manager in China after several success in bigger yacht sales, is now more focused on the super yacht segment development and we are ready to build up our super yacht competence throughout the group.”

According to Simpson, Sanlorenzo sales activity “really picked up across all sizes, GRP and steel”, Lagoon sales have been “excellent”, and “Beneteau sales have been picking up across both power and sail.”

Given the upheaval that followed the parting of ways with Azimut, it’s particularly satisfying, Simpson admits, seeing Sanlorenzo and MCY gaining traction.

DEALER FOCUS | SIMPSON MARINE



▲ A Sanlorenzo 46Steel arriving in Hong Kong last autumn

“Sanlorenzo has the biggest growth potential for us. The Chinese are taken by the exclusivity and quality – the yachts stand out for their innovation and tailor made bespoke design and detailing.” At odds perhaps with the Western stereotype of the Chinese buyer being timid around the water, Simpson claims the locals are increasingly adventurous. He highlights the reception of the new Sanlorenzo SX88 that is making a real impression in Asia: “The SX range has a big open saloon – lots of room for toys and entertaining and easy access to the water. They don’t want a PWC squeezed onto a bathing platform anymore. For the increasingly sophisticated buyers yachting is about activities and action. Monte Carlo Yachts have enjoyed big success in South East Asia and continue to generate interest thanks to their range of very well built yachts available for customisations and in a right market size between 65ft and 105ft,” he adds.

CHANGING TASTES

Buyers are also getting bolder. “Asian buyers don’t necessarily start small and go big. We became a distributor for Sea Ray a number of years ago, thinking that owners would move up, but we learned that someone who bought a Sea Ray would end up with Sea Ray. Now a first yacht can be a 50m, and when they take delivery they immediately want an 80m, then a 100m. They start from nothing and move up the ladder very quickly.”

Simpson Marine is delivering a new Sanlorenzo 500EXP for Asian buyer in the next couple of months. It will feature a helideck and has a dedicated space for securing a three person submarine. “Lots of buyers in Asia are younger and looking for thrills – they are energetic, it’s not enough to anchor and relax.”

They are less rigid too in their tastes, hence the dealer’s multi-brand strategy. “Customers will come in asking for a sail boat and leave with a motoryacht and vice versa. They are more curious – they buy a big Lagoon cat then go on to a superyacht. The market in Asia is about growth and excitement. Boats that break the mould – the big Lagoons, the SX88, and Sanlorenzo 52Steel, that stretches the rules within 500t limit – are attracting

a lot of attention in Asia

At the opposite end of the spectrum, the Aquila range of powercats is proving a good entry point. It has recently sold an Aquila 36 and an Aquila 48 to clients in Malaysia and Singapore. Simpson says the firm is also now renewing efforts with its Viking range of sports fishers – an expert in that niche sector will be joining the team shortly.

Despite the excitement around its bigger yacht portfolio, Simpson is adamant that the core of the business will remain dedicated to the production yacht business. “You can’t build a business around single digit sales of superyachts each year. Production yachts are our core business, meanwhile we are developing super yacht business as it has a strong potential.”

The new CEO, a veteran of the luxury automotive industry world, will be tasked primarily with growing sales on the production boat side of the business. His other key remit initially will be developing our customer service offering throughout the region”.

He is the latest of a number of executives to make the

MIKE SIMPSON | FOUNDER
SIMPSON MARINE

You can’t build a business around single digit sales of superyachts each year. Production yachts are our core business... but we are developing our superyacht business

switch from automotive to the leisure marine sector – a former McLaren exec, Antony Sheriff, is chairman of Princess Yachts – and Simpson believes the disciplines of the auto sector lend themselves to developing the boat business, however it is the CEO’s former supercar sales customers that could prove just as valuable.

To a westerner, the importance of garnering such relationship networks is often underestimated. But ‘guanxi’, as it’s known in China, is an integral part of business in Asia, and Simpson is fully aware that the company’s growth has been fuelled to a large extent, by the extensive web of contacts across the region over the past 35 years. A highly developed network of Chinese connections for instance, is helping grow fledgling markets like the Philippines, Vietnam, and Cambodia.

As well as new boat sales, Simpson sees significant potential in the charter sector. The lion share of Simpson Marine’s charter business is operating out of Phuket, and mostly to European customers, but that is changing. “Asian customers are starting to charter. We’re seeing a definite uptick in superyacht charter among the mainland Chinese,” he says. There are currently ➔



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a growing number of Lagoon cats in the Simpson Yacht Charter fleet, and that number is growing.

“We’ve done charter for a long time but we are further strengthening it,” he says. “We’re structuring it, promoting it as a way to lowering costs for the owners, and tying it in with our Epower finance programme.” Epower was launched last year and has the potential, Simpson believes, to be a game-changer in the Asian market. “There is a definite lack of retail finance for yachts and the majority of firms currently financing yacht purchasers in the region don’t truly understand the business.

“Epower presents to us a great potential as there is lack of retail finance for yacht purchase in Asia. And thanks to this tool, we hope to get more people on the water as it in our mission statement since we first started.”

SAILING BEDROCK

Simpson remains upbeat about the prospects in general for the Asia market. He points to the uptake of sailboat racing as a prime example of how a market can surprise.

“We thought China might be a motor yacht market and we were not sure that Chinese buyers could be interested in sail boats. With Beneteau we had a very good partner and we gave the China Cup a try with 10 40.7s, then a further 20 to create a large one-design fleet and it’s been an incredible success. There were 130 yachts in the fleet this year.”

He highlights the rising profile of China in signature events such as the America’s Cup. “We see sailing as the key to developing the yachting culture in China. You get sailing schools and racing, so it becomes a sport and an activity; schools get involved, it’s a solid foundation. It’s how the yachting industry developed in the West.”

Growing Simpson Marine from what was little more than a shack opposite the newly opened Aberdeen Marina Club more than 35 years ago has inevitably been a test of faith at times for its founder, who remains frustrated by various government attitudes stifling potential growth.

“Are governments doing enough? No. Indonesia is trying to

open up, but that looks like it might meet some resistance from the potential new government; Thailand is trying and there’s talk of a reduction of the tax on superyacht charter, but it’s not been officially approved.” Hong Kong is the worst example, the market has been hampered for years by a lack of marina berths and a depressing lack of will on the part of ruling bodies to do anything about it. “We have a number of typhoon shelters there, designed for commercial use that property developers have offered to develop but the government is not showing any interest. We have a 46m Sanlorenzo tied to a large barge that is anchored to the sea bed. There are a lot of such improvised arrangements – fishing boats replaced by yachts in small yards, makeshift finger pontoons from slipways. The market is finding its own solutions.”

Lack of infrastructure remains a major hurdle. New marinas are being built in China and Vietnam, says Simpson, but often they are little more than window dressing for housing projects and fail to deliver necessary refit, repair and service facilities. “In the past we have had to tow yachts to commercial premises to get problems sorted,” he adds. There’s also a dearth of expertise and suppliers on the ground, not to mention captains and crew.

The volatility of the various markets, and often punitive tax regimes that are another drag. “With taxation at 43.65% on a new boat in China, and 90% on charter yachts in Indonesia it’s a big issue. You then have the political uncertainties coupled with the unclear regulations... it’s a shadow hanging over you all the time.”

WRITTEN IN THE STARS?

There is also a different buying culture to contend with: “In China people expect massive discounts for everything, from a pair of shoes to a yacht. It makes it tough to make a profitable business... and they want it now. Chinese buyers in particular have little patience. Waiting six months to a year is too long, they want instant gratification.”

Developing the right service network has been one of Simpson Marine’s biggest challenges. Phuket is home to its Yacht Care operation, billed as a concierge service for absentee owners who want to base their yacht in Thailand or other popular cruising locations but live elsewhere – it’s an example of the level of customer care the group aspires to. It currently has 10 service points throughout Asia, but Simpson admits they need to do more. “It’s all about making life easier – people have a couple of weeks on board – they don’t want any issues when they return to see their yacht.”

Simpson continues as chairman for the foreseeable future, while the new CEO acclimatizes, and then, no doubt, it will be time to clock up some more air time in his beloved Spitfire.

He allows himself a smile. “2018 will be a good year. The Chinese are very superstitious – 8 is a lucky number – 18 means ‘make wealthy’ in Chinese.” With its diverse portfolio, fresh impetus from a savvy CEO, a strong team of long-term managers and brokers coupled with the massive untapped potential of a region beginning to fall in love with boating, then 2018 could very well be the start of a prosperous period for Simpson Marine. Given the industry veteran’s experience however, one thing is certain – his feet will remain firmly on the ground. **IBI**



▲ From modest beginnings by Aberdeen Marina, Simpson Marine today employs over 100 people in seven countries

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A MAJOR DEAL WITH MERCURY IS THE LATEST IN A NUMBER OF SIGNIFICANT WAYPOINTS FOR THE UK 'OUTDOOR TECHNOLOGIES' MANUFACTURER THAT'S TRANSFORMING ITS BUSINESS BY EMBRACING THE NEXT GENERATION OF BOATER

WORDS: ED SLACK



▲ MD Tom Reed and the Scanstrut stand at METSTRADE last November



SCANSTRUT AT-A-GLANCE

- 2009: Winner of The Queen's Award for Enterprise: International Trade
- 2009: Young Businessperson of the Year Award
- 2013: DAME Special Mention Award
- 2016: Insider 42 under 42 - Growth Award
- 2016: DAME Special Mention Award
- 2017: David Coleman Award for Export
- 2017: Overall Dame Award Winner
- 2017: Chris Husick Award Winner
- 2017: MBY Editor's Choice Award: The Cool 50
- 2018: Pittman Innovation Award Winner

At the Miami boat show in February, UK 'outdoor technologies' manufacturer Scanstrut announced a partnership with Mercury to supply its ROKK range of mounts, waterproof power and charging products to support the engine builder's VesselView Mobile technology. The deal could be another significant step forward for the Devon-based firm, not least in its validation of the ROKK product that had to pass Mercury's notoriously rigorous in-house testing regimes; but more significantly by adding Mercury's extensive dealer network to the Scanstrut and ROKK brands with the associated potential volume business that would help take the firm to another level.

"The company has been growing rapidly, in particular over the last three years, and it feels like we've reached another tipping point in the business," says Tom Reed, managing director of the company that was founded in 1986 to design and supply satellite TV and radome mounts and towers to the leisure boat sector up to 100ft.

Reed joined the business in 2000, having spent a number of years working in Australia and Japan. He acquired the final shares in the business in December 2013 and since then has embarked on an ambitious programme to expand its core technologies to capitalise on the growing use of personal electronics on board. "We looked at the market back then and though

we saw boat sales were variable, participation remained solid," Reed explains. The business needed to evolve to capitalise on those high levels of user engagement.

As well as the Mercury deal, Scanstrut used Miami to introduce its new ROKK Wireless, billed as the world's first outdoor-ready 12V-24V wireless charge system. The range includes an innovative Hidden version that will provide under-surface charging stations anywhere on board. It's the epitome of Scanstrut's vision – channelling a technological prowess learned from years of manufacturing products that promote maximum performance from marine electronics into a wider range of products that resonate with the iPad generation.

The diversification of the business under Reed, and expansion of its product portfolio – from 60-70 items to over 300 today – has necessitated a steep learning curve.

“The deal could be another significant step forward for the Devon-based firm, not least in its validation of the ROKK product”

DEFINING YEAR

At the end of last year, Scanstrut moved into new, larger facilities – a converted tractor shed with an urban-cool feeling to the offices and workspaces – on the outskirts of Exeter in the south of England. It proved a timely step up in a defining year, with Scanstrut's growing portfolio of robustly designed, tactile products capturing the imagination of boatbuilders eager to embrace 'connectivity' and end

users demanding the same electronic functionality on board as they were used to at home. Turnover in 2017 jumped 26% with robust growth aided by the appointment of new distributors and a more focused approach to dealing with them. The firm held its first distributor conference in September, with 25 of its distributors from its 40-plus territories descending upon the new facility.

“There was a real ‘wow’ moment when our distributors saw so much more of what the business was really about, what we’re capable of and the work we’re doing. We shared our product plans for the future and there was a real sense of excitement from them,” says Reed. “We strive to be in partnership with our distributors; it can’t be one-way traffic. We appreciate they have demands on their time, and that we have to train them and help them to sell our product – it’s about understanding each other and growing our businesses together.”

SOLUTION PROVIDER

A particular eye-opener was Scanstrut’s development capability, a prime example being its Venture Connect Conversion Kit, a private label project for dinghy manufacturer RS Sailing, that it took from a working concept to an off-the-shelf product in a matter of months. The plug-and-play system retrospectively adapts an RS Venture dinghy so it can be sailed by those with a wide range of disabilities. It was named the overall winner of the prestigious DAME Design Awards at METSTRADE in November.

“I may be biased but I believe our design team is exceptional and people come to us for solutions based on our track record and our creative approach to how we design and manufacture products,” says Reed. “The private label work cross-pollinates with other core products and vice versa so we end up with a really effective and efficient new product development system that benefits all our customers,” he adds. “It might well become an even more distinct part of the business in the next 12 months.”

The manufacturer has worked on projects with Land Rover vehicles and is in discussion with a global motorsport organisation regarding camera mounts. More projects with RS Sailing are in the pipeline too.

“We deliberately invest a lot of our revenues back into product. We strongly believe our growth is going to come from a continual focus on both reacting to but also predicting changes in our market and having solutions ready at just the right time,” says Reed.

The firm boasts its own in-house team of four designers – unusual, Reed admits, for a firm of its size with a total headcount of just 18.

“It means we can react to trends in the market, can convert ideas to product very quickly,” he explains.

Scanstrut has refined its development process, reducing the time from ‘capturing of the concept’,

to running the commercials and getting into the defined design process, through to the concept phase and prototyping. “Then we’re into the nuts and bolts, design for manufacture stage. That takes about 60% of the total design time and we’re really committed then,” explains Reed. Each stage of the design process is logged, the system being constantly fine-tuned based on a number of metrics and a lean approach. “We’ve got better and smarter at developing products; not only seeing the commercial opportunity but ensuring the ROI is going to be there too.”

The ROKK range of handheld devices, now in their fourth year, took 12 months to bring to market – the ROKK wireless charger, just nine.

As well as all new development work there are, of course, ongoing updates to the rest of the portfolio. “We have more projects to do than design days at the moment,” he admits. A new lab for waterproofing, UV and IP testing is planned, which should speed up the development process further and ensure the products maintain their market leading performance.

SPEAKING THE ‘SCANSTRUT’ LANGUAGE

As the business has diversified from being a B2B solutions provider, Scanstrut has also had to invest in creating a design language around its products to appeal to the aftermarket consumer. Witness the point-of-sale retail packs that accompany the new ROKK hardware roll-out for Mercury. “We have to create a look and feel for a Scanstrut product that is identifiable anywhere, across all our sales promotions material,” says Reed. Scanstrut now offers its sales partners comprehensive kits in the form of aluminium flight cases neatly packaged with the requisite product, so its distributors can enable their potential customers to get hands-on and fully appreciate the product.

“However, our fundamental focus will always be on product performance and quality is key. The total annual percentage of returns across all our ranges is less than 0.1%, which is amazing and provides such a strong foundation for us to build upon,” says Reed.

With over 300 items in its portfolio, many of which interface with a potentially bewildering array of electronics brands and models, refining its online portal was a must.

“The last couple of years we’ve focused on ease of product selection,” explains Reed. “We work with lots of electronics brands, which could be confusing for the customer, so we made a buyers-guide configurator for the website that’s live and updated every week ➔



▲ Scanstrut’s ROKK mounting systems encapsulate the firm’s robust, functional design ethos

with the latest electronics. It can also be embedded on reseller sites too, so it becomes a sales tool for us, and useful for the end user who wants to find the best bit of our kit to complement their specific electronics.”

The firm has embraced video too, teaming up with ‘pioneers’ such as world-renowned stunt driver Terry Grant and 2017 British RYA Champions Sunus Ocean Racing, to show Scanstrut’s products in action.

Over the last few years brand ambassadors have become a significant part of the marketing mix for many brands. However, the Scanstrut approach to finding and discovering potential brand ‘pioneers’ is centred around a Scanstrut product solving a mounting or charging problem for the pioneer. This creates an authentic relationship based on a genuine solution, product trust and brand appreciation, opposed to a relationship built around sponsorship and a falsified endorsement. This is important when it comes

to the content created through these relationships, as the end customer can often spot the difference, potentially devaluing the brand and its products.

The ongoing refinement of product and processes creates positive cycles. “If a product is good, the next product to replace it has to be better,” says Reed, though he offers the caveat that however good a product, gaining traction in the marketplace always takes time. “From showing a product at METSTRADE to seeing a return on that investment is always longer than you’d expect. We launched the Waterproof USB charge socket at METSTRADE back in 2016 and we’re still seeing the sales grow as more and more OEMs incorporate it into their boats. It needed to dovetail with their production cycles, so it’s often not until the new model years start that we see the returns. It’s expensive bringing product to market and it’s a challenging business model, but that’s what we’re committed to and the results are really coming now.”

US POTENTIAL

Developing its US business is another key goal for the next phase of the company. “Building on the excellent work of our previous set-up, we have made significant progress in the US this year,” claims Reed, who says the company is developing a country-wide focus to ensure it converts more of its market potential in the States. “Now we’re really developing both our national retailer, wholesale and distribution accounts and also driving OEM business,” he says, with recently appointed USA national sales manager Keith Nixon coordinating the drive and supporting the team there.

Expansion beyond the marine segment is also a key strategic pillar with the company already making inroads into the agricultural and RV sectors. “We’ve found there’s a blurring of dedicated sector-specific

product when it comes to handheld devices,” says Reed. “A 25-year-old farmer wants his phone to connect the same as a 25-year-old boater. Also, when you put a marine product into other sectors you normally find it’s ‘best in class’ because of the performance requirements our products must meet to survive the harsh marine environment. The agri business with its tractors and quad bikes has similar levels of product performance requirements – it’s wet, muddy, with lots of vibration.

“The RV market’s a little different, with its slightly more traditional demographic, but their tech requirements are catching up very quickly,” Reed concedes. “And with their phones being able to control so much of their onboard experience, their expectations are evolving quickly.”

GETTING THE DETAILS RIGHT

They are not the only ones. The Scanstrut of today has evolved immeasurably in just a handful of years. “The Vessel View tie-up is a great endorsement of the quality of our product and recognition of the level of product we’re now able to achieve,” Reed admits. “Now we can also support it with a full suite of sales tools, from packaging and point of sale to online content and video.”

That growth comes from getting the details right, one step at a time.

“Success for us comes from a composite picture made up of so many elements of our business – its products, customer service, marketing, partnerships. It’s about creating a compelling picture to do business with us and being ready to take the opportunities when they come,” Reed proclaims.

The young MD believes that boating has a bright future and that intuitive, personal electronics are only going to play a bigger part in broadening boating’s appeal. “Yes, we have a very positive outlook. It’s a really exciting time for marine with some amazing products that are making boating easier for everyone and that can only be a good thing.” **IBI**



▲ The ‘Hidden’ ROKK Wireless charge system provides under-surface charging stations anywhere onboard. Easy-to-install, it epitomises the Scanstrut vision



▲ The DAME-winning Venture kit for RS Sailing



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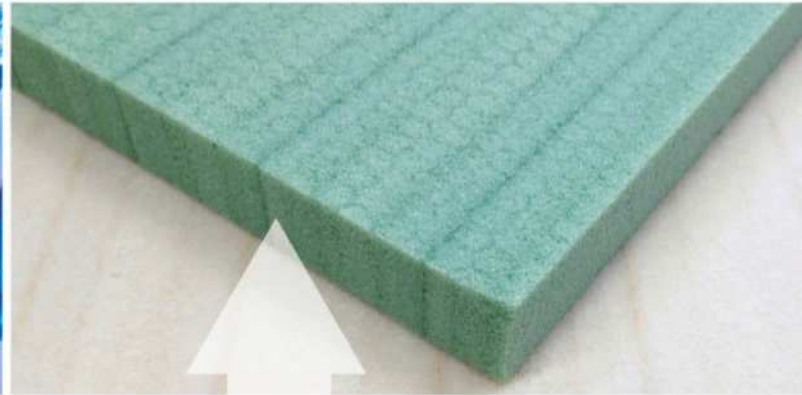
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Composites for the future

ADVANCES IN COMPOSITE TECHNOLOGY ARE HAVING A BIG IMPACT ON THE MARINE INDUSTRY. /BI WENT TO JEC WORLD TO SEE THE LATEST TRENDS AND INNOVATIONS

WORDS: JAKE KAVANAGH



▲ Above: JEC World fills two halls with 1,300 stands covering all sectors of the composites industry. A show that's not just about boats, but also planes, trains and automobiles, all made from composite Top Right: Ligier JS P217 prototype Bottom Right: The 265kg Elixir (monoplane)

FOR THREE DAYS in early March, the exhibition halls of the Paris-Nord Villepinte facility near Charles de Gaulle airport were alive with a combination of proven technology and exciting new ideas. A total of 1,300 exhibitors attended from all over the world, with a particularly strong showing from Asia this year, so all stand space was taken. Coming to see everything from new resins to 3D printers were 42,445 professionals, all on the lookout for advances that could benefit their particular sector.

EXPANDING INDUSTRY

The composites industry is huge, employing some 550,000 specialists worldwide serving no less than 40 sectors, including commercial and leisure marine, and others that overlap with them, such as aviation and sport. These sectors are all represented and categorised at JEC World, but some innovations are so wide-ranging that they have a generic sector to themselves. What works in a turbine blade, for example, can also work on a car, an aircraft wing, or a high-speed sailing hydrofoil.

When it comes to creating composite vehicles and boats, the trend has always been 'stronger, lighter and faster.' The 'faster' element has two aspects – not just the top speed of the vehicle or boat concerned, but also how fast it can be built. At this year's JEC, the prevalence of structural carbon components for trains, planes and automobiles revealed the constant move towards reducing weight and thus the energy required to propel the product.

In a recent interview for *Reinforced Plastics* magazine, Steve Bassetti of



▲ Composite valves and skin fittings such as those developed by Tru Design Plastics are both tough and long-lasting, and eliminate problems with corrosion and electrolysis

the Industrial Manufacturing Group at Michelman, said: “The markets in thermoset and thermoplastic materials continues to grow because of various industry drivers such as automotive ‘light-weighting’ and energy efficiency. More recently, carbonfibre and other alternate fibres such as basalt, aramid and even natural fibres have begun to make inroads into composites.”

Manufacturing boats, hardware and infrastructure is increasingly turning to composites as processes and materials evolve.

“An interesting angle is how composites technology is addressing the demanding standards for surface quality in the boatbuilding market,” explained Sebastiaan Wijk of Dutch-based composite specialists Lantor. “The quality of the finish is a big challenge throughout the

STEVE BASSETTI
MICHELMAN

The markets in thermoset and thermoplastic materials continues to grow because of drivers such as automotive ‘light-weighting’



▲ Composites are replacing traditional metal constructions where lightweight, high tolerance and anti-corrosion properties are paramount, such as with this monocoque aircraft fuselage from M.Torres Disenos Industriales SAU. A tooling reduction of up to 70% is claimed

whole value chain.”

To achieve a glass-like surface, many builders choose to fill, fair and paint the moulding, but improvements in mould making and substrate stability could replace this time-consuming process altogether.

“A smooth surface is extremely important for the end-customer, who spends a fortune on a new vessel,” Wijk continued. “However, surface quality is very difficult to quantify in a technical sense. The result is the combination of resin choice, core material and the skill-level of the boatbuilder. Also, it’s often judged by the human eye.”

Composites are replacing traditional metal constructions where lightweight, high tolerance and anti-corrosion properties are paramount, such as with the monocoque aircraft fuselage from M.Torres Disenos Industriales SAU. A tooling reduction of up to 70% is claimed.

Composites are already replacing metals in many applications through

manufacturing and construction, as is reflected in the JEC Awards for innovation. In the outboard market, for example, OEMs are using a greater mix of composite parts to make their smaller engines more portable and far more resistant to corrosion.

Aluminium decks are being replaced with composite to lessen displacement, and more and more of furniture, superstructures, masts and rigging are being made from resin sandwich rather than metal.

Below the waterline, OEMs are gradually replacing brass, bronze and ZCT fittings with composite alternatives, such as the range from New Zealand-based Tru Design Plastics. These valves greatly reduce the problems caused by corrosive electrolysis, and resist seizing.

IBI went along to JEC World to discover some of the marine-based highlights of the show, and you’ll recognise some well-known brands and personalities within our report.



Better resins and adhesives

TRENDS

Concerns about the environment and workers' health has led to an enforced reduction in styrene content in polyester and vinylester resins, whereas the interest in lighter structures has seen a drive towards infusion. Custom colouring and faster post cure times have also been areas of resin development, along with the ability to recycle or reuse components.

INNOVATIONS

PRECISION COLOUR MATCHING OF GEL COATS BY

ASHLAND

Ashland exhibited a revolutionary way of colour-matching fresh gel coat to an existing shade, allowing OEMs to retrofit boats with a consistent colour. A typical example was a set of outboard covers that had been moulded to match the renovated hulls of sportsboats from the 1960s. The technology can be upscaled to superyachts, and utilises a small, USB-charged scanner no bigger than a snooker ball. The scanner projects a calibrated white light onto the surface of the sample, and the data collected is used by Ashland to mix an exact copy of the pigmented gelcoat.

ABOUT ASHLAND

Established for over 100 years, Ashland is a major supplier of paints, coatings and resins across virtually every industrial sector, including agriculture, medicine and

construction. The company is also a key supplier of 'AME' low-styrene resins and gelcoats to the marine industry. www.ashland.com

SKIN-FRIENDLY EPOXY RESIN BY

GURIT

Epoxy resin can cause a skin reaction in some people after prolonged exposure, so Gurit has developed a new formulation especially for hand laminating applications.

The new resin is called Ampreg30, and the chemistry prioritises health and safety. The resin and its range of hardeners have a 'low toxicity matrix', and have been classified as environmentally non-hazardous with no long-term health hazards either.

Because it has been optimised for hand lay-up, Ampreg 30 is said to have excellent mechanical and thermal properties, easy wet-out for heavy reinforcements, and good cure progression in ambient temperatures. The mix ratio is 100:26 by weight, with the ability to blend from the range of hardeners to achieve intermediate working times. Lloyd's Register and DNV-GL certifications are currently in progress.

ABOUT GURIT

Founded in 1835 in Switzerland, Gurit specialises in a wide range of composite materials. Since 2000, it has acquired several other specialist companies, including SP Systems, High Modulus and Balseurop for organic expansion into new application areas. www.gurit.com



▲ Crestafire FST (Fire, Smoke and Toxic fume retardant) adhesives and resins have been especially developed to comply with international fire regulations

FIRE-RETARDANT ADHESIVES BY

SCOTT BADER

High bulk and paste adhesives have a major role in boatbuilding, especially for hull to deck joins and internal bulkheads, and Scott Bader used JEC to bring two new brands to market.

The new Crestafire FST range has been developed for products that offer Fire, Smoke and Toxic fume (FST) performance. This means they can be used to make composite parts for areas where fire-retardant (FR) ratings are needed, such as in many building and transport applications, and in military, commercial and coded marine vessels. The Crestafire FR range offers gelcoats and intumescent (a substance that swells on heat exposure) topcoats, and structural adhesives. There is also a range of FR resins for open and closed moulds, pultrusion and filament winding. They are all fully compatible with glass, fibre and carbon reinforcements.

Also launched at JEC was the Crestafix range of vinylester bonding paste, such as the new 630PA. "The Crestafix range of rapid cure bonding pastes are strong, light and tough," said Scott Bader's Jon Sewell. "The mix is easy at 50:1, with dispensing machines available, and even on a thick (30mm) block of adhesive, the exothermic reaction won't exceed 65°C."

ABOUT SCOTT BADER

Scott Bader is a global chemical company that produces a wide range of adhesives, composites and speciality polymers for all branches of industry, including a large presence in marine. www.scottbader.com



▼ Ashland's colour scanner projects a consistent white light for a highly accurate colour-matching sample of existing gel coat

Advances in fabrics and foams



▲ The Loop 650 from GS4C SRL is a 'cradle-to-cradle' composite sailing vessel designed to be fully recyclable, hence avoiding the 'cradle-to-grave' element

TRENDS

The marine industry is fairly cautious when considering new materials. OEMs building large and expensive boats like to stick with products they know and trust, but as boats get bigger many are concerned with the quality of the finish. The quality of the reinforcement underneath has a big influence.

"As product group composites manager at Lantor, I monitor all market segments in which we are active," said Sebastiaan Wijk. "The boatbuilding sector hit a rough patch during the financial crisis. As it is a cost-driven and project-based business, I consider cost saving, easy laminate design and quality-consistency (independent from individual skill-level) as the main objectives for new product development at Lantor. Easy-laminate design is important as designers can reconsider the laminate build-up (the material layer choices) for every new project. Consistency is important as it helps to eliminate differences in quality caused by variations in skill."

Speaking for another key supplier, Diab International, group marine manager Valerio Corniani remarked: "To identify

marine trends, you have to separate sail from power. Sailing yachts have always been more advanced because of the greater use of foam or balsa core technology. Most production sailing yachts are now built with using foam sandwich construction. Powerboats have often been single-skinned, but are now in a transition to full sandwich as they need to be lighter,

faster and more fuel efficient to compete. As such, the use of infusion has picked up a lot. In Europe, it is now very common, although it is still catching up in the US and Asia."

The greater use of sandwich core construction and resin infusion has led to the refining of some proven fabrics and foams to reduce resin absorption. Other foams can be heat-formed into rigid shapes, whereas some reinforcements have been amalgamated to remove an entire process step for faster production.

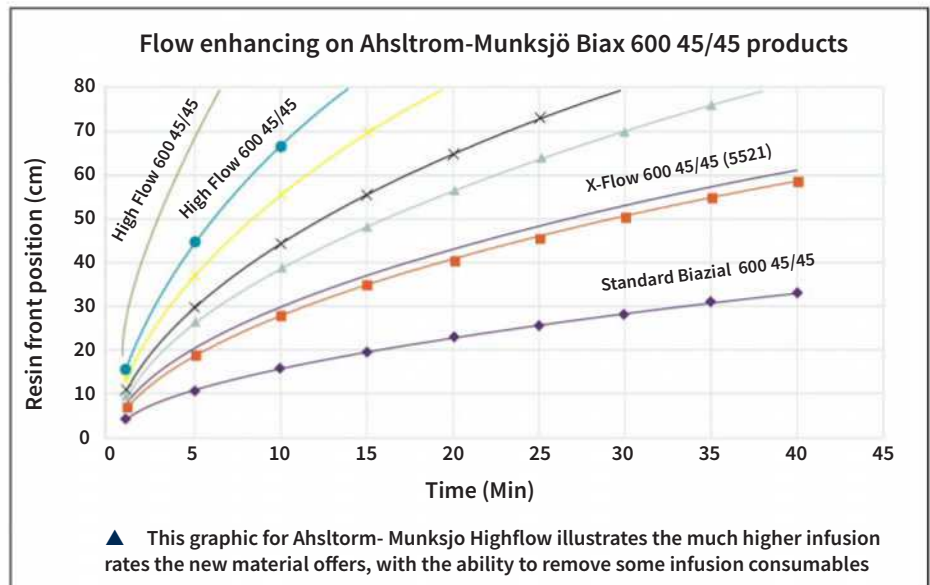
INNOVATIONS

HIGHFLOW FABRIC - FASTER INFUSION AND NO RELEASE FILM BY

AHLSTROM-MUNKSJÖ

Ahlstrom-Munksjo Highflow is a new fabric that the company says delivers the complete wet-out of an infused laminate construction at speeds of up to 300% faster than other fabrics. Actually, Dan Jonsas, the product manager, suggested that this figure could be as high as 500% under certain conditions.

"The material is very new, and not yet fully launched, but already has the advantage of eliminating the need to use other resin flow consumables in laminate packages," he said. "This reduces labour and material costs by up to 15%. Because the resin is pushed so easily through the HighFlow fabric, the



number of air voids is minimal, which improves strength and reduces defects.”

ABOUT

Ahlstrom-Munksjo is a result of merging of two giants in the fibre-based materials industry, the Finnish Ahlstrom and the Swedish Munksjo. The merger took place in 2017, combining a workforce of 6,000 people and annual net sales of €2.15bn. www.ahlstrom-munksjo.com

LIGHTER AND TIGHTER FOAM CORE BY

3A COMPOSITES (AIREXBALTEKBANOVA)

Boatbuilders who have been using the proven Airex T92 and Airex C70 foam cores now have an upgrade that the Swiss manufacturer says is lighter, stiffer and with an even smoother surface. The new Airex T10 is described as a closed cell, thermoplastic and recyclable polymer foam. IBI can confirm the lightweight as we handled a sample at JEC, and could see the homogenous cell structure. “We’ve designed it to work with all important resin systems,” said business development manager Roman Gatzi. “It offers good adhesion, and has a high process temperature tolerance of up to 150°C (180°C in short bursts) without post-expansion or out-gassing effects, so is ideal in infusion post-cure applications. This is great for deck, sidewall, stringers or bulkhead cores, as it is very resistant to compression and shearing.” ➔



▲ 3A Composite’s Roman Gatzi demonstrates the new Airex T10 polymer foam, which he says has been specially designed with high temperature tolerance for post-cure applications

“T10 foam core has a high temperature tolerance of up to 180°C in short bursts, so is ideal for infusion post-cure applications”



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ABOUT 3A COMPOSITES

3A Composites is part of the Swiss-based Schweiter Technologies, a global organisation that says it has pioneered sandwich technology for more than 75 years. The company is a leading innovator within the Airex, Baltek and Banova brands and identifies new business areas for segment specific lightweight composites. www.3acomposites.com

MINIMAL RESIN ABSORPTION BY

DIAB INTERNATIONAL AB

A major supplier to the marine industry with its Divinycell foam cores, Diab has just launched a new type of core material, which it says has only a fifth of the (already low) resin absorption of existing foams. Traditionally, laminators who wanted an ultra-light structure needed to minimise the amount of resin a foam core would absorb and often skimmed the exposed surfaces with a barrier of low-density filler. However, this is a time consuming process with extra material costs.

Diab's answer is Divinycell H60MC, an advanced microcell foam with an ultrafine surface that still guarantees good adhesion. Diab says the surface will also reduce resin absorption by 4/5ths - from 500g/m² to just 100g/m² without any prior treatment.

"As an extra benefit, H60MC has better mechanical properties than the industry standard 60kg/m³ H60 and lower density," Valerio Corniani explained. "In real terms, H60MC allows a saving of around 1kg/m² in both core weight and resin. This material is still very new, so only currently available in one grade suitable for decks, superstructures and internal panels.



▲ Diab's new H60MC core is an advanced microcell that Diab says will reduce resin absorption by 4/5ths

Whilst slightly more expensive than standard foams, it will pay back in terms of significant savings in resin, even when using polyester infusion."

ABOUT DIAB

Diab International AB has been creating composites for over 50 years, and serves all sectors of the transport and wind energy markets. The company has a global manufacturing and support network, and in 2009 became wholly owned by the Ratos Equity Conglomerate registered in Sweden. www.diabgroup.com

SKIN COAT REPLACEMENT AND SELF ADHESIVE GLASS BY

LANTOR

Dutch-based manufacturer Lantor is focussing on products for achieving a flawless finish, and the removal of spray glue. Traditionally, glass tissue has been used beneath a gelcoat to prevent



▲ Dutch-based Lantor was launching its new Skincore product, a combination of core material, CSM and Finishmat D77

print-through of reinforcements, but Lantor has evolved proven products such as Finishmat D77 as a more versatile alternative. New at JEC was a darker version called Soric TF Grey to blend seamlessly with carbonfibre substrates.

Also new was Soric TF adhesive. "The uncontrolled use of spray glue to secure reinforcements is an undesirable necessity in boatbuilding," Lantor's Sebastiaan Wijk explained. "Dry materials with a sticky layer are seen more and more, such as our new Soric TF Adhesive."

Lantor also launched Skincore, a combination material of Lantor core, glass chopped-strand mat (CSM) and Finishmat D77. This material is able to replace skincoat, and so create a more consistent finish.

ABOUT LANTOR

Lantor is part of Cathay Investments Limited, and is headquartered in the Netherlands. www.lantor.com



Pre-shaped foam reinforcement

ANYONE WHO USES sheets of foam reinforcement to stiffen a moulding knows that it only comes in flat sheets, with scoring available in one surface to allow a small degree of curvature. However, a Dutch company can use heat and computer-driven shaping tools to bend any thermoplastic in three dimensions.

Some examples of their work formed the centrepiece on the Gurit stand, where sheets of Corecell had been shaped into gentle curves and linear bends.

Curve Works has built three dedicated heating units, each heating in a different way to deal with most types of thermoplastic. The sheet is formed in the adaptive mould, and once it has cooled down, is finished off with trimming. Curve Works says it is possible to build unique composite boat structures on a budget. The adaptive mould configures itself directly from 3D CAD drawings to create singly or doubly curved panels for a wide range of applications. www.curveworks.nl



▲ US-based Eastman displayed its new Eagle C1235 machine, which the company claims can accurately cut two tonnes of four-ply reinforcement per hour

Rise of the machines

TRENDS

Perhaps one of the greatest advances being made in boatbuilding is the development of the 'large format' 3D printer. This differs from the more common 5-axis milling machine, with which printing both competes with, and compliments. As a result, there are now hybrid versions that can do both.

The difference is that 5-axis milling is 'subtractive manufacturing' (it cuts away material to create a shape), whereas 3D printing is 'additive manufacturing' in that it adds material where nothing existed before.

Five-axis milling is used widely in our industry for making plugs for moulds, but 3D printing is being increasingly used to create specific components to bypass the plug and mould process altogether.

Other machines *IBI* saw being demonstrated were precision laser cutters for trimming reinforcing fabrics, and large scale embroidering looms that can literally custom sew carbon thread and electrical wires into three dimensional contours. Driving all this was sophisticated design software, programmed to keep waste to a minimum.

INNOVATIONS

LARGE FORMAT 3D PRINTERS BY

DIVERSIFIED MACHINE SYSTEMS (DMS)

Already a specialist in 5-axis milling, DMS was promoting the possibilities of its new large format 3D printing systems. Of particular interest was the hybrid

concept, where the machine first creates a component by adding material to a base plate, and the milling element then finishes it off. This dual process minimises waste, speeds up production, and allows for some interesting geometry that would otherwise be almost impossible to machine.

In boatbuilding, this combination can be used to create a mould tool, and then quickly re-engineer the tool with inserts or reshaping to refine a prototype.

"The main customer interest is the speed at which a concept can be turned into a part, without the need for a series of expensive processes," explained project manager James Earle. "Currently, large moulds have to be made for each component and then stored after use in case they are needed again. On very large moulds, this can prove very expensive. Our machines allow a mould to



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▲ A combination of 'metal additive' 3D printing with CNC 'subtractive' routing can result in cost-effective products, such as this vent cowling created by a Diversified Machine System (DMS) hybrid

be made on site – or locally – by 3D printing, and used for both prototyping and production. Because the machine knows where the mould exists 'in space', changes and alterations are easy to make. Accurate scale models can also be made for visualizing or tank testing. The mould tool can be recycled after use, and if needed again, simply re-printed from an electronic file.”

Earle admits that the machines aren't cheap, but each one pays for itself quite quickly. “A prototype doesn't have to be perfect first time round,” he said. “You can make it, touch it, test it, and then change it. This can be done in the fraction of the time normally needed, and with far greater accuracy.”

ABOUT DMS

Headquartered in Colorado Springs, USA, DMS is a privately held corporation that manufactures 3- and 5-axis CNC routers,

3D printers and machining centres. The machines are made in house, including all electrical and engineering work. DMS says it can provide 'performance and features not available in any CNC machining centre of this class or price range.'

www.dmscncrouters.com

EMBROIDERING WIRES, TUBES AND FIBRES BY

ZSK TECHNICAL

If you want to sew a series of LEDs or sensors into a sail, heating wires into a boat seat, strategic reinforcement into a polyamid cloth or tubes into a wetsuit, then one of the three embroidery technologies from ZSK may be of interest.

This German-based company specialises in making industrial embroidery machines, which have a wide number of applications.

One of the machines at JEC was busily sewing carbonfibre 'tow' onto a sheet of glass fibre fabric. This process is known as TFP, or Tailored Fibre Placement, where the fibres are placed in line with stress vectors to meet the distribution of forces on a structural component. Because the 'thread' is being physically tied to the

substrate, there is no risk of it shifting from its designated position, allowing for highly accurate mouldings. In TFP the tow can be combined with other materials such as thermoplastics in one process.

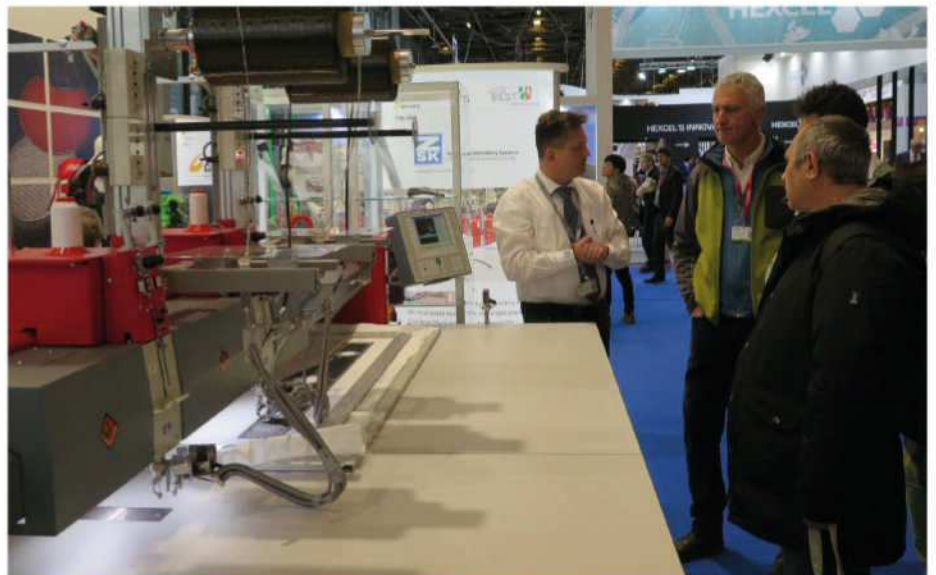
The machines are available with three options of sewing heads – the F-Head is for mainstream garment embroidery, although it can use conductive and 'unconventional' yarns too. The W-Head can lay carbonfibres, electrical wires and hollow tubes onto textiles and other flexible materials. The K-Head achieves voluminous and soft surfaces in the so-called 'moss' embroidery, ideal for creating sensors.

“The machines can be programmed to use a multitude of flexible materials, even optical fibres, as yarn,” ZSK's president Julius Sobizack explained. “For products that will have a special loading requirement, yarns with a steel core can also be used.”

“The mould tool can be recycled after use, and if needed again, simply re-printed from an electronic file”

ABOUT ZSK

ZSK Technical Embroidery Systems is a division of ZSK Stickmaschinen GmbH based in Krefeld in the Lower Rhine area of Germany. The company has been active in the customised embroidery solutions



▲ Embroidery for strength. This machine from Rhine-based ZSK was adding carbon fibre 'tow' (thread) to strategic areas of glass reinforcement to counter stress points. Pipes, wires and even LEDs can all be sewn securely into fabric



▲ Precision cutting of reinforcement cloth, especially carbonfibre, minimises waste and helps pay back the investment in the machine

since the 1990s, specialising in the 'laying of cables, wires, tubes and exotic fibres on flexible material with a high level of automation and efficiency.'
www.technical-embroidery.com

CONVEYORISED DIGITAL CUTTING FOR MINIMAL WASTE BY

EASTMAN MACHINE COMPANY

Automatic cutting is now an important part of the composites industry, and whilst all automated machinery is an investment, the initial outlay must be measured against the ongoing savings in labour costs, the minimising of the scrapping of expensive materials, and the quality of the cut parts.

US-based Eastman Machine Company was demonstrating its latest version of the proven Eagle C125 conveyor system machine. This is able to digitally cut and handle reinforcement materials such as glass, carbon and aramid, as well as non-woven materials. Fitted with an industrial cutting head with three knives and a stylus (with optional router) the machine can provide a clean cut to unique combinations such as Lantor's Soric reinforcement, which has an adhesive layer, protection foil and core-mat in one.

The C125 can exceed 0.5 tonnes of cut fibreglass per hour when cutting single ply, and over 2.0 tonnes per hour when cutting four ply, equating to 90m a minute. The belt surface ensures an even vacuum hold down, and is easy to clean, reducing the risk of cross contamination between different materials.

ABOUT EASTMAN

Based in Buffalo, New York, Eastman is celebrating 130 years in the materials cutting industry. It builds both manually-operated and automatic cutting machines, and has over 1000 fully automated systems installed worldwide.

www.eastmancuts.com



“ Whilst all automated machinery is an investment, the initial outlay must be measured against savings in labour costs ”



▼ The Hexcel stand had a marine display where a section of a Diam 24m mast made by ADH Inotec was available for inspection. The mast was created from Hexcel's fast-curing M79 HexPly

A WORD ON PRE-PREGS

No report on composites would be complete without discussing pre-pregs. These are glassfibre or carbonfibre fabrics that have been pre-impregnated with catalysed resin during manufacture, and which are then stored in very low temperatures to suspend the curing process until needed.

The composite giant Hexcel was showing the type of products its marine customers were creating with pre-pregs, including high-performance mast and foil sections. Hexcel's product offering for the marine sector has expanded with the acquisition of Formax in 2016, and Structil in 2017. At JEC Hexcel was focussing on its enhanced range of pre-pregs, along with woven reinforcements (notably carbon fibre) and multiaxial fabrics for builders of racing catamarans and luxury yachts.

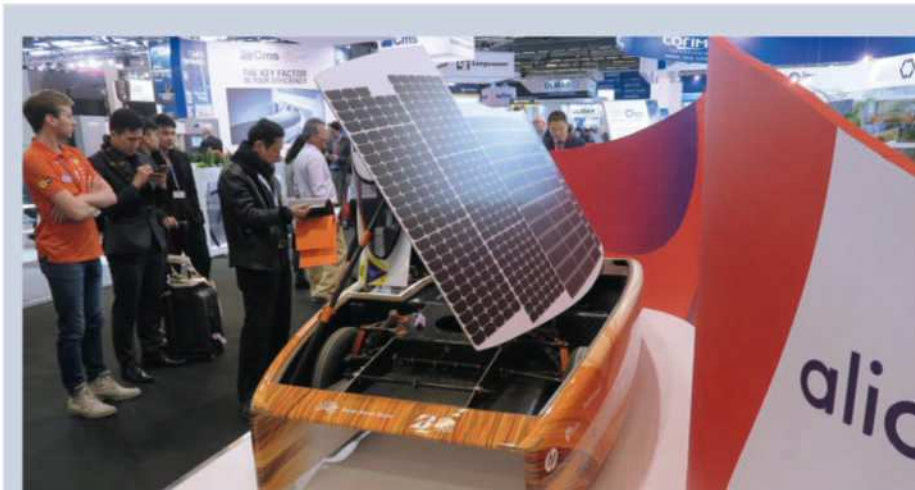
Of particular note was a section of a DIAM 24-m yacht mast made by ADH Inotec. The structure was created from Hexcel's HexPly M79 fast curing, low temperature pre-preg. Hexcel's products are widely used in both aerospace, vehicle manufacture, and wind turbine blades, where Polyspeed pulltruded laminates are used in load bearing areas.

www.hexcel.com

THE DIVERSIFIERS

Expertise within the marine industry often translates easily into other sectors, as several marine suppliers have discovered.

Perhaps one of the most striking diversifications has been Future Fibres, part of the rigging and mast specialists



▲ Aliancy's solar car drew the crowds as it launched its new resin for composite tooling

Points of interest

IT'S IMPOSSIBLE TO properly list all of the innovations at such a large show, but here are some companies that will make a big impact on our industry in the years ahead.

MASTERPLATE FASTENERS

Fixing strong attachment points into hollow composites and carbonfibre sheets can be tricky, but the Italian Company Special Insert has the answer. A range of some 500 fasteners in Italian-made 316 grade stainless steel is available that have been tested with the recommended adhesives from companies like Loctite, Plexus and Permabond. The company has also worked closely with CEL Components S.r.l to



▲ Future Fibres has upscaled and diversified its high-performance yacht rigging to meet challenges in construction and aerospace



▲ Director Barry Paskey is actively exploring new markets for composite rigging, and reported 'a very busy stand'

Southern Spars. At JEC, the company was showing a wide range of rigging solutions for the construction, communications, and aerospace industries.

"We wanted to expand our business beyond high specification yacht masts," explained sales director Barry Paskey. "By up-scaling the dimensions and tolerances of our rigging solutions, we have found them ideally suited for other areas where high stress combines with challenging environments and big variations in temperature. These are conditions that put a lot of wear and corrosion on conventional construction materials."

On the stand were samples of components for bridge supports, crane gantries and telecoms antennas, but Future Fibres says that there is a huge range of other applications for high-stress rigging.

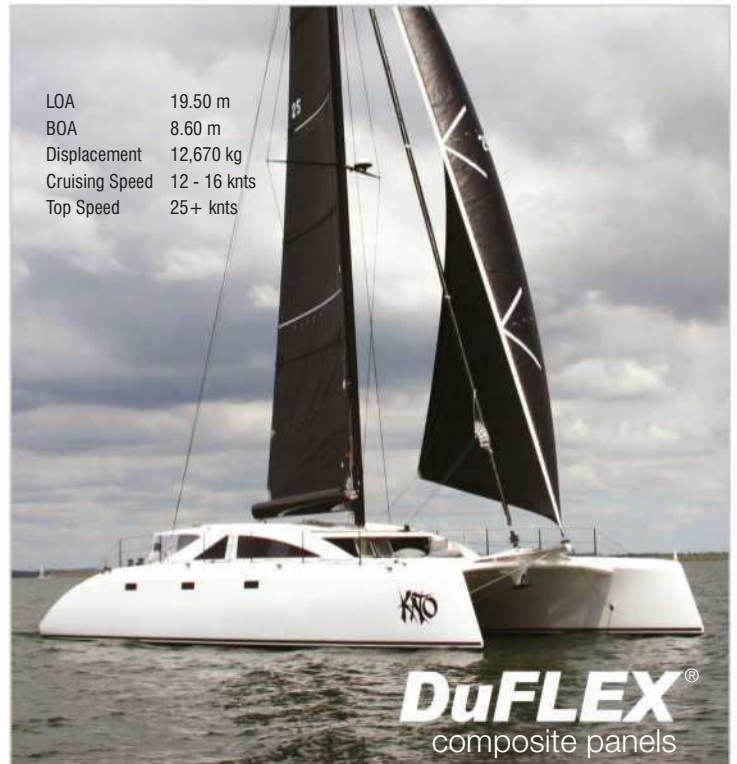
www.futurefibres.com



provide solutions to securing composite sandwich sheets that have a honeycomb core. The fixings are called Masterplate, and UK-based distributor Norther Precision (NP) Ltd says they are proving remarkably effective in difficult applications, such as detachable additions to a motorized surfboard. "We have a custom-designed Masterplate that is secured inside the board to guarantee a strong attachment point without interrupting the boards shape," said NP (Fasteners) Steve Smith.

ALIANCY'S ZERO-SHRINK TOOL-MAKING RESIN

With the solar car they are supporting drawing the crowds, Swiss-based Aliancy launched its new Neomould 2017-S-1 resin for the manufacturing of composite tooling. It says the unique zero-shrink characteristics of this thixotropic resin combined with high viscosity and low shear rates perfectly mirrors the surface and dimensions of the plug. Neomould resin has also proved very effective for hand laminating vertical surfaces with no sagging. www.aliancy.com



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G-Force 2000 Speciale

Kato constructed by Noosa Marine, Australia, utilising DuraKore Strip Planks and DuFLEX Composite Panels cored with ProBalsa, was launched in March 2017.

"This design will take the G-Force concept one step further, using carbon fibre DuFLEX panels with an end-grain balsa core - the ultimate performance cruising catamaran."

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▲ The annual JEC World event in March in Paris is a highlight of the composite world calendar



▲ JEC brings together a wide cross section of the composites industry. It's now enlarging its scope to manufacturers and end users

THE JEC GROUP

THE JEC GROUP was founded in 1996 as a subsidiary of the Centre for promotion of Composites (CPCV), a non-profit association. With a network of over 250,000 professionals, JEC claims to be the largest composite organisation in the world.

The group describes its aims as developing composite markets, and providing global networking and information services. This is achieved through a comprehensive service package offered by JEC's experts. The knowledge pool is deep, and includes a series of publications covering strategic studies, technical books and a composites magazine. There is also a weekly international e-newsletter World Market news with a dedicated French edition. The annual JEC World event in March is the highlight of the calendar, and brings together the widest cross section of the composites industry. A focal point is the series of workshops and conferences held

in the auditorium, where the latest innovations are explained from the stage with audio-visual presentations.

With the composites industry generating an estimated €79 billion of business in 2016, the JEC Group is now enlarging its scope to the next segment of the value chain, the manufacturers and end users.

JEC AWARDS

Every year, 10 winners are chosen from 30 finalists to receive a coveted JEC World award. The categories include sustainability, smart cities construction and marine, and reflect specific breakthroughs in either the application of composites, or the processes to make them.

Many of the innovations result from collaborations between suppliers, universities or designers, and several marine companies were among the finalists for 2018. ➔

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OF INTEREST TO THE LEISURE MARINE MARKET ARE:

1 GURIT teamed up with **ULJANIK JSC** (Croatia) to win their category with a composite car deck. The deck can take an increased payload of 800 tons whilst reducing the fuel consumption to carry it by 4.5%, (2.1 tons of fuel oil per day).

2 MULTIPLAST GROUPE CARBOMAN, which has partnered with **BENETEAU** to create a new process for making hydrofoils. Multiplast has transferred wind blade technology to allow one set of foils to be made each week, with reduced costs and waste.

SAERTEX GMBH partnered with **NEPTUN** to replace the steel deck of a 110m riverboat with one made from composite. This should appeal to the superyacht sector as the deck produced a 45% weight saving, lifted the draft by 5cm and allowed more design options. The deck met with CCNR approval, and provided greater passenger safety in case of a fire on board.

3 ADHEREND INNOVATIONS LLC teamed up with the **COMPOSITES UNIVERSAL GROUP** and used a special design and manufacturing

technique to create Project Cedrus, described as ‘the lightest, safest most compatible and environmentally-friendly hydrofoil ever introduced.’

4 SEABUBBLES MARINE also featured in other categories, with **SICOMIN** introducing InfuGreen 810 bio-resin, said to offer the highest level of sustainable content on the market, whilst offering the same performance as conventional epoxies. It has been used to create the SeaBubble electrically-driven foiling watertaxis, currently being trialled in Paris.

Meanwhile, **GS4C SRL** has teamed with several other OEMs, including **DIAB** and **ISOMATEX** to create the Loop 650, a sustainable ‘zero land-fill cradle-to-cradle composite sailing boat.

ELG CARBON FIBRE has partnered with superyacht mast makers **MAGMA STRUCTURES** to develop a carbon fibre train bogie that claims a weight reduction of 50% and includes recycled material.

A jury of experts will choose the winners, with input from the public via an on-line voting form.

For more information on these, and other finalists, at:

<http://innovationawards.jec-world.events>

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Navy Pier Convention Center
Chicago, IL, USA
27-28 June 2018

JEC Asia International Composites Event (Focussed on end-user markets in Asia-Pacific)

Coex, Seoul, Republic of Korea
14-16 November 2018

JEC World 2019

Paris Nordde Villepinte, France
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SAVE THE DATE

This year's gala dinner and awards presentation will take place on the first day of METSTRADE, which is Tuesday the 13th November, at the National Maritime Museum in Amsterdam.

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Scanstrut ROKK Wireless

www.scanstrut.com

SCANSTRUT'S ROKK WIRELESS lays claim to being the world's first outdoor-ready 12V-24V wireless charger. Exceeding the latest and highest standards of the Qi wireless protocol, ROKK Wireless is independently certified to deliver ultra-safe, fast charging anywhere on board and is easy to install. It is ideal for sail and power boats, and is housed in a fully encapsulated and sealed IPX6 waterproof unit. There are three versions for hidden, surface or bezel installation.

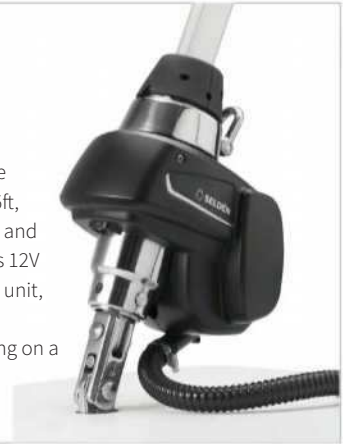


Next generation Furlex Electric

www.seldénmast.com

SELDÉN MAST'S NEXT generation Furlex Electric claims to take headsail furling to a new level. Designed for yachts from 30ft-45ft, the Furlex 204E and 304E have a durable composite outer shell and a 48V electric motor. The DC/DC control box converts the boat's 12V or 24V to 48V, which allows for streamlined cables to the motor unit, easy installation and a compact design.

The push-button function of the Furlex Electric makes pulling on a furling line obsolete. Users can also adjust the speed at which the sail is furled with a new two-speed function.



TDS Teak Sealer & Protector

www.teakdecking.com/www.zetamarine.group

TDS TEAK SEALER & Protector is a water-based, polymer infused liquid that penetrates into the grain of new or freshly cleaned teak, forming a long-lasting sub-surface barrier that helps to slow oxidation and prevent deep-grain soiling from soot, airborne pollutants, food, beverage and lotion spills. It is easy to apply, safe for the environment, and also improves the non-slip properties of the teak. TDS Teak Sealer & Protector will keep teak looking great for up to 3-4 months in Mediterranean areas and longer during winter. The product is manufactured in the US by Teakdecking Systems in Sarasota, Florida and distributed in Europe by Denmark's Zeta Marine Group.



Flitz sealant

www.flitz.com

FLITZ INTERNATIONAL'S PREMIUM sealant is specially formulated to protect against UV rays, water stains, dust/dirt, bug splatter and more. The sealant is engineered to work on fibreglass, all metal surfaces, painted finishes, clear coats, plastics and glass, and is designed to protect finishes for up to one year in both freshwater and saltwater conditions. The sealant comes in a 237ml/8oz bottle, which is enough for a 28ft boat. The sealant includes a trigger spray bottle and a dual-sided 40cm x 40cm/16in x 16in microfibre cloth.



WOW-SOUND portable speaker

www.wowwatersports.com

THE WOW-SOUND PORTABLE bluetooth speaker from WOW Watersports can pump out 50 hours of 360°, high-volume stereo on a single charge. The IP67-rated waterproof, shock- and dust-proof speaker connects with any bluetooth-enabled mobile device. It features four 2in active speakers spaced evenly around the circumference of the system, and one 4in passive radiator on top for a big, deep bass.

A carry handle, large buttons for play, pause and skip functions and a 360° LED light make it easy to use anywhere on board or at dock. A stemmed bottom design fits WOW-SOUND into most cup holders.



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Stainless steel hook from Fuchs

www.fuchs-cranes.de

FUCHS FÖRDERTECHNIK'S STAINLESS steel hook is designed to optimise the handling of tenders onboard large luxury yachts. It is said to be the only hook worldwide that is DNV GL certified for man-riding and normal loads.

The integrated hook weight for safe crane operation is more compact than the usual wire weights, Fuchs claims. Every centimetre that can be saved in height is valuable in the day-to-day handling of tenders. More space also allows them to be moved safely inside the boat garages onboard the yacht.

The hooks, available in different sizes, are not only used as load attachment devices for Fuchs cranes, but are also offered separately for optimising crane systems already installed onboard. It has a maximum load of 4,000kg.



Besenzoni designs App for gangway operation

www.besenzoni.it

BESENZONI HAS DESIGNED an App for use on IOS 9.0 and Android 7.0 devices or higher that allows boat owners to operate the gangway (both retractable and external types) installed on their boat. The free App must be used in conjunction with a receiver/adaptor that can be purchased via Besenzoni's sales and support network.

The Besenzoni Unit Control (BUC), for use on mobile phones or tablets, uses bluetooth technology together with the standard infra-red or radio-wave remote control already provided when purchasing the gangway. The App can be connected to as many as eight devices at the same time, enabling it to be used by more than one family member and across more than one mobile phone or tablet.

Fusion redesigns Signature Series

www.fusionentertainment.com

FUSION'S NEWLY REDESIGNED Signature Series speakers have been acoustically enhanced with an optimised magnet system, refining the sound even further. Available in 6.5in, 7.7in and 8.8in models, they have also been given a sleeker look and feel.

An enhanced woofer magnet system delivers even leaner midrange frequencies, claims Fusion, producing louder and clearer audio. This is matched with an updated tweeter for better cut-through and transparency.

Combining 'CURV' Cone composite technology with a silk dome tweeter and fully sealed crossover components, Fusion says that its Signature Series speakers offer an "unparalleled premium audio experience", even the harshest of marine conditions.



Smart speed sensors from Airmar

www.airmar.com

AIRMAR'S NEXT GENERATION of Smart speed sensors – the DX900+, UST800/850 and UDST800 – combine speed, depth and fast-response water temperature in one compact, thru-hull fitting with no moving parts. They boast several new features and are paddlewheel-free, eliminating the need for maintenance. New features such as transverse speed, leeway, heel and trim make the electromagnetic DX900+ sensor a perfect solution for racing sailors and long-distance cruisers, says Airmar, while the ultrasonic UST800/850 and UDST800 are ideal for use on sailboats and cruising boats of all types and sizes. Another advantage is that both new sensors easily retrofit in most Airmar two-inch housings, making upgrades simple.



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

Next generation Thru-Hull lights from Lumishore

www.lumishore.com

LUMISHORE'S NEXT GENERATION Thru-Hull lighting systems come with additional features such as MFD (Multi-Function Display) control, plug-&-play installation, and upgraded functionality, bringing unique advantages to boat owners, installers and dealers alike.

All lights are now fully synchronised, eliminating the need for master lights to control secondary lights in the system, reducing the light models required for a complete underwater lighting system.

SUPRA Series dual-colored lighting systems are controlled by Lumishore's i-Connect Switch and/or directly from



a compatible MFD, allowing the boat owner multi-access functionality to their lighting system.

EOS Series colour change lighting systems are controlled by Lumishore's EOS STV2203-i Color Controller, a dedicated 3.5in/89mm full-screen display, and/or directly from a compatible MFD, which allows the boat owner to eliminate another controller for a clutter-free helm or to provide alternative control zones including iPhone-enabled Wi-Fi. Thru-Hulls are available in three sizes and brightness levels.

Italwinch SMART-R windlasses

www.mzelectronic.it

THE ITALWINCH SMART-R line of windlasses from MZ Electronic are supplied with a 1700W motor and are suitable for boats of up to 16m in length. The round-base units can be installed so that the shaft is positioned vertically or horizontally. This makes it ideally suited for use in sailboat anchor lockers, where space is critical. The windlasses are available with or without a capstan drum and can carry 6mm, 8mm or 10mm chains. A chain counter sensor is also included.



Torqeedo Ultralight 403 C

www.torqeedo.com



THE ULTRALIGHT 403 C is a longer-running version of Torqeedo's smallest electric outboard with integrated lithium battery, offering almost three times the range and run time of its previous model. It boasts a 915 Wh battery – 2.85 times the

battery capacity compared to the standard Ultralight 403 with 320 Wh battery, while adding just 1.7 kg to the overall weight. Including the high-capacity lithium battery, the Ultralight 403 C weighs less than 11kg and offers speeds of up to 9.8km/h and a maximum range of more than 100km at slow speed. It comes standard with GPS and a digital display that shows real-time power consumption, battery charge status and remaining range.

Williams upgrades MiniJet 280

www.williamsjettenders.com

WILLIAMS JET TENDERS In the UK has upgraded its MiniJet 280 for 2018. The tender is now equipped with a 50hp BRP Rotax Ace 900 engine, enabling increased acceleration and improved handling – even at maximum passenger capacity.

Weighing under 200kg, the MiniJet 280's light weight and compact dimensions makes it ideal for owners of sub-45ft power and is now a confirmed fitment for the Bavaria C57 and C65, and Hanse 588.

"The upgrade, which takes it from a 45hp to 50hp, may not seem like very much to some, but it makes a big difference to how the boat accelerates, without comprising its existing superb handling ability," says sales director Mathew Hornsby.

Existing MiniJet owners are entitled to an upgrade kit, with new BRP dash cluster.



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Versilia Rendezvous debut for Videoworks

www.videoworks.it



VIDEOWORKS HAS INTEGRATED into its onboard systems new solutions by James Loudspeaker, a California-based leader in loudspeakers for outdoor/marine applications that are constructed out of aircraft grade aluminium for strength, sonic performance, and durability.

C.110sm ACT is a 10in wall subwoofer with integrated DSP and amplifier and is designed to offer smooth, deep bass to complement any audio system in a discrete and space-saving design. Complete with a custom coloured, perforated aluminium grille, they can be flush fitted to be as unobtrusive as possible.

C.806TiMACT is a more compact 8in wall loudspeaker with integrated DSP and amplifier for use where a smaller footprint is required.

Both will be presented at the 2018 Versilia Yachting Rendez Vous (May 10-13) in Viareggio, along with MyInfo, a fully integrated entertainment- info-domotic system able to perform multiple tasks and visualize the information on an iPad, iPhone or Apple TV.

With its software and graphic interface developed by Videoworks, Myinfo is Intuitive, user friendly and customisable, and can be used to control, CCTV, charting, navigation data, and more.

More functionality has been added to the system with the introduction of MyInfo Remote for cloud access to all the above services.



Torqeedo and WhisperPower collaborate

www.torqeedo.com

TO EXTEND THE range of a yacht equipped with a Torqeedo Deep Blue Hybrid electric propulsion system, Torqeedo has collaborated with WhisperPower to develop a 25kW 350V DC variable speed diesel generator – the Range Extender. The generator has been 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.

The compact and silent generator is based on WhisperPower's Genverter principle that sees the speed adjusted to the desired power. The advanced power electronics ensure that the generator always operates at the most efficient speed, so that fuel consumption, noise, vibration and exhaust emissions are minimised; the consumption is only 295g of fuel per kWh of electricity and the noise level of 54 db (A) at a distance of 7m is very low.

Integrated into the Deep Blue Hybrid system, the Range Extender forms part of an innovative system that offers unrivalled comfort, luxury and independence based on largely zero-emission sailing. An important option is the generation of energy for charging the BMW-i lithium batteries through renewable energy sources such as solar panels and hydro generators. The DC generator is automatically managed and started up by the Advanced Hybrid Control System providing the reassurance of back-up power.

Yacht Management control from Deep Blue



www.deepbluesw.com

DEEP BLUE LATEST'S V3.1.096 software has 14 modules that provide access 24/7 to every aspect of today's increasingly complex yacht operations. From accounting and financial reporting, maintenance and inventories, to human resources management for crew and yacht events, Deep Blue can log all the actions and receive approval through the software.

Available in three packages (Pro, Fleet and Custom), Deep Blue is designed expressly for non IT specialists, with a user-friendly interface that can be accessed by unlimited, simultaneous users from any device online via secure dedicated servers, or offline through a local onboard server without an internet connection.

It features a customisable dashboard and key modules associated with everyday operations and procedures on yachts.

These include: Financial – which allows the user to follow in real time accounting operations for crew, management and owner payments and expenses, pending invoices, and give or receive approval; Maintenance – allowing chief engineers to build custom maintenance programs by area/group/system linked to the electronic Log Book; and HRM, to create crew work schedules, watch duties and rest days which can be amended by users to declare real working/rest hours in compliance with yacht and/or MLC regulations.

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Mastervolt's Charge Mate Pro 90

www.mastervolt.com



THE MASTERVOLT CHARGE Mate Pro 90 is an electronic relay that allows a second battery to receive up to 90amps of charge current from a single alternator. Suitable for all battery types, it is ideal for recharging Lithium Ion cells and has built-in safety features.

The Charge Mate Pro 90 always prioritises the primary battery whilst still charging the secondary – an effective solution for charging two batteries from one source while significantly reducing the risk of a flat battery.

An example would be a bow thruster battery and a service battery connected to the same alternator. The Charge Mate Pro 90 would prioritise the service battery for the bulk of the charge, whilst still feeding current through to the bow thruster battery. Any return current is automatically blocked, even if the secondary battery is of a higher voltage, which helps to keep the bow thruster battery sufficiently charged.

Rated to IP65 standard, the relay is housed in a corrosion-resistant housing flanked by two heat sinks, and its operation can be monitored via built-in LED indicators. The unit includes automatic battery detection, so it can work seamlessly with either 12V or 24V systems.

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Poland (April 2018)

BUSINESS IS BOOMING IN THE EU'S 6TH BIGGEST ECONOMY

Note: This report complements our market report on Poland found in this issue on page 34

ECONOMIC

▶ Poland's economy expanded an estimated 5% in the final quarter of 2017 (compared to the same period last year) and posted real GDP growth of 4.6% for the year overall – the fastest pace in six years.

▶ Economic momentum carried into 2018, leading to forecasts for further expansion this year

– although at a more moderate pace of 3.8% – with household spending and higher fixed investment as the primary drivers.

▶ Thus far, the economy has been unaffected by the European Union's political dispute with Poland over potential 'Rule of Law' encroachments on the independence of its judicial sector.

▶ Against the backdrop of these prickly tensions, however, is a hefty distribution of EU development funds to Poland – €83 billion between 2014 and 2020 – representing the largest share awarded to any EU country. The huge inflow of funds led to a 10% hike in investment last year arising from spending in both public and private sectors and helping fuel overall growth.

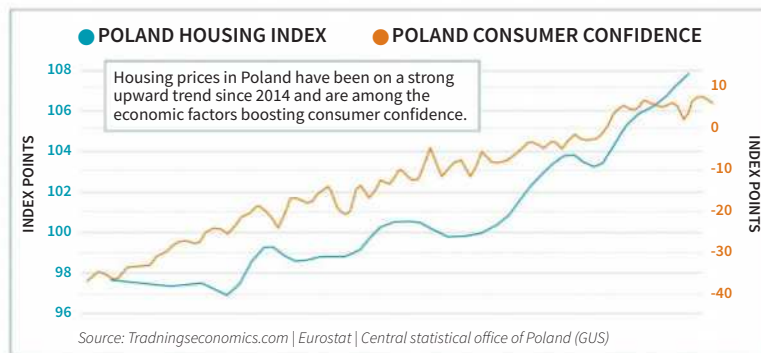
▶ Manufacturers in the boatbuilding sector are among the many direct beneficiaries of this investment largesse – and by extension so are their parent companies such as Group Beneteau and the Brunswick Corporation which spotted the benefits of building boats in Poland years ago.

▶ Their subsidiaries are among numerous Polish yards currently in the midst of plant expansions and new R&D facilities funded by the EU grants. Much-needed improvements to Poland's roadways are also targeted in the funding projects, which will also help Polish builders transport some 15,000 boats destined for export across the border this year.

CONFIDENCE

▶ Consumer confidence reached an all-time high in February and January of 6.2 index points, but slipped in March to 5.4. Over the past two decades, the index averaged -18.0, with a low of -39.7 in April 2002.

▶ Lower consumer prices, strong employment and a hike in the minimum wage that came into force in January are among other factors



boosting Poland's confidence and household spending.

▶ Consumer spending softened slightly in the fourth quarter of 2017 after reaching a record high in the previous quarter, but remains robust.

▶ In the meantime, sentiment in the manufacturing sector hit new heights in March reaching 18.7 points, up from 16.2 in February and the highest reading since May 2008.

▶ Poland's manufacturing Purchasing Managers' Index (PMI) – held steady in March at 53.7 points, the same reading as in February, and comfortably above the 50-point threshold that indicates expansion vs. contraction – where it has been remained for over three years, the longest expansionary stretch since the index began in June 1998.

▶ On the negative side, Polish manufacturers – including boatbuilders – are experiencing a shortage of workers throughout the country, which is starting to create backlogs and is likely to put more pressure on wages.

DEMAND

▶ Other indicators for consumer demand have also been very strong in Poland. New passenger car sales totalled 486,350 units in 2017, representing growth of 17% and making it Europe's seventh largest market behind Belgium. Across Europe as a whole, new car sales grew 3.4% reaching more than 15 million for the first time since 2007.

▶ The upward trend in Poland's car sales has continued in the first two months of 2018, posting a 15.3% increase compared to the same period a year ago.

▶ Consumer credit has been on the rise and also reached a new record in February, well above the level for the past two decades.

▶ Poland's Housing Index increased to 106.50 index points in the third quarter of 2017 from 105.44 index points in the second quarter of 2017. The Housing Index averaged 101.94 index points from 2010 until 2017, reaching a record high of 106.57 in the second quarter of 2011 and a record low of 97.15 index points in the first quarter of 2014.

▶ Housing prices in Poland have been on a strong upward trend since 2014 and are among the economic factors boosting consumer confidence.

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3JH40 wins Miami 2018 Innovation Award

YANMAR introduces the 3JH40 as the world's smallest common rail inboard marine diesel engine in displacement, dimensions, and weight.

The 3-cylinder 3JH40, with an output of 40 mhp, will enable a whole new category of smaller leisure boat owners and commercial vessel operators to benefit for the first time from the efficiency and performance advantages associated with the most recent electronically-managed CR fuel-injection technology.

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www.yanmarmarine.com