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METS TRADE MARINE EQUIPMENT TRADE SHOW 15-16-17 NOV 2022 AMSTERDAM **TRADE SHOW SPECIAL**

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STOCK REPORT Marine markets go under the spotlight	FRESH LOOK The retrofit revolution uncovered	CHANGING TIMES Princess Yachts talks business and growth

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If there is a takeaway from 2022's boat shows and events, it seems that **networking face-to-face, reconnecting and building new business relationships in person is as important as ever.**

Anecdotal evidence from our market report (see page 5) suggests that though the leisure marine market is softening and economic factors loom large, boat shows and events provide an unrivalled opportunity for businesses to place their products in the spotlight.

In this issue of *MIN*, we discuss the growth and future of the retrofit market on page 14 and discover how Freedom Boat Club is approaching the increased demand for boat shares on page 11. UK boatbuilder Princess Yachts reflects on supply chain issues and how delays have impacted its factories and volumes on page 21. And on page 17 we take a look at how media partnerships with platforms including Vice TV and TikTok have been used by Discover Boating in the US.

The *MIN* team will be in attendance at METSTRADE 2022 and look forward to seeing many of you there. Do drop by and see us on stand 01.385 and share your news with the team.

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STOCK REPORT

As economic uncertainty looms, GMBA members assess the marine market



POLAND | Piotr Jasionowski

The production and commercial season of 2021/22 in Poland ended with a major 'slippage'. Almost all Polish boatbuilders faced delays in the implementation of production plans because of increased absenteeism caused by the covid pandemic and very serious disruptions in the supply chain.

Nevertheless, most of the Polish boat and yacht manufacturers, as well as distributors and sellers, confirm a significant increase in the value of sales and indicate record levels. Shipyards report an increase in production levels compared to the 2020/21 season by around 20 to 45 per cent.

Around 30 per cent of manufacturing companies confirm their order portfolio for 2023 is at the current or higher level. These are companies that produce yachts from the higher segment, over 50ft. Companies mainly producing motorboats up to 26ft are beginning to express concern about the next production year.

The war in Ukraine raises great concern for the Polish yachting industry – and causes the outflow of Ukrainian workers, increases in energy costs and high inflation, which reduces manufacturers' margins and forces them to frequently adjust (unfortunately upwards) product prices and renegotiate contracts. Thus, the mood of the yachting industry in Poland has changed from very optimistic to cautiously pessimistic.



FINLAND | Dr. Jouko Huju

It is no shock that new boat sales have fallen in 2022 but the real surprise is that new boat registrations are only down 10 per

cent in the first eight months of the year. During the worst pandemic years when people stayed at home there was a real boom in boating investments. Numbers rose by 15-20 per cent annually. As the pandemic recedes consumers have started to return to their usual work-life patterns and have begun travelling again, which has evened up boat sales.

The Russian aggression against Ukraine has had a big impact on consumer confidence, which we found at its lowest in recorded history in August 2022. We are also challenged with high inflation, rising fuel prices, supply chain issues and rising material costs but the outlook is still relatively positive. If we return 2018/2019 levels, it is not bad at all.

Companies in the market with new types of boats – be it hull shape, propulsion system or level of comfort – are enduring these challenging times much better. First attempts with alternative propulsion systems are also emerging. Electrification is coming but it will take time until the products and the infrastructure on a larger scale are ready.

The secret behind succeeding here is to find a partner who has enough capital and resources to make themselves widely known. We do have two good boat shows and having a presence there is a good start.



FRANCE | Jean Michel Gagné

The global turnover of the nautical industry has grown by 4.9 per cent over the last year, while exports now represent 79 per cent of the market share.

The multihull cruising segment has increased by almost 10 per cent, the secondhand market has risen by 17 per cent while board sports, paddle and canoeing has exploded with a total production of 53,000 units and a global turnover reaching +60 per cent.

The 2022 summer season confirmed these favourable trends with huge success for the charter market – both in France and in the French overseas territories – and robust activity for the watersports sector. The marina industry has seen a strong resurgence of foreign visitors, particularly British boaters, and marina operators say they have surpassed 2019's figures. Beach clubs and sailing schools have also reported a good season. Only river boating and inland waterways have sometimes suffered due to the drought and low water levels.

The most important and satisfying factor is probably the emergence of a new generation of boating and marine enthusiasts. Younger consumers are more attentive to issues of sustainable development but also less experienced and in need of coaching. Thus, the profession must adapt to the changing values and attitudes of these customers and improve its business model with evolving offers.

The positive feedback received from recent boat shows in Cannes, Monaco and La Rochelle seems to be sufficient to sustain the marine industry, even if the global economic and political situation, and the supply chain disruption are issues of concern.



UNITED KINGDOM | David Lewin

During the pandemic, outdoor sports and pastimes were some of the beneficiaries with boating in all its forms seeing an upsurge in interest. Shutting down the world's economy for several months, however, naturally caused huge problems in the supply chain of raw materials and parts, coupled with a shortage of skilled labour due to many foreign workers returning home. This has pushed out delivery times for new boats, with many running well into next year and 2024.

The war in Ukraine had a severe impact on the market in 2022.

Energy prices rocketed, parts such as electronic chips are still scarce and political uncertainty and high inflation is not helping the outlook. Interest rates are increasing strongly to curb that inflation. It remains to be seen if the younger generation – who were being hailed as returning to the sport – will be able to afford it with more expensive housing and living costs kicking in.

It has to be said that the clouds on the horizon look very black but despite that, order books are still full, the industry turnover has grown 6.5 per cent from pre-pandemic levels to €4.86bn and this year's Southampton International Boat Show was hailed a great success even though attendance was slightly down due to the Queen's funeral.

Large yacht sales continue to be strong and 'niche' builders also continue to do well. The UK is home to several electronics companies, which are also developing exciting new technologies. There is much to be proud of in the industry, with advances in emission-free propulsion systems, and the reduction of emissions within the manufacturing processes ongoing.

Large yacht sales continue to be strong and 'niche' builders also continue to do well.

David Lewin, GMBA UK



SWEDEN | Bjorn Ingemanson

Even with sharply increasing fuel prices we have seen an all-time high boat market in Sweden. As in several countries, many Swedes started to buy boats during the first wave of the pandemic, and much





Credit: Southampton International Boat Show

more time was spent on the water. The total number of leisure boats in Sweden is estimated at around one million and every year 25,000 new boats are sold. The majority of the new boats are smaller boats with engines between 10 to 300hp.

One trend we've seen over the last couple of years is that buyers are looking for boats where the family can stay overnight, which means that the average size of boats is increasing.

And while June and July were previously considered the boating season, August is now also a key boating month.

The question is how long can this strong market continue given the widespread economic factors. Information gathered from the latest boat shows indicates the number of visitors has still been high and the exhibitors are reporting strong sales. I believe we are coming closer to a more normal boat market and that we will see a decline in sales of new boats in the coming years. However, the trend to spend more time on the water will remain.



AUSTRALIA | Maryanne Edwards
Australia's inflation, like many other countries around the globe, is a result of the knock-on effects from the covid pandemic, the war in Ukraine and strong consumer demand. The economic recovery

from the global recession caused by covid lockdowns has been stronger than expected, which is partly due to the government providing long-term emergency stimulus packages.

Boat sales are still healthy despite the expectations of higher interest rates. Sales certainly have not dropped off as some feared. There are some indications it has plateaued slightly but the general opinion from brokers is the market is still buoyant. Demand still remains above the pre-covid period and while consumers may wish to ponder boat buying decisions – given interest rate hikes and inflation – those who do not buy now know they are in for even lengthier lead times.

The ability to attract and retain staff is a major issue for the entire Australian marine industry. With strong demand in new build, and repair and service, employees are jumping from one business to another for a few more dollars. A recent national government jobs summit has endeavoured to address a number of issues – particularly skilled worker visas.

Due to the distance from many global markets, the cost of transport is a key issue faced by exporters and importers in Australia. Global transport costs are up 30 to 50 per cent and some are also reporting low availability.

Positively, the charter market in the Pacific is extremely busy, with David Good, CEO Superyacht Australia, commenting that “there are probably not enough vessels for the demand at the moment”.

Given the war in Ukraine and the post-covid environment, a number of superyacht owners are focused on heading to the Pacific. There has been considerable investment in infrastructure and services in Australia, so the Australian industry is well placed to look after and service the growth in demand by

‘Big players’ are recognising the [opportunities] so we are witnessing an attempt to consolidate marinas by large investment funds

Boris Miskic, GMBA Croatia

the global superyacht fleet. While cost of materials and shipping had been increasing dramatically before inflation officially became an issue, some report signs of stabilisation. Energy and fuel costs will continue to be an issue for some time. Pricing for new boats is being reviewed carefully and this is being done relative to the scheduled year of build completion.

While boat shows are reporting increasing numbers, some people are too busy to travel, and with escalating travel costs and continued concern over travel disruptions most companies are still receiving strong orders without attending boat shows.

Shipping costs from Australia and costs of exhibiting boats makes shows a very expensive branding exercise. The current demand has taken the pressure off shows as a primary selling function in established markets and some boatbuilders are preferring smaller targeted events.



CROATIA | Boris Miskic

Comparing the preliminary results of the 2022 nautical season with the results from 2021 or 2020, which were certainly burdened by the pandemic, we note a significant increase in activity in almost all segments of the nautical business. As marine tourism itself is the main driver of a large part of the nautical industry, we expected

a successful charter season. The charter industry, as well as the increased activity of buying and selling pleasure boats, also increases demand for marina berths. Along almost the entire Mediterranean, investment projects for the construction of new marinas or upgrades to existing marina facilities are commencing.

Even ‘big players’ are recognising the opportunity for investment, so we are witnessing an attempt to consolidate marine facilities by large investment funds and groups. The largest chain of marinas in the Mediterranean, ACI Club – based in Croatia – together with its new partner Lurssen Group, has taken over the concession for the construction of the new luxury marina Porto Baroš in Rijeka.

Lurssen Group has become one of the most important investors in Croatia in a very short time. In 2020, a new project bureau was founded in Rijeka, for the design of yachts and patrol boats. In addition to building the marina in Rijeka in partnership with ACI, it also announced new acquisitions in the nautical and shipbuilding sector.

The newly formed Marina 21 group, with its initial three marinas in Croatia, has announced further expansion and acquisitions in Croatia and beyond. And, following the takeover by CVC Capital Partners, D-Marin is aiming to become the largest and most important chain of marinas in the Mediterranean.



NORWAY | Knut Heiberg-Andersen

Prior to the presentation of the government's state budget in October 2022, politicians warned voters ‘must save, tighten [their] belts and prepare for the worst!’ With higher inflation (6.9 per cent by September 2022), higher interest rates, energy prices and higher taxation on businesses and wealth, times are likely to be challenging.

From high demand in 2021 and 2022 and delivery problems for all segments of the industry, we now see the pipelines gradually being filled up with stock and even some stock left over from last season.

The lower boat segment up to 6.5 metres is expected to be the hardest hit. However, when talking to the dealerships of larger and more luxurious brands, there seems to be a calm and more relaxed approach to the changing times.

Domestic boatbuilders in Norway such as Goldfish, Ibiza, Hydrolift,



and Viknes are all in good health and although they are taking the necessary measures to meet a drop in the market, there is far from any panic in the market and buyers are still coming through the doors.

Stronger foreign currencies also make travelling outside Norway less appealing and domestic activities more attractive. Though Norwegians love to spend part of their holidays in warmer climates, it has been an interesting to see more Norwegians discovering their own country and boating at home.



SOUTH AFRICA | Veda Pretorius

South Africa continues to be one of the major international players in sailing and power catamarans. All the larger catamarans are for the export market with definite growth in the power catamaran sector, where the vessels are getting larger each year.

Although boat sales are booming – with most of the export boatbuilders sitting with a full order book for the next three years – the manufacturing sector has serious challenges. The near constant load shedding that South Africa has experienced in the last two months has necessitated factories to invest in solar power and purchase generators, the costs of which have grown significantly over the last year.

South Africa is also struggling to meet the skills demand in the sector. There is only one boatbuilding academy and it does not meet all the training requirements for the industry. Most of the training is still done in-house but proves challenging when the yards have such a busy manufacturing schedule.

Global supply chain issues also continue. Companies are struggling

to get the necessary parts and equipment from their European and US suppliers, which are not able to meet demand due to shortages of skills and assembly parts. The dysfunction in the SA ports also adds to the delays.

The local boating population continues to be small and focused on fishing and skiing boats although the domestic consumer is passionate about spending time on the water. The time is ripe for more targeted campaigns to grow the number of recreational boating enthusiasts.

High interest rates, high fuel costs and inflation right at the start of the summer boating season is, however, not a good omen. On a more positive note, Boatica, previously known as the Cape Town International Boat Show, is back after a two-year hiatus and there is real excitement to have the industry all together again.



TURKEY | Yavuz Sipahi

During the pandemic, consumers with sufficient economic means prioritised the purchase of medium and large sized boats and yachts in order to escape the crowds and protect themselves with some exclusivity.

Many potential buyers took advantage of the significant VAT and SCT reduction implemented on private boats over the past few years. However, since the conflict between our northern neighbours on the Black Sea, Russia and Ukraine, serious problems have arisen for Turkey. At the beginning of April, the VAT and SCT breaks were rescinded and taxes have been increased again.

As a result of the increasing inflation rate and serious

devaluations in foreign currencies over the last two years, consumer purchasing power has decreased significantly and around 80 per cent of the population has fallen into financial difficulties.

This raises concerns about the future in the country. Currently, a significant part of the population are waiting for the delayed general and local elections in 2023 in the hope of calmer times ahead.



SPAIN | Oscar Siches

Sales were strong in Spain during the summer 2022 season but fell 17 per cent in September. In the Balearics (the busiest nautical region of the country), usage was high and charter business very high, exceeding the last three years.

Unfortunately, the Balearic government launched a campaign blaming marine activities for killing the posidonia seagrass and polluting entire beaches in Ibiza and Formentera. The marine associations have rebuked this and have requested scientific evidence and hired a laboratory to take samples and provide official results as to the cause – whether it be boats or broken/overstretched sewage discharge pipes being overloaded during the busy summer months. We await these findings and hope to further protect recreational boating.

With central government elections next year, promises are being made to help small and medium sized companies but infrastructure is still lacking. Electric boats and refit of electric propulsion is gaining momentum but little infrastructure is being built to support the change. There are currently no fiscal advantages to owning an electric craft either. As elsewhere, Spain is waiting to see what happens this coming winter with fuel and gas prices.



NETHERLANDS | Albert Willemsen

After the pandemic the demands and sales in the Netherlands for new and secondhand boats increased. Not only for small boats, but also for luxury craft (15 to 24 metres) and superyachts. This year, we welcomed the return of the Dutch In Water Boat Show after a two-year hiatus with 330 boats on display by 167 exhibitors. There was a lot of interest in new

Companies in the market with new types of boats – be it hull shape, propulsion system or level of comfort – are enduring the challenging times much better

Dr. Jouko Huju, GMBA Finland

electric propulsion systems as well as different energy forms such as hydrogen and ammonia.

In addition to supply chain delays another cause for concern within the industry is the price of energy – particularly within the superyacht, repairs, maintenance and refit yards; where the use of gensets inside dry docks or shipyards is prohibited and dependent on shorepower. The price of which has risen by at least 300 per cent in the Netherlands and other parts of the EU.

This is also impacting material suppliers such as aluminium producers. One aluminium producer had to close its doors due to excess energy costs. If this continues it will impact the whole industry, not just in the Netherlands. In summary, we have strong sales particularly in the luxury 15m to 24m segment craft but this is tempered by the effects and threats caused by high energy prices and the geopolitical situation.



ITALY | Lorenzo Policardo

The last two years for Italian boating have been the best ever and offer solid prospects for the future by helping consolidate structural growth. Considering global critical scenarios with supply chain issues, prices and availability of raw materials, and a growing shortage of skilled labour, this is an exceptional result.

From a global sector turnover of €4.6 billion in 2020 to €6.1 billion in 2021, the predicted turnover for 2022 is €7 billion in 2022, according to Confindustria Nautica Statistics. Some factors to explain this include exports in March 2022 reaching an all-time high of €3.37 billion. Of the 1,024 yachts over 24 metres ordered in the world, the Italian industry has 523 under construction, equal to 51 per cent. Plus, the rebirth of the domestic market in the post-covid era has also led to the advent of young Italians purchasing boats, with the internal market exceeding €1 billion for the first time since the financial crisis of 2008.

Consolidation of domestic demand should fundamentally help insulate from what is transpiring

internationally; a possible global recession, the energy crisis and the geopolitical situation.

Today's technological challenge is that of sustainability and interpreting a market demand that is more attentive to the principles of environmental protection. R&D activity needs to address not just the objective of non-fossil fuels, but also of innovative materials and low-impact production techniques.



NEW ZEALAND | Maryanne Edwards

New Zealand's inflation currently sits at 7.3 per cent. Key drivers are the cost of utilities, petrol, international freight, and air travel.

Latest figures released by NZ Marine state that the annual growth rate in vessels is 44,810 per annum contributing to the current value of the New Zealand marine sector being \$2.9 billion.

New Zealand has seen strong growth of 28 per cent in the domestic market and 26 per cent growth in its export market. Sales are still healthy despite the expectations of higher interest rates. There is still strong consumer demand for both new and used boats and this has accelerated with the summer season arriving.

NZ companies involved in export have continued to see robust growth in their key markets, especially USA and Australia. NZ companies with staff based in Europe are also reporting strong growth. Anecdotal evidence suggests a direct collation between 'boots on the ground' and sales growth following. Relationships are still best developed face to face but as covid proved, once established, they can be maintained online.

The ability to attract and retain staff is a major issue for the New Zealand marine industry. The industry owned Marine and Specialised Technologies Training Academy (MAST) has mitigated the effects of this in part but more apprentices are needed.

As a significant superyacht destination and refit base, the superyacht sector continues to thrive. With the borders being closed so long during the pandemic it is taking a little longer than many hoped to see the expected influx of superyachts. Yet refit and maintenance yards are experiencing

higher than pre-covid levels with continued growth expected.

In terms of inflation, it is interesting how people appear to be accepting the price increases but this may change in the new year and will no doubt impact consumer spending. Many are watching the market over the European winter to see how the industry is affected globally.

When asked about the importance of attending boat shows, 'vital' is a word used by many. It is felt the need to reconnect, meet, and show off your business has never been more important. Businesses are looking to offset any future slow down so gains made in the next three months at shows are deemed very important.



USA | Dr Thom Dammrich

As we entered 2022, most of the recreational boating industry was still euphoric about the pandemic-related spike in new boat sales. The industry was focused on challenges related to boatbuilding capacity, supply chain issues, and skilled labour shortages. But in early 2022, there were already traditional, tell-tale signs that the market was turning.

NMMA reported that 50 per cent of new boat sales during the pandemic were being made by first-time boat buyers. While positioned as a cause for celebration it is more a cause for concern longer term. According to the association, nearly 50 per cent of first-time boat buyers leave boating within three years and the industry has done little to address the issues that cause first-time boat buyer attrition - unexpected costs and time commitment related to maintenance and storage, and unexpected hassles.

Today, and in the next couple of years, there is likely to be a glut of late-model pre-owned boats in the market that will weigh heavily on new boat sales.

As we approach the end of 2022 manufacturers remain busy building customer orders from 2021 and rebuilding dealer inventory. But, not unexpectedly, NMMA reports that new powerboat sales in the US fell 18 per cent in the first seven months of 2022 compared to 2021 and dropped 11 per cent below the same period in pre-pandemic 2019. It's not a disaster but it is hard to argue that the growth cycle has ended and we are in the challenging part of the business cycle now and for the next couple of years. Buckle your seatbelt - this is just the beginning of the current downturn.

The US reported the highest inflation in 40 years in September 2022 (8.6 per cent) and the US Federal Reserve, which has been aggressively raising interest rates, has signalled this inflation-fighting posture will not change soon and the likelihood of a full-fledged recession is now much more likely than not. And, worse, there are worries that the actions of the US Federal Reserve will lead to a global recession.

A strong dollar also makes imported boats from Europe less expensive to US consumers, adding competitive pressures to the US yacht segment.

It's not a disaster but it's hard to argue that the growth has ended and we are in the challenging part now. Buckle your seatbelt.

Dr Thom Dammrich, GMBA USA

A silver lining is that dealer inventories are historically low. which, as recession looms, is good for dealers and manufacturers. And, as business slows at manufacturers - as it inevitably will - there will be time to work on innovation. Significant innovation often

emerges from downturns and it is this innovation that usually helps to propel new boat sales out of the down portion of the business.



GERMANY | Goetz-Ulf Jungmichel

When the boat show season started in Cannes, in September, expectations were cautiously optimistic. This caution turned into absolute confidence and gave way to the over-fulfilment of expectations as the days of the boat shows progressed.

One worry, however, is the entry-level boating section. This has completely collapsed because after two years of the pandemic, consumers can again travel as usual to other destinations.

A further reason for the purchase restraint is the cost of living crisis, explains Karsten Stahlhut, managing director of the Bundesverband Wassersportwirtschaft (BVWW) - with consumers starting to save.

For boats upwards of €60,000 the market is still stable and growing - the higher the price, the more stable the market. While spending on equipment and accessories is also significantly down at the moment.

At the boat shows in Germany like Interboot Friedrichshafen, Inwater Boot & Fun Berlin as well as many other in-house dealer exhibitions, the mood was excellent, although the industry needs to deal with such problems as very long delivery times and the price increase clauses. In these inflationary times no project can be granted a sustainable price. Nevertheless, the German maritime industry is in a satisfied mood. ■

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Credit: Southampton International Boat Show



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Sharing economy



With boat shares experiencing strong growth, Freedom Boat Club sets out its franchise objectives

A surge of transition from boat ownership to boat usage is underway. It's being evidenced by Freedom Boat Club's growth. This boat share club, with 80,000 members, has seen its member numbers growing worldwide despite economic uncertainty. And the plan is continued expansion.

Jason Worthy, Brunswick Group's VP boating services (EMEA), says the entire time he's been heading up expansion on the European side of the world, there's been a "weird dynamic". He calls it the "one, two punch". Firstly, it's the wider economic challenges from covid and latterly the Ukraine situation.

Even so, Worthy and his team have gone from a standing start in 2021 to 34 locations spanning the UK (four), France (three) and Spain (27), with the 35th boat share club set to open in Denmark in 2023. These are a mix of what Worthy terms 'corporate' locations (with clubs run by teams that Freedom recruits) and franchisees - a mixed ownership model that will continue.

"Fundamentally," says Worthy, "Freedom Boat Club is a franchise business and that's where the majority of growth over time will come from. But in the near term we

will continue with corporate growth to get a strong platform as that's a great way to bring franchisees in."

The company's actively looking in its existing European locations and Portugal as well as - to a lesser extent - Asia Pacific, Australia and New Zealand. Other countries are not being specifically targeted for now although they're not ruled out either.

Lake and river locations - inland waterways - are firmly in sight, as evidenced by the UK's Lake Windermere franchise, which opened late summer 2022. Worthy says there are 3,000 miles of waterways in the UK and Europe, offering scope for aggressive growth, and mirroring the growth mindset of the US and Canada where there's "a tonne of blue space opportunity" with lake and inland state locations.

"Shared boat access is here and consumers like it," he says. "The challenge is finding entrepreneurs who want to invest. It's a legitimate business opportunity, the model is ripe and ready."

Even though the vessels are all new - as part of the value proposition - and each new location offers more flexibility for customers to travel,

some might posit that there is only a finite pool of those wishing to use, rather than own, boats. But Worthy says he's witnessed a correlation between each franchise opening and a spike in new members signing up.

"Sign up has kept at a steady trajectory," he says. "We haven't seen a drop off." This is despite the current economic climate which has consumers on the ropes.

"Even when the economy's pressing, everything is trending in the right direction," says Worthy. "Our attrition rate is really low, we're maintaining membership rates at a high level. Boating is being presented as a service, it's a safe way to get onto the water, with a lower financial commitment."

But he says that Freedom is really thoughtful about where it locates. "We're not going to use a scattergun approach and grow too fast. We'll demonstrate that the model works before hitting the scale button," he says. Plus he doesn't want to stretch Freedom too thinly as the support needs to be there for the franchisees.

And while he doesn't rule out repeating the hyper-growth, which

Lake and river locations are firmly in sight, as evidenced by the UK's Lake Windermere franchise



came with buying Fanatic's 27 locations (a process that he now says is "settling down and going steady" with all eight corporate locations Freedom branded), he says for the most part the company's mainly concentrating on organic growth in Europe. ■

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World Preview

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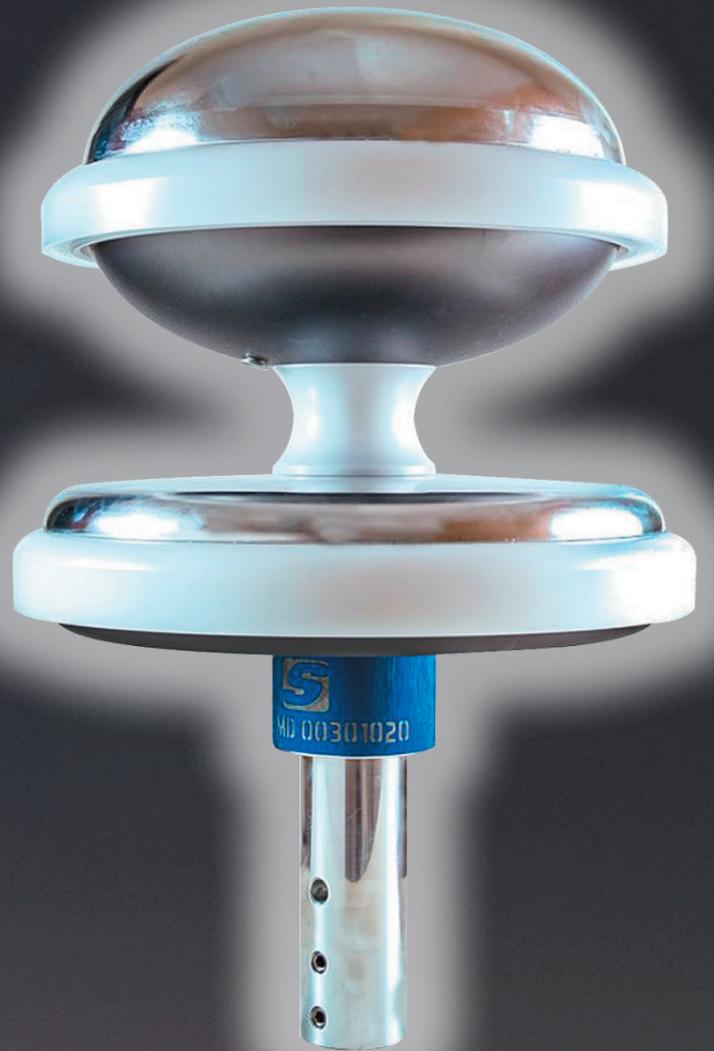
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Fresh look



Will upcycling and retrofitting change the face of the market?

'Retrofit', 'refurb' and 'recycle' are all parts of the circular economy's language and are key tenets of the environmental push, which is slowly changing the way consumers buy across all industries.

While buying 'second-third-fourth hand' has long been embraced by many boat owners (with well-made product lasting for decades), marine companies and owners are now looking to capitalise on upcycling – the art of taking an object that might be otherwise discarded and reusing it to create a product that is higher quality/value than the original. It's different from a singular refit of one aspect – it's about a holistic approach to making a product better, while making the customer journey as straightforward as possible.

This trend has started with motoryachts where Setag Yacht's CEO Chris Gates spotted a market with huge potential soon after taking retirement and couldn't resist returning to work.

Gates says his new business is "the biggest upcycler in the industry". The company, formed in 2021, employing 14, and based in Plymouth offers complete refurbishments for Princess, Fairline

and Sunseeker yachts (and more). He says the superyacht refit market has been important and profitable for many years, and Setag is realising the opportunity for refits in the £100,000 to £10 million market, filling what he terms as "a huge gap in a traditionally fragmented repair market, to provide the one-stop-shop for owners to have all the work done."

"It's so simple in concept," Gates adds. "That service level doesn't exist elsewhere, the one-stop element. There are a lot of people out there servicing parts of the industry, but we offer a collection of very experienced people in one place. We're offering a complete design-led service to the pre-owned market."

Setag is making the most of a combination of economic drivers. Demand is at an all-time high across the world, international builders are out of entrepreneurial ownership and into corporate ownership and prices are going up dramatically. But these all sit on top of the fact that while cost is at the greatest it's been, as Gates continually stresses, so is demand. And, further to this, powerhouse builders have considerably increased the average model

size. "There's a gap in under 60ft models being made," says Gates, "but a fantastic stock of pre-owned boats ripe for refit."

That's where the upcycle comes into its own. "The boating industry is like high-end fashion – you have to excite the same customer continually," says Gates. "By default, anything that is pre-owned dates quickly. They have classic lines – but the interior might not be to taste."

Gates adds: "£200k will get you a decent pre-owned but the inside may be very disappointing. Anybody spending that money should be very proud of what they get. They don't want to spend time maintaining or making excuses for it." After a refurbishment customers can have a practically new boat at a fraction of the cost.

Gates says that 80 per cent of his business so far has come from long-term owners. The remainder are people who've bought yachts and immediately want them refreshed. There are lots of 'feeder products' to keep Setag busy, meaning as people buy new, more second-hand products become available. "There is plenty of room in the market for our services. New

There's a gap in under 60ft models being made, but a fantastic stock of pre-owned boats ripe for refit."

Chris Gates, Setag Yachts

boat buyers feed the pool of pre-owned products."

Chris Fowey, sales and marketing director for Fischer Panda UK, is also experiencing a surge in long-term owners looking to up-spec. The company is taking advantage of this growth opportunity, which he believes has arisen as the marine trade is still struggling with supply chain backlog. This has pushed new build slots off into the distant future meaning owners are spending their money on upgrading instead of buying new.

Fischer Panda has been active in refits since its inception but Fowey reports he's seeing far more package deals, around generators and system solutions "to enhance and develop what owners have onboard" including air-conditioning and water makers.

"The backlog of build slots is creating opportunities in the retrofit market," says Fowey.



Tomahawk 37 after refit. Credit: Setag Yachts



Before: Princess V52



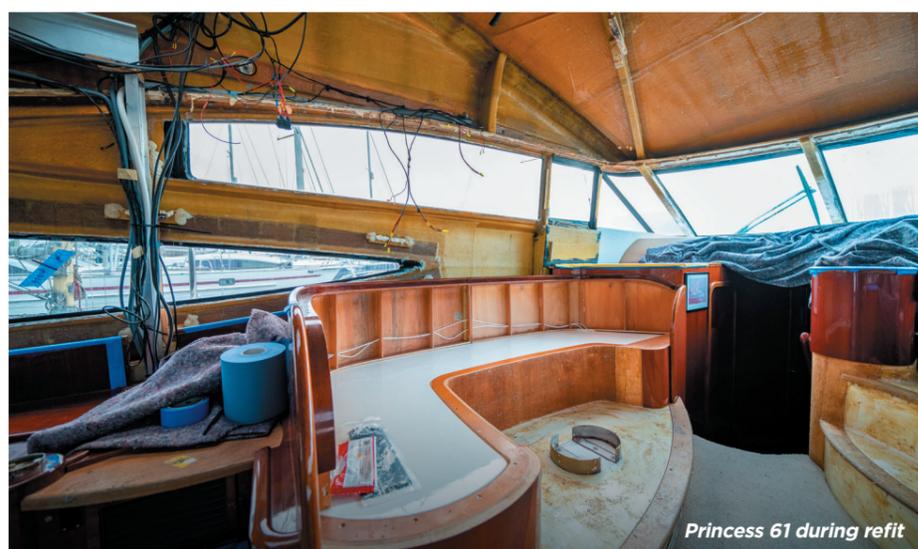
After: Princess V52



Before: Sunseeker 75



After: Sunseeker 75



Princess 61 during refit



Tomahawk 37 before refit. Credit: Setag Yachts

“A boat owner has a perfectly good boat, but can add more luxury items and enhance specifications, ticking medium- and long-term boxes. The traditional boat owners, living a bit of a ‘rough’ lifestyle [without various home comforts onboard] are dwindling out of interactions I’m having with customers. Modern day boaters expect luxury onboard and all those items need powering. So their systems need to scale up as demand increases.”

Fowey is keen to actively support the promotion of retrofitting as a viable option for owners. “It isn’t complicated,” he says, “if

owners partner with the right yard, one that understands their boat systems, it takes away a lot of concerns and red tape about retrofit projects.

“We can enhance and improve, and bring new boat standards to an existing boat. We need more companies coming onto the field and seizing these opportunities. There is no needless waste, it’s recycling.”

Currently Fowey’s focus is in bringing in hybrid systems, although that’s where costs can jump considerably. Packages typically start around £10,000

“We can enhance and improve, and bring new boat standards to an existing boat. We need more companies coming onto the field and seizing these opportunities.”

Chris Fowey, Fischer Panda UK

and rise to £100,000 in project value. Both companies agree that the majority of projects they’re working on are owner-driven upcycles.

“The refurb is owner-led but there is opportunity for companies to specialise in retrofit and sale,” says Fowey.

While the system specification Fischer Panda is offering doesn’t yet offer a direct return on investment he says “it does help enhance the value of the boat from a resale perspective. If new owners are coming with families and partners, they will want to make them comfortable.”

According to Gates: “Most boats are fetching what they are asking for. The few owners who have sold are making more margin on top of the refit costs (which are included).”



Chris Gates



Chris Fowey

But whether that will transition into a ‘fix and flip’ market model, with entrepreneurs buying, renovating and then selling boats for profit, or the market will stay owner-driven, remains to be seen. ■

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Generation Game



Credit: Discover Boating/Will Saunders

NMMA's VP of marketing, Kevin Williams, discusses how strategic partnerships with Vice TV, TikTok and other media platforms are helping to engage the next generation of boaters

To be successful in today's competitive marketplace, businesses must understand how to market to each generation and what motivates them. For recreational boating, demographic trends show that the next generation of boating prospects will most likely be more diverse and less likely to come from boat-owning families than previous generations.

Reaching the next generation of leisure boaters where they live, work and play digitally and experientially, is fundamental to growing the boating market. That is why Discover Boating [owned by USA organisation the National Marine Manufacturers Association] embarked on a 2022 marketing strategy that includes strategic media partnerships, as they help further amplify the joys of boating among our target audiences.

Discover Boating commissioned a research study to find groups to target that would be open to boating. The segmentation study defined potential target groups using two main factors: participation in sports and outdoor activities, and income. Three key groups emerged: traditional boaters, growth segment and emerging segment.

Traditional boaters most closely resemble the current boat owner, while the growth and emerging

segments provide opportunities to expand the market for recreational boating – representing 91 million people and more than 1.5x the traditional boater segment size.

What is clear is that the future of boating will not look like the past. It is thus imperative for the boating industry to appeal to a younger, more diverse demographic and demonstrate how boating can include them.

ESPN

With a strong interest in sports being a common thread across our target audiences, one of our media partners was top sports network, ESPN. ESPN featured Discover Boating across its digital platform throughout the summer and showcased recreational boating on its popular weekly television morning show, *First Take*, which averages 445,000 viewers daily, with 40 per cent in the 18-24 age group. The episode was filmed live with Discover Boating from a boat and Discover Boating's *Anthem* video also ran during the episode making the exposure even more impactful.

Discover Boating's *Hooked* video – celebrating the joy and family traditions of fishing – also ran on ESPN streaming services, and Discover Boating digital ads were placed on ESPN.com, which

boasts nearly 11 million unique visitors per month.

Vice TV

Another strategic partnership is with Vice TV, which aims to showcase the benefits of boating among the industry's growth and emerging target audiences. As a leading network among 18-34-year-olds, Vice TV reaches 65 million homes, helping Discover Boating invite the next generation to experience life on the water.

Two of Discover Boating's videos – *Anthem* and *Hooked* – ran on Vice as well as a custom short documentary, which centered around fishing aboard a personal watercraft.

Partnering with Vice helps build a connection between Discover Boating and what 'see you out here' (our campaign tagline) can mean to the next generation of boaters through a familiar, authentic and human-centric voice across platforms and formats.

Ebony Media

Ebony Media is one of the most highly trafficked platforms and respected media within the African American community.

Discover Boating's partnership with Ebony came to fruition through two key activations

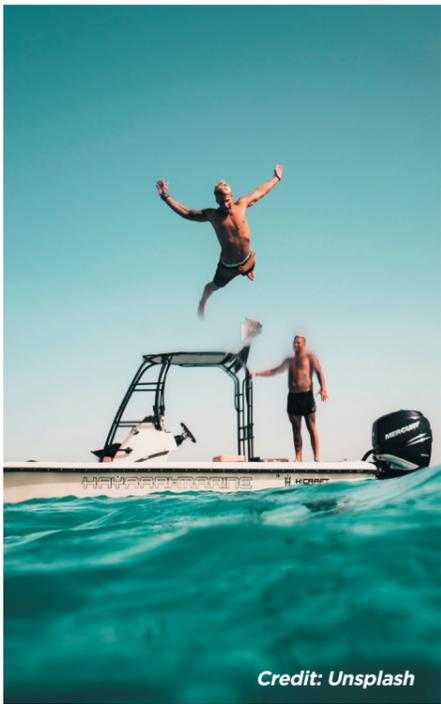
It is imperative for the boating industry to appeal to a younger, more diverse demographic and demonstrate how boating can include them

over the summer. Ebony invited Discover Boating to be part of its well-known *Cooldest Black Family* video and content series, which covers African American families participating in different activities from travel to sports to technology and more. As one of platform's most popular series, the Discover Boating videos have garnered millions of views and can be viewed on ebony.com.

Discover Boating also joined Ebony Media as a co-host for a waterside event, where influential and affluent guests from across the community experienced the fun of life on the water. From cruising to networking and book signing events, guests spent quality time onboard boats enjoying the lifestyle and learning about Discover Boating.

TikTok

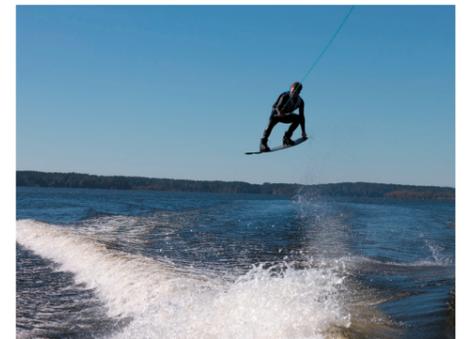
Discover Boating launched two pilot TikTok campaigns – #BoatAppetit and #WaterWear – over the summer of 2022 to



Credit: Unsplash



This image and right: Stills from the Discover Boating media partnerships



The TikTok campaign earned 30 million video views and the average engagement rate was 13 per cent.

further engage the next generation of boaters and connect with the brand's target audience on a platform where they are already consuming video content.

Leveraging two of TikTok's most popular categories (food and fashion) Discover Boating selected content creators to share

their favourite recipes to bring onboard and showcase their best boating attire. Rather than a 'traditional' media buy, this strategic effort allowed Discover Boating to break through to consumers across a variety of demographics and interests and helped tell the industry's story through relevant influencers.

The influencers encouraged their engaged followers to experience life on the water and learn how to get started at DiscoverBoating.com. In less than one week of the launch, the campaign generated

more than 3.5 million video views. Within two months, the campaign earned 30 million video views. The average engagement rate was 13 per cent and the highest was 24 per cent.

Discover Boating established these and other strategic media

Vice TV reaches 65 million homes, helping Discover Boating invite the next generation to experience life on the water

partnerships in order to amplify the industry's voice and maintain momentum and participation coming out of the pandemic. Building engagement with new markets will provide important growth for the future. These media partnerships are helping Discover Boating connect with the key growth and emerging target segments and provided an opportunity to elevate and extend our reach and connect with more potential boat buyers. ■

Kevin Williams is vice president of marketing for NMMA.

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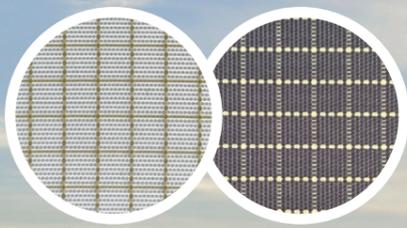
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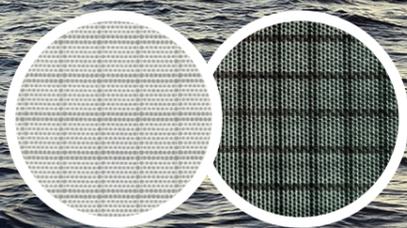
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Princess Yacht's Newport Street site in Plymouth, UK

Changing times

Princess Yachts' executive director sales & marketing, Will Green, reflects on seismic shifts impacting the market

No one could have planned for the challenges the pandemic would present to the industry and beyond, and while demand for boats rocketed in the latter part of 2020 in the UK, there is no doubt manufacturers are still dealing with unprecedented market shifts.

"Our biggest issue is availability," says Will Green, executive director sales and marketing for UK luxury boatbuilder Princess Yachts. "It's slowing us down because we're so far forward sold. By the end of September 2022, our global stock was only two boats - I think that's a record since 1965 when Princess started.

"If there is a bit of a correction in the markets that will almost be helpful, because it's so painful when you've worked so hard to build a range, build a brand and a dealer network to then have customers that you can't satisfy."

Limited availability of parts has caused delays and backlogs

across the industry. "Undoubtedly, we've lost customers where other yards have got availability, and we haven't, which is a frustration. But there's not a lot we can do about it.

"We got to the point last year where we're building at a rate of 200 boats a year and selling at a rate of 300 boats a year and you just can't sustain that."

As people have returned to more usual patterns of travel, Green says he is starting to see that the covid 'rush' has passed. "I think the 'let's just get on with it' mindset remains though. We're still seeing people making decisions, possibly quicker than they once did."

Despite the delays and long lead times, customers also currently seem happy enough to wait. "I've never known customers to be so understanding - possibly because they're seeing this same effect in so many other areas of their lives. And perhaps they would rather wait for the boat they really want

to own rather than get one quicker that's not quite right."

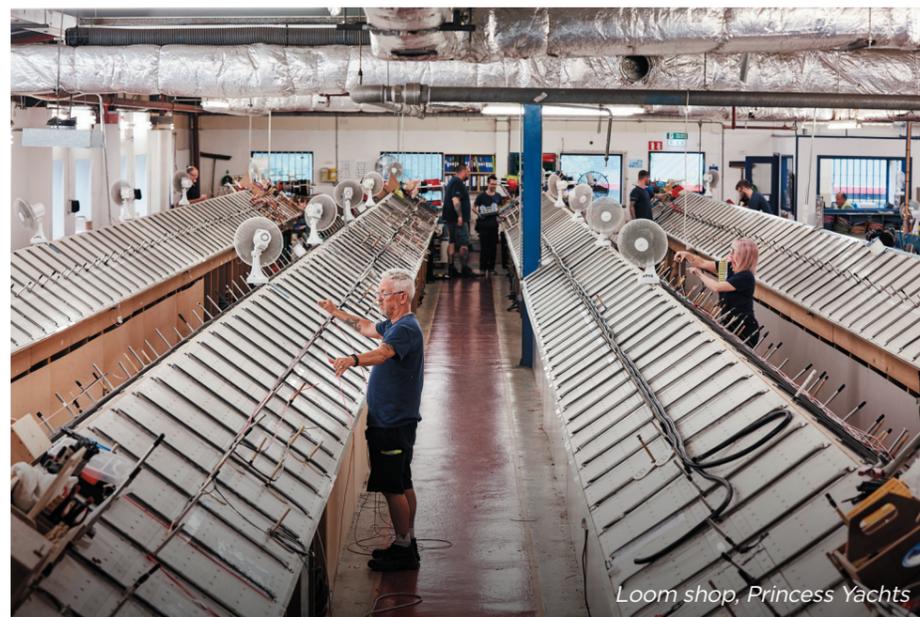
Pricing conundrums

In today's market, where raw material price fluctuations can prove a constant headache, pricing strategies have had to change.

"In 2020 [when covid hit] demand

We got to the point last year where we're building at a rate of 200 boats a year and selling at a rate of 300 boats a year and you just can't sustain that.

Will Green, Princess Yachts



Loom shop, Princess Yachts



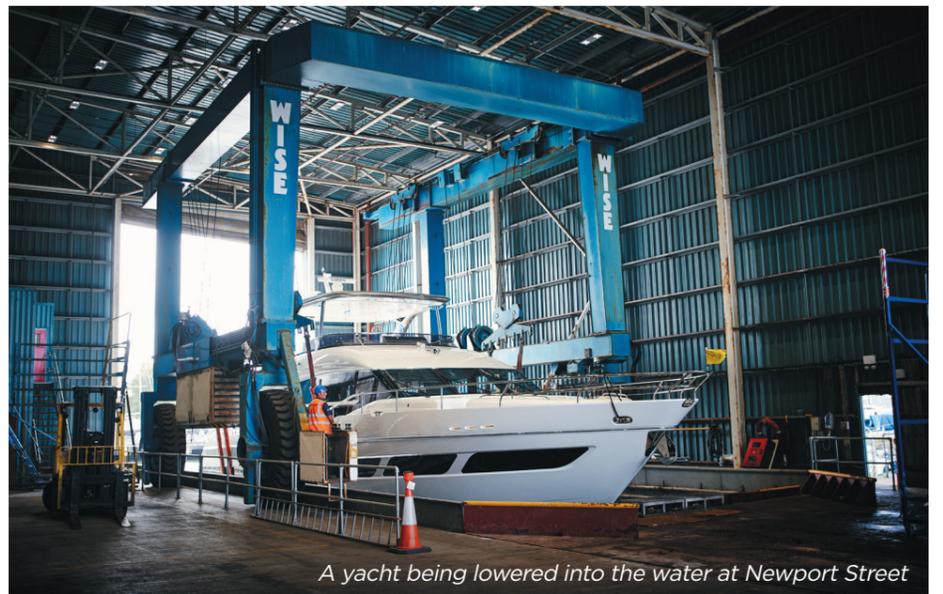
Princess' kit parts machine shop



Boat crew fitting the stairs onboard



Louis Hunter, lead concept designer sketching initial designs



A yacht being lowered into the water at Newport Street

halved pretty much overnight and I was fearful of how we would keep our 3,200 staff busy for April or May – so putting the prices up was the last thing we were thinking about,” says Green. “On reflection, we probably got caught out a bit where we didn’t put the prices up as much as we should have.

“Six to 12 months ago I was a bit concerned that we were perhaps overcooking our pricing. We were being very aggressive and putting the prices up quite dramatically. In hindsight, thank goodness we did because the cost of raw materials alone has gone through the roof.”

“But it is difficult. Customers want you to commit to a price beyond a period where you can commit to the cost of the materials that are going to build that boat.”

In terms of supply chain and parts, factory lines producing large yachts can absorb delays more easily, as evidenced by superyacht builders being more insulated from supply chain woes. High volume, high quality builders can be more heavily impacted.

“We see this in our own range. If you take our biggest boat – the 95 – the takt time is much longer than it is on our smallest boat. And the slower the takt, the more time you have to react to shortages. You’ve got a lot more work content in a

longer takt so you can keep people busy by giving them different tasks to do.

“If we don’t have an engine for two or three weeks on a 95 we can cope with that. Whereas on a V40 it would stop our line. Or, as we did for a lot of last year, we’d have to put the engines in at the end, which is much more complicated and then requires a certain amount of disassembly to put the engines in so you end up doing the same job twice. We have become expert troubleshooters but it doesn’t do much for efficiency. It’s inevitably affected our volumes.”

Expansion plans

With a large order bank on the books, halting investment in new models could have been tempting but Princess has continued to develop and launch new products. “I think we’re benefiting from the fact that the product range is so good. We have put a huge amount of investment into making sure that Princess range is highly competitive.”

Green says that although his factory teams are having to work inefficiently at times, they are the company’s most valuable asset.

Princess has revealed expansion plans for its sites in Plymouth, UK, which Green says will “futureproof” the business.

Six to 12 months ago... we were being aggressive and putting the prices up quite dramatically. In hindsight, thank goodness we did

Will Green, Princess Yachts

“We’ve got seven factories in five locations in Plymouth. By carrying out this investment, it just frees up the options for us. We’ve got more facilities and can move things around to be more efficient. And potentially we will have the space to build bigger boats again as we once did with the M Class.”

Princess has stopped producing its M Class range, which included the Princess 30M (launched 2016), 35M (launched 2014) and 40M (launched 2012), but big boats are not being ruled out for the future.

“We when we stopped building the M Class boats, it was down to the maths – with the same people, in the same factory we could generate a higher level of turnover and gross margin with a smaller boat than we could with the M Class. And potentially who knows one day we might be able to do both.”

Sustainability

As the industry pivots to embrace a more sustainable future, Green

is clear on where he views the current potential to be for his sector of the market. “I think we have satisfied ourselves that a purely-electrically powered planing GRP cruising boat in our size range is not viable. The technology just doesn’t exist today to do that electrically over any sensible distance.

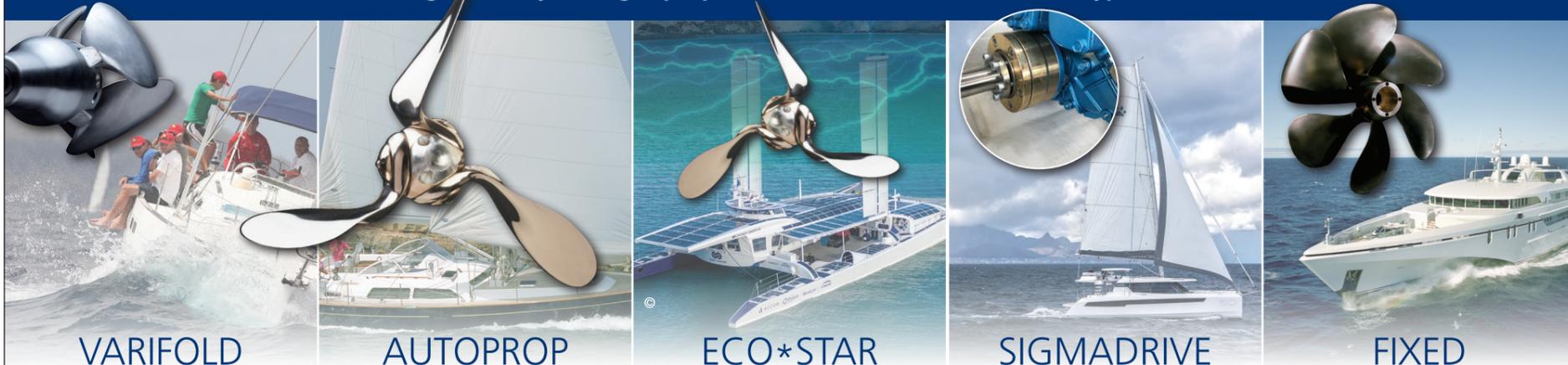
“Our efforts in sustainability are more structural. For example, we’ve just commissioned a very large biomass boiler at South Yard. We like to joke we are the biggest furniture maker in the UK, and we create a lot of scrap wood so we’re recycling that and turning it into fuel. Similarly, we’re just about to embark on a large solar programme, installing solar panels across the business.

“In terms of the product, while the method of propulsion is fixed, at least for now, our hulls are so much more efficient now than in the past. We have also begun offering the option to run the hotel services on lithium batteries, which is quite appealing to customers for reasons of both environment and comfort. This means once you get to your destination, for example, instead of turning on a diesel burning generator, you can run silently on electric power.” ■

Images courtesy of Princess Yachts Ltd.

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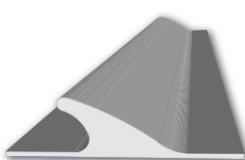
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Top Gear



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GlobalFix V5 AIS EPIRB

The DAME Award nominated GlobalFix V5 AIS emergency position indicating radio beacon (EPIRB) is the world's first mobile connected automatic identification system (AIS) EPIRB with return link service (RLS). Developed by marine safety and rescue technology developer ACR Electronics, the compact and waterproof device features integrated AIS and near field communication (NFC) technology for use with the free ACR mobile app, and compatibility with RLS alerting. The rugged, robust device has a ten-year battery life and includes global navigation satellite system (GNSS) positioning, 406MHz Cospas-Sarsat distress signals with MEOSAR compatibility and 121.5MHz local homing signal.

Combining multiple technologies means that upon activation, the beacon not only transmits the survivor's emergency signal to the global Cospas-Sarsat satellite rescue system, but it also immediately broadcasts an AIS safety message that can be seen by any AIS-equipped vessel nearby.

www.acrartex.com



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Makefast Louvred Roof

The Makefast Louvred Roof system features blades that can be both opened and fully retracted, creating a choice of shade and ventilation styles. Users can open the blades to allow air and daylight in and retract the roof to let sunshine flood in, or to view the stars on a clear night. The versatile design aims to give yacht owners more choice in how they use their deck space.

www.makefast.com

Simrad NSX

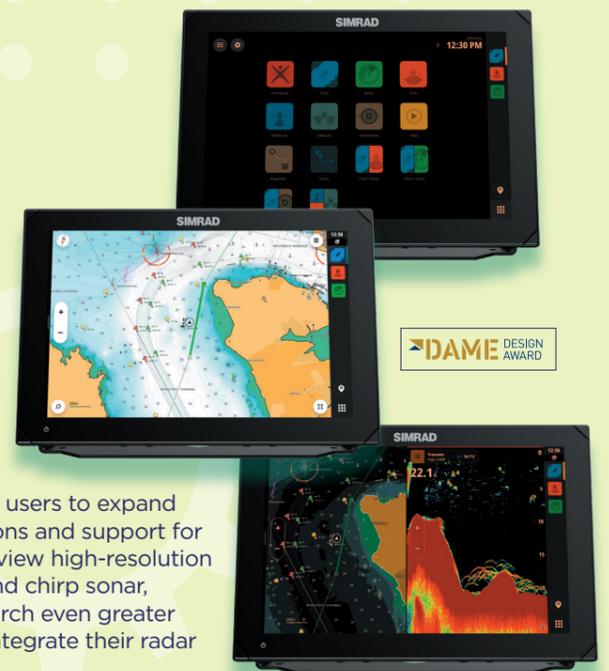
The DAME Award nominated Simrad NSX is available in 7in, 9in and 12in display sizes and features a modern interface with a new, intuitive touchscreen experience. Designed to provide clear views of chart detail, it has C-MAP navigation capabilities and is compatible with sonar, radar and autopilot systems. Simrad app integration also enables users to connect to their smartphone.

NSX is designed to deliver a wide ecosystem allowing users to expand the MFD with additional functionality, easier integrations and support for a wide range of third-party applications. Boaters can view high-resolution images below and to the sides with Active Imaging and chirp sonar, SideScan/DownScan imaging and FishReveal - or search even greater depths with compatible transducers. Users can also integrate their radar and autopilot systems by connecting to auto-routing.

NSX is compatible with the new C-MAP Discover X and Reveal X marine-optimised charts, which claim to offer the fastest ever auto-routing. The charts are unique to NSX and feature full-featured vector charts with custom depth shading and high-resolution bathymetry showing contour lines down to a 1ft level of detail. A new map inspection feature also enables one-touch access to information on locations, POIs, tides, channels and more.

www.navico.com

METSTRADE | stands 02.229 & 02.323



Revolve Rollable Boat Hook

DAME Award nominated Revolve has designed and developed a full-size rollable boat hook that stows into a space not much bigger than a coffee cup. It uses rollable composite technology, from Rolatube. Unrolled in seconds, it is a light and strong 1.9m/6ft boat hook and weighs less than 450g (1lb). When stored, it rolls up to fit into a space 11x12cm (4.3 x 4.7in). Deck clutter is reduced, and minimal on-board storage space is taken up. The Revolve boat hook will float and has a high visibility design.

www.seaviewprogress.com



METSTRADE | stand 05.320



METSTRADE | stand 05.261

Timeless Tube

Timeless Tube has launched a new system of custom-made mechanical joiners for marine railings of any shape or size. The 'dry-joining' system has been developed for use where on-site welding is not an option. For use for both straight and curved rails, Timeless Tube MD Tom McMillan says the joiners offer a discreet, neat fit that also prevents water ingress. The joiners also allow for any small gaps that can occur at the time of fitting.

"Timeless Tube is renowned for our bespoke marine railings. Our oval, flat-sided oval and radiused square designs are chosen for their superior aesthetics and ergonomics. It is important that these railings also look and perform their best once they are installed, which is why we designed the joiners" says McMillan.

www.timelesstube.com



METSTRADE | stand 05.406

Marine Magic Non Skid Deck Cleaner

Following the success of its first product - the Marine Magic All Purpose Boat Cleaner - the company has developed a cleaner specifically for use on EVA foam decking.

The Non Skid Deck Cleaner is designed to keep owner's SeaDek, and other EVA foam decking, looking like new. According to Marine Magic it is environmentally safe, formulated specifically for SeaDek and EVA foam decking, 100 per cent Biodegradable, and produced in the UK.

www.seadekpro.uk

Top Gear



Raymarine YachtSense Link

The DAME Award nominated YachtSense Link is a multipurpose marine mobile router equipped with Raynet ethernet ports, mobile broadband connectivity, and onboard Wi-Fi.

Designed to keep boaters connected through 4G/LTE broadband and local Wi-Fi networks with seamless integration to Raymarine devices, YachtSense Link allows boaters to connect Raymarine Axiom displays, phone, tablets and PCs to a unified onboard network.

The device automatically switches between marina Wi-Fi and mobile networks to ensure customers are always connected. When used with the Raymarine mobile app, boaters can monitor and control onboard systems virtually. Support of dual SIM cards offers connectivity to international mobile networks and an integrated GPS allows boaters to stay connected from port to port.

METSTRADE | stand 03.438

www.raymarine.com



Integrel... The Next Generation

The Next Generation of the successful 2018 DAME winner sees the introduction of inline generation, e-drive plus generation and e-drive, generation plus torque boost.

The DAME Award nominated Integrel...The Next Generation product range consists of Integrel Inline, Integrel Plus and Integrel Ultra - innovative sustainable power solutions for the sailboat and powerboat markets.

METSTRADE | stand 01.580

www.integrelsolutions.com



Ocean Signal rescueME AIS PLB3

The DAME Award nominated rescueME AIS PLB3 combines multiple levels of integrated signal technology within a single personal locator beacon (PLB), offering boaters a powerful safety solution for rapid rescue in a man overboard (MOB) emergency, even if the survivor is incapacitated.

Designed for installation within a lifejacket for semi-automatic activation upon inflation, this mobile connected device unites GNSS (global navigation satellite system) positioning, 406 MHz, 121.5 MHz signals and AIS transmissions, as well as the new Galileo return link service (RLS) technology.

The device benefits from the global response capabilities of the Cospas-Sarsat rescue services, while also using AIS technology to indicate a MOB position to any nearby vessels or aircraft for immediate aid.

It features integrated near field communications (NFC), meaning owners can monitor their beacons, review self-test results, view GNSS test locations, and monitor beacon performance and maintenance.

The Ocean Signal AIS PLB3 also features more built-in local aids to location in the form of the 121 MHz homing signal, plus visible and infrared strobe lights for final pinpointing in low visibility rescues.

METSTRADE | stand 03.438

www.oceansignal.com

Sertec Marine lightning protection

The Sertec Marine CMCE is designed to protect boaters using countermeasures that control and compensate the electro atmospheric effects produced by climate change, industrial, meteorological or solar electromagnetic pollution, manifested in the form of electrical storms, electromagnetic pulses, etc. Sertec says the technology creates a 'shield' that essentially drains the electric charges to the earth or surrounding water. This aims to eliminate the formation of lightning within the protected area.

METSTRADE | stand 05.261

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