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INTERNATIONAL BOAT INDUSTRY

ISSUE 422 | OCTOBER-NOVEMBER 2017

The business of boating

US

Industry eyes two more years of growth

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Punching well above its weight, Estonia has a surprising amount to offer marine OEMs

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Demand and supply: Comfort and innovation driving growth

INCREASED GLOBAL BOAT SALES AND THE DESIRE FOR GREATER LEVELS OF COMFORT ONBOARD ARE FUELLING THE DUTCH EQUIPMENT MARKET

WORDS: BELINDA SNELL



▲ Noise and vibration requirements are becoming stricter than ever

Dutch suppliers of marine equipment and accessories are reporting healthy sales in 2017, with demand for products that improve onboard comfort levels or lower the cost of boating coming from both the aftermarket and boatbuilders alike. According to national watersports association HISWA, equipment firms in the Netherlands grew sales by 5.6% last year and 2017 is on course to potentially beat that figure.

"Our sales to the recreational marine market are already up by over 30% this year," says Roel ter Heide, owner and director of electrical power systems specialist WhisperPower. "In 2017 we've seen a greater uptake of our hybrid low emission power systems for onboard comfort provision," he says. "Most Dutch boatbuilders are changing their traditional systems of large generators and small inverters to a system with a high-power inverter (7kVA-14kVA) and a small, compact 1, 2 or 3-cylinder variable speed generator."

▶ WhisperPower's New School touchscreen display

At the recent HISWA In-Water Boat Show, as many as 70% of the approximate 200 boats on display had a WhisperPower system or product on board. These ranged from a touch-screen panel, a 48V/525 Ah 2 V maintenance-free battery set, a high-output alternator installed on a Volvo engine, and loose chargers and converters to complete systems. The company's New School concept – energy systems that are quieter, more compact, and safer – are now found on an increasing number of yachts.

"Most of our business is going to OEM customers in Europe," says ter Heide, who cites builders like Steeler, Boarnstream, North-Line and Super Lauwersmeer amongst its Dutch clients. "We're still doing a fair bit in the aftermarket but our

OEM business is growing fast.

"After the Benelux one of our main markets is in Poland where we fit over 500 boats with small power systems, which includes customers like Delphia and XO."

Re-power is another market which is growing, he says. "Boaters are forced to exchange power systems and diesel generators of 'old' brands which are not serviceable any longer by new products."

One of WhisperPower's latest inventions, the Piccolo 4.4 kVA marine diesel generator, is suitable for boats from 30ft-40ft and can be fitted in any location.



POWER PLAY

At marine air-conditioning specialist Clion Marine, CEO Robert Andeweg told IBI that reducing power

loads on yachts and superyachts is one of the company's prime focuses. Clion makes reverse cycle inverter-driven chillers that produce both cooling and heating from one machine. Having no peak load during start-up, the chillers have very low power consumption levels and automatic capacity modulation minimises the amount of energy used without compromise.

"Reducing power consumption is a big issue in this market," says Andeweg. "Air-conditioning is the biggest spender of power on board, which is why we only supply inverter chillers so that there is no power peak anymore and the energy balance on board can go down."

Clion plans to launch its biggest inverter chiller – a 270,000 BTU unit – along with a new fresh air make-up

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unit at METSTRADE 2018. Clion's fresh air systems are designed to continuously renew air onboard a yacht to create a comfortable and healthy environment. "Our systems condition the extracted outside air not only by temperature, but also on relative humidity, which makes this system unique," Andeweg explains. "People want more luxury. Even if they sail in Northern Europe, they want their yacht to be prepared for Mediterranean conditions – either for themselves or for other reasons such as the future sale of the yacht."

Andeweg is forecasting slight growth in 2017, with an increase in sales of medium-sized yachts driving demand for associated equipment.

"Our domestic sales are performing well," says Treeske van Cappellen at noise and vibration control specialist Van Cappellen Consultancy. The company, which provides specialist services for yachts and merchant vessels from 20m-140m in length, is expecting a 5% rise in turnover this year after taking on new projects in the Netherlands.

"Noise and vibration requirements are becoming stricter ever so slightly," says van Cappellen. "We've noticed that builders and owners are starting to hire their own acoustic consultants and the use of noise and vibration prediction software is becoming increasingly more common."

SKILLED WORKERS

In 2017, Van Cappellen provided consultancy services to some of the country's biggest yards – among them, Contest Yachts, Heesen, Jongert, Oceanco, Royal Huisman and Vitters. "We're working on some challenging projects right now which we can't reveal," she says.

Finding skilled workers in traditional segments such as woodworking is perhaps the biggest challenge facing the Dutch industry in 2018, says van Cappellen, with yards building increasingly large vessels.

"Through in-house and external training, we're able to strengthen our knowledge and keep our services at a high level," she adds.

Quality products, quick delivery and personal attention are key to success at Allpa Marine Equipment, an independent



▲ Allpa MD Mark Rutgers says sales are up 10%

wholesaler and distributor of technical marine products whose sales are currently up by 10% compared to last year. According to managing director Mark Rutgers, growth is attributed to the company's well-balanced range of stock, as shops – and OEMs in particular – require just-in-time delivery. Allpa has around 10,000 items in its catalogue and stocks more than

25,000 individual items at a warehouse in Nijmegen near the German border.

Rutgers told IBI that the aftermarket, which accounts for around 65% of the business, is benefitting from large numbers of second-hand boat owners who continue to refit and maintain their vessels.

"The Dutch market is slowly starting to stabilise," he says, adding that domestic sales account for 45% of the business. Germany is Allpa's second-largest market at 40%, with other European countries accounting for the remainder. ➔

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▲ Domestic sales are on the rise for Seajet

In Germany, Allpa has strengthened its relationship with OEM builders such as Bavaria and Hanse. "We're now supplying all new Bavaria motorboat models with shaft propulsion and hydraulic steering systems, as well as kitchen appliances, and we're also selling propellers, trim tabs and pumps to Hanse," says Rutgers, adding that demand for Allpa's products in the Netherlands is mostly on the aftermarket, where its positioning is concrete.

INCREASING SALES

"We're doing more and more business with the sloops, day sailers and day cruisers in the Netherlands," he says. "Despite bad weather in August and September, our domestic sales are up by 7-8% and I already have some orders and commitments for 2018 - from boatyards, chandleries and shops." Rutgers would not rule out further growth through acquisition, having already acquired Marine Store and Optinaut in the Benelux and Germany.

Seajet, whose factory in Heijningen

produces antifoul coatings and yacht paint for over 40 official importers and distributors worldwide, is a division of Chugoku Marine Paints in Japan. "Up until recently sales in our own domestic market in the Netherlands have been traditionally very small. The main reason for this was because we simply didn't have an approved copper-based antifoul that we could sell in the Netherlands," says Michael Berkers, a local Seajet sales rep. "That has all changed with the development of Seajet 038 Teichi, which is fully approved for the Dutch home market until 2021. Our distributor, PS Marine Coatings, have done a good job so far in getting awareness of the Teichi product and generating sales within marine stores and boatyards."

According to Berkers, volume sales per litre of Seajet paint and antifoul in 2016 was very good and gross turnover was up 26% year-on-year. "Our distributors have told us their customers have healthy order books once again and we can more confidently look towards the future with the belief the crisis is pretty much all behind us now," he says, adding that the growth trend has continued into 2017.

Seajet's most recent product (Seajet 038 Taisho) is a self-polishing, copper-free formulation that uses E-cone as the active ingredient of choice, with low water solubility and a low leaching rate.

"We are pleased to say that Seajet is in an even better situation now than last year, not least due to the opening by our parent company, Chugoku Paints BV, of our brand new 'high-tech' factory and office facility, which opened in March this year."

Located next to the old building in Heijningen in the south of Holland, the new factory has a fully automated, 'closed' production process that has led to a 95% reduction in emissions. The building itself has 1,190 solar roof panels to power the internal heating system. "We have the capability to double output from a factory that is not only 'worker friendly' but almost entirely self-sustainable," says Berkers.

AFTERMARKET SALES

"The Dutch market is picking up," says Gianluca Silvestri, business unit manager at Thetford Marine, which supplies cooking, cooling and sanitation products under the Thetford, Norcold and Tecma brands. "We've noticed growth in the entire market, both high-end and low, including new and used yachts. This is stimulating aftermarket sales as well," he says.

Thetford, whose European headquarters are based in Etten-Leur in the south of the country, is a global business with production plants in each continent. While the Netherlands represents a very small percentage of turnover, sales are nevertheless positive due to strong cooperation with a local distributor.

Growth is being driven by its Tecma toilet range, including the next generation

Flexi 2G line of toilets and matching bidets. The Silence Plus 2G is the foundation for the Flexi line.

Silvestri told *IBI* that market signals for 2018 are very encouraging, both at OEM and aftermarket level.

"Consumer confidence

is high and this is stimulating new-builds across the globe. The repair and refit market is also very active, reducing the seasonality of the aftermarket. As a result, our sales through distribution are spread across the year, not just in peak season."

Apart from a continuous request for innovative products and new design, Silvestri told *IBI* that customers are looking to reduce their stock levels whilst demanding on-time delivery. "This is a challenge because our company is also working on reducing inventory," he says. "The OEM market of medium to big shipyards have increased their ability to plan and forecast their orders. This is a great help for us and contributes to our successful management of stock and delivery within the schedule. This is a different story for the retail market, where the growing driver is on-time delivery, without forecast. This is a big challenge for the global market, not only for marine." **IBI**

"We've noticed growth in the entire market, both high-end and low, including new and used yachts. This is stimulating the aftermarket"



▲ The Silence Plus 2G range by Tecma

