

SAMPLE PAGES

Recreational Boating Industry Statistics 2017



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WELCOME



The only product of its kind, the ICOMIA Statistics Book provides a wealth of industry intelligence in one useful reference document. Our statistics are used extensively within the industry, especially by those interested in investing or seeking to work within our industry. In order to assist those carrying out more detailed research we provide raw-data Excel spreadsheets.

Highlights this year include new entries from India, Lebanon and UAE and our new Marine Industry Association Member Ship and Boat from Denmark and the addition of charts displaying 10-year trendlines. The 2017 edition of the ICOMIA Statistics Book is the most comprehensive yet, covering more countries than ever before.

This year we also have three articles included in the Book, originally published in International Boat Industry (IBI) magazine in 2018. The first features an interview with President of Mercury Marine, John Pfeifer, who explains the significance of the engine builders' latest launches. The next is an insightful overview of the Polish industry in 2017. The third article is a market overview of the US, with insights in to the reasons for the rapidly improving health of the market.

As usual the Book includes detailed national reports on the industry's largest market countries, global summaries of key product segments from 25 countries, export/import data for international trade in boats from 28 countries, marine engine statistics from ICOMIA's Marine Engine Committee plus international boat show statistics and the Superyacht Group's Annual Report. We are working with our members in France, Hong Kong and Italy on obtaining data which will be presented in a second edition due in autumn, increasing the number of reporting countries to 28. Purchasers of the first edition will be notified when the second edition is available for download at no extra cost.

I would like to give special thanks to this year's contributors, including our members, the ICOMIA Marine Engine Committee, The Superyacht Group, the International Federation of Boat Show Organisers, IBI Magazine, the ICOMIA Statistics Committee and our consultants, Alastair Wilson and Liquid Scope.

We hope this year's Book offers a unique insight into the worldwide recreational boating industry; all feedback is greatly appreciated.

Udo Kleinitz
Secretary General
ICOMIA

International Council of Marine Industry Associations
ICOMIA Secretariat
Marine House, Thorpe Lea Road, Egham,
Surrey, TW20 8BF, United Kingdom
T: +44 (0) 1784 223702
E: info@icomia.com
W: www.icomia.org

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Contents summary



This annual summary of national statistics from ICOMIA's Marine Industry Associations (MIAs) includes information from 25 countries, which between them represent the majority of the world's recreational boating industry. Data has been presented in a visual format for ease of cross-reference and comparison. Also included are specific detailed national reports from eight countries, trade data for 43 countries, superyacht statistics, boat show statistics and engine statistics.

Section A:

ICOMIA's MIAs have provided a snapshot overview of their industry based on the first two-quarters of 2017. Although no quantifiable data is gathered; the survey acts as a barometer to indicate recent trends in the global recreational boating industry.

Section B:

The tables in this section reflect reported data – some MIAs were able to provide more information on their country's marine industry than others. If the information is omitted, it doesn't mean there isn't any trade or sales in this area. Similarly, "total" values are the totals of the available information only - the actual total values may be different. This comprehensive review provides an excellent tool to compare statistical information of different countries.

Section C:

National statistics for each country can be found in this section in a dynamic visual format. For some countries, further statistical information may be available in the more detailed 'extended country reports' published by the individual MIAs, included in full in Section I.

Section D:

The major international recreational marine engine manufacturers have submitted engine sales figures for 40 countries, covering all of Europe and the USA. These sales statistics include outboard engines and personal watercraft and are provided by the ICOMIA Marine Engine Committee (IMEC) and the US National Marine Manufacturers Association (NMMA).

Section E:

Eurostat Trade Data, which gives import/export, figures for EU countries. These figures are drawn from national government data and comprise the best available collation of EU trade information.

Section F:

UN Comtrade Data, which gives import/export, figures for non-EU countries. These figures are drawn from national government data and comprise the best available collation of non-EU trade information.

Section G:

Superyacht statistics - reproduced with the kind permission of The Superyacht Group.

Section H:

Boat show statistics, reproduced with the kind permission of ICOMIA's sister association, the International Federation of Boat Show Organisers (IFBSO).

Section I:

Extended country reports - supplied to ICOMIA by various MIAs.

Section J:

Brought to you by International Boat Industry (IBI)

Further copies of this 2017 edition as well as previous editions of the ICOMIA Recreational Boating Industry Statistics book may be purchased from the ICOMIA Secretariat, email: info@icomia.com

Meet ICOMIA



THE INTERNATIONAL TRADE ASSOCIATION REPRESENTING THE GLOBAL MARINE INDUSTRY SINCE 1966

A GLOBAL ADVOCATE, THE INTERNATIONAL COUNCIL OF MARINE INDUSTRY ASSOCIATIONS – **ICOMIA** – WORKS WITH INTERNATIONAL AUTHORITIES AND MAJOR ORGANISATIONS, PUBLISHES GUIDELINES AND PRODUCES TOOLS TO FACILITATE THE GROWTH OF THE INDUSTRY

We bring together national boating federations in one global organisation and represent them at an international level, presenting a strong and united voice when dealing with issues challenging the industry.

35 national federations across the world are full members of ICOMIA and they include the vast majority of the industrialised countries from North America across to Japan and China and from Finland to New Zealand.

Our objectives are to provide a forum for the exchange of views between the different national marine industry associations, to produce internationally agreed standards to ensure high quality and safety of industry's products, to remove all barriers to trade, wherever they may exist and to promote boating and to give guidelines where appropriate.

ICOMIA represents an agreed international industry opinion on environmental matters related to boating and we seek to minimise any adverse effects of boating on the marine environment.

“ *ICOMIA is crucial for the future of our industry. We need an organisation to address all the issues that in any way deny or restrict the free flow of our products into the world markets. This is not just confronting hostile regulation but also developing standards that have universal recognition and acceptability* ”
Udo Kleinitz, ICOMIA Secretary General

COMMITTEES

Our working committees mostly consist of our member associations and address issues challenging the marine industry worldwide

LIBRARY

Members can find all of ICOMIA's resources in the Online Library

MEMBERS

With the help of our members throughout the world, ICOMIA acts internationally on behalf of all those concerned with the marine industry

ICOMIA TOOLS & RESOURCES

ICOMIA Environment Guide (IEG)

Clear and concise outlines of the latest environmental legislation affecting the EU, US, Asia and Australia plus international organisations such as IMO.
Only 300EUR for 12-month subscription

ICOMIA Technical File Generator

Unique award-winning software package that simplifies the entire process of creating and managing compliance documentation required by the Recreational Craft Directive.
Visit www.icomia.tech for more information

Standards Bulletin

Early notification on changes to existing standards and modifications to production methods; as developed and maintained by the ISO Technical Committee for Small Craft Standards (TC 188). FREE for members!

ICOMIA Quarterly Economic Statistics Report

Quarterly information on global economic development and features categories such as the Producer Price Index and the Big Mac Index. FREE for members!

Half Year Trend Report

Recent economic trends in the global recreational boating industry as well as the general outlook for the coming year.
FREE for members!

ICOMIA Equipment Distributors Database

List of equipment distributors in the ICOMIA member countries. FREE for members!

Scantlings Calculator & Keel Checker

Excel based software for boatbuilders with limited time or expertise to conduct their own scantling calculations on the basis of ISO 12215-5. Keel Checker: A tool for assessing whether keel designs are within the parameters of ISO 12215 Part 9. FREE for members!

ICOMIA's Global Conformity Guidelines

Detailed guidance for boatbuilders needing to comply with the alternative Standards system. FREE for members!

ICOMIA Technical Guides

Recognised Guidelines and Standards, including 'Electromagnetic Compatibility (EMC) Assessment Recommendations': and 'Minimum Acceptable Finish and Appearance for Superyacht Gloss Coatings' etc. FREE for members!

Guide to the Recreational Craft Directive

Interactive guide for boatbuilders providing information on how to safely manufacture, import, distribute and sell products on the EU single market, EEA and Switzerland. FREE for members!

GET IN TOUCH

Please direct all correspondence to the Secretariat Office:

International Council of Marine Industry Associations

Marine House
Thorpe Lea Road
Egham, Surrey
TW20 8BF
United Kingdom

T: +44 (0) 1784 223702

E: info@icomia.com

Registered Address:

International Council of Marine Industry Associations

Brigade Pironlaan 132
B-1080 Brussels
Belgium

For more information about our work, please visit:

www.icomia.org

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EXPLANATORY NOTES

The following explanatory notes are provided to MIAs to assist them in completing the ICOMIA statistical data report form.

Overseas territories

Figures for overseas territories are not included in the national statistical reports

Total marine employees

This represents the estimated grand total of all employees covered by 3 distinct groups:

Group A (Main Section)

Producers, boatbuilders, equipment and clothing manufacturers, sailmakers, engine builders

Group B (Support Section)

Service providers, marina operators, charter boat companies, insurance, naval architects, trade magazines, boat transportation companies, marine equipment suppliers and shops, fuel, maintenance, distributors/dealers, brokers

Group C (Other Services)

Travel agents, marine/marina hoteliers, servicing of marinas/yacht harbours, marina (general store) shops, food and drink provisions/stores

Total boat park

Boat park is defined as boat fleet in use - the total number of recreational boats (up to 24m/80ft) in use/service/ownership in the country

Boating facilities

- Marinas/yacht harbours
- Wet berths/slips, drystack berths, drysail berths
- Open moorings
- Slipways

In addition to the total number of marinas/yacht harbours, boating facilities include the total number of alongside wet berths/slips available for use, including dry-stack berths and drysail berths (where applicable); and the total number of slipways, irrespective of size or capacity

Area of inland lakes and waters

Includes major rivers and/or waterways where recreational boating can take place

Inboard motor boats

An inboard/sterndrive motorboat has an engine connected to either a shaft or an external steerable drive unit, or water jet propulsion

Other rigid boats

Other rigid boats include outboard motor boats – but not Rigid Inflatable Boats (RIBs)

Inflatable boats

An inflatable boat has a buoyant hull structure achieving all or part of its intended shape and buoyancy by means of inflation - Rigid Inflatable Boats (RIBs) are included with inflatable boats

Boats - production

Total number of motor boats/sail boats/no-engined boats, inflatable boats and rigid boats manufactured within the country

PWC - production

A PWC is a personal watercraft. For example: a Waverunner, Jetski or Seadoo

Sales - new boats

Total value of new motor boats/sail boats/no-engined boats, inflatable boats and rigid boats, marinas, brokerage, charter, retail shops etc. including imported boats. PWCs are not included

Sales - accessories and equipment

This includes both boat accessories (fixed or loose aftermarket items that may be added when the boat is commissioned or later by the owner) and marine equipment (fitted to the craft during its construction). Plus optional items, like a radar

Sales - services

This includes anything not covered in Boats, Engines and Boat Accessories/Marine Equipment. For example, Services include rigging, painting, insurance, boat servicing

N.B. Some MIAs were able to provide more information on their country's marine industry than others. This is reflected in the amount of data presented in this section for each country. If the information is omitted from a particular country's page, it doesn't mean no trade exists in this area. Similarly, "total" values are the totals of the available information only - the actual total values may be different. **(cont.)**

Export/import data not available from European MIAs has been retrieved from European Commission Eurostat, and from UN Comtrade for non-European MIAs. Eurostat or UN Comtrade data used in this way has been referenced throughout this section.

Where available, outboard and PWC sales data has been retrieved from ICOMIA's Marine Engine Committee (IMEC).

Primary source of inflation rate and lending rate data is The World Bank (<http://data.worldbank.org/>) and the secondary source is Trading Economics (www.tradingeconomics.com). Population data obtained from the Population Reference Bureau (www.prb.org).

Some "Total" values may not equal to the sum of all sub-values due to rounding.

In some cases data is precisely recorded whilst in others it's based on expert estimates provided by our Marine Industry Association members.

CURRENCY VALUES - 1 EURO (EUR) EQUALS:

The below values are as at 1 March 2018. Source: www.oanda.com

24.63

PESO
(ARS)

ARGENTINA

1.57

DOLLAR
(AUD)

AUSTRALIA

3.97

REAL
(BRL)

BRAZIL

1.56

DOLLAR
(CAD)

CANADA

7.73

YUAN RENMINBI
(CNY)

CHINA

7.44

KUNA
(HRK)

CROATIA

25.41

KORUNA
(CZK)

CZECH
REPUBLIC

7.45

KRONE
(DKK)

DENMARK

79.57

RUPEE
(INR)

INDIA

130.67

YEN
(JPY)

JAPAN

1.69

DOLLAR
(NZD)

NEW
ZEALAND

9.63

KRONER
(NOK)

NORWAY

4.18

ZLOTY
(PLN)

POLAND

1.62

DOLLAR
(SGD)

SINGAPORE

14.35

RAND
(ZAR)

SOUTH
AFRICA

188.92

RUPEE
(LKR)

SRI LANKA

10.08

KRONA
(SEK)

SWEDEN

1.15

FRANC
(CHF)

SWITZERLAND

4.65

LIRA
(TRY)

TURKEY

4.30

DIRHAM
(AED)

UNITED ARAB
EMIRATES

0.88

POUND
(GBP)

UNITED
KINGDOM

1.22

DOLLAR
(USD)

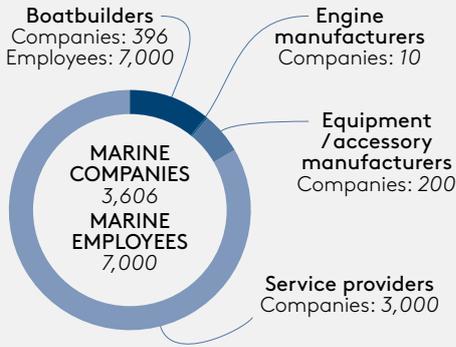
UNITED
STATES



Germany

3,624km
Length of
sea coastline

COMPANIES AND EMPLOYMENT



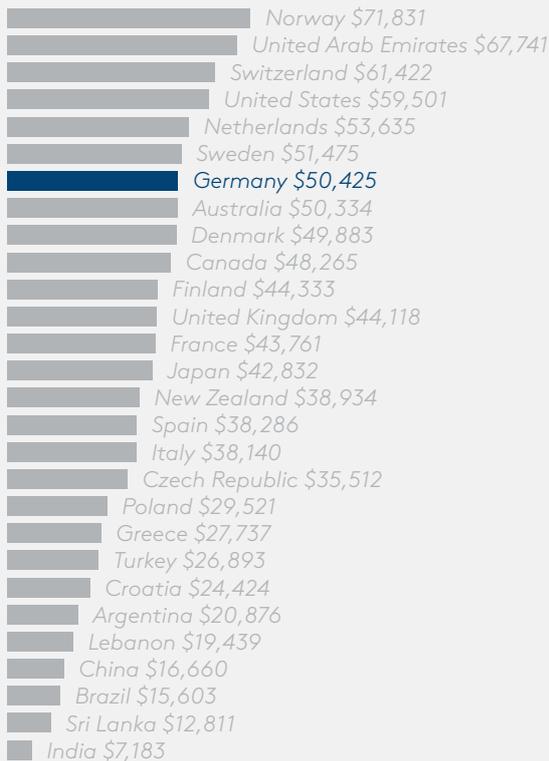
8,000km²
Area of inland
lakes and waters

ECONOMIC DATA

0.5%
Inflation rate

GDP

GDP dollar estimates are derived from PPP (Purchasing Power Parity) calculations per capita. Values are in international dollars. Source: International Monetary Fund.



BOATING FACILITIES

2,700
Total marinas/
yacht harbours

CLAUS-EHLERT MEYER

DBSV(*)
T: +49 40 30 70 67 90
E: meyer@dbsv.de
W: www.dbsv.de

JÜRGEN TRACHT

BVWW(*)
T: +49 221 59 57 10
E: info@bvww.org
W: www.bvww.org

* Germany marine industry information supplied by both DBSV and BVWW

BOAT OWNERSHIP



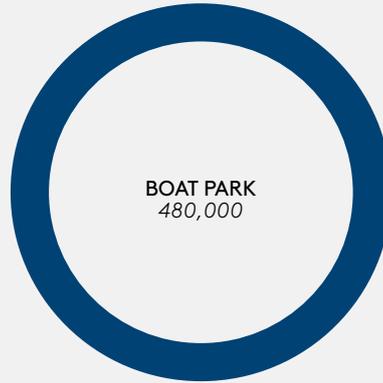
83,100,000
Population



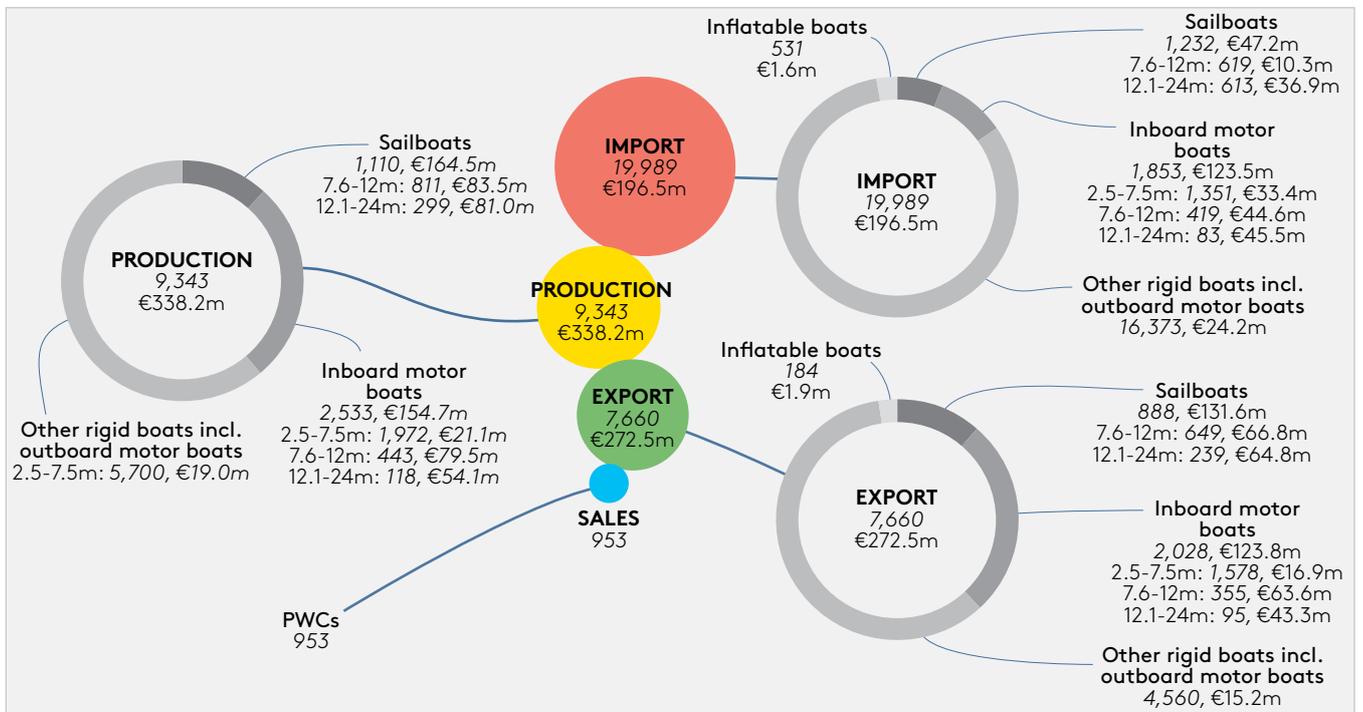
480,000
Total boat park



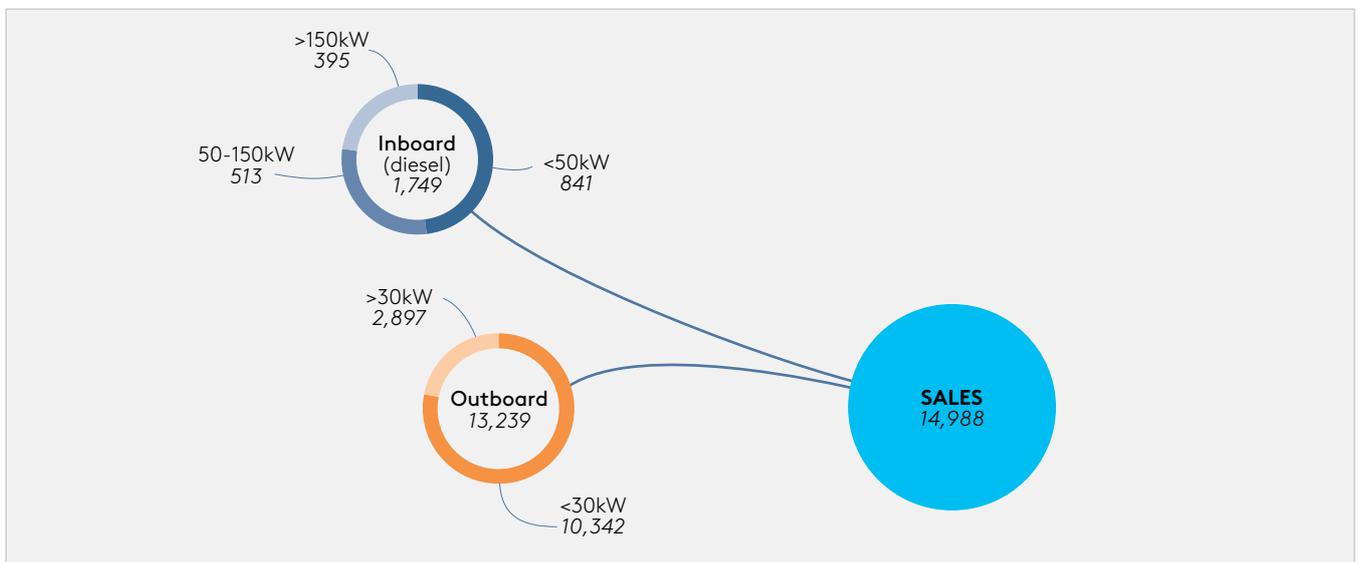
173
Persons per boat



BOATS



ENGINES



Data supplied by the MIA and other sources (refer Explanatory Notes prior to start of Section A)

Inflatables and RIBs import/export: Eurostat

SECTION

D

2017

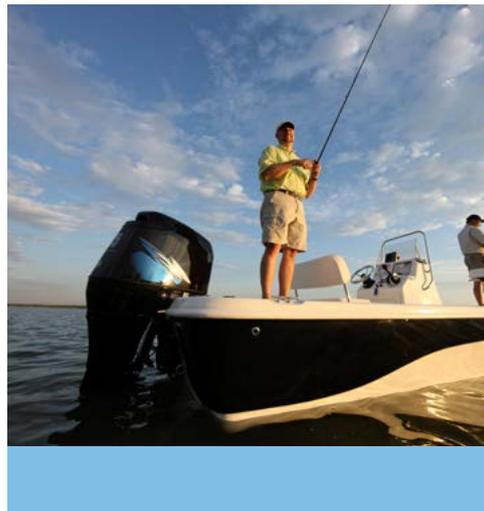
**OUTBOARD AND
PERSONAL WATERCRAFT
STATISTICS**

2017 outboard and PWC statistics



Recreational marine outboard motors and personal watercraft sales figures in most European and Mediterranean countries are accurately recorded by the main recreational marine engine manufacturers that form the ICOMIA Marine Engine Committee (IMEC), as per the map on the following page. IMEC also collects identical sales statistics for Russia. Furthermore, the National Marine Manufacturers Association of the United States (NMMA) collates the US outboard engines sales figures, which are published annually.

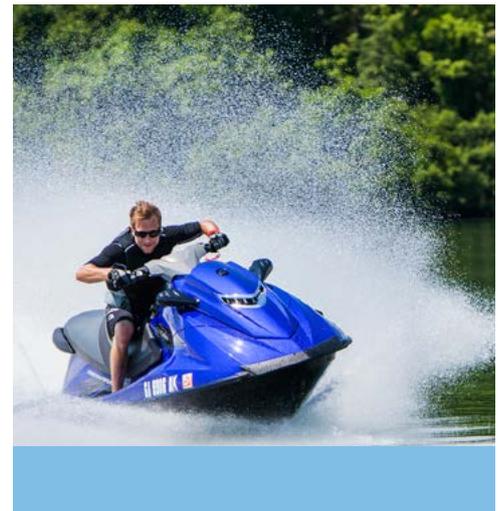
IMEC data is collected monthly by the IMEC members for combustion outboard motors and for personal watercraft. The monthly sales figures per company are reported on a voluntary basis to an independent marketing company. The data is based on sales to dealers and boat builders and as such provide an excellent tool with which to measure market developments per power category or engine type on a regular basis.



OUTBOARD MOTORS

Seven outboard motor suppliers report their sales figures through IMEC. In alphabetic order, these companies are Bombardier Recreational Products, Honda, Mercury Marine, Selva Marine, Suzuki, Tohatsu and Yamaha.

The US market is supplied by Bombardier Recreational Products, Honda, Mercury Marine, Suzuki, Tohatsu and Yamaha.



PERSONAL WATER CRAFT

Participants are Bombardier Recreational Products, Kawasaki and Yamaha. Taken together, these three companies represent nearly 100% of the PWC market in Europe.



ICOMIA
INTERNATIONAL COUNCIL OF
MARINE INDUSTRY ASSOCIATIONS

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Marine House, Thorpe Lea Road, Egham, Surrey, TW20 8BF, United Kingdom
T: +44 (0) 1784 223702 | E: info@icomia.com



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