

OCTOBER 2013

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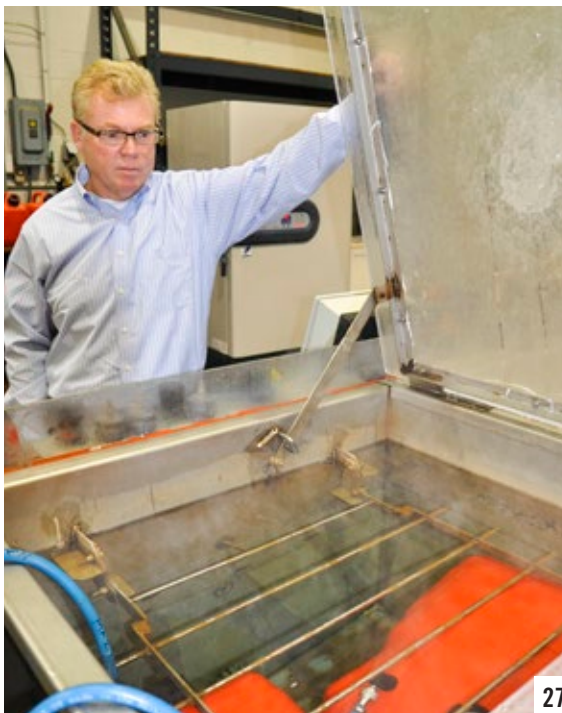
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CONTENTS

VOLUME 10 ■ NUMBER 5 ■ OCTOBER 2013



Features

PRAXES

This Canadian-based company is helping corporations to forge unique and lasting relationships on the world stage.

By Elizabeth A Kerr

IMPACT

*David Jones—Scepter
Industry leading Scepter Corporation.*

by Andy Adams

IBEX

A selection of the IBEX 2013 Innovation Award Winning Products.

by Andy Adams

RESEARCH

It's Time for a Canadian Made Solution—John Kerr analyzes the state of the Canadian boating industry.

By John Kerr

Departments

Insight.....	5
Industry News.....	6
Ad Nauseam.....	10



On the Cover:
*David Jones at Scepter.
Photo by Andy Adams*

PACIFIC YACHT INDUSTRY FORUM

INTERNATIONAL
CONFERENCE AND
YACHT SHOW

28-31 MAY, 2014.
VANCOUVER

Taking place in Vancouver next year, The Pacific Yacht Industry Forum will comprise a 2 day Forum and a 3 day Yacht Show in central Vancouver.

Produced by Quaynote Communications, the yacht event specialists, and officially supported by Canadian Yachting, this unique forum will provide the perfect showcase for BC and Pacific based yacht industries who wish to raise their profile before a wider, international audience.

The Pacific Yacht Industry Forum will target Yacht Builders, Designers, Brokers, Managers, Associations, Lawyers, Accountants, Registries, Financiers, Insurers, Captains, Owners' representatives, Marina operators, and anyone with a vested interest in successful yacht ownership and operations.

At the conference, issues to be covered include Vancouver to Alaska cruising, the demand for berth space in the north-west Pacific, servicing larger visiting yachts, addressing the lack of information available to captains on facilities in the North-west coast, and a look at regional customs regulations, provisioning, maintenance and refit facilities.

The Yacht Show will feature a dazzling display of new-buildings, yachts for sale and charter, with ample opportunities for networking, entertaining and on-board viewings.

For more information about the Pacific Yacht Industry Forum, or to discuss your company's participation as speakers, sponsors, or exhibitors, please contact me now:

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+1 604 538 2474
+1 604 996 6937
lorna@quaynote.com



BY ANDY ADAMS

Polish Your Crystal Ball

2014 Is Coming

WELCOME TO THE OCTOBER ISSUE of Boating Industry Canada magazine—the issue where we try to bring you valuable new research information.

I use the word 'try'. We think we have succeeded this year, but too often in past years, there has been no new industry data available, or the data has been too narrowly focused to really benefit our readers in their unique individual businesses.

Perhaps the most valuable article in this issue is from our resident curmudgeon and sardonic commentator, John Morris. His task is to offer thought-provoking commentary from a marketing perspective and in his Ad Nauseam column, he talks about Polishing The Crystal Ball.

John comments that, "For individual marine dealers in Canada the crystal ball is often replaced with the rearview mirror. What happened last year? The last ten years? Each dealer knows the marketplace they operate in, not necessarily according to graphs and charts but more likely from anecdotes and feel."

He is suggesting that the most valuable information comes from your own customers. If you're close to them and get time to ask about their vacation plans for 2014 and about their boat, you can probably get a more useful view of the future than any industrywide data can provide.

Especially among a high net worth demographic like boat and yacht owners, they have the wealth to defy gravity if they so choose. The economy could tank and they may still be ready to buy.

Our CEO, John Kerr, has provided us with our featured research article and he provides important broadly-based measures of the marine industry in Canada, but he laments the lack of regular statistical data to facilitate proper year-over-year comparisons here in Canada. You really do need a crystal ball.

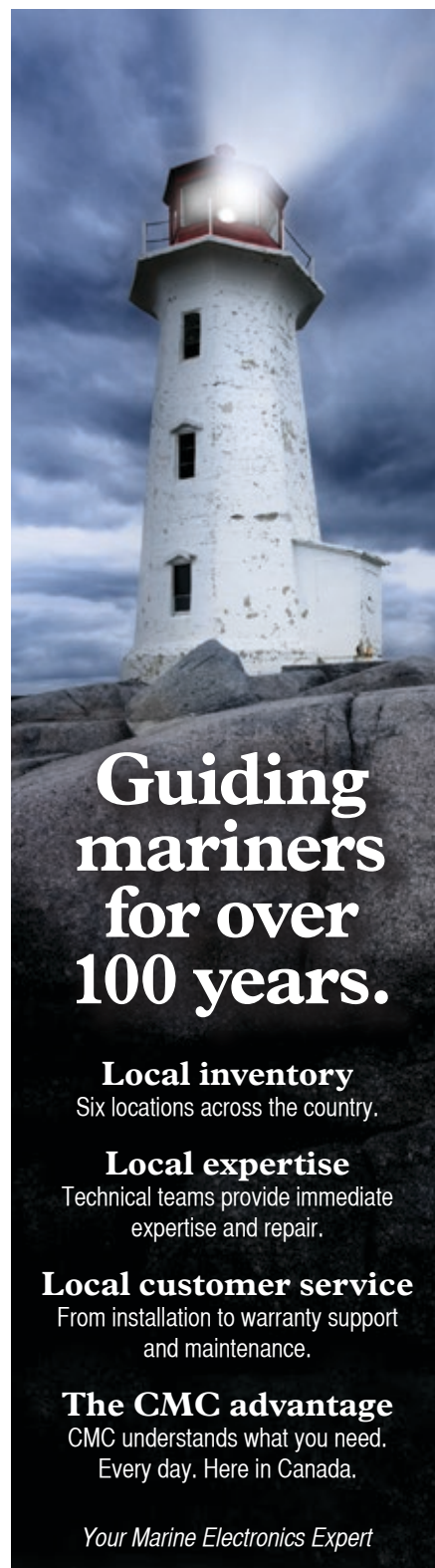
Beyond anything you can read in these pages, we think that a very valuable perspective is available from spending time with your peers this fall. We hope that you will get out to the dealer shows being held across the country by Canada's marine distributors. Attending those events offers a great opportunity to talk to the industry, hear other people's comments and plan your strategies for 2014.

If you can attend the BC Marine Trades Association Annual Conference November 27–28, 2013 at River Rock Casino Resort in Richmond, BC or the Boating Ontario Conference and Trade Show this December 1–3 at Deerhurst Resort in Huntsville, Ontario, you will find probably the single best opportunity this year to compare notes with other marine industry business people and to ask questions in the various information sessions.

It's important to remind our readers that you don't have to be a member of the BCMTA or Boating Ontario to attend. Just as the distributor shows welcome everyone who wants to come and attend, so do the events held by our marine trades associations.

So, we wish you the best of luck polishing your own crystal ball this fall and we hope you enjoy this issue. When you succeed, the industry succeeds!

Andy Adams - Editor



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All Canadian Marine Industry

Invited to Network and Learn at BCMTA Conference Event

THE SPOTLIGHT is on the customer at this year's BC Marine Industry Conference November 27th and 28th at the River Rock Casino Resort in Richmond. Registration for the 3rd Annual Conference is significantly higher than the same time the previous two years, according to the BC Marine Trades Association (BCMTA).

Members of the marine industry across Canada are invited to the BC event. A renowned lineup of speakers will take the stage over the two days, including keynote Nancy Friedman—the Telephone Doctor, TV personality and author on customer service – as well

as management speaker and business coach Donald Cooper who will present his 90-minute MBA and Bob Gray, the memory guy, who will teach attendees how to always remember customers' names. Richard Straka of GE Capital will return to share an overview of the Canadian marine industry and representatives of Hamazaki Wong will update the group on BCMTA's multicultural strategy. A tour of the new Milltown Marina and Boatyard is also being organized for Day 2.

The BCMTA, through the BC Marine Industry Conference, also provides companies opportunities to increase



exposure of their products and services. Sponsorship is available in three categories. Sponsors, who are part of all pre and post-event promotion, also receive a table at the conference to display products and share information.

www.bcmata.com. ■

The Quebec Marine Association

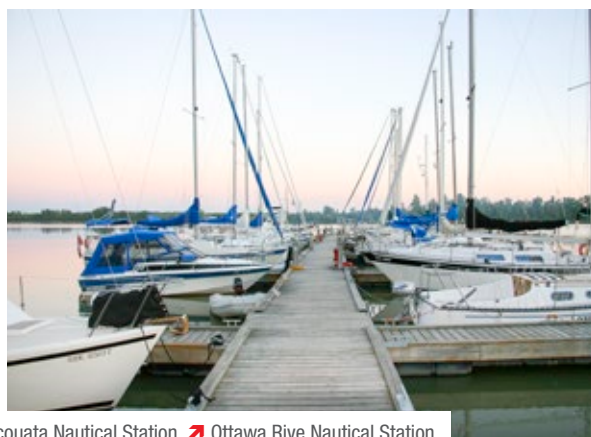
launched two nautical stations

THE QUEBEC MARINE ASSOCIATION and its program Quebec Nautical Stations launched this summer two world-class marine destinations: the Ottawa River and the Lake Temiscouata nautical stations. The program is now made up of 14 destinations and it unites thousands of people from the nautical, tourism and public sectors; all mobilized to develop nautical infrastructures and facilitate access to water.

A nautical station is a secluded location offering easy access to a multitude of water activities like canoe/kayaking, cruises, water-themed fun, excursions, marinas, maritime heritage, beaches, diving, scenic lookouts, wind and much more. Equipment rentals are available as well, providing visitors with a wealth of options.

ABOUT THE OTTAWA RIVER NAUTICAL STATION

Located between Fassett and 'les rapides de Joachim', the Ottawa River Nautical Station offers a variety of activities for your holidays, trips or outing. This



↖ Lake Temiscouata Nautical Station. ↗ Ottawa River Nautical Station.

station has two wildlife reserves, four controlled harvesting zones, 89 outfitters and many ecological reserves. Cruises, outdoor escapes, rafting, canoe and adventure kayak are only a few examples of activities that are available in this great region.

ABOUT THE LAKE TEMISCOUATA NAUTICAL STATION


The lake Temiscouata has been identified in 2012 by a Quebec magazine,

L'Actualité, as one of the prettiest lakes in the province. This station has an important historical aspect. In fact, some water paths led our travelling ancestors coming from Quebec and Montreal to the Atlantic Ocean, and you can see some remains that witness it. This nautical station has different levels and water conditions that will satisfy families, beginners and experts.

www.quebecstationsnautiques.com (English version coming soon). ■

Discover Boating Canada

Campaign Results, Reports Boost in Manufacturer Referrals

		FY 2013	FY 2012	YOY %
Website	Unique Visitors	507,098	377,795	34%
	Pageviews	1,625,446	1,200,260	35%
	Manufacturer Referrals	115,098	38,730	197%
Social Media	Facebook Fans	34,945	20,242	73%
	Twitter Followers	1,441	1,078	34%
	Google +	143	n/a	

DISCOVER BOATING CANADA shared results from its 2013 bilingual media campaign with highlights including a 197% increase in DiscoverBoating.ca referrals to manufacturer websites, despite a 17% smaller media budget from the previous year.

Discover Boating Canada's 2013 national public relations efforts generated positive news coverage promoting recreational boating coverage on media outlets including The Weather Network,

CP24, Shaw Multicultural Channel, Rogers TV and *Divine.ca*.

For more information, contact Tracey Hart at Discover Boating Canada at thart@nmma.org.

The campaign aimed to increase referrals to manufacturer websites from DiscoverBoating.ca and delivered 115,098 referrals to manufacturer websites, nearly triple results from the previous year.

Generating prospects through consumer education was a focus for 2013

utilizing the new Beginner's Guide to Boating, a booklet available to consumers which offers step-by-step information on getting started in boating. A total of 17,643 guides were distributed via requests for the Beginner's Guide to Boating, as well as members of the recreational boating industry and Parks Canada who helped distribute the guides nationally.

On the social media front, Discover Boating Canada Facebook fans rose to 34,945, a 73% increase from 2012. Highlights included a popular summer photo-sharing Facebook contest which resulted in the addition of 1,455 fans. Notably, 1,040 of Discover Boating Canada's Facebook fans used the Boat Selector Tool on *DiscoverBoating.ca*.

Twitter followers increased 34% to 1,441 through real-time conversations, enhanced content and interaction. ■

Save the Date! NMMA Canada Industry Breakfast at TIBS 2014


BE SURE TO MARK YOUR CALENDARS for the upcoming NMMA Canada Industry Breakfast to be held on **Tuesday, January 14, 2014 at the Toronto International Boat Show.**

This year's event will include a complimentary hot breakfast for those in attendance, highlights from the 2013 Canadian Recreational Boating Statistical Abstract, a presentation by GE Capital, the NMMA Canada Hall of Fame award presentation and more.

Last year's breakfast was a success and attracted more than two hundred people from the industry as well as officials from Transport Canada. The event included

highlights from the second annual Canadian Statistical Abstract and 2012 Economic Impact Study, an opening presentation by Andy Adams of Boating Industry Canada and a presentation on trends for the boating industry by John Peak of GE Capital. A surprise special guest speaker, Member of Parliament Barry Devolin for Haliburton-Kawartha Lakes-Brock, also addressed the crowd at the event and touched on a number of important issues for the recreational boating industry. The event concluded with the induction of Chris Goulder, former President of Volvo Penta Canada, into the NMMA Canada Hall of Fame.



 Barry Devolin,
Member of Parliament
for Haliburton-Kawartha
Lakes-Brock.

Stay tuned for your invitation with further details. We look forward to seeing you at the 2014 NMMA Canada Industry Breakfast at TIBS. ■

Boating Ontario 2013

THIS SUMMER IN ONTARIO, recreational boating saw about a 20% decline in people boating from the May long weekend to October 1st. This was caused by quite a few storms and poor weather days during the early part of the summer. Gas prices, as always, caused quite a few people to limit their boating and more anchoring took place. The sale of boats at the beginning of the year started off at the boat shows with a bang but tapered off as the season went on. The sale of larger boats seemed to reflect conservatism about the economy. Although the professionals tell us the recession is well behind us, I am not certain.

Parks Canada has appointed a new executive director to oversee the canals and waterways in the country. Everyone at Boating Ontario is hopeful that after the 2012 and 2013 communications

challenges we will be able to improve communications in 2014. The Trent and Rideau will be on the agenda at the Boating Ontario Conference and Trade Show being held at Deerhurst Resort from December 1st to 3rd this year.

The school season is now underway and Boating Ontario is again working with Georgian College to help encourage students to join the One Year Marine Mechanic program at their Midland campus. For the 2013 year the program has 28 students enrolled in the one year program. Georgian will again be delivering apprenticeship programs for Marina Mechanics with Level 3 from Dec



↑ Boating Ontario's Al Donaldson discusses the industry with Cameron Taylor at the 2012 Boating Ontario Conference in London, Ontario.

2, 2013 to Feb 7, 2014, Level 1 Jan 6, 2014 to Feb 28, 2014 and Level 2 from Feb 10 to Apr 4, 2014. Anyone interested in the programs should contact Boating Ontario or Georgian College. The College of Trades is also looking for Board of Directors for the new Marine and Small Engines program Board of Directors. ■

Qualifying the Industry

↓ Participants in the Halifax Workshop held October 9: From Left to Right: Rob Franklin of Stevens Boat Works, Marlin Creaser and Andrew Corkin of Iron Wind Marine, Ron Snow and Matt Baird of Seamasters Services, Korey Smith of Rosborough Boats and Christian O'Neill, of the NSBA.



DURING THE MONTH OF OCTOBER 2013, the Nova Scotia Boatbuilders Association (NSBA) and the Atlantic Marine Trades Association (AMTA) hosted four workshops in Nova Scotia. The purpose of the workshops was to provide information to people who have been working full time as marine service technicians, providing service, repair, refit and upgrades to marine vessels, power and sail in the commercial and recreational

marine sectors who wish to challenge for a Nova Scotia Marine Service Technician (MST) Certificate of Qualification. Those wishing to challenge the MST certification must demonstrate with documentation that they have at least 12,000 or more hours (approximately 6 years) working full time in the full scope of the new trade. Candidates are offered the opportunity to write the test for a reduced fee until July 1st 2014.

In March 2013, the Province of Nova Scotia issued certificates to the first six certified Marine Service Technicians who set the standard for future candidates in the Trade. With certified Technicians in place, the NSBA is confident that a MST apprenticeship program will begin in 2014. NSBA has recently partnered with the Quadrant Marine Institute of BC to use their MST learning materials. ■

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Polishing the Crystal Ball

BY JOHN MORRIS

AS WE SPEAK, Spring 2014 is visible on the horizon. But before it arrives, it's floorplan time, merchandise ordering time and staff hiring time. What to do?

Yes, we first get to the boat show season, but then the daffodils bloom and it's time to launch. What will you be featuring at your dock/showroom/retail outlet and how many of them will you be able to sell?

If you are a wise practitioner you have been keeping closely in touch with your customers and absorbing their plans. How many will move up? You've had an eye on the water and government bulletins to ascertain the depth available. You're working with your suppliers who, we hope, have a good idea of what will appeal to buyers as the sun returns to our shores.

Yes, some research is available from industry sources but we're not consumer juggernauts like Nestle or Budweiser

and research is expensive. An individual dealer isn't likely to have a staff economist or stats genius on board so you rely as most of the industry must, on intuition plus a mix of talking to customers and your peers.

For example, last winter our anecdotal research as well as statistics showed that pontoon boats was a hot category last winter and many dealers took orders for as many as they could deliver. Will that hold this spring or is wakeboarding going to boom. Will the America's Cup provide a bump in catamaran sales? Will inflatable PFDs push conventional PFDs off the shelves?

NMMA Canada has commissioned a comprehensive study of the industry entitled *The Economic Impact of Recreational Boating in Canada 2012*. It's an interesting read and offers some very warming stats such as About 35% of Canadians (9.4 million people)

participate in boating and Canadians own over 4.3 million boats. It is packed with stats and information and in its conclusions in Section 5 pronounces "After a number of austere years, the boating industry organizations that have survived have a guardedly positive outlook for their future." So, hooray.

Useful as this document may be in its helicopter view, it has little to say about consumer trends or preference beyond noting that the aging population and tourism have impacts on some segments of the population and that cross-border shopping has a large influence on retailers.

Research online provides a lot of heat but not too much light. An example: in January 2011 *Cottage Life* published a broad article called "6 new boat design trends." The article does a nice job of rounding up the views of designers and builders on the characteristics they think consumers want based on their

perception of sales and tastes. But are they right? In the article's Towboat section, the introduction reads "Love 'em or hate 'em, powerful, aggressive-looking sport boats have rendered the traditional, inboard-powered ski boat almost extinct." Does that match your experience?

I spent some time reading on the Internet with interesting results. There's quite a lot out there—Practical Sailor has a very good look at the difference in performance between traditional and more modern sail cruisers along with a discussion of what consumers like about each.

For individual marine dealers in Canada the crystal ball is often replaced with the rearview mirror. What happened last year? The last ten years? Each dealer knows the marketplace they operate in, not necessarily according to graphs and charts but more likely from anecdotes and "feel."

It's easy to go wrong unfortunately unless you're incredibly conservative. Last year I attended the C&C reunion

and observed some very extensive ash-sifting as the best brains in the business reviewed the huge successes and ultimate failure of Canada's largest builder that was once the world's leader in sailboats only to close up completely a decade later. Did C&C not see the changes coming?

Actually the folks on the discussion panel couldn't even identify with certainty the forces that led to C&Cs decline. Foreign competition? A bad economy? Over-production? Quality that was so good the market became saturated with old boats? Aging sailors turning to trawlers? It was informed conjecture, but conjecture nonetheless. In hindsight, perhaps the company could have reduced production, modernized its boats and stayed competitive, but we'll never know that. We do know that decades ago the Toronto International Boat Show, a bellwether of boating in this country, was dominantly sail with only a smattering of power. Last year

it was entirely the reverse. What will it look like in decades to come?

So where does that leave you. Doing what you always have done often means you'll continue as you always have. That may be a slow boat ride, but it might also be safe. On the other hand if you were a Muskoka dealer who loaded up on pontoon boats you may be feeling pretty good right about now. Wise insight or a lucky guess—write in and tell us! Please.

LAST WORD

On the website of the British Marine Federation (their version of the NMMA and operators of the London Boat Show) there's a quote from a prominent British manufacturer who wisely notes "In today's highly competitive global market, quality research and data from various sources is the cornerstone of every strategic decision we make." For the Canadian marine enterprise, this is sage advice. The big question is where do we source that information? ■

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Halifax-based **PRAXES** Steps Up for 2013/2014 Clipper Round the World Race

**You just can't call 911
from anywhere...**

BY ELIZABETH A KERR

PHOTOS COURTESY OF CLIPPERROUNDTHEWORLD.COM



**3 DAYS, 21 HOURS, 8 MINUTES
AND 5 SECONDS INTO RACE**
3, Leg 2 of the 2013/2014
Clipper Round the World
Race (Rio De Janeiro, Brazil to Cape
Town, South Africa), Halifax-based
PRAXES—the race's Global Emergency
Medical Partner—is launching its first
ever Twitter program targeted at the
South African market...to attract new
customers in the next ports of call. A
program to push Google ads globally
is also underway.

But that's not the beginning of this
extraordinary partnership at sea.

In 1997, Susan Helliwell, MESC,
P.Eng., along with emergency doctor
(and husband) John Ross, M.D.
responded to a Request for Proposal
to provide emergency medical support
to the offshore oil and gas industry.
Winning the bid, PRAXES Medical
Group was then established to address
the needs of businesses with remote
workers in dangerous industries. Susan
is currently CEO of PRAXES and is

responsible for its overall business
development and management strategy.

PRAXES—a supplier of industrial
telemedicine—provides health services
for clients on-site and in the most remote
locations in the world. Already support-
ing the Canadian Navy and Coast Guard,
oil and gas installations, prisons, mines,
fishing fleets, and even Mount Everest
climbing teams, PRAXES stepped up
this spring to supply 24/7 global emer-
gency medical support to the 2013/2014
Clipper Round the World Race. Why?
To dramatically increase awareness of its
service to a qualified global audience.

Two years ago, John Hockin, VP of
Marketing at PRAXES, made the fruit-
ful pre-qualified cold call to the Clipper
organization in the UK. His goal was to
put PRAXES on the global stage. The
task was to identify a unique opportunity
that would provide PRAXES increased
and significant awareness and branding,
prestigious third-party endorsement,
and a sexy international venue with
huge worldwide appeal and impact,

all of which would attract a network of
international distribution channels for
PRAXES. The Clipper Round the World
Race certainly fit the bill and on May 23,
2013, this exciting Canadian/UK part-
nership was announced.

Not three months later, as part of
the critical pre-race preparation, Susan
Helliwell and John Ross, M.D. arrived
in the UK to conduct hands-on training
with the skippers and onboard medics to
enable the efficient and effective response
to a medical emergency onboard.
Training included how the service works
and how it's to be used during the race.
There was also a demonstration includ-
ing a head to toe survey of what kind of
injuries and medical problems might be
anticipated. Additional training was also
offered for simple suturing, airway man-
agement and intubation.

As the official supplier of global
medical emergency support to the more
than 12 skippers and 600+ amateur
crew, PRAXES' EMDoc service provides
24/7 access to one global number, a



▶ The PRAXES Medical Group logo is in good company with Henri Lloyd, Rotary Aquaspeed and Rockport on the transom of every boat in the fleet.

guaranteed response time of five minutes or less, answered by a Canadian emergency doctor specialist anywhere in the world, for the entire duration of the race.

In addition to this, PRAXES oversees the comprehensive medical kit and supplies, and its EMwerx software system designed to manage people, assets and emergency events, in real-time, in the field. In addition to the traditional Medical Report Form completed as part of registration, PRAXES has provided the ability for each crew to also complete a detailed Personal Health Record (PHR) to log additional information such as next of kin, medications being taken, known allergies, and any other significant medical history that would be important to know if one had to be treated for a medical emergency while on board. (A PRAXES emergency physician can access this information in the event a call is made.) Although strongly recommended, completing the form is not mandatory.

So, today, twelve identical, 70-foot, stripped down racing yachts—each

sponsored by a unique location and manned by a fully-qualified skipper—are competing in Leg 2 of the 2013/2014 Clipper Round the World Race.

Other than the skipper, the more than 600 crewmembers are amateur sailors representing cultures, religions and lifestyles from over 40 countries but are now learning to share a common understanding for teamwork and for respect.

In the event of an incident, every skipper will be able to call PRAXES for medical advice given by the 'on call' emergency physician who will have access to the crewmembers' medical history (if they have completed a PHR) and be able to diagnose remotely and recommend appropriate treatment.

Over the past 15 years, use of the PRAXES onboard emergency support system has significantly reduced the number of emergency incidents resulting in medical evacuations and/or diversions, due to appropriate onboard diagnosis and immediate treatment. ▶

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➡ Henri Lloyd, an event partner for more than 10 years, has been the Clipper Race's Technical Clothing Supplier since 2005.



➡ Canadian yachtsman Eric Holden has been selected as one of the twelve elite sailors tasked with skippering the Henri Lloyd team around the world in the ninth edition of the Clipper Race. Eric, 33, is fresh from his role as weather forecaster for the Canadian sailing team at London 2012.



on site, expansive branding online and on board, as well as access to and inclusion in all public relations efforts, including social media.

Each sponsor and/or partner is assigned an account manager whose focus it is to ensure that each and every request is dealt with a “whatever it takes” attitude. From the very start of the relationship, every effort has been made to ensure that no matter the request, a solution was uncovered, whenever possible. Ongoing communications (at least every other day) solidifies this welcomed rapport.

The Clipper team feels strongly about delivering value to its sponsors so they gathered them all together in London before the race and encouraged them to get acquainted and work together. This corporate camaraderie will continue in each port along the way.

To complement this collaborative approach, PRAXES has also been working with the Canadian Trade Commission Service (TCS) to maximize business possibilities in every port. PRAXES visited with TCS staff in London who will represent PRAXES in ports of call along the route. TCS will leverage PRAXES' sponsorship rights to promote both PRAXES and the Canadian Health IT sector worldwide. To support this, PRAXES is contributing to

a year-long blog on ExportCanada—the TCS web-based magazine that reaches more than 23,000 Canadian businesses.

Skippers contact the PRAXES' support line by a satellite phone. Every call has access to automated translation services—ready at hand. For insurance, historical and statistical purposes, every incident call is recorded. Because the degree of experience is vast in varying circumstances, every medic, RN, doctor or caller is also evaluated by the emergency doctor: 1) to ensure the caller was prepared with an appropriate and complete evaluation; and, 2) to vet the caller's personal diagnosis. PRAXES' commitment to the best care available starts with that call. (To date, there have been seven recorded incidents resolved on board during the Clipper Round the World Race.).

In addition to onboard care and treatment, PRAXES is supplying crew with “virtual clinics” set up on the docks—yet another way to reduce unnecessary visits to the local hospital and lower insurance claims.

Although PRAXES is the only Canadian sponsor in this Clipper event, it is not the only Canadian component.

Canadian yachtsman Eric Holden has been selected as one of the twelve elite sailors tasked with skippering the ➤

In fact, Clearwater Fleet—one of the world's leading seafood companies—achieved a savings of more than \$500,000 in one year alone, largely due to the significant number of reduced diversions (estimated to cost \$100 a minute).

For the Clipper Round the World Race, the cost of insurance is a significant expense in the running of this year-long race. Premiums are impacted by hospital visits at any given port. It is estimated that the implementation of PRAXES' Emdoc service will reduce the number of onshore treatments (i.e., hospital visits) by 35%, thereby reducing insurance costs as well.

Imagine, too, the peace of mind for crew and their loved ones at home!

In return for this, the Clipper Round the World Race provides each of its sponsors, partners and stakeholders a complete shopping list of sponsorship benefits including the traditional signage

“Twenty years from now you will be more disappointed by the things that you didn’t do than by the ones you did do. So throw off the bowlines. Sail away from the safe harbour. Catch the trade winds in your sails. Explore. Dream. Discover.”

—Sir Robin Knox-Johnston, Founder and Chairman of the Clipper Race.

Henri Lloyd team around the world in the ninth edition of the Clipper Race. Eric, 33, is fresh from his role as weather forecaster for the Canadian sailing team at London 2012. Boasting a strong racing pedigree, Eric was part of the first Canadian team to win the Marblehead to Halifax Ocean Race in the race’s 106-year history. Apparently, he also has his eye on becoming the first Canadian skipper to claim victory in the Clipper Round the World Yacht Race. (You can follow Eric’s progress at <http://yib.tl/clipper2013>.)

Jim Cole, a 70-year-old Halifax/Dartmouth, Nova Scotia native, now residing in San Francisco crewed in the 2010/11 race. Although Jim had sailed for more than 35 years, he spent three weeks at Clipper’s UK training facility getting accustomed to the 68’ racing yachts sailed in that competition. Jim is the oldest participant ever to compete in the race to date.

Alyson Murray, a Bridgewater, Nova Scotia native participated in the 2010/11 race at the age of 20 being the youngest crew member at the time. Having whetted her appetite as a volunteer when Halifax was a port of call a year earlier, Alyson was hooked. After serious contemplation about postponing her graduation (in neuroscience at Dalhousie), Alyson joined the fleet to do the final two of seven legs.

PRAXES should be applauded for stepping up. Its involvement in and support of the 2013 Clipper Round the World Race is an exemplary example of how Canadian corporations can forge unique and lasting partnerships on the world stage. In this case, PRAXES was looking for a two for one return but rumours have it, that even six weeks in, it has surpassed that!

Today, PRAXES boasts a national bench of 20 emergency physicians that is constantly growing, through in-house referral only. Future plans include a consumer solution, so stay tuned. ■

USEFUL WEBSITES

PRAXES Medical Group praxes.ca
 Clipper Round the World Race clipperroundtheworld.com
 Canadian Trade Commission. tradecommissioner.gc.ca



↑ Mayor Boris Johnson and Sir Robin Knox-Johnston, Founder and Chairman of the Clipper Race announced London as the host city for the start of the 2013/2104 Clipper Round the World Yacht Race.



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David Jones

Scepter Corporation

**LEADING A CANADIAN CORPORATION
IN AN INTERNATIONAL ROLE**

STORY AND PHOTOS BY ANDY ADAMS



FEW PEOPLE REALIZE the impact that Canadian engineering and collaboration have had in the international development of both EPA and CARB environmental standards for marine fuel systems. Fewer people probably realize that virtually ALL the leading marine industry outboard manufacturers now use OEM portable fuel containers manufactured by Scepter Corporation. And, Scepter Corporation is a Canadian company with all of their marine manufacturing facilities located in Canada; Toronto in fact.

So, if you were to check the portable marine tank that was supplied with your outboard engine it was most likely made in Canada by Canadians.

It's a great story and a proud legacy that David Jones is now responsible for.

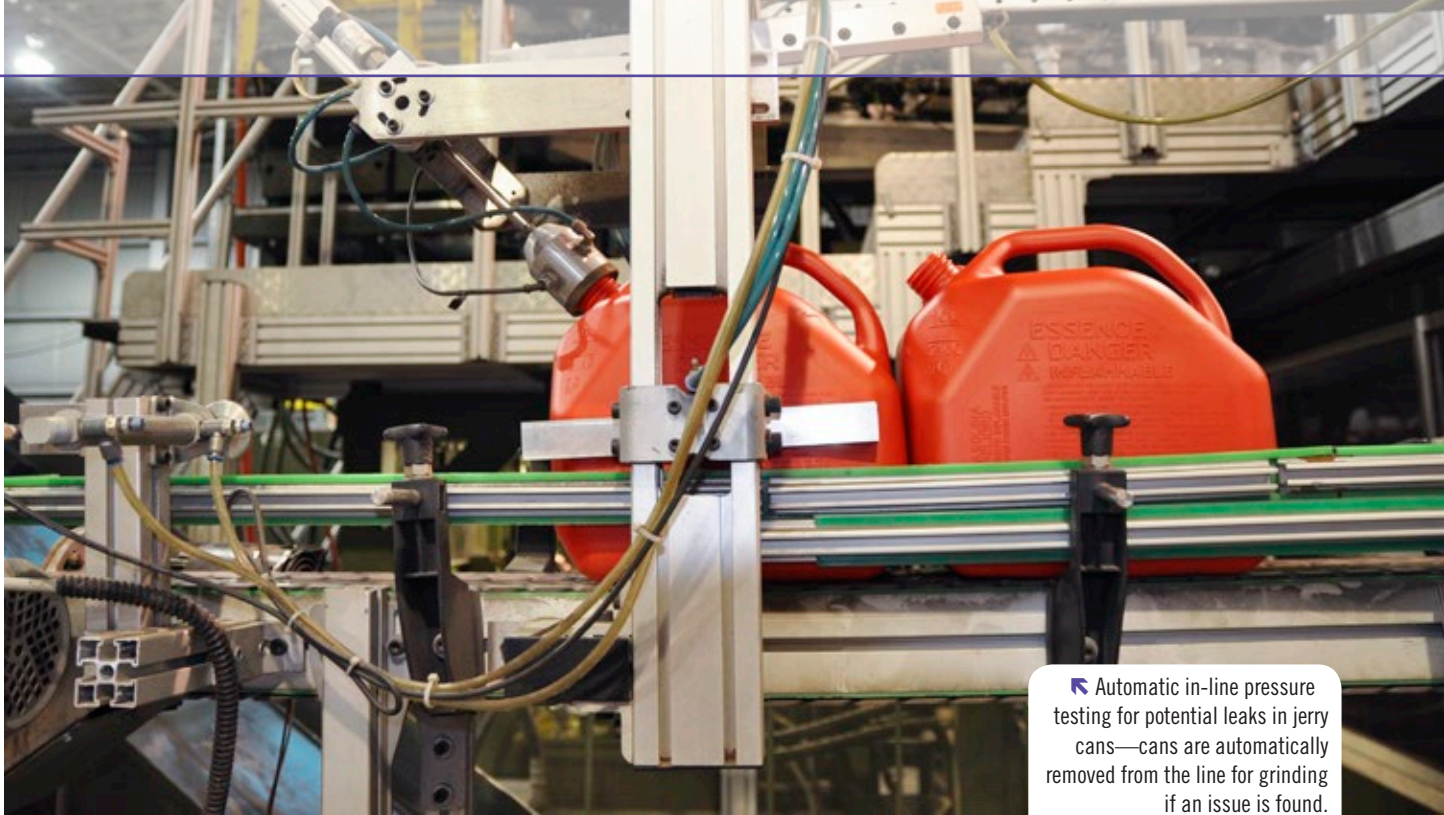
How Scepter Corporation got to this point is also an important lesson for Canadian businesses.

There are lots of less expensive products out there and we all know consumers vote with their wallets. The OEM outboard manufacturers know that too, but government regulations, corporate environmental responsibility and an understandable desire to avoid warranty and corporate legal consequences, all demand reliable quality that meets or exceeds the requirements.

Enter our well-educated Canadian workforce responsible for design, engineering and production of Scepter products. At their Toronto-area plant, Scepter employs 270 people, running shifts five days a week, 24 hours a day plus weekends and everything Scepter does is to ISO 9001 quality levels.

The company's head office, manufacturing and primary warehouse is now located at 170 Midwest Rd. in Scarborough, (part of Toronto) and it has 10 shipping doors and 5000 skid ▶

▶ Sample fuel containers undergo destructive testing in accordance with Canadian and international standards throughout the production runs. Testing temperatures can reach 70C and pressures to 26PSI during these tests.



Automatic in-line pressure testing for potential leaks in jerry cans—cans are automatically removed from the line for grinding if an issue is found.

positions. This is supported by a nearby secondary warehouse at 1170 Birchmount Rd. that has five shipping doors and 2700 skid positions. This is a big operation!

The company sells across North America, South America, Europe, Russia, South Africa, Asia, Australia and New Zealand. David Jones is the person responsible for their marine fuel system products. David travels a lot!

Born and raised in London, Ontario, David still chooses to live there because with so much travel, where he lives is a bit irrelevant.

So, you might have expected David to have attended the University of Western Ontario in London but instead, David attended the University of Waterloo and later University of Toronto. His career found him working in the marine industry manufacturing “starboard” type composite marine flooring out of a Wallaceburg, Ontario location when this opportunity came.

David joined Scepter Corporation in 2006. David’s role was to ensure a seamless transition between him and John Ferguson, David’s well known and highly regarded predecessor. Especially at the OEM level, their customers needed a seamless transition. John’s reputation was excellent and he was the person who originally began the marine tank certification process and through his

career brought the OEM businesses into Scepter. David is humbled yet proud of the fact that Scepter has been, and continues to be, in a position to truly work with the outboard engine OEM businesses to meet their marine fuel tank requirements. David and Scepter work hard to make sure that their tanks are a worry-free component for those customers.

David also manages the aftermarket business relationships and in fact, Canada only represents about 10% to 15% of the business because Scepter is exporting to Western Europe, Russia, Japan and even China.

In total David looks after the aftermarket business through 42 different distributors in 33 different countries. His title is Group Manager of Marine Products—International Export, OEM and Aftermarket.

How they gained all that OEM business is really the big story but first, a bit of background is in order.

SCEPTER HISTORY

Scepter Corporation has had an illustrious history. Scepter was founded in 1949 by Evald Torokvei. He made inflatable plastic toys at night and sold them during the day. During the 1950s the company expanded into PVC and HDPE plastic production for industrial applications and they purchased their first plant

in 1953. The business had doubled in size by the 1960s.

They first developed “Scepterene” resin for gasoline containers in the 1960s and also worked to be a part of the development of CSA specifications for Jerry Cans. The company saw its first year of million-dollar sales in the 1960s and also started working with high tolerance parts for automotive and military customers.

Demonstrating the company’s versatility and skills, they became a very large player in the PVC pipe manufacturing industry making up to a 300 mm diameter pipe.

In the 1970s they purchased their second plant in Scarborough, developed 600 mm PVC pipe, the largest in North America, expanded with two new facilities in Canada and became the leading manufacturer of Jerry Cans and beverage cases. Also at that time, the two sons of Evald Torokvei [Tom and Bob Torokvei] took over the business.

During the 1980s they developed a national sales force for PVC pipe with 13 locations in Canada, set up injection molding design and mold manufacturing facilities and began manufacturing portable marine fuel tanks.

The company also did well working to military specifications and Scepter became recognized in the 1990s as a leader in innovative ammunition packaging. The ▶



US military adopted Scepter military fuel cans as their new standard.

Recognizing their expertise in fuel containers, Scepter was awarded multi-year contracts with Honda, Yamaha, Tohatsu, Mercury and others through the 1990s for portable marine fuel tanks.

The Scepter pipe division merged with Canron's pipe division to become Canada's largest extruder of PVC pipe.

During the 2000's, the California Air Resources Board [CARB] ushered in a new era of emissions and spill-proof regulations for gasoline containers. Scepter developed their then-new "ECO" fuel containers and spout systems.

The company also made extensive investments in new multilayer technologies to meet the ongoing environmental initiatives by the EPA and CARB for all fuel containers—military Jerry Cans and

marine. We will come back to that in a minute but we should also mention that Scepter's skills and resources helped them develop a new line of household products at that time.

They also acquired the "Flo'n'Go" siphon-based liquid transfer system. Bob Torokvei became President of Scepter during that time and they also purchased the assets of Blitz creating a new company; Scepter USA to produce only Jerry Cans for the US market.

SCEPTER'S SPECIALTIES


From a strictly technical standpoint, Scepter can do pretty much anything that can be done using injection molding and blow molding; their chosen areas of specialization in production processes.

So, to be clear, in terms of their marine products, Scepter produces

portable fuel tanks under the Scepter brand name using injection molding and blow molding processes. We make that point because eight years ago Scepter entered into marketing permanent fuel tanks, fuel fittings and accessories through a global marketing partnership with Moeller Marine.

Moeller uses roto-molding processes for their Moeller inboard permanent marine fuel tanks, seating and a host of other marine focused items.

As an interesting side note, both Scepter and Moeller are privately-held family businesses and their alignment is very complimentary, delivering the broadest range of marine fuel tanks and fuel related products in the industry, yet with very little product or marketing overlap. This alignment has really strengthened both companies.



↙ Multilayer blow moulding technology is used throughout the plant for both jerry cans as well as marine tanks.

That is why Canadian-made Scepter products are exported to China and sold there. An amazing statistic is that Scepter remains one of the largest suppliers of Jerry Cans in Australia and they are all produced in Toronto.

You will always see David attending METS in Amsterdam serving their many European customers. It may seem incredible that Canada has so many industry-leading companies because as David points out, many are quiet about their accomplishments and fly under the radar.

Corporately, Scepter is a member of both the National Marine Manufacturers Association (NMMA Canada) and the National Marine Distributor's Association, (NMDA).

Scepter is part of the Canadian NMMA Pavilion at METS, we asked Sara Anghel, NMMA Canada's Executive Director about David.

"I first met David at the Scepter facilities in Toronto in 2008. I was so proud and impressed to see such a successful and large marine business located in Canada. It is world class. David is an integral part of the NMMA as a member of both the NMMA and Discover Boating Boards in Canada. His expertise and contributions are extremely valuable to the entire industry and he always goes beyond the call of duty. Earlier this year I had the privilege to accompany David and a few of our other accessory manufacturers to the Dubai and Eurasia Boat shows as part of the NMMA Trade Mission, David consistently worked to help promote his fellow colleagues and their businesses while also communicating the overall NMMA messaging when speaking with international distributors; the industry is fortunate to have him involved."

David modestly told me that, "Our technical and highly engineered products sell best in markets where there are regulations—a hurdle that has to be overcome. Then, manufacturers who focus on lower quality and price have difficulty gaining a foothold. No one benefits when it's a market free-for-all



↙ A "typical" 25L Canadian/International OEM style Scepter portable marine tank.



↙ a "typical" 25L United States multilayer construction EPA/CARB OEM style tank with 2-way self venting tethered ratcheting cap with pressure relief feature.

While we most closely associate Scepter with products designed to carry fuel, the company has available a range of wastewater tanks, seating products and even ice chests that are well-suited for marine and other uses through this partnership.

Their home products are very familiar to most of our readers. Scepter makes the green recycle food bins and blue boxes that many families have. But those are just the tip of the international iceberg. As I walked through the plant, I noticed American drug store chain Walgreen's shopping baskets in one area, waiting to be shipped to the U.S.

Bet you thought those would come from China!

Well, Scepter can be very competitive globally, even using Canadian labour and facilities...but especially when Canadian engineering and quality are important.

to the lowest price."

More than that, when regulations are involved, it's best to be at the table contributing knowledge and expertise when the regulations are drafted in the first place. David and his predecessor took Scepter to the table for the development of the EPA and CARB regulations and to contribute Scepter's engineering and production knowledge to develop solutions to the environmental and emissions challenges that handling fuel poses.

In the marine industry, until the EPA got involved in the last 3 to 5 years, OEM outboard engine manufacturers could buy one tank and certify it for sale anywhere in the world therefore, they only had one inventory item.

Now with the United States requiring that only EPA, and in the case of California, CARB, certified products be offered for sale in the market, this has resulted in two distinct inventories—a "USA/North American" tank, and a tank that is certified and sold throughout the rest of the world although, in some cases companies have chosen to go with only one—a "world" tank.

Scepter products are CSA approved. David explained that technically, you ▶

➤ Automatic deflashing of parts:
The use of automated process
ensures consistency of products.

can sell non-CSA tanks but reputable retailers in Canada would not generally want to participate in having non-approved product for sale and expose themselves to potential liability issues with non-approved product when there is a Canadian performance standard.

I was impressed to learn that all Scepter tanks are pressure tested for quality even though that is not specifically required. Scepter tanks may be over-engineered but that's how you maintain a great reputation for quality products and even at that, Scepter's tanks are good value at both OEM and aftermarket price points.

Also, the aftermarket quality from Scepter is the same. The wording they use is to say, "The same quality put into the OEM product range is available in aftermarket products".

Alphabetically, Scepter supplies OEM portable fuel tanks for BRP, Honda, Mercury, Nissan, Suzuki, Tohatsu and Yamaha. That's just about everybody.

David says Scepter pours on the research and development and has introduced numerous improvements across the board. What sets you apart is being involved with the front-end in the legislation with organizations like EPA and CARB.

This affected Jerry Cans in 2001. Then, in 2006, 2007 when the EPA and CARB were drafting new regulations for

environmental challenges like permeability, Scepter was seen as an industry leader and they were able to participate in the development of the regulations. The money required for the research and development to go to these market areas is big. All the major players are at the table and Scepter was able to support the process and collaborate to achieve the mandate.

Plastic originates as a petroleum derivative. They responded to the new EPA and CARB requirements by adding layers of material into polyethylene to change the level of permeability. As the EPA and CARB permeation requirements get more stringent, Scepter has invested in technology and has moved into six-layer multilayer blow-moulding to achieve the barrier required today, as well as positioning the company to meet future barrier requirements.

From a quality perspective, all of their work is done in-house. The only things Scepter outsources are the flammability tests which have to be done in a special laboratory environment.

David guided us on the plant tour and some of the machines are impressively large as well as very complicated. Special processes have been developed to get the new six-layer material to meet the regulations. Each of the layers is extruded hot and separately into what is basically a tube of flowing material.

This is then pinched off and blown into a mold at high temperature and pressure resulting in what appears to be a single piece of material that is in fact, six layers, each serving a different purpose.

Elsewhere in the plant the caps, pouring spouts and other components are also being made and these go through a series of tests and inspections as they proceed through the manufacturing process.

Should one fail, the whole run is scrapped.

Randomly, products from each run are also subjected to high temperature pressure tests that exceed virtually anything a consumer tank might experience in the real world.

That's the great lesson for other Canadian businesses—compete in an industry or an area where knowledge, skill and top quality have real value. Exceed expectations and go above and beyond with research and development to help you stay on top.

Throughout all of this, David Jones is the front man for the Scepter Marine Products, constantly on the go and always in touch with the customers at every level. The whole operation runs lean and David is really the go-to-guy for his customers, but that is the best way to manage the business.

Scepter Corporation is at the top of their industry and perhaps the most difficult assignment of all is to stay on top. ■

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*Note: This form is for marine trade attendee use only – not for exhibitor use.

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THE INNOVATION AWARD WINNERS AND MORE

STORY AND PHOTOS BY ANDY ADAMS



➤ IBEX 2013 was held in Louisville, KY. Next year it moves to Orlando.

PROBABLY THE SINGLE MOST COMPELLING REASON to attend The International BoatBuilders' Exhibition and Conference (IBEX) is to find the best and the newest ideas and products for the marine industry. This year offered a fine group of interesting and clever new products for the boating public.

One of the first new products that caught our eye was "Sheenstop"—a low-water bilge filtration system that keeps hydrocarbons of all types out of the bilge water without compromising the high-water bilge system capacity for emergency needs. It's an industrial

technology used in commercial shipping and it's been brought to the recreational yacht owner.

John Bartnick is the developer of The **↓ Dry Boat System** and he had a pair of identical fiberglass runabouts on display. Both were boats with foam cored construction but one had been cut open extensively to repair and replace the wet and damaged core while the other was

being dried out using a dry air injection system applied to the bad core areas using small diameter hoses and manifolds. The advantage is that the core can be dried out without removing engines and doing other expensive work and with a minimum of rebuilding required, even to dry out a transom. 'Good idea and major savings to repair a yacht with a wet core.



➤ This boat shows the engine in place while the transom is being dried. ➤ The Dry Boat System can dry a wet bottom core.

← This new cushion material from Indratech looks perfect for Canada's climate.



Another product making its marine industry debut was called ← “Indratech” and it’s a seat or mattress cushion material made from thick filaments that provide softness but promote a major increase in air circulation compared to foam materials.

We really saw an opportunity for a product by Dolphinite. This is an aerosol canister (just like ordinary spray paint) but it has a clever internal supply of catalyst that can be released into a colour-matched gel coat in the main part of the spray can. A special valve makes it even more effective and colour-matched new and used boat gel coat repairs can be made easily and quickly at marinas, repair yards and perhaps even by owners. Compared to other ways to repair damaged gel coat, it’s a bargain.

One of the highlights of IBEX is the Innovation Awards and at the Industry Breakfast, the winners of the 2013 IBEX Innovation Awards were announced.

The 2013 IBEX Innovation Award winners are:

1 → Boat Care & Maintenance: Pettit Paint Hydrocoat Eco

“This product is actually two good bottom paint technologies made to work together,” said Innovation Award judge Beth Leonard.

Boatbuilding Methods & Materials: Safety Components Fabric Technologies Breakwater
“A marine exterior fabric with a ten year warranty, made from an advanced polymer alloy, and built to withstand the harshest environment is unheard of,” according to judge Nigel Calder.

Boatyard and Dealer Hardware and Software: Navico System Builder

Judge Ben Ellison commented, “This is a product that simplifies the sales and order process and also begins the proper documentation and diagram of the electronics on a boat.”

Deck Equipment & Hardware: Syntec Industries Smart Wheel

“This product from Syntec Industries is an





5



6

invitation to boat builders everywhere to trick out their boat steering wheels with wireless or Bluetooth communication,” explained judge Frank Lanier.

Honorable Mention: Marine Accessories Corporation Xtreme Bimini

2 Furnishing & Interior Parts:

Spradling International Marine Fastmount Very Low Profile Clip

“The Fastmount Very Low Profile Clip vastly improves panel mounting with no special tools,” said judge Pete Robson.

Honorable Mention: Kenyon International Silken 2

3 Mechanical Systems: Dometic Marine SeaLand Orbit 7100 Series Toilet

“Dometic has come up with a smart solution to fitting marine toilet into today’s multi-angled small space heads,” explained judge Pete Robson.

Environmental Award: Clean Marine Systems Environmental Valve Vent

“The Environmental Valve Vent is a perfect example of using the power of IBEX to solicit input from design engineers from the major OEMs,” commented lead judge Alan Wendt. “This yielded an improved product that solves forthcoming EPA regulations.”

4 OEM Electronics: Co-Awards to Volvo Penta Glass Cockpit System, Raymarine Evolution Autopilot

Judge Ben Ellison said, “The Glass Cockpit System sets a new industry standard for the integration of engine and navigation data.”

“Simplified installation and no calibration make co-winner Raymarine’s Autopilot a game changer,” added judge Zuzana Prochazka.

Honorable Mention: Fusion Electronics Marine Stereo with Universal Media Device Dock and Bluetooth Streaming

5 Outboard Engine: Yamaha Marine Group 2.8L inline Four Marine Power Platform

“This highly versatile four stroke power platform featuring a narrow footprint and ability to retro fit has a very broad appeal for both the end user and the marine industry,” said judge Beth Leonard.

Propulsion Parts, Propellers: Seastar Solutions Lower Unit Fill/ Drain Kit

Judge Frank Lanier stated, “The Lower Unit Fill/Drain Kit will encourage owners to take better care of their lower units by being environmentally responsible.”

6 Safety Equipment: American Boat & Yacht Council Safety Equipment App

“This app is personalized to your size boat and a necessary good start for the large percentage of boaters who do not buy through a retail dealer who would otherwise provide new boater instruction,” said Beth Leonard.

Be sure to visit the www.boatingindustry.ca website for the latest from IBEX including several new product videos. ■



3



4

Responding to market moves:

The METS success story

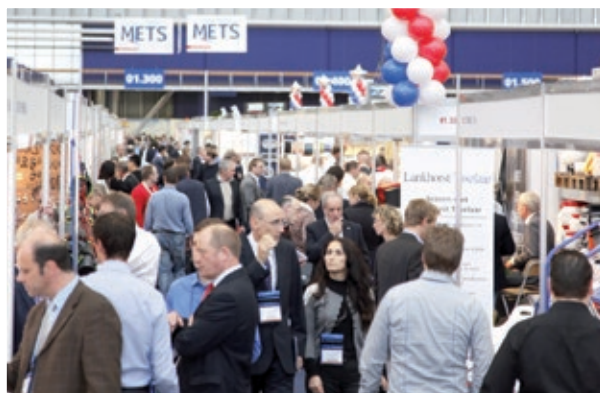
In an era where trade shows in every industry sector have been forced to re-evaluate their raison d'être, one event in the leisure marine world continues to go from strength to strength. Some say it's the ideal location in Amsterdam, others the no-nonsense B2B atmosphere that attracts marine professionals and businesses in ever greater numbers. But there is a third factor behind the METS success story... the show's ability to listen to the market and diversify into new areas.

25 years and still growing strong

METS - the Marine Equipment Trade Show - celebrated its 25th anniversary in 2012 as the world's largest and most visited leisure marine trade show. Despite the recession, the event attracted an impressive international attendance and the number of exhibitors remained exceptionally high. The fact that almost half of the exhibitors pre-booked stand space for 2013 before METS 2012 had even closed speaks volumes for the value attached to this annual gathering of the global marine industry.

"It is clear that exhibitors and visitors alike welcome the fact that METS is strictly trade-only," explains Irene Dros, Domain Manager of Amsterdam RAI Convention Centre, which has successfully organised METS for the past quarter of a century. "Keeping our focus firmly on products attracts people from over 100 countries and has also led marine industry associations from 15 countries to set up their own pavilion."

The METS organisers have also enhanced the show's diversity by introducing specialist pavilions. "The first of these - the SuperYacht Pavilion - was opened several years ago and we have been pleased to see it develop a very distinctive identity of its own while remaining very much part of the overall METS experience," adds Dros.



An unmissable date with the SuperYacht Pavilion (SYP)

While boat shows such as those in Monaco and Fort Lauderdale have traditionally been first on the calendar of companies in the large yacht industry, METS now attracts more suppliers in the sector than any other event worldwide. The SuperYacht Pavilion runs in association with the Global Superyacht Forum (GSF), one of the world's leading summits for captains, designers, builders, project managers, brokers and owners.

Showcasing innovation at the Construction Material Pavilion (CMP)

The Construction Material Pavilion offers a unique platform for material suppliers to showcase their products, skills and expertise to the global marine leisure industry. Last year's METS showed that visitors were very inspired by the wide variety of (raw) materials that can be used in boat and yacht building. METS 2013 will also feature high-end knowledge exchange via the special Construction Stage.

Fast developments at the Marina & Yard Pavilion (MYP)

The marina industry is developing at a rapid pace and the Marina & Yard Pavilion is dedicated to all kinds of equipment for the marinas and associated boatyards, the MYP attracts marina owners and operators from around the world. There is a particular focus on equipment such as pontoons, boat mooring systems, utility pedestals, specialist lighting, pump-out systems, hoists, cranes & trailers, in-water boat lifts, management software, boat cradles & stands, fire fighting & safety equipment and dock fenders.

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RESEARCH

IT'S TIME FOR A CANADIAN MADE SOLUTION

BY JOHN KERR

WHEN WE DECIDED TO LAUNCH **BOATING INDUSTRY CANADA MAGAZINE** 10 years ago, our drive to find information on the industry was a tough assignment. We had tons of anecdotal information, but our management wanted facts and figures and like most of those that manage marine businesses in this country, we had to default to the US and international reports that were by their nature, somewhat marginal on Canadian data.

Since that time we have been studying the marine market place. Patterned after our successful annual industry reporting that we do in the Canadian electrical industry, our desire to learn more about this business has taken off with a life of its own.

It's time for a "made in Canada" solution. It's time to get insight and information that reflects the industry. Are we in recovery or not? Are we selling and stocking the right product and marketing it in the right place? Are we overstocked in Canada? How old is the fleet of boats in Canada? No one really knows.

GE Capital shares data with our readers through their "GE Spotlight" series which is great for larger dealers, but for broad industry data, discussions

with the NMMA, Boating Ontario and with efforts to access more detail from the Transport Canada registration data still have not generated as much actionable research as we would like. Clearly the numerous interests and factions in our industry must come together to fund and share resources sooner rather than later if we want to get the data. We must have solid research to make the right decisions the first time.

Transport Canada's treasure trove of data that goes back a decade has been locked down by the bureaucracy who feel sharing it with those that need it would betray some perceived privacy laws. This could not be farther from the truth. Sharing market data by boat type, brand, and the first three letters of the postal code of an owner, in no way betrays the ultimate boater. Imagine the power of this knowledge where we can share and discuss market share, look at historical data, make better inventory decisions, properly align brand and product needs with the market mix of a particular dealer, thereby working more closely with the marketplace around us to better serve it.

This article and the effort we have put into it is our ongoing effort to drive the business forward and provide the industry

with the "must have data" it needs. While we are presenting this somewhat from the 39,000 foot level, it's a start.

Some interesting facts:

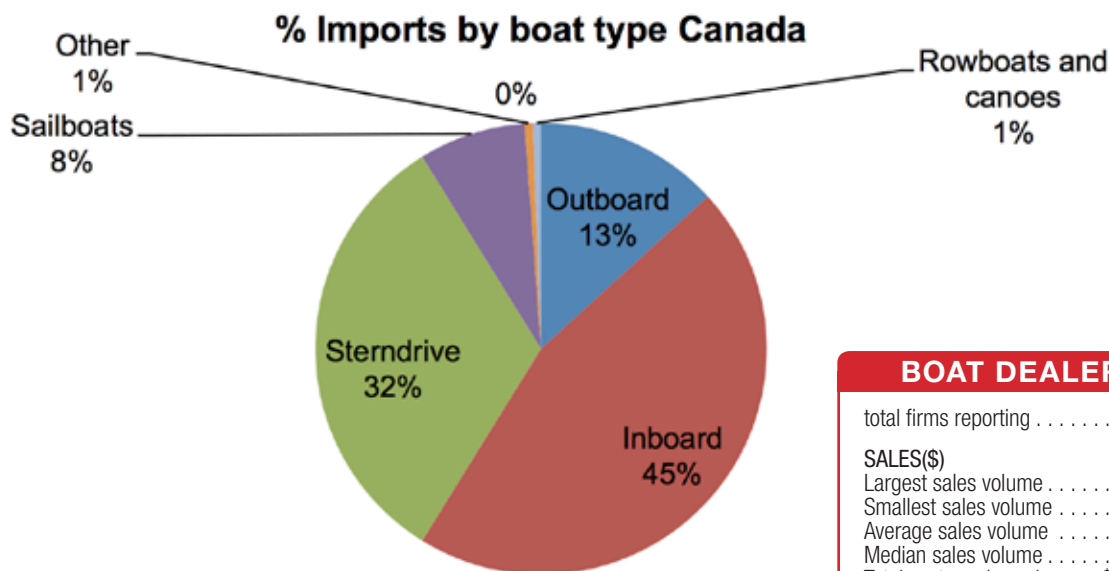
So just how big is the Canadian market? Here is a snap shot

1. The sale of new boats is estimated ... \$700 Million this year
2. Brokerage/used boats... \$750 million
3. Aftermarket and accessories... \$330 million
4. Overall expenditures for boating related expenses... \$1.72 billion
5. Total Canadian market...\$3.5 Billion

The detail we can assure you, will follow if we can gain the industry support we all need.

The following tables represent our country's activity in terms of importing boats and equipment. Segmented somewhat by key overall categories, it presents an overview of our activity and our marine engine business here. The value of boats imported in to Canada has dropped substantially from 2008 by 21% to just under \$600 Million. The following table (next page) ↓ details our imports and sheds some light on the make-up of our market here as well.

For the boat builders, the good news ▶



is that we are exporting more boats to the US market with nominal gains from the previous years. Sadly, we are far away from the high water marks of the mid 90's.

As one might assume, the engine market is a major component of activity in the marine market in Canada. The below ↓ is a snap shot on the makeup of the value of the imports into Canada which is estimated to approach \$100 million this year. Not surprisingly this is relatively flat to the year before. However, it is substantially up from 2009 by almost a factor of 2X due to the realignment of engine inventory, and a strong retrofit trend. The outboard market represents 50% of boat use in Canada.

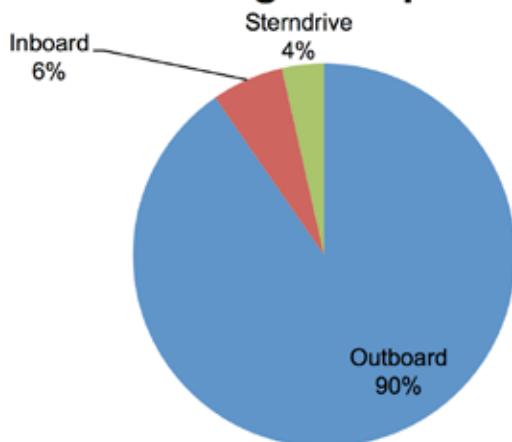
The Fleet in Canada

Levering some inside information along with some great statistics levered from analysis of BOATCAN listings and others from the past several years we can draw some conclusions on our aging fleets.

Segmented simply by Power and Sail the average age of our powerboats in Canada is approaching 22 years while the sail fleet is older at 27 years. Many of us intuitively understand why this is, based on the way the boats are being built, the ease of retrofit and the simple functionality upgrades possible in navigation, interiors and safety.

It's very hard to generate any real meaningful stats for the other segments of our ▶

% Value of Engine Imports Canada



BOAT DEALERS 2013

total firms reporting 2457

SALES(\$)

Largest sales volume \$45,500,000
 Smallest sales volume \$650,750
 Average sales volume \$4,987,500
 Median sales volume \$23,075,375
 Total sector sales volume . . . \$2,245,500,000

Employee Size

total employees in sector 5107
 largest employee size 37
 smallest employee size 2
 average employee size 8
 median employee size 20
 revenues per employee \$439,690.62

BOAT COVERS ALONE 2013

total firms reporting 175

SALES(\$)

Largest sales volume \$2,120,000
 Smallest sales volume \$139,000
 Average sales volume \$1,215,000
 Median sales volume \$677,000
 Total sector sales volume . . . \$277,890,000

Employee Size

total employees in sector 657
 largest employee size 17
 smallest employee size 2
 average employee size 9
 median employee size 6
 revenues per employee \$422,968.04

SAIL MAKERS 2013

total firms reporting 37

SALES(\$)

Largest sales volume \$5,325,000
 Smallest sales volume \$227,500
 Average sales volume \$1,057,000
 Median sales volume \$2,776,250
 Total sector sales volume . . . \$49,875,000

Employee Size

total employees in sector 184
 largest employee size 24
 smallest employee size 2
 average employee size 6
 median employee size 13
 revenues per employee \$271,059.78

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total firms reporting 909

SALES(\$)

Largest sales volume \$24,780,000

Smallest sales volume \$240,750

Average sales volume \$3,912,000

Median sales volume \$12,510,375

Total sector sales volume . . . \$330,000,000

Employee Size

total employees in sector 3950

largest employee size 24

smallest employee size 2

average employee size 14

median employee size 13

revenues per employee \$83,544.30

BOAT REPAIR 2013

total firms reporting 1344

SALES(\$)

Largest sales volume \$9,545,000

Smallest sales volume \$275,000

Average sales volume \$910,000

Median sales volume \$4,910,000

Total sector sales volume . . . \$275,000,000

Employee Size

total employees in sector 1050

largest employee size 26

smallest employee size 1

average employee size 4

median employee size 14

revenues per employee \$261,904.76

MARINAS 2013

total firms reporting 1878

SALES(\$)

Largest sales volume \$23,450,000

Smallest sales volume \$245,000

Average sales volume \$775,500

Median sales volume \$11,847,500

Total sector sales volume . . . \$1,720,000,000

Employee Size

total employees in sector 4765

largest employee size 43

smallest employee size 3

average employee size 4

median employee size 23

revenues per employee \$360,965.37

market in the sport boat, pontoon, PWC segments and fish segments save that its evident all are approaching 12- 14 years.

Brokerage sales in this country have been flat across Canada, partly due to the recent push by US brokerages to flood the market with boats and partly due to the economic reality. We are estimating a total of 3125 boats were sold in brokerage firms across Canada with the West (Alberta/BC) running slightly ahead of Central Canada at 41%. The Quebec and Atlantic provinces represent 19%.

Boat Dealers

Looking deeper at the new boat inventory here, we see this as flat to nominally down from the previous year.

We have begun an informal survey

of a group of dealers across Canada and here are some metrics that you might find interesting as an overview alone.

The split of the nature of dealers here ↴ versus the US is interesting analysis in itself, but what we are presenting is a quick snap shot that might provide some insight.

The chart to the right ➡ attempts to segment the market further in Canada and gives an overview of each segment therein.

In closing we are keen to have any input and collaboration we can get and are most keen to pull together an industry working group to attack this issue of "made in Canada" data. As we move forward, we intend to begin an outreach to as many as we can and look forward

to your input and thoughts.

Please feel free to reach out to us today: aadams@kerrwil.com. ■

BOAT COVERS, CANVAS AND UPHOLSTERY

total firms reporting 399

SALES(\$)

Largest sales volume \$27,500,000

Smallest sales volume \$130,000

Average sales volume \$999,875

Median sales volume \$13,560,000

Total sector sales volume . . . \$431,444,000

Employee Size

total employees in sector 1350

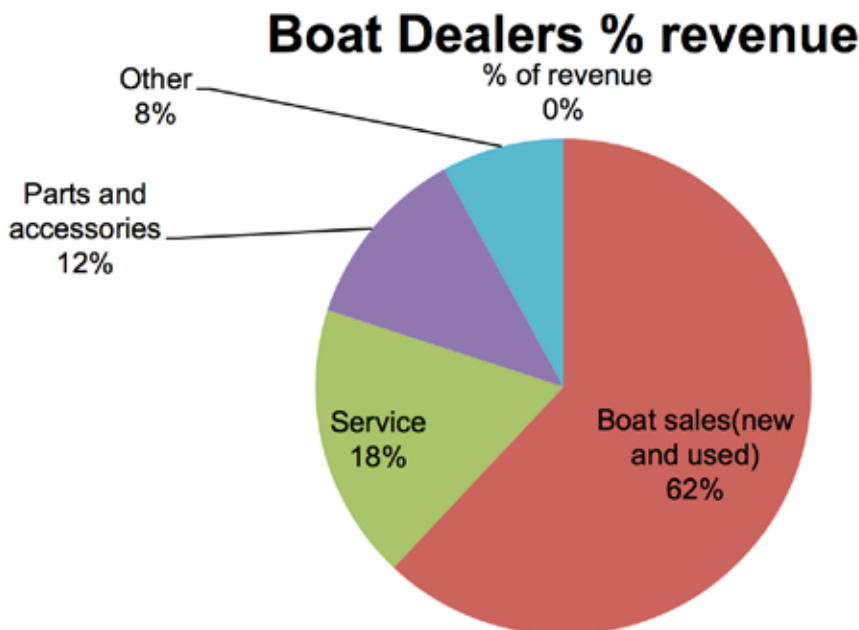
largest employee size 45

smallest employee size 1

average employee size 17

median employee size 23

revenues per employee \$319,588.15





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- 6 Safe Skeg Products
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- New Power Trim / Power Steering Fluid
- 16 Anode Kits and Anodes for Volvo and Yamaha outboards

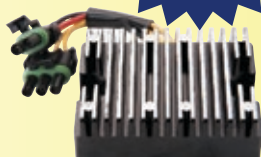
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