



National Marine
Manufacturers Association

Welcome to the Webinar **Top Export Markets for Boat** **and Equipment Manufacturers**

The webinar will start shortly

June 5, 2012





Today's Presenters



Rebecca Torres

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Assistance Center
U.S. Department of Commerce



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International Trade Administration
Office of Consumer Goods
U.S. Department of Commerce



Promoting U.S. Marine Technology Products and Services Worldwide

U.S. Department of Commerce
Marine Technology Team

Presentation by Rebecca Torres, Commercial Officer
U.S. Export Assistance Center, Clearwater, FL



U.S. Commercial Service Network

- Trade specialists in over 100 U.S. cities and 83 countries worldwide tied to U.S. Embassies
- Industry specialization
- Corporate and Trade Association Partnerships
- Customized client solutions
- Quantifiable results





Marine Technology Team

Assisting U.S. companies to increase exports related to:

- Port equipment and services
- Shipbuilding and pleasure boats
- Underwater and ocean technologies

How we assist:

- Promote your products and services worldwide
- Identify and evaluate international partners
- Navigate international documentation regulations
- Successfully bid on foreign government contracts
- Tap export financing through our partners, U.S. Export-Import Bank



Marine Tech Team Partnerships

- Maritime Alliance
- Marine Technology Society (MTS)
- Marine Oceanographic Technology Network (MOTN)
- National Marine Manufacturers Association (NMMA)
- Reed Exhibitions
- American Association of Port Authorities
- and other regional associations...

USFCS/NMMA Strategic Partnership

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A Special Message from Under Secretary Francis [Share](#) [More info](#)



0:00 / 1:22

YouTube

"The National Marine Manufacturers Association is pleased to work with the Commerce Department on this important initiative to educate our members on how to increase revenue by successfully expanding their export markets."



Thomas Dammrich
President, National Marine
Manufacturers Association

Welcome to the New Market Exporter Initiative in alliance with the National Marine Manufacturers Association.

This program is part of the President's National Export Initiative to help U.S. businesses expand exports.



Marine Industry Specific Webpage

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http://export.gov/industry/marine/index.asp

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Related Topics

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Marine Technology

Oceans span the globe—does your Marine Technology business? Keep your company growing by devising or expanding your international export strategy. From Brazil to China, from Korea to Europe, the opportunities for your marine technology products and services are almost endless.

The U.S. Department of Commerce's International Trade Administration (ITA) Marine Technology team provides international market research, business leads, and promotional events tailored to marine technology companies. Our programs support U.S. product and service exports related to:

- Port equipment and services
- Shipbuilding and pleasure boats
- Underwater and ocean technologies

The ITA Marine Technology team is here to help you:

- Promote your products and services worldwide
- Identify and evaluate international partners
- Navigate international documentation regulations
- Successfully bid on foreign government contracts
- Tap export financing through our partners at the U.S. Export-Import Bank

 [Sign up for Marine Technology email updates](#)

Trusted sites

100%



US & FCS Historical Support at Pleasure Boat Related Trade Shows

- Egypt International Boat Show-Cairo
- Das Boot-Dusseldorf
- Dubai International Boat Show-Dubai
- China Boat Show-Shanghai
- Marine Equipment Trade Show-Amsterdam



Types of Trade Show Support

Washington HQ, In-Country Post, U.S. Domestic offices work together to provide:

- Most up-to-date market research to U.S. exhibitors
- Promotion of event on CS website, publications, etc.
- Pre-show industry/country market briefing
- Targeted in-country promotional campaign to potential buyers
- Identification and where appropriate, invitations to foreign government officials to visit U.S. exhibitors



State-Level Assistance

- Florida Manufacturers:
 - Enterprise Florida* is offering 3 grants for each of these upcoming international shows
 - METS – November 13-15, 2012
 - Dubai Boat Show – March 5-9, 2013
 - China (Shanghai) Boat Show – April 11-14, 2013
 - Sanctuary Cove – May 23-26, 2013
 - * Contact Julie Balzano at 305-808-3666 or jbalzano@eflorida.com
- Other States: Check with your State Economic Development organization to determine if funds are available



READY, SET, GO!

- **Register** on our marine specific web page for market research and trade leads: <http://export.gov/industry/marine/index.asp>
- **Explore Training and Counseling Opportunities**
 - Webinars/On-Line Training (e.g. www.export-u.com , www.export.gov)
 - In-Person Events
 - Small Business Development Center
 - U.S. Export Assistance Center
- **Develop an Export Business Plan** (sample at <http://www.export.gov/exportbasics>)
- **Perform Market Research** - <http://www.export.gov/mrktresearch/index.asp>
 - [Country Commercial Guides](#) (read latest “Doing Business In” guides)
 - Industry Overviews
 - Market Updates
 - Multilateral Development Bank Reports
 - Best Markets
 - Industry/Regional Reports



READY, SET, GO! – continued

- **Find Buyers**

- Trade Events – Searchable list of Trade Events (http://www.export.gov/eac/trade_events.asp)
 - Trade Mission
 - Trade Shows
- Commercial News USA/Florida Export Directory
- *International Partner Search*
 - You Provide Us with Company Background Information and Marketing Materials
 - You Receive a List of Up to 5 Pre-Qualified Partners
- *Gold Key Service*
 - Pre-screened appointment schedule arranged before you travel
 - Customized market briefings with our local trade specialists
 - Post meeting debriefing and assistance in determining appropriate follow up

- **Due Diligence of Buyers**

- *International Company Profile* (includes interview and site visit)



THANK YOU!!!



INTERNATIONAL
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Top Markets for Recreational Marine Products

John Vanderwolf, International Economist
U.S. Department of Commerce
International Trade Administration
Manufacturing and Services
Office of Health and Consumer Goods
June 5, 2012



Topics to be Covered

- What is the NEI Recreational Transportation Sector
- Top Markets and Export Growth Potential
 - Australia, Brazil, Turkey, the Netherlands, Japan, and UAE
- Challenges to U.S. Industry



Recreational Transportation

Description

- **Recreational Transportation includes the following NAICS codes:**
 - 336213 Motor Home Manufacturing
 - 336214 Travel Trailer Manufacturing
 - **336612 Boat Building and Repairing (including marine engines & accessories)**
 - 336991 Motorcycles, Bicycles, and Parts Manufacturing
 - 336999 Miscellaneous Vehicles Manufacturing
(Snowmobiles, ATVs, and Golf Carts)



Recreational Transportation

Selection/Significance as NEI Sector

- Why was recreational transportation selected as an NEI sector?
 - Potential for export growth is high and will could exceed the doubling of exports from 2009-2014.
 - Helping small and medium firms with a potential strong impact on new jobs!
- What does it mean for the industry?
 - **Hopefully a greater percentage of US government resources for the industry.**
 - **More coordination among those that can help you.**



Recreational Transportation

Key Characteristics

- **Global Market Size:** \$32.2 Billion
(2009, excluding U.S.)
- **CAGR:** 8.6%
(2000-2009)
- **U.S. Share of Global Market:** 14.7%
(2009)
- **SMEs:** 97%
(2008)



Recreational Boat Products

Market Growth Rates of U.S. Exports 2010-2011

Country (size rank)	Growth Rate
Australia (2 nd)	7%
Brazil (5 th)	21%
Netherlands (8 th)	23%
Turkey (9 th)	24%
Japan (11 th)	43%



Recent Export Trends

U.S. Exports of Recreational Marine Products

Annual + Year-To-Date Data from January - March

Country	2009	2010	2011	2011 YTD	2012 YTD	Percent Change YTD 2011-12
World	1,652,531	2,045,934	2,041,013	482,135	568,261	17.90%
1. Canada	474,416	596,687	623,609	145,993	167,381	14.70%
2. Australia	110,191	225,420	241,662	55,250	45,003	-18.50%
3. Belgium	76,646	94,793	82,446	25,118	32,513	29.40%
4. Mexico	69,379	90,474	75,723	17,441	22,762	30.50%
5. Brazil	29,745	56,773	68,644	19,521	27,649	41.60%
6. Italy	80,374	90,978	67,108	11,878	11,322	-4.70%
7. Germany	44,451	50,533	50,508	14,696	17,798	21.10%
8. Netherlands	39,688	39,131	48,239	13,876	10,135	-27.00%
9. Turkey	24,103	37,301	46,234	15,393	4,513	-70.70%
10. Spain	26,806	33,424	40,674	12,774	8,307	-35.00%
Other random Top 20						
11. Japan	23,959	24,071	34,510	8,995	21,256	136.30%
15. United Arab Em	46,126	36,429	27,950	9,259	11,518	24.40%
18. Hong Kong	8,204	18,035	25,410	2,436	7,918	225.00%
20. China	6,600	12,660	23,496	5,016	6,945	38.50%



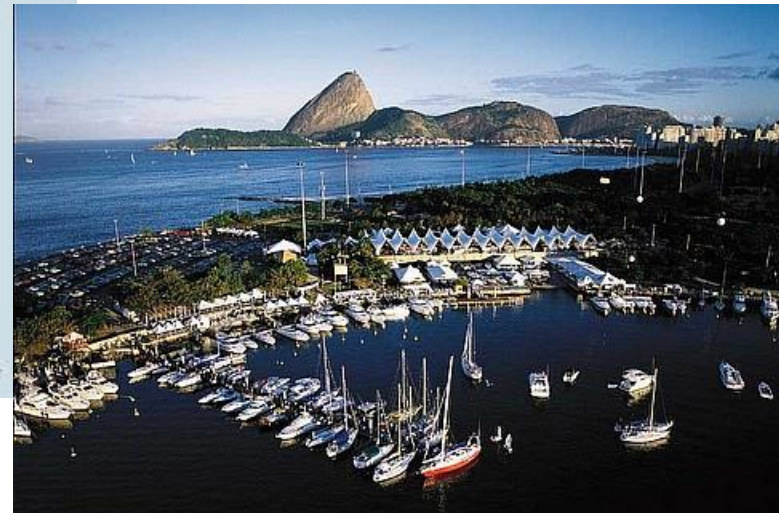
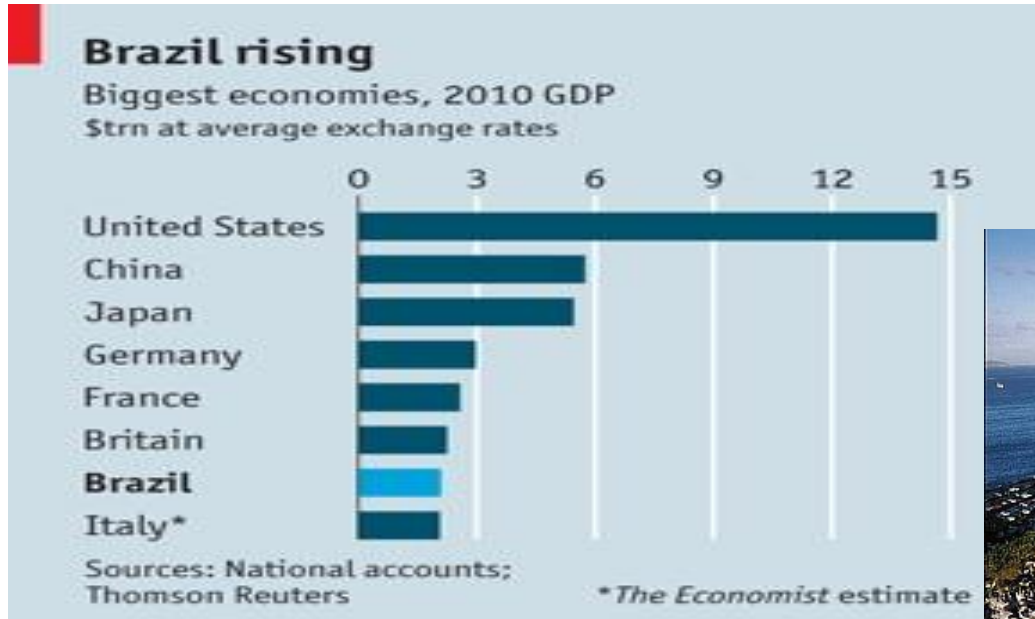
Australian Boat Market

- Australia is 2nd largest market for U.S. boats and parts
- The Australian economy is the 13th largest GNP.
- The strength of the Australian dollar has made U.S. products more competitive and as a result U.S. manufacturers have a greater share of the market.
- Trade Association for Australia is the Boating Industry Alliance Australia (info@biaa.com.au)
- Melbourne, Sidney and Queensland all have major shows in their regions



Brazil Boat Market

Forecasts vary, but sometime in the decade after 2014—Brazil is slated to become the world's fifth-largest economy, overtaking Britain and France.





Brazil Boat Market



- ▶ 200 Million consumers with ever increasing purchasing power
- ▶ Per capita income is 2x that of China
- ▶ Brazil is currently the 5th largest export market for US boats and parts.
- ▶ 5,000 recreational fiber glass boats manufactured in Brazil in 2010
- ▶ All following numbers from 2005 -150 officially registered shipyards (that produce powerboats, boats and sail boats)
- ▶ 654 private marinas, yacht clubs and storage docks;
- ▶ 1,247 scuba dive operators;
- ▶ 856 lodgings and hotels on the waters edge - beaches, rivers, lakes and dams;
- ▶ 1,518 boating related stores;
- ▶ 1,242 workshops and repair stations: and
- ▶ Since 2005, 60 per cent of the Brazilian recreational boating activity has been taking place in southeastern region of the country.





The Netherlands Boating Market

- The Netherlands is the 16th biggest economy but is a big portal to the European boat market
- The Netherlands was the 8th largest export market for US boats and Parts.
- Financial/fiscal crisis has hit a little later here, but I feel that this is more of a minor blip or correction than a long term structural problem that some of the other European markets are facing.
- The METS trade show in Amsterdam has become one of the most important boat show in Europe!





Boat Market in Turkey

- Turkey is the 18 biggest economy with over 8000 km of coastline surrounded by the Black, Caspian, and Mediterranean Seas on three sides. There are 290 shore facilities.
- Turkey was the 9th largest export market for US boats and Parts.
- While manufacturers of mega yachts can expect competition from domestic manufacturers, there are not many smaller boat manufacturers
- Approximately 1 million yachts tour the Mediterranean Sea and Turkey is working to capture 5% or 50,000 yachts.
- Parts may be particularly profitable as 99% of parts are imported into Turkey
- Major Event: Eurasia Boat Show, Istanbul, 2/2013

Boat Market in Japan

- Japan is the 3rd biggest economy and of course, is recovering from the tsunami in 2011. The tsunami recover is provided an initial opportunity as those who were insured replaced there boats.
- Japan was the 11th largest export market for US boats and Parts.
- There is also major efforts throughout Japan to rebuild marina and with a more recreational friendly.
- Major Event: Japan International Boat Show, Tokyo, 3/2013
- The major prospects in this market is boats under 25 meters, docks accessories, and other accessories.





Boat Market in the United Arab Emirates

- The United Arab Emirates UAE is the 30th biggest economy and but has a significant number of wealthy consumers
- While export sales declined in 2011, U.S. exports are up 24 % in the first quarter of 2012.
- Major Event: Dubai International Boat Show, Dubai, 3/2013
- Best prospects for this market is larger boats and luxury parts and accessories.





Recreational Transportation

Challenges

- Restrictive tariff rates and tariff/tax combinations
- Non-tariff restrictions inconsistent with international norms
- International standards alignment and transparency
- Other



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Thank You

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This webinar will be posted to the NMMA.org website.

<http://www.nmma.org/membership/webinarseries/default.aspx>

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