



Recreational Boating Industry

**POWERING
THE CANADIAN
ECONOMY**

NMMACANADA®

**2017
POLICY
AGENDA**

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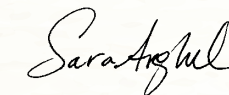
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A Note from NMMA Canada's Executive Director

The recreational boating industry is a major contributor to the Canadian economy. This Canadian pastime brings more than 12 million people together on the water every year, generates over \$10 billion in revenues and has a GDP impact of \$5.6 billion. It also employs about 75,000 people across Canada.

The National Marine Manufacturers Association (NMMA) was formed nearly 100 years ago to advocate and promote the strength of marine manufacturing, the sales and service of its members, and the boating lifestyle. NMMA Canada is the national association representing the recreational boating industry in Canada. NMMA member companies produce more than 80 percent of the boats, engines, trailers, accessories and gear used by North American boaters. Representing over 1,400 members in North America, our association is committed to growing our industry through public policy dialogue with government, market research initiatives, product quality assurance, marketing communications and public awareness programs.

NMMA Canada collects and analyzes industry market data, promotes opportunities for our members to export in the global marketplace, and helps marine manufacturers succeed in providing safer products for the boating industry through our mandatory certification program. To ensure continued growth of the Canadian recreational boating industry, NMMA Canada represents the industry on public policy issues, advocating at all levels of government. As an important pastime for so many Canadians and a significant contributor to the economy, we must continue to protect and promote the recreational boating industry through sound policies on issues involving access, fuel, safety, conservation, manufacturing and trade. Please use this agenda as a template for policy decisions.



Sara Anghel

Executive Director
National Marine Manufacturers Association Canada

What is NMMA Canada?

Dedicated to advocating for and promoting the strength of marine manufacturing, the sales and service networks of its members, and boating.



MEMBERSHIP

Represents boat, marine engine and accessory manufacturers and associate members with over 1,400 members in North America — NMMA members represent 80 percent of marine products manufactured in North America.



SHOWS

Owens and produces 20 boat and sport shows in key North American markets to provide quality sales venues for exhibitors and shopping venues for consumers.



INTERNATIONAL

Works to create opportunities overseas, offering services to help members expand into the global marketplace.

STATISTICS

Collects, analyzes and distributes industry, economic and market data — the industry's primary source of boating research, statistics and technical data.



CERTIFICATION

Maintains boat, personal watercrafts, trailer and oil certification programs to promote safety and help manufacturers produce quality products.

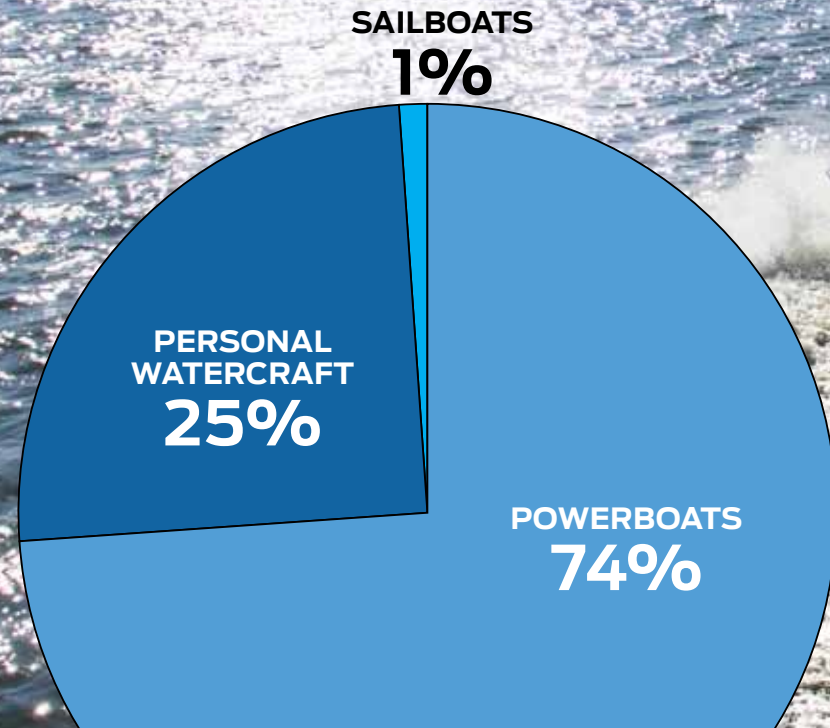


GOVERNMENT RELATIONS

Represents the industry on public policy issues, advocating at all levels of government to protect the interests of the marine industry and the boating public.



Canadian Recreational Boating Statistics



ESTIMATED
8.6 million

RECREATIONAL
BOATS IN
CANADA



59%

of boat owners have a household income of less than \$100K



12.4 million adult

Canadians participate in recreational boating in 2015



TOP 5 boating activities

Fishing



Entertaining



Nature observation



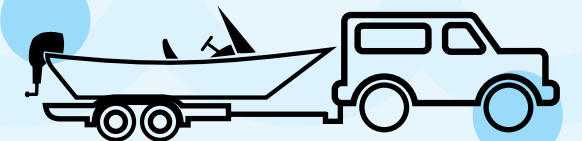
Sightseeing



Swimming



More than **85%** of boats in Canada are under 26 feet and towable



DATA SOURCES: Unless otherwise noted, data is from the NMMA Canada 2016 Recreational Boating Statistical Abstract. Data for economic impact, jobs and businesses is taken from the NMMA Canada 2016 Boating Economic Impact Study

Marine Businesses Around Canada

Laws that affect manufacturing, employment, labour issues and small businesses are of particular interest to the boating industry. Issues such as workplace safety, labour policy and workforce development affect marine businesses' day-to-day operations. NMMA believes that Canadian employment and labour laws should promote the creation of domestic jobs and we work to ensure that the needs of marine manufacturing and recreational boating are represented.

GDP IMPACT OF

\$5.6 Billion

\$10 Billion
IN TOTAL REVENUES

Help Wanted: Building Jobs in the Recreational Boating Industry

- ▶ Skilled workers are needed to support the Canadian recreational boating industry and many of our companies are struggling to find and retain qualified workers.
- ▶ NMMA believes that Canadian employment and labour laws should promote the creation of domestic jobs and we work to ensure that the needs of the marine and recreational boating industry are represented.

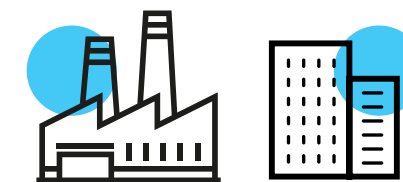


Canadian marine industry supports:

75,434 JOBS



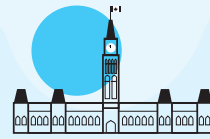
ABOUT 4,800 BUSINESSES



Access

Access to our nation's waterways is of utmost importance to the recreational boating industry. NMMA works hard to ensure that conservation and resource management is balanced with robust access for boaters and anglers. NMMA's job is to work with government entities like Parks Canada, Transport Canada, Fisheries and Oceans Canada and any other agencies to promote the interests of the recreational boating community. NMMA has worked closely with the government to ensure our waterways owned by Parks Canada are managed properly and receive the investments needed.

Ensure a Robust Canadian Recreation Economy:



Government policies on federal lands and waters must balance conservation with visitor access.



National Parks and Marine Conservation Areas are important access points for the 12.4 million adult Canadian boaters.



Federally managed waters should be maintained for the use and enjoyment of the public.



Visitation pays! Boating and fishing are important contributors to local economies and robust access increases visitation to our parks and conservation areas.

Recreational Fishing

Recreational anglers provide a significant boost to the Canadian economy:

Anglers spend a total of \$8.3 billion

annually to support their outdoor passion, creating jobs in tourism, transportation, retail goods, boating, vehicle sales and more

Anglers spent \$1.6 billion

on boating equipment for recreational fishing in 2010

Fishing is one of the top 5 outdoor activities

undertaken by Canadian pleasure travelers

According to industry sources, over

25% of the population, enjoy recreational fishing

Boating Safety



NMMA believes education is the best way to prevent boating accidents and improve boating safety.

NMMA Supports:

- ▶ Mandatory boater education and hands-on skills training
- ▶ Mandatory wear of engine cut-off devices
- ▶ Proper disposal of outdated flares.

NMMA has developed a free safe boating app (funded by Public Safety Canada) in partnership with the boating safety community including Transport Canada and law enforcement.

The bilingual Discover Boating Safety app provides relevant, easy to use, helpful and up-to-date information about safe boating practices for Canadian boaters.

Available from the Apple and Google Play Stores.



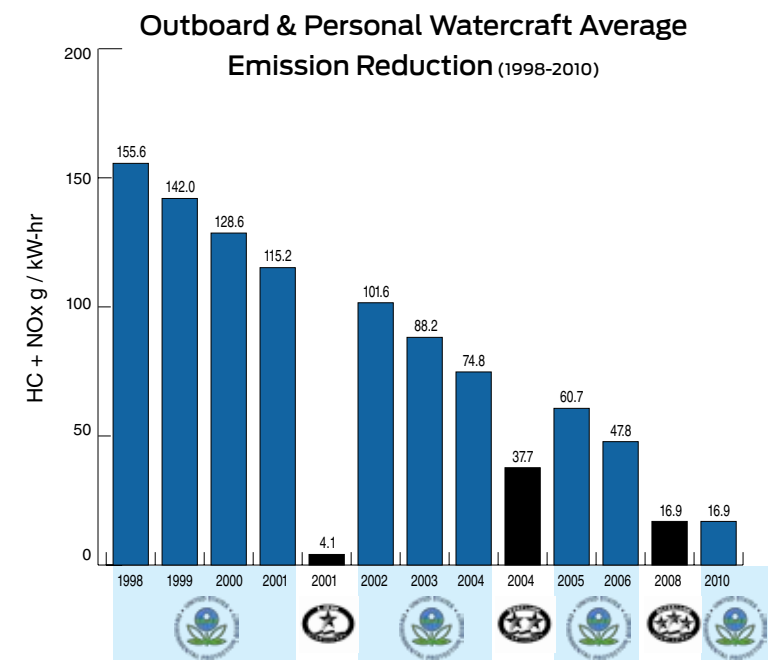
Conservation



Boating is Clean & Safe for the Environment

- ▶ Boaters need clean water for safe and enjoyable recreation
- ▶ Marine engine manufacturers have led the way in reducing emissions

Through improvements in engineering and manufacturing standards, the recreational boating industry continues to lead the way in green initiatives for cleaner engines.



Fuel Policy

E15 is fuel that has 15 percent ethanol in volume. Its introduction in the U.S. is a great concern to the recreational boating industry. There are serious and well-documented human safety, environmental, and technology concerns associated with ethanol blends over 10 percent in boat fuel tanks and engines.

NMMA supports renewable fuels and innovation in the supply. The Canadian government needs to take into account the negative effect of E15 on recreational boating fuel tanks and engines as it develops renewable fuels regulations .



Preventing Aquatic Invasive Species

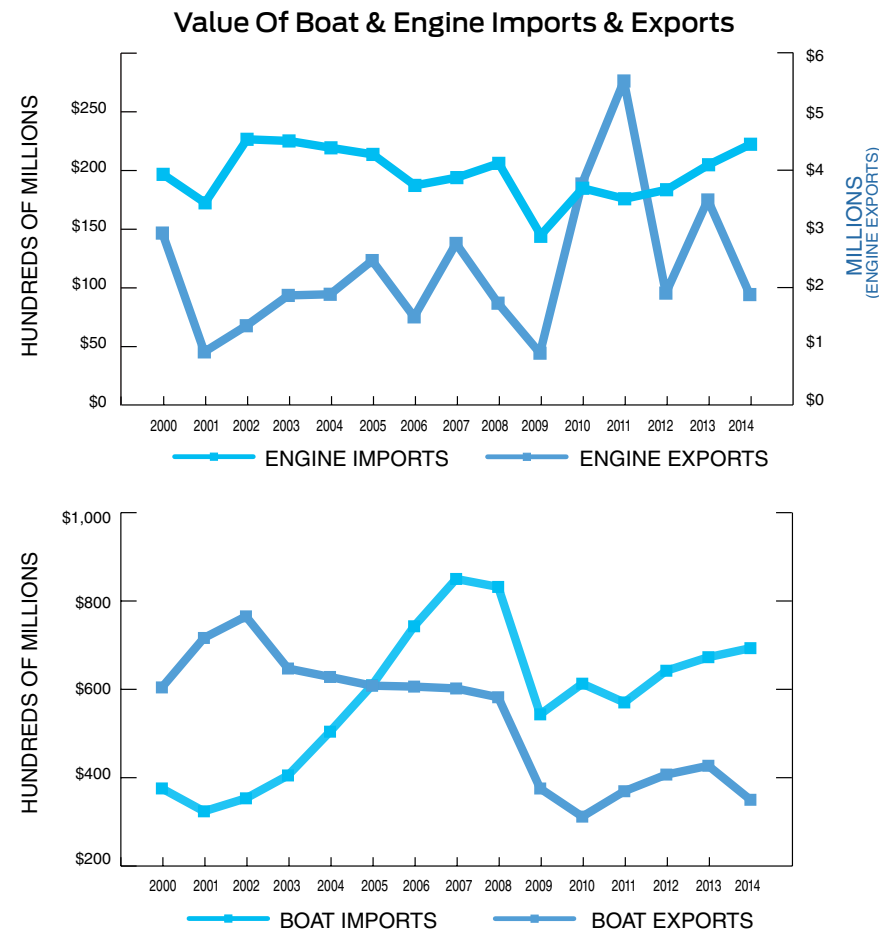
The spread of harmful plants, animals and other organisms threaten Canada's water habitats and have lasting economic damage for the boater, local community, and boating industry.

Marine manufacturers and the industry are doing their part to examine design controls which help prevent the spread of Aquatic Invasive Species.

Trade

Exporting Helps to Open Up a Large Amount of Opportunity for Canadian Marine Businesses

With more than 95% of consumers living outside of North America, there is significant opportunity for marine businesses to profit through exporting and trade. However, to compete in the global marketplace, Canadian businesses need policies and trade agreements in place that facilitate worldwide trade.



SOURCE: NMMA Canada 2015 Recreational Boating Statistical Abstract

In 2014, exports of recreational boats and marine engines in Canada totaled \$354.6 million, a 15.5% decline from 2013

There must be more done to improve exports of Canadian product.

Boating Benefits Through Trade

Marine Manufacturers support trade policies which:

- ▶ Lower tariffs for recreational boats and marine engines
- ▶ Promotes harmonization of recreational vessel construction standards
- ▶ Reduces technical barriers to trade including duplicative product testing procedures
- ▶ Establish regulatory coherence mechanisms with transparency and stakeholder engagement
- ▶ Allow for transparent and uniform customs procedures
- ▶ The Gold Standard for Canadian boat manufacturing



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National Marine Manufacturers Association Canada

nmma.ca | discoverboating.ca

14 McEwan Drive West
Suite 8
Bolton, ON L7E 1H1

905-951-4048