RECREATIONAL BOAT MANUFACTURING AND MARINA SERVICES
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EXPERIENCED, INNOVATIVE AND HIGHLY SOPHISTICATED
Coastal culture is a way of life in Australia, so it’s little wonder that its recreational marine industry is one of the most reputable in the world.

Australia’s vast ocean surrounds, developed economy and highly experienced workforce mean that the industry is well placed to service international demand.

Australia is home to some of the world’s most renowned yacht and boat manufacturers – including Echo Yachts, Riviera and Stebercraft – known globally for their superior technology, durability, comfort, safety and speed across the water.

Australian marine equipment manufacturers – including Ronstan International, Muir and Aqualuma – have also gained global recognition for ingenuity, providing customised solutions in marine hardware, components and accessories.

Australia’s coastline is home to some of the best serviced marina facilities in the world. Here you can find expertise in marina planning, construction, management and a range of commercial and retail services.

Australian companies are delivering innovative solutions that improve the operational efficiency, safety and profitability of marine global value chains, and maximise the advantages of the close, and rapidly growing, Asian market.

This industry capability report provides an overview of Australian capability in the recreational boat building and marina industries. It includes case studies from a few of the many Australian companies that possess specialist expertise and international experience.

Talk to your local Austrade representative for more tailored advice and information on connecting and partnering with the Australian boat building and marina industries.
The Australian recreational marine industry is a strong contributor to Australia’s economy. The economic value of marine-based industries has nearly doubled in the past ten years and is expected to continue to grow. In 2014, the Boating Industries Alliance Association (BIAA) estimated the total value of the Australian marine manufacturing industry at $8 billion, with total exports in 2009-10 of $422 million.

Boat building, marine equipment and accessory manufacturing, repair and refit, superyachts and marina hubs underpin economic growth, employment and social wellbeing in cities, regional towns and small communities around the country.

“Australia is again making an impact on the global stage. Our superyacht refit yards are busier than they have ever been, and skills and expertise continue to develop in this sector. Australia is a maritime nation and as such has always had a reputation for quality, innovation, skills, expertise and most of all a ‘can do attitude’.”

- Maryanne Edwards, CEO Australian International Marine Export Group (AIMEX)

MARINE EXPORTS

Products and Services Segmentation 2014/15

- Half-cabin cruisers: 27.7%
- Open runabouts: 25.5%
- Sailboats and catamarans: 14.8%
- Full-cabin cruisers: 11.0%
- Dinghies: 7.0%
- Ski and wake boats: 5.9%
- Other Craft: 4.7%
- Repairs: 2.5%
The industry is well supported by active associations, such as the Australian International Marine Export Group (AIMEX), Superyacht Australia (SYA) and the Marina Industries Association (MIA). Vibrant, strong and innovative, the industry boasts technical expertise, skilled workmanship and design capabilities along with world-class build and design facilities.

Australia’s technologically advanced products, systems and services provide quality and value-for-money. Industry capability includes:

- Cruisers, motor yachts, pleasure craft
- Custom race boats, catamarans, multi-hulls
- Sail boats, small craft, dinghies
- Superyachts
- Equipment, hardware and accessories, including:
  - stabilisers, mooring and docking
  - electronics and instrumentation
  - protective and safety systems
  - propulsion and engine systems
  - decking, flooring and furnishing
- Industry commercial services, including:
  - design, architecture and engineering
  - brokering and marketing
  - legal and compliance.

“Our industry is mature… and we retain critical intellectual property. We started off as a domestic producer of pontoons but are now an international business; we view ourselves as a global company with local expertise.”

- John Hogan,
CEO Superior Jetties and Director Marina Industries Association (MIA) Australia
Australian designed marinas, pontoon, docking and flotation systems have revolutionised the industry and can be found in many locations throughout the world. The industry exhibits a range of capabilities, from the planning and design stage through construction and highly tailored commercial and customer-centric services.

Industry capability includes:

- design and planning
- components and materials
- construction and engineering
- marina/project management
- software and training
- safety and security systems
- mooring, towing and berthing equipment and accessories
- education, including certifications
- environmental/clean marina accreditation
- marketing, retail and commercial services.
The Australian recreational marine industry is globally competitive, possessing strengths in four key areas: quality, innovation, responsiveness and reliability.

QUALITY

Premium workmanship, superior build

Quality workmanship is a core competitive advantage of the Australian recreational marine industry. Over several decades, Australian industry has developed a highly experienced workforce with significant build capability.

Australian components are in high demand globally, winning numerous international awards due to their durability, resilience and performance. Australian marine equipment and accessory manufacturers are well-recognised for their capability in a diverse range of marine hardware, components and accessories, including marine ropes, radars, winches, barbecues, buoyancy aids, autopilots, lighting and dock flotation systems.

Australia has an unequalled reputation for design and production of high quality fibreglass, composite and aluminium motor and sailing boats, ranging from small dinghies to yachts.

An 84 metre superyacht now being built at Echo Yachts, in Western Australia, is the largest ever superyacht project undertaken in Australia. Echo Yachts are also constructing a 46 metre shadow vessel. A catamaran design (see cover), it will be built in fibreglass with cutting-edge vacuum infusion processes and high-tech laminates, and will be a support vessel for the superyacht.

Quality is also on display at state-of-the-art marina facilities around the country. Federal, state and local governments have partnered with industry to provide marinas particularly suited to maintenance, repair and refit. This product knowledge and service expertise is increasingly in demand at marina hubs around the Asia-Pacific.

In 2014, in recognition of his services to the world of sailing, Alistair Murray, Managing Director of Ronstan International, was awarded the industry distinguished service award at the 45th United States Sailboat Show in Annapolis, Maryland. Alistair’s 40 years of work in the boating community is characteristic of the commitment and depth of expertise in the sector, and is acknowledged in the world’s largest recreational marine market.

“We are well known in the industry for having a strong, reliable product and whilst we need to ensure that we stay competitive with how we source our raw materials and components, we do this without compromising the integrity of our product.”

- Matthew Johnston, Muir Engineering Group Pty Ltd
INNOVATION

Where expertise and creativity combine

Australian marine components suppliers are regarded as some of the most innovative in the world. From purpose-built unbreakable galley equipment through to high-tech hydraulic steering and engine systems, innovation is core to the industry’s competitiveness.

The industry takes investment in research and development seriously. Marine architects and engineers employ the latest in 3D design and manufacturing technology to augment bold vision with superior finish.

Marine composites manufacturers have been adding value to existing global value chains through the design, production and integration of advanced materials that are often world-first patented technologies resulting from significant research and development partnerships.

Australian-owned McConaghy Boats is a good example of this. Innovation, research and development, and advancing composite technology have been at the core of McConaghy Boats for over 45 years.

Explorer-filmmaker James Cameron chose the McConaghy Group when he needed to rely on composite materials for his record-breaking submarine dive to the bottom of Challenger Deep. Located at the southern end of the Mariana Trench, this is the deepest part of the world’s oceans.

Australian marinas are also at the forefront of global best practice, with many offering in-house internationally certified education and training programmes that are attractive to businesses searching for that qualification to give them an edge.

“Our business success is based essentially on our design creativity, supported by sound technical detail presented to an internationally accepted standard.”

- David Bentley, Principal, David Bentley Yacht Design
An 84 metre luxury superyacht by Echo Yachts. Image courtesy of Echo Yachts.
RESPONSIVENESS

Unique challenges, tailored solutions
Small to medium manufacturers are known for their expertise in niche products and services, nimbleness, short-run manufacturing capability and advanced understanding of industry trends. They are able to adjust to market demand and tailor products faster than competitors.

Larger firms have also built their growth around understanding the customer experience.

While exhibiting at the Dubai International Boat Show, Steber International, a premium manufacturer of fibreglass recreational and commercial vessels, received a visit from the Emir of Qatar. The owner of Amiri Yachts, the Emir wanted an ambulance boat.

Managing Director Alan Steber introduced the Emir to their commercial vessel model, and showed they had the capacity to reconfigure it to meet his needs. Having captured the Emir’s attention, Alan asked him to return in an hour to view further details.

Alan sought the services of another Australian exhibitor, Spear & Green Design, a marine architect service provider. Together they customised the commercial model to the Emir’s specifications. On the Emir’s return, he was impressed by Steber’s quick response and a deal was signed. In addition to the ambulance boat, Steber is now working on three more vessels for the Emir; a fuel supply vessel, a medical support vessel and charter boat.

Australian marinas, another sector of the industry, have also been designed to cater for the full spectrum of customer needs. Whether it is a superyacht docking for maintenance and refit, or purely a leisure visit and stay, Australian marinas are managed by experienced boaters.

The Australian Superyacht and Marine Export (ASMEX) Conference is held in May each year, before the Sanctuary Cove International Boat Show. It is one forum where the industry comes together to share export experiences, best practice principles and discuss new markets.

“Being close to the customer has been the key to Ronstan’s growth and its ongoing success. Management has personally visited export customers and spent time in their markets, learning about market needs and trends so that the latest and most appropriate products are made available, backed up with great service.”

- Alistair Murray, Managing Director, Ronstan International
RELIABILITY

A track record of on-time delivery

The combination of workforce experience and integration expertise has seen the Australian recreational marine industry develop a reputation for delivering on schedule and on budget.

The quality, innovation and responsiveness that characterises the industry resonates with international customers who desire a superior experience, from suppliers they can rely on.

AirBerth Boat Lift Storage Systems recently won a tender to supply boat lifts to the United States Navy. Justin Lye, AirBerth Marketing Manager, says their boat lifts are innovative, environmentally friendly, maintenance free and reliable. In pursuing the tender with the US Navy, AirBerth committed to supply, install and deliver product training on time and within the quoted budget. They did this so successfully, AirBerth are now a supplier to the Singapore Police as well.

“Our main selling strategy is quick response, knowledge of the product and its uses and quick turnaround of orders to anywhere in the world.”

- Jason Cooper, General Manager, Poly Flex Australia
Marine Equipment

**Case study: Arctic Steel**

When 12 offshore wind farm work boats were commissioned in the Isle of Wight, UK’s leading manufacturer of wind farm vessels, South Boats, looked to Australia’s Arctic Steel to adapt and supply their cast 2205 stainless steel seawater strainers.

The aluminum vessels, built by South Boats, were 13 to 24 metres in length, and designed for wind farm construction and crew transfer in a cold-water climate; vastly different to the typical conditions found off the coast of Australia. Arctic Steel has had vast experience supplying recreational and commercial vessels that are often used in harsh climates, and they were able to transfer these technologies to meet South Boats’ requirements.

Arctic Steel’s design of the 2205 stainless steel seawater strainers focuses on operational efficiency and quick and easy day-to-day maintenance. Additionally, the 2205 stainless steel that Arctic uses is a better metal to combine with aluminum construction than the traditional bronze strainers commonly available in the market.

South Boats were supplied with the strainers to budget and on schedule, enabling them to meet their launch schedules for their customers.

Arctic Steel has agents around the world, in the USA, United Kingdom, Netherlands, Poland, Singapore, New Zealand, and the Maldives, and supplies to countries as far afield as Egypt (Suez Canal work boats), the Caribbean, Norway, Sweden, France, Spain, Philippines, Taiwan, China, and Korea.

Marine Accessories

Case study: MagicEzy

In 2013, MagicEzy revolutionised ‘do-it-yourself’ fibreglass repair, by inventing and launching a range of world-first products designed to perform fibreglass repairs fast; often in a matter of seconds.

Much to the delight of boat owners around the world, the new repair system is easy to use, fast to apply and exceptionally strong. MagicEzy guarantees this by providing a 3 year durability guarantee.

“Boat owners find that performing DIY fibreglass repairs is usually time consuming, difficult, messy and potentially hazardous to their health,” said MagicEzy CEO, Warwick David Lindsay.

“With MagicEzy, professional looking repairs to chips, gouges, scratches, cracks and even hairline cracks can now be performed fast, even by a complete novice. In many cases, repairs can be done in less than 10 seconds, compared to days using traditional methods.”

MagicEzy 9 Second Chip Fix™ is a pre-coloured nano filler that repairs cavities fast. MagicEzy’s other flagship product, Hairline Fix, seals and colours stress cracks to help prevent them from spreading. Hairline Fix received international recognition when it was selected as one of the Top Products 2014 by the highly respected U.S. publication, Boating Industry Magazine.

Both products are available in 11 colours and come in a ready-to-use, one-part formula with a built-in spatula. Development and production takes place at MagicEzy’s facility in Kunda Park, Queensland.

MagicEzy products are stocked by the leading boating accessory retail chains in Australia, New Zealand, and England along with hundreds of independently owned boat chanderies around the world. Currently, MagicEzy has distributors in the USA, Canada, Germany, France and the UK.

magicezy.com
Boat Manufacturing

Case study: Steber International

Steber International is one of Australia’s leading and most respected boat builders, now in its 66th year of boat manufacturing.

Specialising in ‘purpose built’ fibreglass boats, the wide range of Steber designs are utilised in many commercial applications. Clients include the Navy, Rescue, Customs, Police, Patrol, security, commercial fishing, sightseeing and professional sport, with all boats built to strict survey requirements.

One of the latest Steber vessels commissioned, the 38ft Cape Hawke, was built for Forster-Tuncurry Marine Rescue. The Cape Hawke can operate up to 30 miles out to sea, and will assist in marine rescues from Camden Haven to Seal Rocks on the Australian east coast.

Steber are also renowned for their high performance recreational cruisers, and are regarded as leaders in the industry for sea keeping vessels.

Following the enlargement of their factory, Steber can now manufacture vessels from 22ft to 65ft, operating to a Quality Assurance System and Sustainability Program.

Building on this, Steber is about to launch a new international venture which will see the company’s range sold directly into China. Targeting the rapidly growing Chinese middle class, Managing Director, Alan Steber said “this is a huge potential market for us”.

steber.com.au
Marine Equipment

Case study: HyDrive Engineering

When your boat is travelling fast, you need to be able to maintain precise control. Combine that with the manoeuvrability and lightness of an exceptional hydraulic steering system, and driving is a pleasure.

For 45 years, HyDrive Engineering Pty Ltd has placed safety and satisfaction at the core of their products.

As the largest manufacturer of hydraulic boat steering gear in the southern hemisphere, more than 700,000 HyDrive steering systems are in the market world-wide. HyDrive’s extensive range offers superior corrosion resistance, power and performance.

The product range caters to all types of boats from 5 metres to over 200 metres in length, including pleasure, commercial and military vessels.

HyDrive produces all types of control systems – from manual hydraulic for small boats (outboards, inboards, sterndrive and jets), power-assisted steering for larger pleasure and commercial vessels, plus full electronic steering (fly-by-wire) controls for superyachts, large commercial boats, patrol boats and small ships.

The company is based in South Australia, and around 70 per cent of HyDrive’s production is shipped to 75 countries around the globe. According to General Manager Graham Anderson, everything is manufactured in-house, including the pumps, cylinders, and valve units, using precise machining and superior materials.

‘We build for strength’, Anderson says. ‘We believe that we’re the strongest and most powerful hydraulic steering system on the market.’

That claim is tested daily in the harshest waters around the world. In Iceland the steering gear is caked with ice in sub-zero temperatures, and the same equipment can endure the warm, salt-rich waters found on the equator.

HyDrive components are engineered to outlast the boat. Only the seals will need replacing from time to time.

hydrive.com.au
Marina Manufacturing

Case study: Superior Jetties

Superior Jetties manufactures a variety of marine berthing systems, industrial flotation and accessories for commercial, domestic, private and government clients.

In addition to physical product, Superior provides complete turnkey solutions for all types and sizes of berthing needs, from design and engineering through to manufacture, installation and project management services.

Two marina systems are particularly suited to export. The Capri Marina System uses polyethylene rotomoulded floats with an aluminium structure and a timber or composite deck. Superior’s proprietary aluminium waler system allows for adjustable positioning for pile brackets, hinges, fingers and fenders.

The Ultimate Modular Dock (UMD) Marina System is a versatile option applicable to situations where a smart appearance and flexibility is appropriate. If required, the modules are easily demountable and movable. Each rotomoulded module is tough, durable, UV stabilised and does not deteriorate in a marine environment. The modules can withstand heavy conditions and tough treatment, making them ideal for private, commercial and public use applications.

“We have now established an international network of strategic partnerships that allows us to deliver projects through multiple sourcing,” said Superior Jetties Managing Director John Hogan.

“We can manufacture and supply from Korea, China, United Arab Emirates (UAE), India and Australia - unrivalled flexibility and efficiency designed to provide customers with the best value.”

A recent marina installed in the UAE was designed and manufactured entirely by Superior Marinas UAE, supplemented with expertise from Australia as needed.

Superior Jetties also manufactured and installed the first marina in downtown Seoul, Korea, and the first bonded marina on the Bund in Shanghai, China. Product has been exported to Fiji, New Zealand, The Seychelles, New Caledonia, Hong Kong, Oman, Qatar and Republic of the Sudan. Product and intellectual property have also been exported to Malaysia, Korea, UAE, India, China, Indonesia and Taiwan.

superiorjetties.com
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### Recreational Boat Manufacturing - Products, Materials and Services
- **Yachts**
  - cruisers, motor yachts, pleasure craft, racing yachts
- **Sports/Speed Boats**
  - fishing boats, multi-hulls, custom race boats
- **Small Boats & Crafts**
  - sail boats, kayaks/canoes, inflatables, dinghies
- **Equipment & Accessories**
  - components, hardware, structural, apparel, safety equipment
- **Design & Engineering Services**
  - naval architects, engineers, interior and industrial design

### Superyacht Manufacturing - Products, Materials and Services
- **Construction Materials**
  - composites, aluminium, fibreglass
- **Supplies & Provisioning**
  - catering, food and beverage, cleaning
- **Crew Training**
  - safety standards, open water
- **Commercial Services**
  - insurance, legal, brokering, marketing, compliance
- **Repair & Refit**
  - life extension, upgrades, retrofit, modernisation

### Marina Industry Services
- **Planning & Design**
  - concept design, master planning, feasibility
- **Marina/Project Management**
  - marine, pontoons, dry dock, facilities
- **Safety & Security Services**
  - training, fire services, alarms, gates
- **Education & Training**
  - courses, accreditations
- **Mooring & Towing Equipment**
  - boats, trailers, lifts, fenders

### Marine Equipment/Hardware & Accessories
- **Stabilisers/Mooring & Docking**
  - anchors, fenders, bollards, cranes, carriages & winches, windlass & deck equipment
- **Electronics & Instrumentation**
  - navigational, auto-pilot, batteries, power sources, security systems, ICT radios, satellite communications, entertainment systems
- **Protective & Safety Systems**
  - fire protection, flotation, diving equipment, rescue systems
- **Propulsion & Engine Systems/Equipment**
  - engine components, rudders, oars/paddles, steering systems, hydraulics
- **Decking/Flooring/Furnishing**
  - tiles, insulation, seats, galley equipment, upholstery, paints, alloys
- **Design & Engineering Services**
  - naval architects, engineers, interior and industrial design

This table provides some examples of organisations and their capabilities, and is not an exhaustive list. Contact your local Austrade representative for assistance connecting with the Australian businesses that best suit your requirements.

[austrade.gov.au](http://austrade.gov.au)
### KEY AUSTRALIAN BOAT SHOWS

<table>
<thead>
<tr>
<th>Boat Show</th>
<th>Location</th>
<th>Details</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sanctuary Cove International Boat Show</strong></td>
<td>Sanctuary Cove, Queensland</td>
<td>19 – 22 May 2016 sanctuarycoveboatshow.com.au</td>
<td>sanctuarycoveboatshow.com.au</td>
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<tr>
<td><strong>Gold Coast International Marine Expo</strong></td>
<td>Gold Coast Marine Precinct, Queensland</td>
<td>19 – 22 May 2016 gcmarineexpo.com.au</td>
<td>gcmarineexpo.com.au</td>
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<tr>
<td><strong>Melbourne Boat Show</strong></td>
<td>Melbourne Conference and Exhibition Centre</td>
<td>17 – 20 June 2016 melbourneinternationalboatshow.com.au</td>
<td>melbourneinternationalboatshow.com.au</td>
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</tr>
<tr>
<td><strong>Superyacht Australia Tahiti Networking Event</strong></td>
<td>Marina Taina, Tahiti</td>
<td>2016 – Date TBC superyacht-australia.com</td>
<td>superyacht-australia.com</td>
</tr>
</tbody>
</table>
### International Boatbuilders Exhibition & Conference (IBEX)
- **Location**: Kentucky Exposition Center, USA
- **Details**: 15 – 17 September 2015, ibexshow.com

### Monaco Yacht Show
- **Location**: Port Hercules, Principality of Monaco
- **Details**: 23 – 26 September 2015, monacoyachtshow.com

### Fort Lauderdale International Boat Show
- **Location**: Fort Lauderdale, USA
- **Details**: 5 – 9 November 2015, showmanagement.com

### Marine Equipment Trade Show (METS)
- **Location**: Amsterdam, Netherlands
- **Details**: 17 – 19 November 2015, metstrade.com

### Dubai International Boat Show
- **Location**: Dubai International Marine Club, Dubai
- **Details**: 1 – 5 March 2016, boatshowdubai.com

### Taiwan International Boat Show
- **Location**: Kaohsiung Exhibition Center and Horizon City Marina, Taiwan
- **Details**: 10 – 13 March 2016, boatshow.tw

### Asia Pacific Maritime 2016
- **Location**: Marina Bay Sands, Singapore
- **Details**: 16 – 18 March 2016, apmaritime.com

### China (Shanghai) International Boat Show
- **Location**: Shanghai, China
- **Details**: 7 – 10 April 2016, boatshowchina.com

### Singapore Yacht Show
- **Location**: Sentosa Cove, Singapore
- **Details**: 7 – 10 April 2016, singaporeyachtshow.com
GOVERNMENT AND INDUSTRY ASSOCIATIONS

The Australian International Marine Export (AIMEX) Group is the peak body representing the Australian marine export and superyacht industries. AIMEX promotes Australia’s thriving marine industry to the world. Members listed in their public marine industry business directory enjoy up-to-date industry information and marketing support, including representation at boat shows and events around the world. aimex.asn.au

The Boating Industries Alliance Australia (BIAA) is the national peak body for the recreational and light commercial boating industry in Australia. It provides a national voice for the alliance of state-based associations. biaa.com.au

The Department of Industry and Science is an Australian Government department helping industry to become more efficient, competitive and innovative. industry.gov.au

The Marina Industries Association (MIA) is the peak industry body for the marina industries in Australia, Asia and the Pacific regions. MIA is dedicated to the needs of marina owners and operators of berthing, mooring, storage and slipway/workshop facilities connected to sailing, cruising and general boating. MIA’s mission is to support the sustainable development of the marina industries through education, accreditation and research programs. marinas.net.au

Superyacht Australia is an organisation of businesses providing products and services to the superyacht industry. superyacht-australia.com

REFERENCES

2. IBISWorld, C2392 Boatbuilding and Repair Services in Australia, March 2015.
The Australian Trade Commission – Austrade – contributes to Australia’s economic prosperity by helping Australian businesses, education institutions, tourism operators, governments and citizens as they:

• develop international markets
• win productive foreign direct investment
• promote international education
• strengthen Australia’s tourism industry
• seek consular and passport services. Austrade helps companies around the world to identify and take up investment opportunities in Australia as well as to source Australian goods and services.

Our assistance includes:

• providing insight on Australian capabilities
• identifying potential investment projects and strategic alliance partners
• helping you to identify and contact Australian suppliers.

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