



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA OVERVIEW



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA OVERVIEW

- **HONG KONG BOATING INDUSTRY ASSOCIATION (HKBIA)**
- AFFILIATED ASSOCIATIONS/ORGANIZATIONS
- HKBIA LOCAL PROFILE
- HKBIA INTERNATIONAL PROFILE
- HKBIA PICO REPORT
- HK AS THE LEADER OF THE BOATING INDUSTRY IN ASIA
- HK BOAT SHOW

HKBIA OVERVIEW



ABOUT THE HONG KONG BOATING INDUSTRY ASSOCIATION (HKBIA)

The HKBIA is a not-for-profit-trade association that represents all sectors of the leisure marine sector. Hong Kong is a mature boating market, with - according to the Marine Department - close on 10,000 registered leisure marine vessels, along with thousands of unpowered leisure marine craft.

The pleasure boat industry itself has grown significantly in recent decades and now includes a myriad of services which from boat builders, brokers, yacht management, charterers and distributors, to chandlers, clubs, marinas, training organisations, sail-makers, technical and professional services and specialised media.

SMALL AND MEDIUM ENTERPRISES - MULTI MILLION DOLLAR INDUSTRY

Many of the companies in this industry are small business but there are a growing number of companies with significant turnovers, and this multi-million dollar industry remains unrepresented at all levels both in Hong Kong and overseas. The Hong Kong BIA has been established in order to rectify this situation.

HKBIA

AIMS AND OBJECTIVES

Established as a not-for-profit Industry Association to represent, promote and grow ALL sectors of the HK Leisure Marine Industry

AIMS AND OBJECTIVES:

Promote and Grow the Leisure Marine Industry

RAISE PROFILE THE OF HK BOATING AND LEISURE MARINE INDUSTRY IN HK AND OVERSEAS
PROMOTE THE HK INDUSTRY INTERNATIONALLY, PROVIDE INTERNATIONAL CONTACTS AND OPPORTUNITIES FOR IMPROVED TRADE RELATIONS
ORGANISE LOCAL BOAT SHOW FOR ALL INDUSTRY PARTICIPANTS WITH INTERNATIONAL OUTLOOK
MAKE BOATING MORE ACCESSIBLE TO ALL IN THE COMMUNITY

Government Advocacy

COMMUNICATION WITH GOVERNMENT AUTHORTIES TO PROVIDE A 2-WAY DIALOGUE WITH THE INDUSTRY
WORK WITH THE GOVERNMENT ON STANDARDS AND OTHER REGULATIONS
ADVOCATE FOR MORE MOORINGS AND FACILITIES

Environment Advocacy

INVESTIGATE CONDITIONS FOR BOATING AROUND HONG KONG, ADVOCATE AREAS THAT CAN BE IMPROVED FOR THE BENEFIT OF HK, THE INDUSTRY AND RESIDENTS
EDUCATE AND ASSESS FOR POSSIBLE ENVIRONMENTAL ISSUES IN THE INDUSTRY AND EFFECTS IN HONG KONG

Education, Conferences and Events

PROVIDE AN INFORMATION PLATFORM – INDUSTRY REPORTS, FORUMS, CONFERENCES, TALKS
PROVIDE A WAY TO INCREASE AWARENESS AND RAISE PROFESSIONAL STANDRARDS
ASSIST IN CREATING CONTACTS AND A CARREER PATH FOR THOSE WANTING TO JOIN THE INDUSTRY

HKBIA MEMBERSHIP

REPRESENTING THE INDUSTRY

Platinum Members



Gold Members



2018- 26 Members

2023 - 53 Members

Trade association that represents all sectors of the leisure marine sector.

Hong Kong is a mature boating market. The pleasure boat industry itself has grown significantly in recent decades and now includes a myriad of services.

Standard Members



Honorary Members

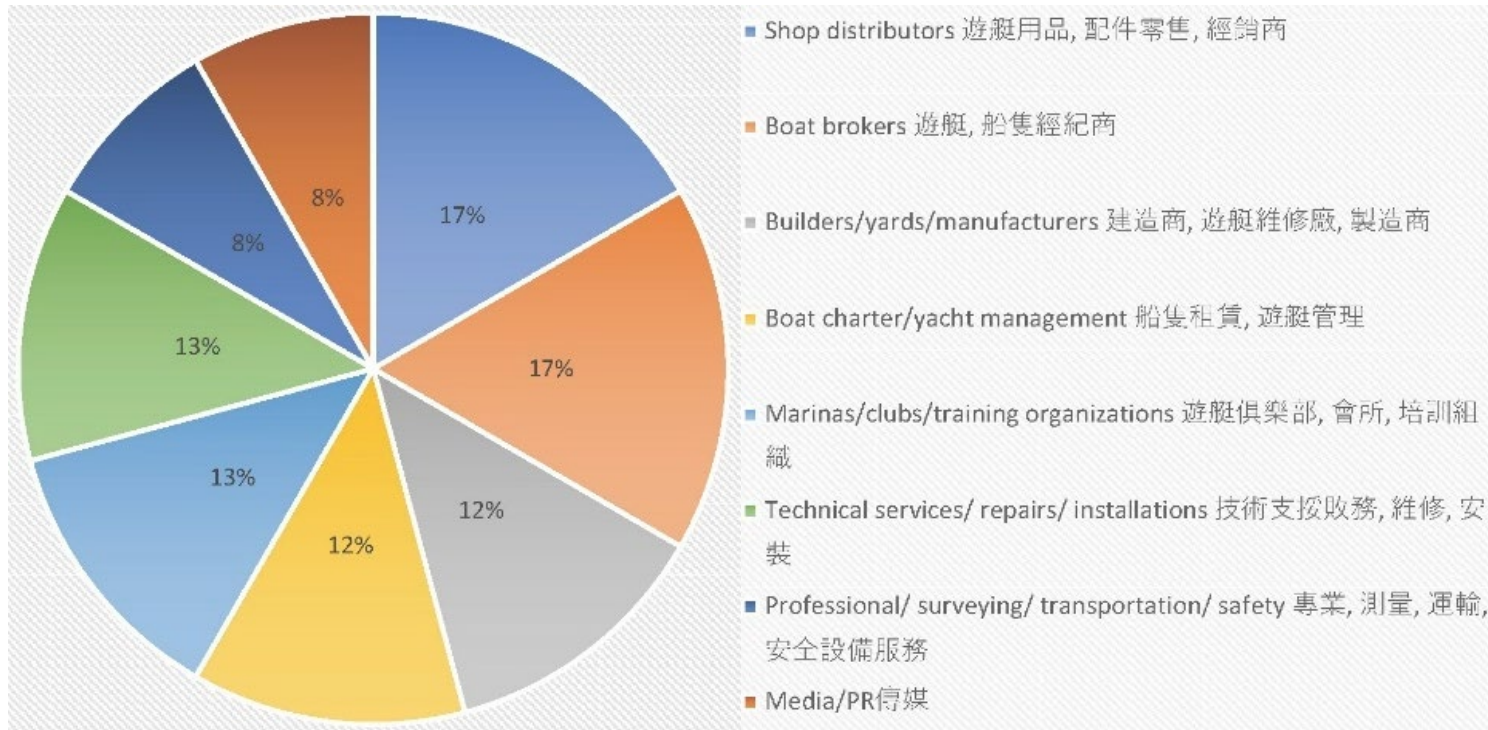


Hong Kong Boating
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香港遊艇業總會

HKBIA MEMBERSHIP

REPRESENTING THE INDUSTRY

HK MARINE INDUSTRY SECTORS DISTRIBUTION (COVID-19 SURVEY)



HKBIA SECTORIAL COMMITTEES

1. ENVIRONMENTAL ADVOCACY

All HKMIS (Hong Kong Marine Industry Sectors)

2. STANDARDS

Shops/Distributors
Professional/Surveying/Transportation/
Safety Service
Technical Services – Repairs/Installations

3. MOORINGS/MARINAS

Marinas/Clubs/Training Organisations

4. BOATS

Builders/Yards/Manufacturers
Boat Brokers

5. CHARTER

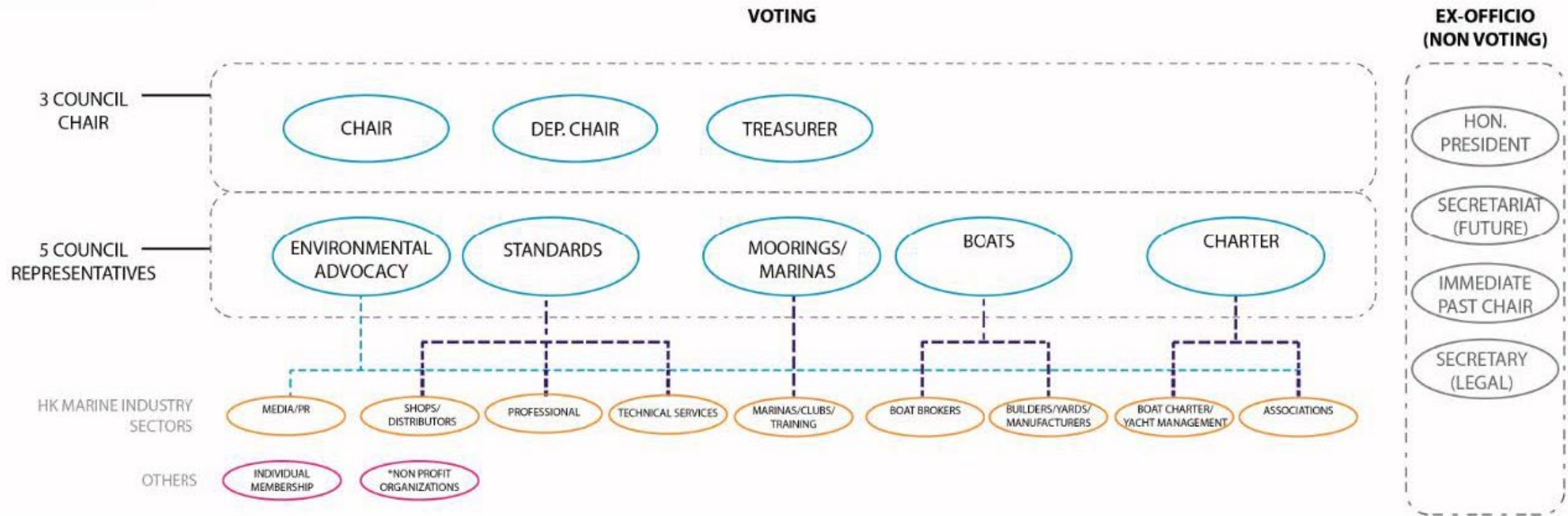
Boat Charter/Yacht Management
Vessel Operator Associations



Hong Kong Boating
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HKBIA STRUCTURE

COUNCIL STRUCTURE



HK LEISURE MARINE INDUSTRY OVERVIEW

STRONG MARITIME CULTURE



FISHING VILLAGE

1800s



FREE PORT



FINANCIAL HUB

TODAY

Once a fishing village, Hong Kong (HK) has rapidly developed into one of Asia's busiest ports. As Asia's World City backed with a strong economy, HK provided plenty of opportunity for the leisure boating industry to grow. Since the late eighties, water sports has massively gained in popularity and more of the wider population are participating in all types of water sports especially those involving boats under sail or motor. From 1999 onwards, the number of registered pleasure vessels has constantly increased an indication the industry is growing. Today, HK has positioned itself as the top leisure marine industry in the Asia Region. China has indicated that they are learning from the HK Leisure Marine Industry for future development in the mainland. HK plays a key role in the Greater Bay Area Yacht Industry development and in the Asia region.



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HK LEISURE MARINE INDUSTRY OVERVIEW

MATURE BOATING MARKET – LEADER IN ASIA



TOTAL NUMBER OF PLEASURE BOATS

10,269

49% MOTOR YACHTS*

31% OUTBOARD BOATS*

20% SAILING*

approx. 250 to 300 CHARTER

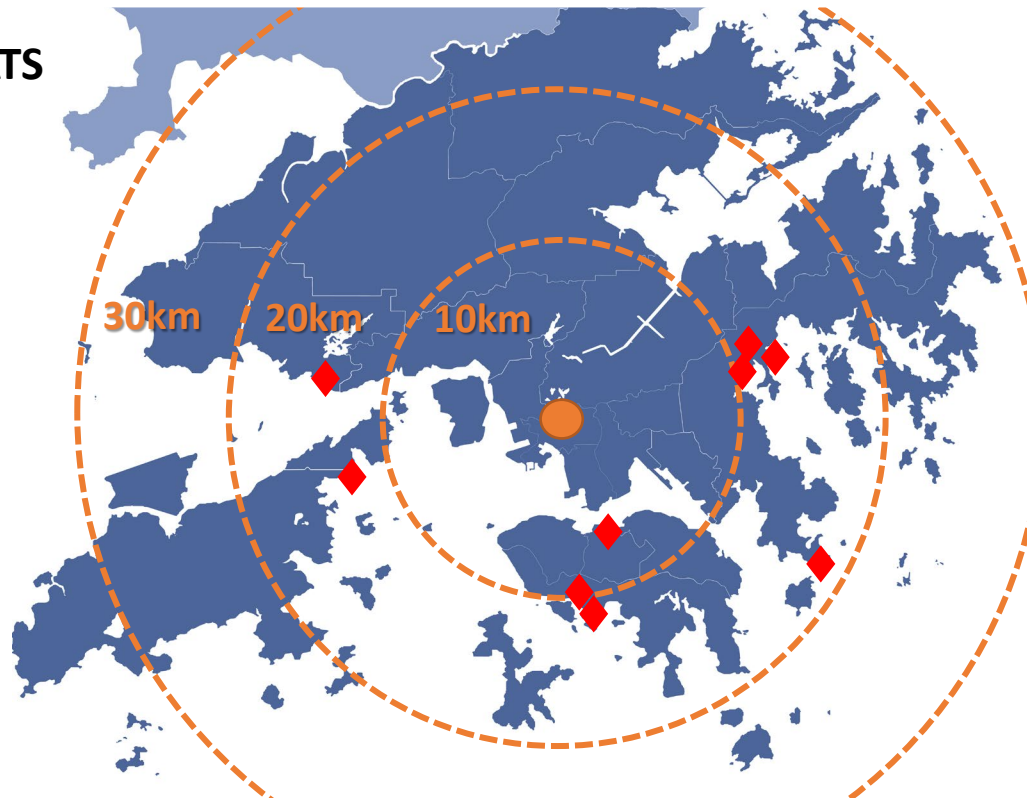
*BASED ON AERIAL STUDY



9 MARINAS/CLUBS

2000+ Private Berths/Moorings

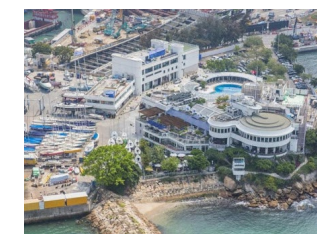
1892 Public Moorings



Hebe Haven Yacht Club



Lantau Yacht Club



Royal Hong Kong Yacht Club

Leisure marine industry has grown significantly and has been leading in the Asia region. HK has become known Internationally as one of the best sailing areas in the world with renowned sailing clubs and fantastic sailing opportunities.



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HK LEISURE MARINE INDUSTRY OVERVIEW

TRADE AND EMPLOYMENT



JOBS: Over 5000+ *



COMPANIES: 500+ *

INDUSTRY TURNOVER: HK\$ 1bn + *

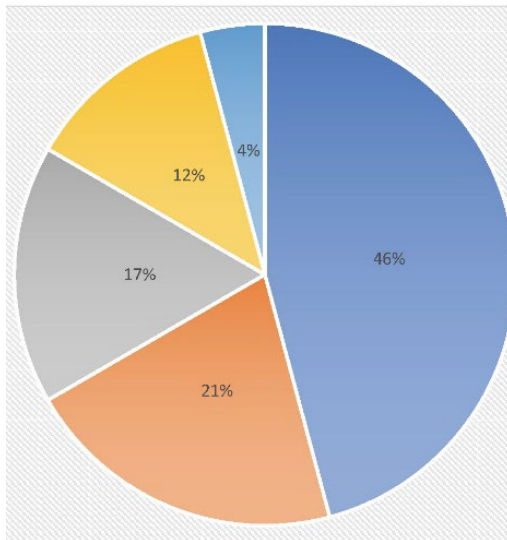
*** Estimate**



LOCAL/INTERNATIONAL

Companies are both local and international in their dealings. Offering their expertise and services in this field to neighboring cities/countries.

HK is as a key Financial and Trading Hub in Asia, making it the perfect place for further growth in the International market.



- 1-4 employees | 1-4 名
- 5-9 employees | 5-9 名
- 10-19 employees | 11-20 名
- 20-49 employees | 20-49 名
- > 50 employees | <50 名



SMALL & MEDIUM ENTERPRISES

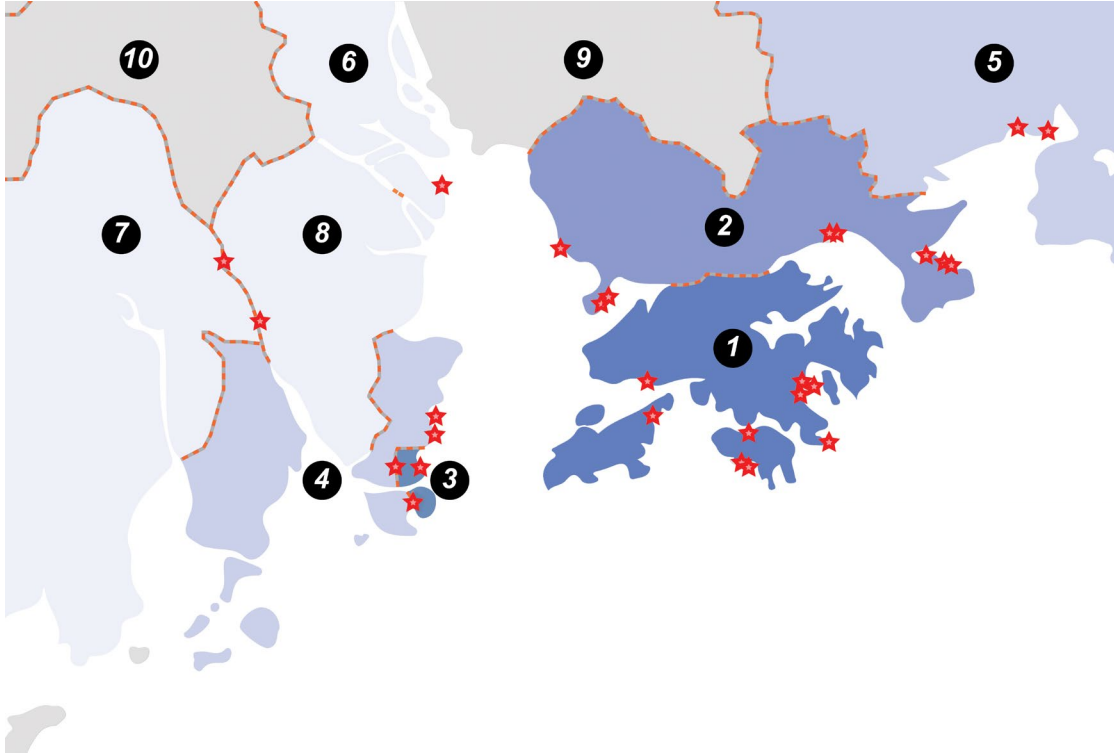
The broad boating industry mainly consists of a range of SME's that need the proper infrastructure and support from the government to develop.



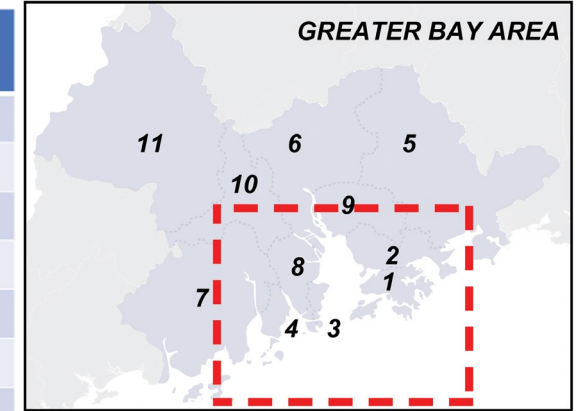
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HK LEISURE MARINE INDUSTRY OVERVIEW

TRADE AND EMPLOYMENT – GREATER BAY AREA



#	CITIES	MARINAS/ CLUBS	GDP (US\$B)
1	HONG KONG	9	341.41
2	SHENZHEN	8	331.99
3	MACAU	3	50.36
4	ZHUHAI	2	37.95
5	HUIZHOU	2	56.68
6	GUANGZHOU	1	318.15
7	JIANGMEN	1	112.18
8	ZHONGSHAN	1	51.05
9	DONGGUAN	0	39.8
10	FOSHAN	0	141.29
11	ZHAOQING	0	32.56



TOTAL: 27 MARINAS

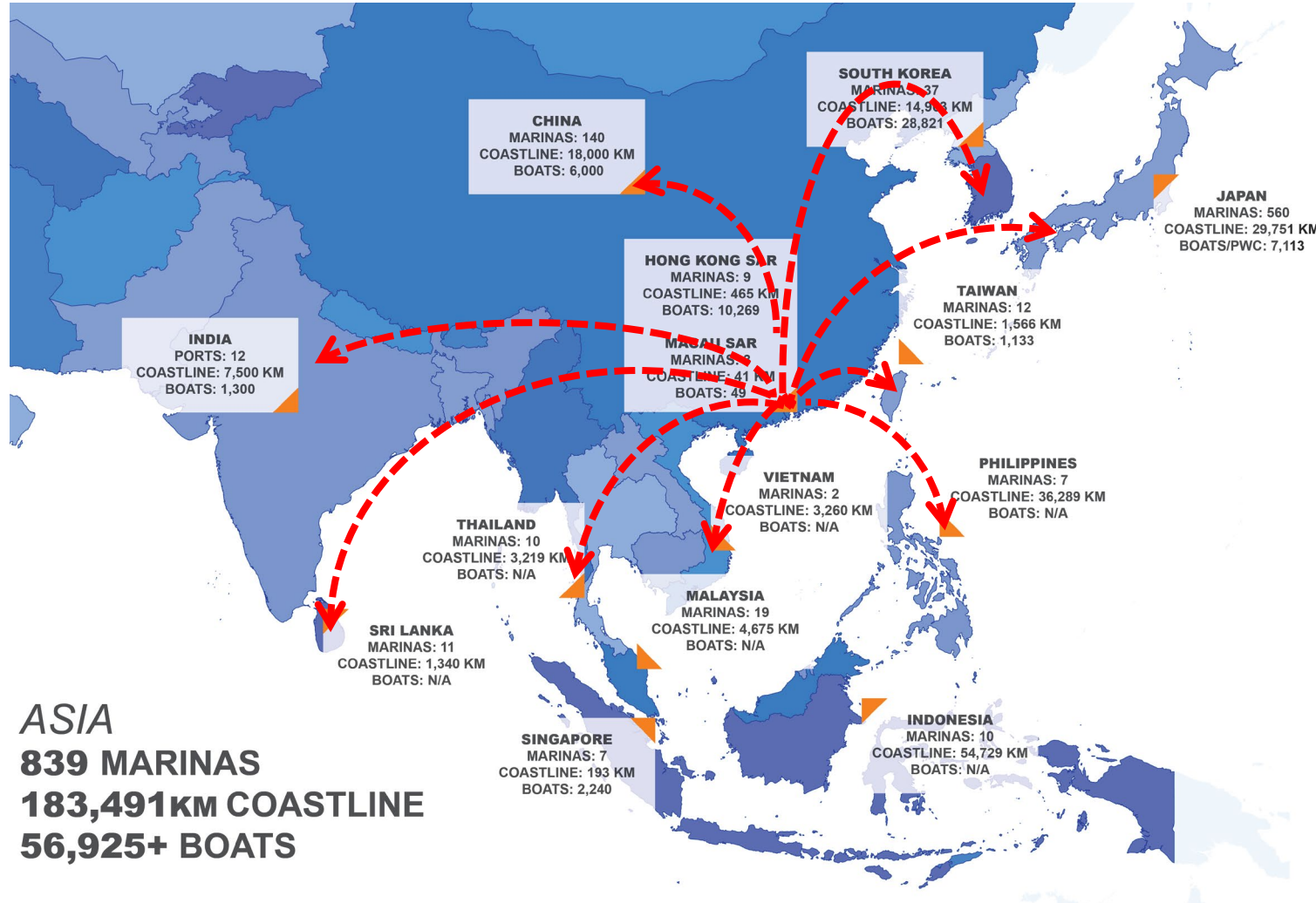
GOVT ADVOCACY

- Standardize boat regulations
- Standardize CIQ policies
- Increase mooring facilities

The local knowledge/expertise and services from HK can be exported across the Greater Bay Area (GBA) as many of the surrounding cities are only just developing their own Leisure Marine Industry.

HK LEISURE MARINE INDUSTRY OVERVIEW

TRADE AND EMPLOYMENT – ASIA/INTERNATIONAL



As a key financial and trading hub, HK has lots of opportunity for Leisure Marine Industry Growth in Asia and International markets.

As leaders of the Leisure Marine Industry, key Manufacturers and Boat Dealers frequently export their services to neighboring cities and countries.

The industry is mainly service oriented that can be easily exported to cities in China that are looking to learn from mature markets like Hong Kong.

HKBIA OVERVIEW

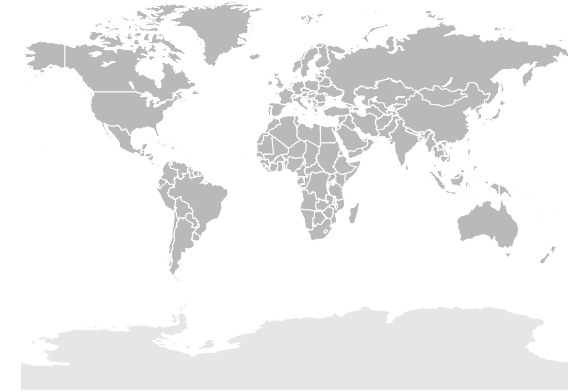
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AFFILIATED ASSOCIATIONS/ORGANIZATIONS

BUILDING ALLIANCES/EXPORTING EXPERTISE

Main Goal:

- Expand reach of HKBIA to encompass existing related associations. Increase Hong Kong's voice and presence on the world stage and provide representation.
- Invite more local /grassroot members to HKBIA to make boating more available to all.
- Invite honorary & non profit organizations related to the industry to share ideas/promote good causes that can benefit the industry and the community.
- Learn from and exchange ideas with other associations and adopt ideas that benefit the HK Boating Industry.
- Form a strong industry network in Asia to export our services to China and South East Asia.
- Emerging markets like China and Vietnam reference HK as a mature boating market to learn from.



WORLD



HONG KONG



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AFFILIATED ASSOCIATIONS/ORGANIZATIONS

BUILDING ALLIANCES



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HKBIA LOCAL PROFILE

GOVERNMENT LIASON – IMPROVING STANDARDS

The HKBIA represents the whole leisure boating industry and acts as the main contact point between the various HK Govt departments. HKBIA advocates to improve industry standards and practices to make boating more accessible and safe.

Current Dialogue with Mardep:

- ~~Acceptance of ISO, CE & Class Classification for P.V. Registration (achieved)~~
- Mooring allocations (Sai Kung Moorings, Shek O development)
- Better Safety Standards (ISO, CE, RCD II)
- Acceptance of International Operating Licenses
- Better curriculum for PVOL license (practical)



Seek solutions to protect our local waters.

- Reduce oil/fuel spills
- Reduce black water discharge in our waters
- Reduce pollution in the sea (plastics)
- Adapt to more frequent storms and sea level rise



HKBIA LOCAL PROFILE

GOVERNMENT LIASON

The HKBIA is the source for accurate government clarification that affect the leisure boating industry.

Clarification on Group Gathering Restrictions for Class IV Vessels:

In summary from the Food & Health Bureau and Ince & Co advice (Prior to confirmation from F&H Bureau):

Privately owned Class IV vessels are classified as “private spaces”. As they are not “public spaces”, the group gathering regulation (Cap. 599G) does not apply.

Class IV Charter Boats that are hired for social gatherings are classified as “Party Rooms”. Therefore under Cap. 599F Schedule 2, are required to be suspended till 28 July 2020



食物及衛生局
Food and Health Bureau

During the chaos and ever dynamic regulations during the Covid-19 pandemic, HKBIA was the source of clarification for group gathering restrictions related to the leisure boating industry.



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HKBIA LOCAL PROFILE

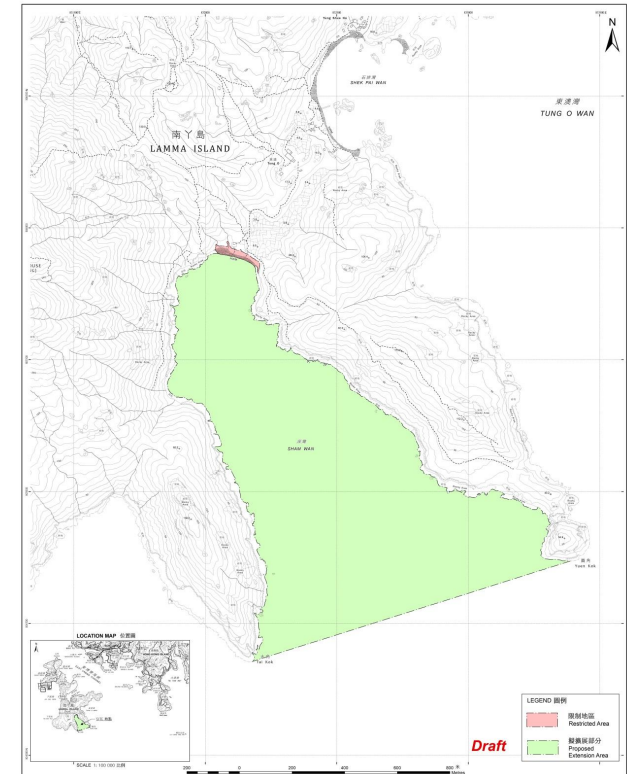
GOVERNMENT LIASON - ENVIRONMENTAL

Hong Kong is surrounded by a beautiful coastline that needs to be protected. Nautical tourism relies on a pristine cruising environment. The HKBIA has been supportive of the local government's environmental initiatives.

HKBIA expressed support for the Proposed Expansion of Sham Wan Restricted Area on Lamma Island and extension of restricted period for Conservation of Green Turtles



漁農自然護理署
**Agriculture, Fisheries and
Conservation Department**



Hong Kong Boating
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香港遊艇業總會

HKBIA LOCAL PROFILE

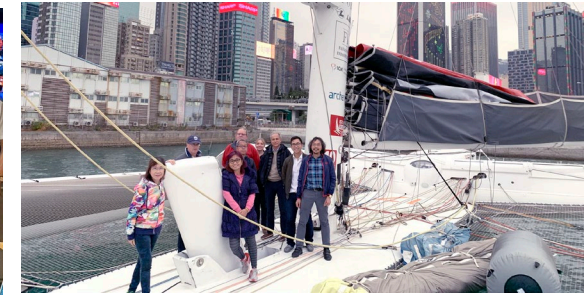
OVERVIEW - TALKS, EVENTS & LOCAL INVOLVEMENT

Building a stronger local profile for the HK boating industry and providing a platform to promote the SME's of the industry

- Guest Speaker and networking events
 - Lindsay Porter – HK's Dolphins & Porpoise (2019)
 - Paul Zimmerman – Post-Mangkut Protection Works (2021)
 - Simon Boyde – Low Impact Boating (2021)
 - Colin Dawson – Marine Insurance (2020)
- IDEC HKBIA tour (2020)
- Lantau Yacht Club Tour (2020)
- Government Liaison
- HKGCC Member



Lindsay Porter – HK's Dolphins & Porpoise (2019)



IDEC HKBIA tour (2020)



Paul Zimmerman – Post Mangkut Protection (2021)



Hong Kong Boating
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HKBIA LOCAL PROFILE

MEMBERS EVENTS

Member Networking Events

- Provide platform for members to get to know other players in the industry
- Provide place for new members to find out more on how to get into the industry.

Industry/Educational Seminars

- To share ideas/information that can inform our members to prepare for the future in our industry
- To inform our members of current trends in our industry



Hong Kong Boating
Industry Association
香港遊艇業總會

Member Involvement

- How can the industry adapt to climate change?
- How can we grow boating in Hong Kong?
- How do we form a clear career path for the next generation to join our industry?
- How do we increase community understanding and participation in our industry?



Hong Kong Boating
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HKBIA LOCAL PROFILE

PICO REPORT – July 2021

The HKBIA has shared the latest Industry Report to the HKSAR Government's Policy Innovation and Co-ordination Office (PICO). The report highlights the key issues the leisure boating industry has been facing and suggests various ways the government could help.

For the full report – please use the following link (HKBIA Member's Only):

[DIRECT LINK](#)



Hong Kong Boating Industry Association
香港遊艇業總會

Date: 16 July 2021

Mrs HO Pui Ling, Doris, JP
Policy Innovation and Coordination Office
Hong Kong Special Administrative Region

Subject: Hong Kong Boating Industry Association – Industry Report


Mrs HO Pui Ling, Doris, JP,

On behalf of the Hong Kong Boating Industry Association (HKBIA), we have enclosed a full report that describes the current state of the leisure boating industry and highlights the views from the various sectors of our industry. We also include a report from one of our marina members that specialize in super yachts in Hong Kong.

The HKBIA is a trade association that represents all sectors of the leisure boating industry. Many of the companies in this industry are small business but there are a growing number of companies with significant turnovers, and this multi-million dollar industry remains unrepresented at all levels both in Hong Kong and overseas. The HKBIA was established to rectify this situation.


We hope the Industry Report will shed some light on the current challenges the leisure boating industry is facing and provide some insight on how the government can support this industry to grow.

Yours sincerely,



Lawrence Chow
Chair
Hong Kong Boating Industry Association

Unit 702-703, 7/F, Cheung Tat Centre,
18 Cheung Lee Street, Chai Wan, HONG KONG
www.hongkongbia.com
info@hongkongbia.com



Hong Kong Boating Industry Association
香港遊艇業總會

EXECUTIVE SUMMARY

Hong Kong Boating Industry Association

The Hong Kong Boating Industry Association (HKBIA) is a trade association represents all sectors of the leisure boating industry from boat builders, brokers, yacht management, charterers and distributors, to chandlers, clubs, marinas, training organizations, and insurers, technical and professional services and specialized media. Hong Kong is one of the leading markets in Asia and is set to continue to grow with the recent peak of interest in water sports during the pandemic.

The industry report outlines the leisure boating industry background, the current challenges the industry is facing and how the government can support to develop the industry.

Background

Hong Kong has a strong maritime history and culture tracing back to when it was just a small fishing village. The maritime roots, coastline, and location of Hong Kong have helped develop the city to become a major free port, financial centre and cruise hub in Asia. Now, there is the opportunity to develop the boating leisure boating industry to put Hong Kong on the map as the top leisure boating market in Asia. Surrounded by water and islands, the coastline of Hong Kong is the perfect cruising ground for water sports of all types.

Challenges

The list of challenges is described in "Section 3 – Hong Kong Boating Industry Sectors". Some of the key challenges the leisure boating industry encounter include:

1. Lack of Sheltered Water Mooring Spaces
2. Lack of infrastructure to provide access to the water.
3. Classification of "Pleasure Vessels" for hire or reward" as separate from "Party Rooms" under the Group Gathering Regulations.


Solutions

We welcome the government to help support this industry as there is so much potential for boating to grow in Hong Kong. The social, economic, and environmental benefits from the growth of the industry is immense.

The list of suggestions of ways the government could help is described in "Section 8- How Can the Government Support the Industry?". Some of the main solutions include:


1. Facilitating the development of public marina facilities and the expansion of typhoon shelters to allow moorings to be laid inside them.

Hong Kong Boating Industry Association | State of the Industry Report Page 3 of 33





Hong Kong Boating Industry Association
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Piles can also be driven into the sea bed for boats to moor on as below.



Moorings are handled by the Marine Department but we are led to believe that the installation of piles comes under the Fisheries and Seabed Reclamation Ordinance. So whether this could be allowed under the Ordinance we are unsure.

In studies by a Marine Consultant, the Pak Sha Wan Bay would require that a breakwater be installed at the entrance of Pak Sha Wan to give more shelter to the bay from high seas coming in from the south east direction. This would also allow for more sheltered water moorings to be installed inside the bay.



Before Existing: 1560+ Boats
Typhoon Shelter Protection Potential: 1800+ Boats

These figures are for single point moorings only. If the mooring system is changed to other type of moorings then many more boats could be mooring in the bay.

Pak Sha Wan is a large body of water and during strong typhoons winds the wind inside on sea waves, or fetch, inside the bay. A form of wave attenuation system will be required inside Pak Sha Wan to make it safe for double moorings. If Marina style berthing was allowed as part of Pak Sha Wan this would not as a wave attenuator and allow double block moorings to be used in places.

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COMPREHENSIVE
REPORT (32 PAGES)
ON INDUSTRY
WITH
SUGGESTIONS



Hong Kong Boating
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香港遊艇業總會

HKBIA LOCAL PROFILE


PICO REPORT – POSITIVE RESPONSE FROM HK GOVT

“Your report covering the current state and needs of the leisure boating industry in Hong Kong is informative and insightful. Thank you for sharing the report with us.” Development Bureau

By Email and Post

香港特別行政區政府
The Government of the Hong Kong Special Administrative Region

發展局
起動九龍東辦事處
九龍 觀塘
海濱道 122 號



Energizing Kowloon East Office
Development Bureau
No. 122, Hoi Bun Road,
Kwun Tong,
Kowloon

本署編號 Our reference : () in DEVB/EKEO/9-20/3
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電話號碼 Tel No. : 3904 1618
傳真號碼 Fax No. : 3904 1161

27 July 2021

Mr Lawrence CHOW
Chair, Hong Kong Boating Industry Association
Unit 702-703, 7/F, Cheung Tat Centre
18 Cheung Lee Street
Chai Wan, Hong Kong

Dear Mr Chow,

Re: Hong Kong Boating Industry Association – Industry Report

Thank you for your letter of 19 July 2021 to the Secretary for Development and the Industry Report attached to the letter. We have coordinated with the Invigorating Island South Office (IISO) and would like to reply to you on behalf of the Secretary.

Your report covering the current state and needs of the leisure boating industry in Hong Kong is informative and insightful. Thank you for sharing the report with us. There are issues falling under the purview of the Marine Department, and we understand that you have also sent the report to the Department.

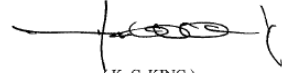
As announced in the 2020 Policy Address, one of the key projects under the Invigorating Island South initiative is to explore the expansion of the Aberdeen Typhoon Shelter area and the vessel berthing area as well as providing more land facilities. IISO is working closely with the Civil Engineering and Development Department in studying the technical feasibility of expanding Aberdeen South Typhoon Shelter with a view to commencing the investigation and preliminary design of the project as soon as possible. IISO also collaborates with relevant government departments in providing additional landing facilities and formulating proposal for developing a waterfront open space in Ap Lei Chau, including possible incorporation

- 2 -

of a dragon boat storage area to promote water-friendly culture.

As for Kwun Tong Typhoon Shelter, we understand that it is still required for providing shelter for local vessels under inclement weather, and serving as the home base for different types of local vessels during normal days. This may limit the possibility for designating part of it solely for mooring of leisure boats. We trust that the Marine Department would provide their views on this aspect. On your suggestion in paragraph 8.2 of the report to develop all manner of water sports and water-based recreational activities, it is in line with our commitment to introducing and facilitating more water-friendly activities in Hong Kong. For instance, we have facilitated some water sports associations in their applications for sites fronting Kwun Tong Typhoon Shelter to provide land-based supporting facilities. You may also be interested in the Government's proposal for the development of a water sports complex at the rehabilitated Shek O Quarry site. For details, you could refer to the paper submitted to the Southern District Council on 8 July 2021 which is available on the District Council's website.

Yours faithfully,


(K. C. KING)
for Head of Energizing Kowloon East Office
Development Bureau

c.c. Director of Marine
Head of IISO, DEVB
Principal Assistant Secretary (Harbour), DEVB
Chief Engineer/Port Works, CEDD



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HKBIA LOCAL PROFILE

LEARNING SERIES – ELECTRICAL & FIRE SAFETY SEMINAR

28 JULY 2021

*HKBIA JOINED SEMINAR
CONDUCTED BY
MARINE DEPARTMENT,
MARINE POLICE AND
FIRE SERVICES
DEPARTMENT*

Knowledge Management (Marine Policing) Beyond Boundaries Learning Series
– Electrical Safety and Fire Prevention on Vessels

Beyond Boundaries Learning Series (Marine Policing) and Marine Port District have invited honoured guests and experts from Marine Department, Fire Services Department, and Marine Police as speakers to share valuable insight on electrical safety on vessels, fire prevention, and observations on fishing vessels.

The seminar will cover topics such as industry best practices on managing electrical systems on fishing vessels and, owing to recent fire incidents taking place in Hong Kong waters, case studies on vessel fires and what we can do to prevent such accidents from occurring.

The sharing session will be hosted by PCRO MPDIST at Aberdeen base and co-organised by the Knowledge Management Marine Policing Team with simultaneous ZOOM broadcasting at Marine Regional Headquarters, Marine North Division, Marine East Division, and Marine West Division bases. Details are as follows :-

Date/ Time	: 2021-07-28 (Wednesday) 1530 hrs to 1730 hrs
Venue	: Marine Port District Officers' Mess, 7/F Aberdeen Marine Base, 28 Shum Wan Road (simultaneously broadcast by ZOOM at Marine Regional Headquarters, Marine North Division, Marine East Division, Marine West Division)
Guest Speakers	: 1) Mr. CHAN Kwok-king, Launch Mechanic Station Sergeant, Hong Kong Police Force 2) Mr. LAI Kim-hing, Senior Ship Inspector / Local Vessels Safety, Marine Department 3) Mr. CHAN Yu-hoi, Assistant Divisional Officer (Marine) 1, Hong Kong Fire Services Department
Facilitator	: SIP Sammy LEONG, PCRO MPDIST
Language	: Cantonese
Topics	: 1) Observation on Fishing Vessels (by Marine Police Technical Charge Certificate qualified Station Sergeant) 1530 hrs - 1600 hrs



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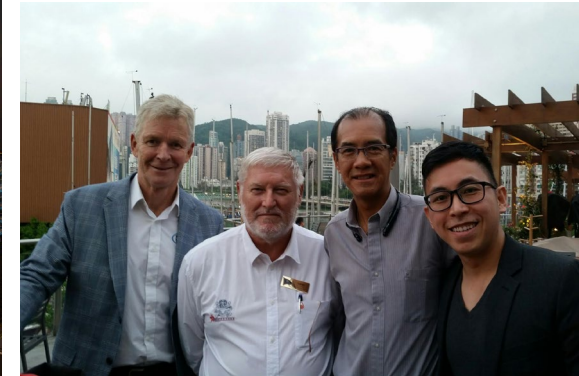
HKBIA INTERNATIONAL PROFILE OVERVIEW

Building a stronger international profile for the HK boating industry as a key market to export services.

- ICOMIA Executive Meeting 2019
- MIA Meeting 2019
- ICOMIA congress 2019
- Asia Pacific High Level Yacht Industry Forum 2019
- HK Int'l Boat Show (Cancelled)
- ICOMIA congress 2020 (Cancelled)
- ICOMIA/IMG/HKBIA Marina Tour 2020 (Cancelled)
- ICOMIA Executive Committee
- ICOMIA Low Impact Boating Initiative
- MIA & HKBIA Industry Meeting 2020
- Asia Boating Dialog 2020
- World Marinas Conference – Reconnect 2020
- Asia Pacific High Level Yacht Industry Forum 2020
- Metstrade Connect 2020 – State of the Industry
- ICOMIA AGM 2021
- Executive Meeting 2021
- ICOMIA IAWG (in progress)



ICOMIA Executive Meeting 2019



MIA Meeting 2019



ICOMIA Congress 2019



Asia Pacific High Level Yacht Industry Forum 2019



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA INTERNATIONAL PROFILE

ICOMIA EXECUTIVE MEETING 2019



HKBIA ICOMIA Welcome Dinner (28 March 2019)

Royal Hong Kong Yacht Club

Meeting members of ICOMIA and exchanging ideas
with the various marine industries associations
around the globe.



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA INTERNATIONAL PROFILE

MARINA INDUSTRY ASSOCIATION 2019 & 2020

HK has many well established Clubs/Marinas that have operated for decades. Marina Consultancy companies like Bellingham Marine and Brookes Bell export their consultancy services to developing marinas in Asia.

Update and knowledge sharing from Marine Industry Associations in Asia:

- *Marina industry best practices*
- *Clean Marina Program*
- *Gold Anchor Program*

Members participated:

- *Hebe Haven Yacht Club*
- *Lantau Yacht Club*
- *Royal Hong Kong Yacht Club*
- *Bellingham Marine*



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA INTERNATIONAL PROFILE

ICOMIA CONGRESS 2019

Increase Hong Kong's International profile, promote Hong Kong Industry and stay informed of activities and issues affecting other International Marine Industry Associations:

- Share experiences/existing conditions of HK Marine Industry.
- Form industry network with international community to provide information on HK Companies and the services that they could export.
- Exchange ideas and learn from the experience of other marine industry associations to ensure the HKBIA is up to date with the international industry developments.
- To learn of any upcoming regulatory changes might affect Hong Kong and the industry
- Improve knowledge of how other countries have grown their industries
- Keep informed of any international environmental issues that may affect Hong Kong and understand approaches taken to address issues in other countries.



HKBIA INTERNATIONAL PROFILE

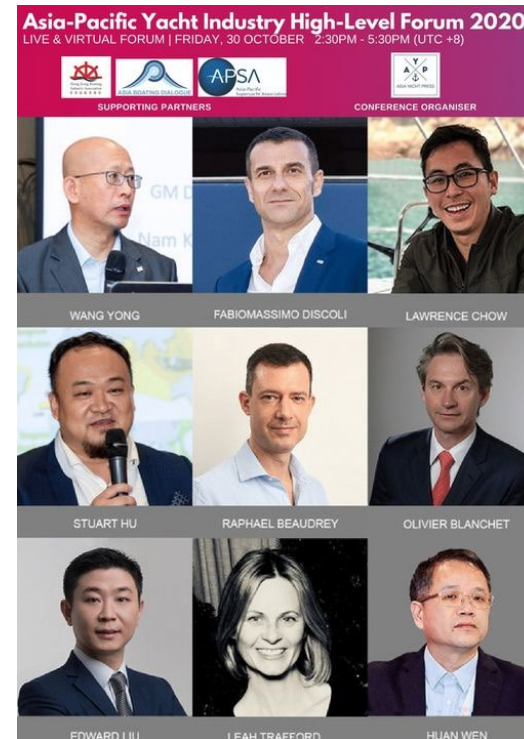
ASIA PACIFIC YACHT INDUSTRY FORUM 2019/2020

HKBIA continues to engage with the regional boating industry associations to provide advise on how HK can be a key player in the GBA yacht industry development.

Engaging in discussions with maritime experts in the Greater Bay Area (GBA) on:

- Developing the Sailing Yacht Economy
- Yachting in the Greater Bay Area (GBA)
- Yachting and Marine Economic Development

Lawrence Chow (Hong Kong Boating Industry Association) focused on the potential of Hong Kong becoming the key Leisure Boating and Nautical Tourism Hub of the the Greater Bay Area. Initiatives like the ICOMIA regulatory reference guide and Asia Boating Dialogue are key platforms that will facilitate standardized regulations and market growth in the near future.



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA INTERNATIONAL PROFILE

LOW IMPACT BOATING INITIATIVE

HKBIA leads the way in reducing our impact from all segments of the boating industry



The Low Impact Boating Initiative

What we can do now to reduce the environmental impact of our industry

Hong Kong Boating Industry Association

25 June 2020

Summary

This paper seeks to introduce multiple measures to reduce the immediate environmental impact in the build and operation of leisure marine vessels.

The Low Impact Boating Initiative (LIBI) is a new framework to address areas in which the world wide leisure marine industry, from paddle boards to Superyachts, can work together to reduce the environmental impact of our industry.

There is an overwhelming scientific consensus that human activity is raising world temperatures, leading to unsettled climatic conditions and the potential for catastrophic rising sea levels on a world wide scale.

Our energy intensive lifestyles, increasingly adopted worldwide, are working against our ability to reduce greenhouse gas emissions and pollutants.

Where consumer campaigns around the world have had a huge impact on other industries - from plastic straw manufacturers to cars - our industry has failed to keep up with the changing commercial and regulatory environment outlined in the Appendix to this paper.

In general the Leisure Marine Industry has been a receiver, not an initiator, of environmental regulations mostly generated by National authorities. Few initiatives to address these issues have come from us as an industry.

While commercial maritime has been adopting increasingly strict criteria for build and operation of new and existing vessels, in comparison the leisure marine industry on a worldwide scale is still looking for exemptions on fuel use, exemptions on emissions, and much of the fleet is constructed out of materials which are impossible to recycle except with high energy inputs.

The Low Impact Boating Initiative seeks to rectify that deficit. We need to be leaders, not just followers, or we are in danger of received regulations putting our entire industry's existence in question.



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA INTERNATIONAL PROFILE

ASIA BOATING DIALOGUE

The Asia Boating Dialogue (ABD) co-organized by the HKBIA and SBIA seeks to gather the Asian recreational industry in the sharing of market information and technical expertise and facilitating effective networking towards a Collective Voice. The ABD was a great opportunity for HKBIA to share the successes of the HK Industry to the rest of Asia – spurring interest for other Asian countries to import the services & expertise from HK to help grow boating in their respective territories.


ASIA BOATING DIALOGUE 2020 SESSION 1
TUESDAY 22 SEPTEMBER 2020
1600 Singapore Time / 0800 UTC +8













Market Updates – Insights from Regional Industry Leaders
Free-To-Attend: Register ONLINE at <https://asiaboating.org>

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SUPPORTING INDUSTRY ORGANISATIONS & AGENCIES














SUPPORTING PARTNERS

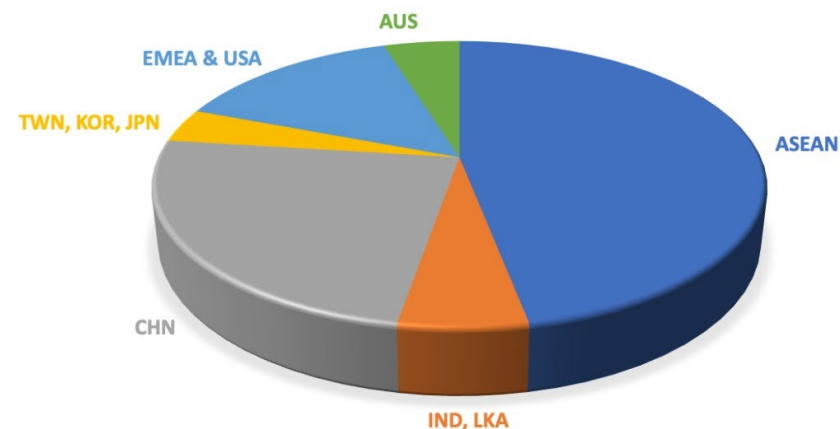







170 attendees

ASIA BOATING DIALOGUE 2020 - GLOBAL REGISTRATION
SESSION 1: 60% WEBINAR ATTENDANCE RATE



Hong Kong Boating
Industry Association
香港遊艇業總會

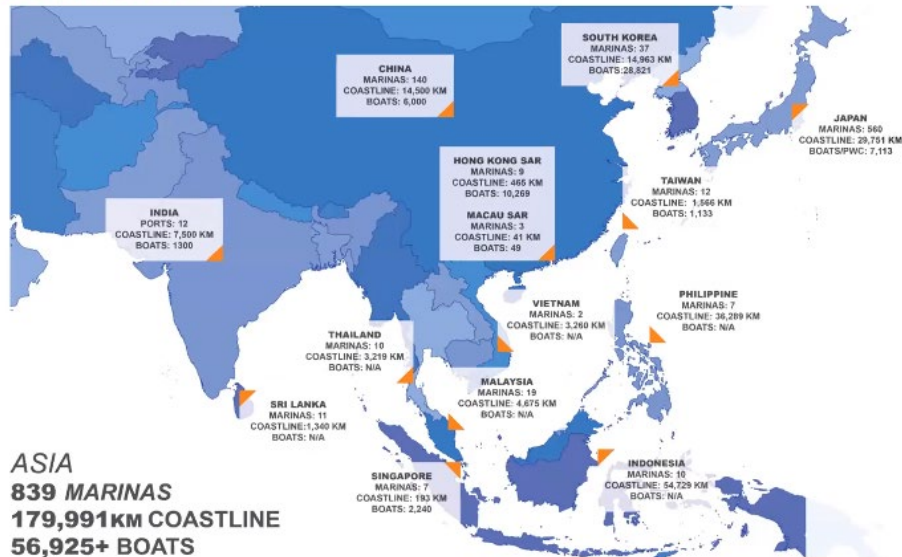
HKBIA INTERNATIONAL PROFILE

WORLD MARINAS CONFERENCE - RECONNECT

The World Marinas Conference gathers the global leading marina and club operators, owners and vendors along with related government agency representatives. Presentations and panel discussions focus on future leisure, social and economic trends and how they impact marinas.

ICOMIA
WORLD MARINAS
CONFERENCE
INDUSTRY RECONNECT

BOATS & MARINAS IN ASIA



 www.icomia.org

HKBIA presented: State of the Industry – Asia

Asia is an emerging leisure boating market that has the plenty of potential for growth. Established markets like Hong Kong, Singapore and Japan can set the example for new markets like China and Vietnam.



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA INTERNATIONAL PROFILE

METSTRADE CONNECT – STATE OF THE INDUSTRY

Where the global leisure marine industry comes together

The METSTRADE Show is the world's largest trade exhibition of marine equipment, materials and systems. We are the only truly international B2B exhibition for the marine leisure industry and have served as a platform for innovation, market developments and networking since our launch in 1988. In addition to the overall leisure marine industry, we cater for three specialist sectors, namely Superyachts, Marinas and Yards and Construction materials.

ICOMIA will give a global perspective on the leisure marine industry, offering key insights on developments and opportunities in different markets.

Lawrence Chow, Chairman of HKBIA provided insight from Asia.



METS MARINE
TRADE EQUIPMENT
SHOW

<https://www.metstrade.com/programme/state-of-the-industry/>



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA INTERNATIONAL PROFILE

US COMMERCIAL SERVICE WEBINAR

U.S. Commercial Service to host webinar on boating industry in Hong Kong, China

🕒 March 18, 2021

The [U.S. Commercial Service](#) will be hosting a webinar discussion covering an overview of the pleasure boat industry in Hong Kong and China, followed by a Q&A session. Join to hear from industry experts on markets the export opportunities for U.S. companies.



- DATE: Wednesday, April 14th, 2021
- TIME: 9pm EST/ 6pm PST
- LOCATION: WEBEX Virtual
- COST: \$25 USD

AGENDA:

- Welcoming Remarks and Hong Kong Overview: Paul Frost, Deputy Senior Commercial Consul, U.S. Consulate General Hong Kong and Macau
- Hong Kong Pleasure Boat Industry Briefing and Opportunities for U.S. exports: Lawrence Chow, Chair, Hong Kong Boating Industry Association
- China Mainland Marine Market: Hanes Roberts, Commercial Officer/Attaché, U.S. Embassy Beijing
- China Pleasure Boat Industry Policy Overview: Gao Jing, Deputy General Manager, China Classification Society
- China Pleasure Boat Industry Briefing and Opportunities for U.S. exports: Stuart Hu, Distinguished Consultant, Sanya Central Business District
- Moderated Q&A: Phil Minard, ITA Marine Technology Deputy Team, Leader of Pleasure Boats



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA INTERNATIONAL PROFILE

2021 – Virtual Attendance

ICOMIA AGM 2021

ICOMIA Executive Meeting 2021

Metstrade 2021

World Marinas Conference 2021

Asia Working Group 2021



Hong Kong Boating
Industry Association
香港遊艇業總會

HKBIA OVERVIEW

- HONG KONG BOATING INDUSTRY ASSOCIATION (HKBIA)
- AFFILIATED ASSOCIATIONS/ORGANIZATIONS
- HKBIA LOCAL PROFILE
- HKBIA INTERNATIONAL PROFILE
- **HKBIA PICO REPORT**
- HK AS THE LEADER OF THE BOATING INDUSTRY IN ASIA
- HK BOAT SHOW

POLICY, INNOVATION AND COORDINATION OFFICE (PICO) REPORT



Hong Kong Boating
Industry Association
香港遊艇業總會

Date: 16 July 2021

Mrs HO Pui Ling, Doris, JP
Policy Innovation and Coordination Office
Hong Kong Special Administrative Region

Subject: Hong Kong Boating Industry Association – Industry Report

Mrs HO Pui Ling, Doris, JP,

On behalf of the Hong Kong Boating Industry Association (HKBIA), we have enclosed a full report that describes the current state of the leisure boating industry and highlights the views from the various sectors of our industry. We also include a report from one of our marina members that specialize in super yachts in Hong Kong.

The HKBIA is a trade association that represents all sectors of the leisure boating industry. Many of the companies in this industry are small business but there are a growing number of companies with significant turnovers, and this multi-million dollar industry remains unrepresented at all levels both in Hong Kong and overseas. The HKBIA was established to rectify this situation.

We hope the Industry Report will shed some light on the current challenges the leisure boating industry is facing and provide some insight on how the government can support this industry to grow.

Yours sincerely,

Lawrence Chow
Chair
Hong Kong Boating Industry Association

Unit 702-703, 7/F., Cheung Tat Centre,
18 Cheung Lee Street, Chai Wan, HONG KONG
www.hongkongbia.com
info@hongkongbia.com



EXECUTIVE SUMMARY

Hong Kong Boating Industry Association

The Hong Kong Boating Industry Association (HKBIA) is a trade association represents all sectors of the leisure boating industry from boat builders, brokers, yacht management, charterers and distributors, to chandlers, clubs, marinas, training organizations, sail-makers, technical and professional services and specialized media. Hong Kong is one of the leading markets in Asia and is set to continue to grow with the recent peak of interest in water sports during the pandemic.

The industry report outlines the leisure boating industry background, the current challenges the industry is facing and how the government can support to develop the industry.

Background

Hong Kong has a strong maritime history and culture tracing back to when it was just a small fishing village. The maritime roots, coastline, and location of Hong Kong have helped develop the city to become a major free port, financial centre and cruise hub in Asia. Now, there is the opportunity to develop the boating leisure boating industry to put Hong Kong on the map as the top leisure boating market in Asia.

Surrounded by water and islands, the coastline of Hong Kong is the perfect cruising ground for water sports of all types.

Challenges

The list of challenges is described in "Section 3 – Hong Kong Boating Industry Sectors". Some of the key challenges the leisure boating industry encounter include:

1. Lack of Sheltered Water Mooring Spaces
2. Lack of infrastructure to provide access to the water.
3. Classification of "Pleasure Vessels let for hire or reward" as separate from "Party Rooms" under the Group Gathering Regulations.

Solutions

We welcome the government to help support this industry as there is so much potential for boating to grow in Hong Kong. The social, economic, and environmental benefits from the growth of the industry is immense.

The list of suggestions of ways the government could help is described in "Section 8: How Can the Government Support the Industry?". Some of the main solutions include;

1. Facilitating the development of public marina facilities and the expansion of typhoon shelters to allow moorings to be laid inside them.

Hong Kong Boating Industry Association | State of the Industry Report

Page 3 of 33



Hong Kong Boating
Industry Association
香港遊艇業總會

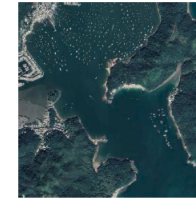


Piles can also be driven into the sea bed for boats to moor on as below.



Moorings are handled by the Marine Department but we are led to believe that the installation of piles comes under the Foreshore and Seabed Reclamation Ordinance. So whether this could be allowed under the Ordinance we are unsure.

In studies by a Marine Consultant, the Pak Sha Wan Bay would require that a breakwater be installed at the entrance of Pak Sha Wan to give more shelter to the bay from high seas coming in from the south east direction. This would also allow for more sheltered water moorings to be installed inside the bay.



Before
Existing: 1560+ Boats



Typhoon Shelter Protection
Potential: 1800+ Boats

These figures are for single point moorings only. If the mooring system is changed to other type of moorings than many more boats could be mooring in the bay.

Pak Sha Wan is a large body of water and during strong typhoons winds the wind builds up sea waves, or fetch, inside the bay. A form of wave attenuation system will be required inside Pak Sha Wan to make it safe for double moorings. If Marlin style berthing was allowed in parts of Pak Sha Wan this would act as a wave attenuator and allow double block moorings to be used in places.

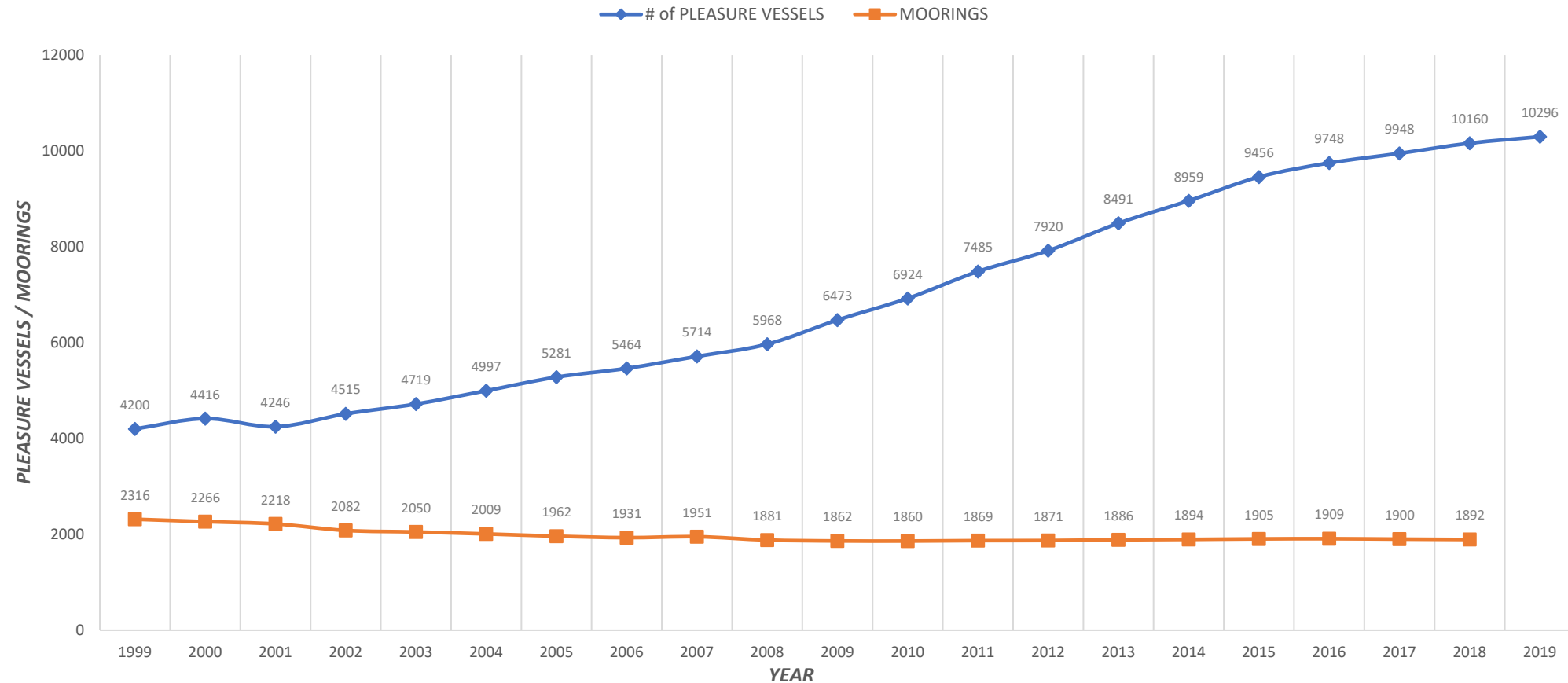
Hong Kong Boating Industry Association | State of the Industry Report

Page 18 of 33

COMPREHENSIVE REPORT
(32 PAGES) ON INDUSTRY
WITH SUGGESTIONS

MOORINGS IN HK – BOTTLENECK OF INDUSTRY

HKBIA - PLEASURE VESSELS & PUBLIC MOORINGS COMPARISON



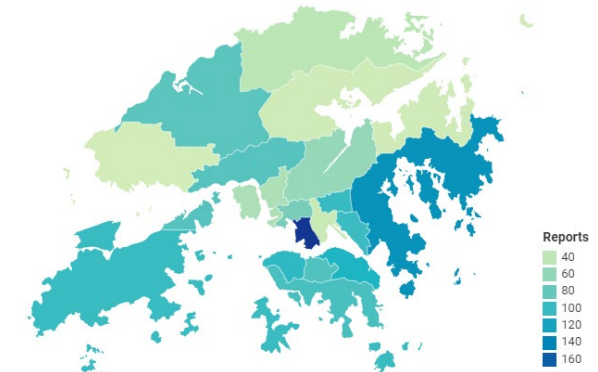
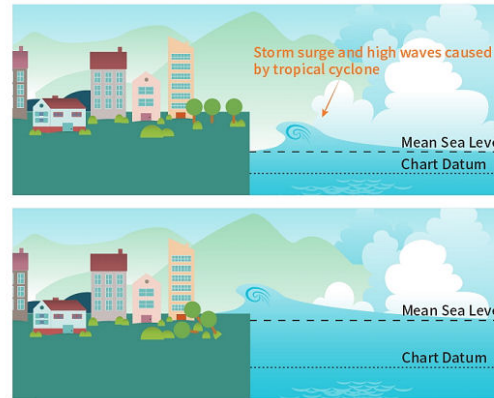
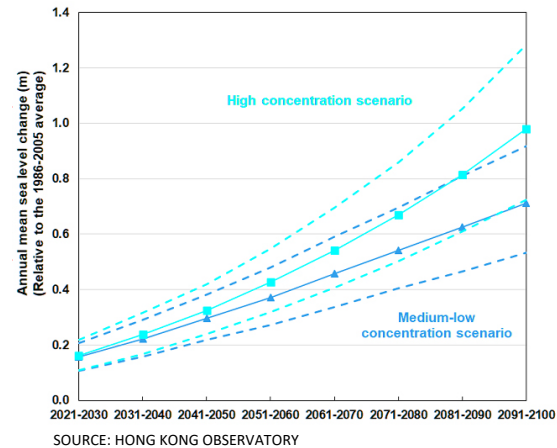
Hong Kong Boating
Industry Association
香港遊艇業總會

MOORINGS IN HK – BOTTLENECK OF INDUSTRY

THE NEED FOR SAFE & ACCESSIBLE MOORINGS

HKBIA advocates for safer moorings and protected coastlines in HK as storms get more frequent and more intense

Typhoon Mangkhut - 2018



Hong Kong Boating
Industry Association
香港遊艇業總會

MOORINGS IN HK – BOTTLENECK OF INDUSTRY

NEW GOVT MOORINGS – NOT A SOLUTION



*INACCESSIBLE
MOORINGS*

NO INFRASTRUCTURE

NO FACILITIES

*NO BENEFIT FOR THE
BOATING INDUSTRY*

https://www.mardep.gov.hk/en/pub_services//ocean/pdf/ocean_privatemoorings.pdf



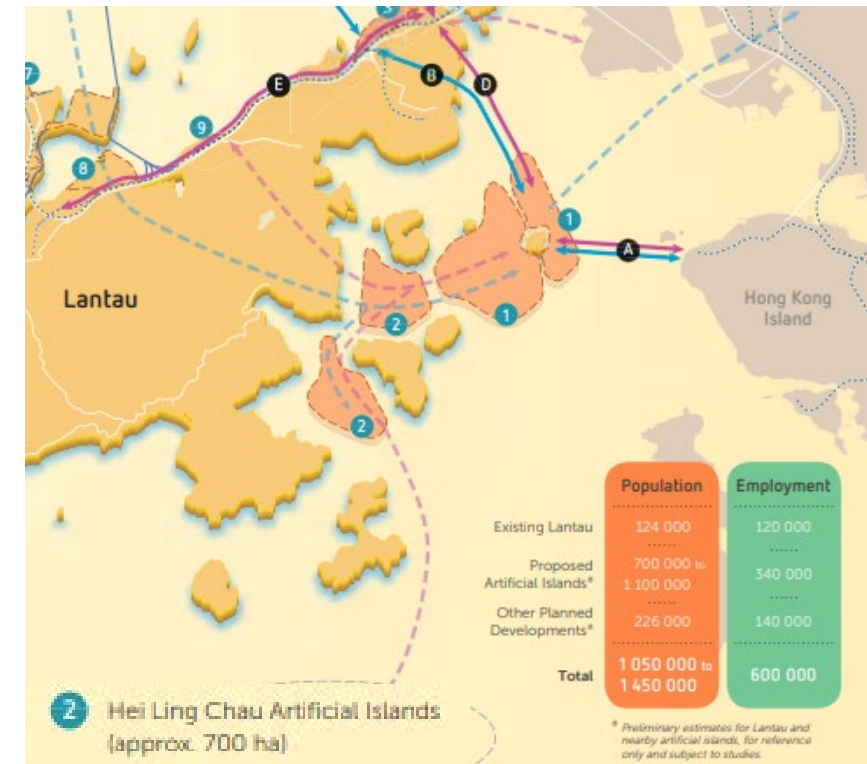
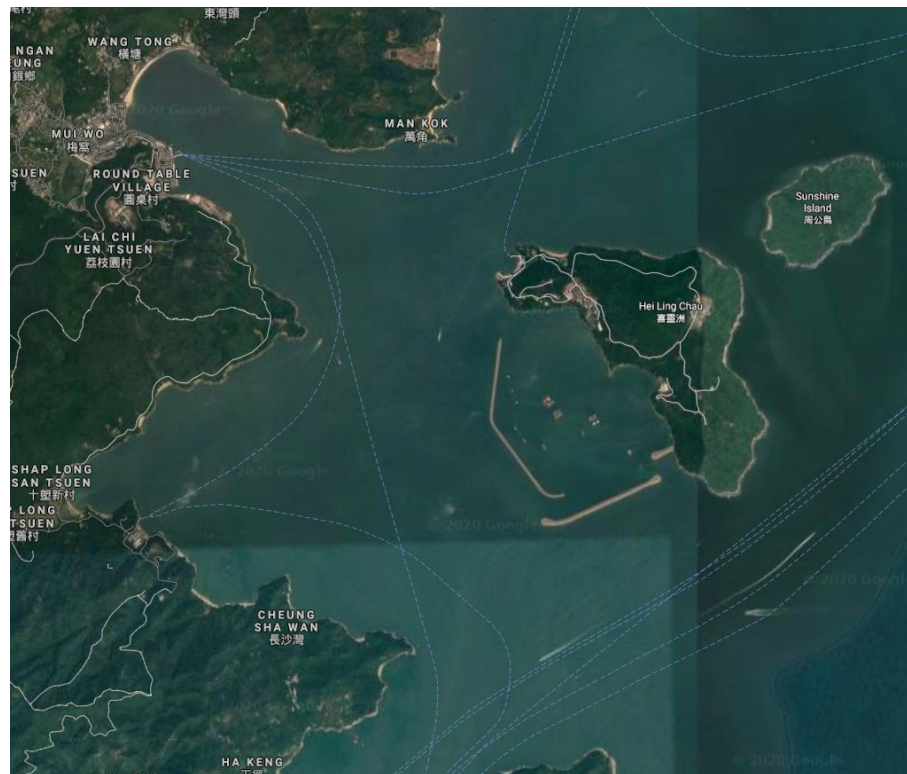
Hong Kong Boating
Industry Association
香港遊艇業總會

MOORINGS IN HK – BOTTLENECK OF INDUSTRY

HEI LING CHAU

Artificial islands from the Lantau Tomorrow Vision scheme will occupy the current Hei Ling Chau. With even less moorings available, where would leisure boats go? HKBIA seeks to find a solution

CONFLICT W/ LANTAU TOMORROW VISION



Hong Kong Boating
Industry Association
香港遊艇業總會

POTENTIAL MOORING DEVELOPMENT

Marina Cove & Hebe Haven – Typhoon Shelter Protection



Before
Existing: 1560+ Boats



Typhoon Shelter Protection
Potential: 1800+ Boats

**+ 15%
Moorings***

Potentially more if fore
& aft mooring is used



*Estimate – subject to further study

POTENTIAL DEVELOPMENT FOR BOATING INDUSTRY

Aberdeen Typhoon Shelter — Boost local economy and enhance community engagement



Before
Existing: 1005+ Boats



Expanded Typhoon Shelter
Potential: 1300+ Boats

**+ 30%
Moorings***

Potential for stronger
economic development
in Aberdeen



*Estimate – subject to further study

*Excludes dry stack boats

POTENTIAL DEVELOPMENT FOR BOATING INDUSTRY

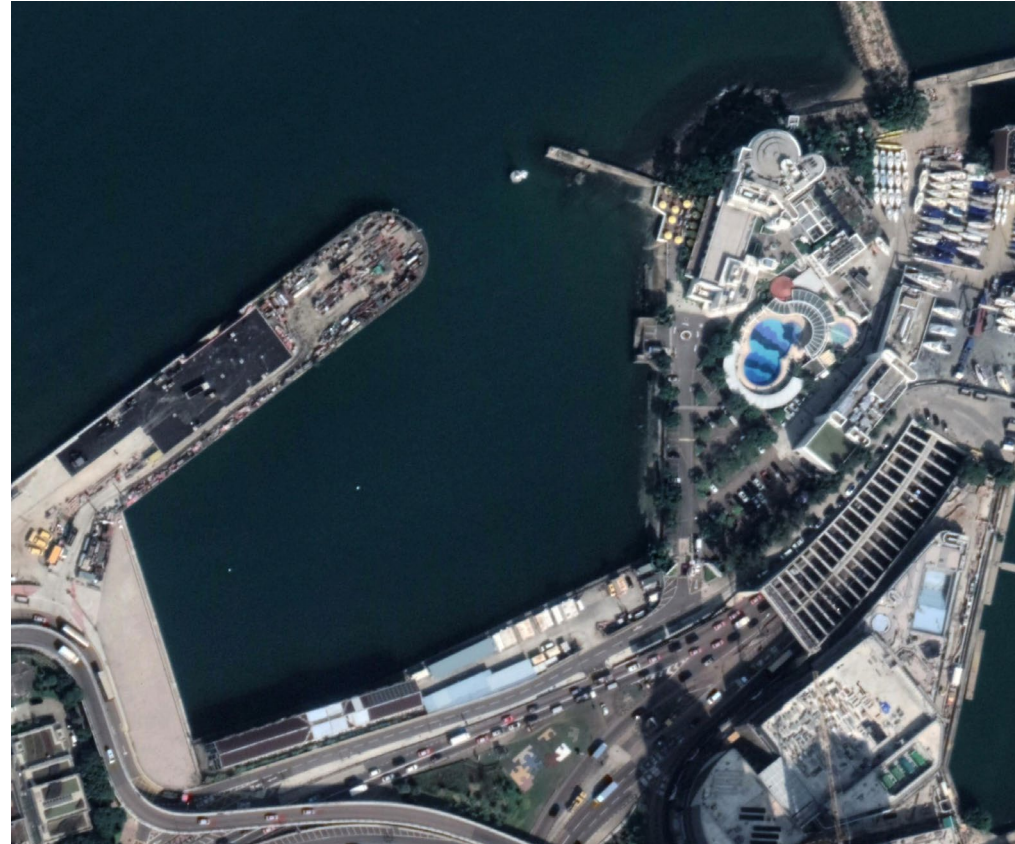
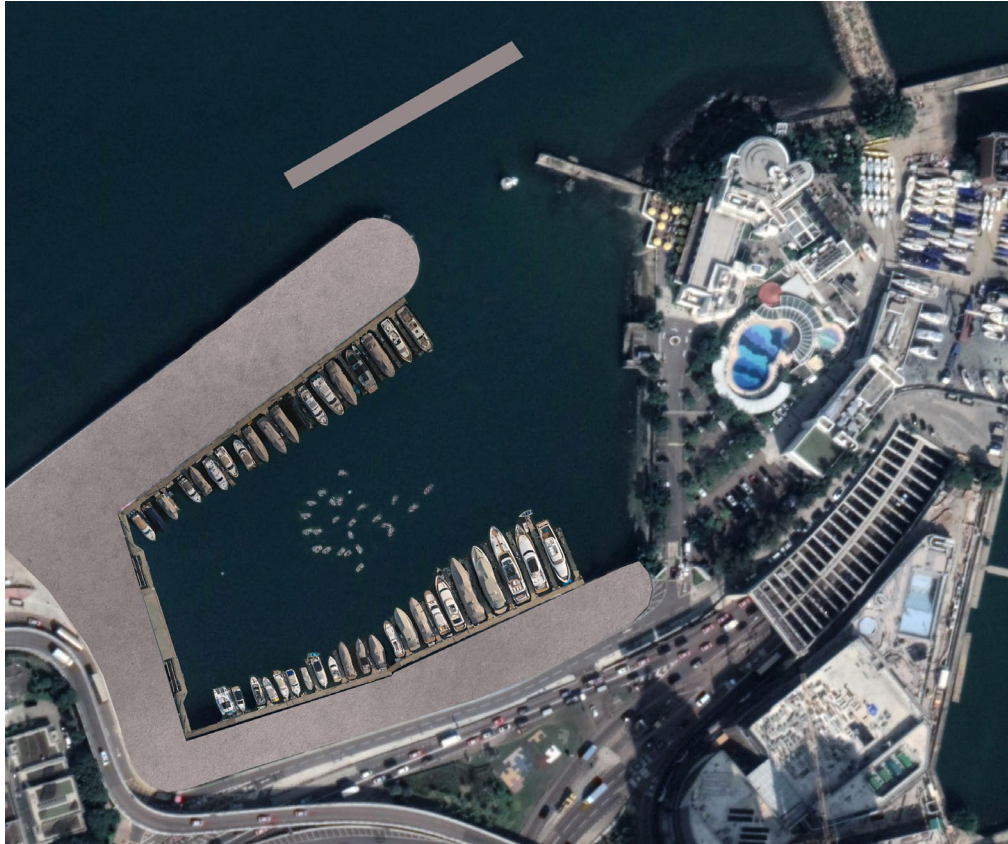
Tai Tam Bay— Redevelopment as Water Sports Centre and Marina



The old Shek O quarry basin is no longer used as a tunnel building area and could be used as a water sports centre. The land area required for a water sports centre is already in place as is an access road. Sailing, Paddle Boarding, Canoeing, fishing trips, water skiing, wakeboarding activities can all take place from this facility. There is space to develop boat sheds and storage racks, workshops, offices, install slipways and pontoons for use by the different type of water sports enthusiasts. There is also space for some moorings inside the area. The facility is well protected from typhoons.

POTENTIAL DEVELOPMENT FOR BOATING INDUSTRY

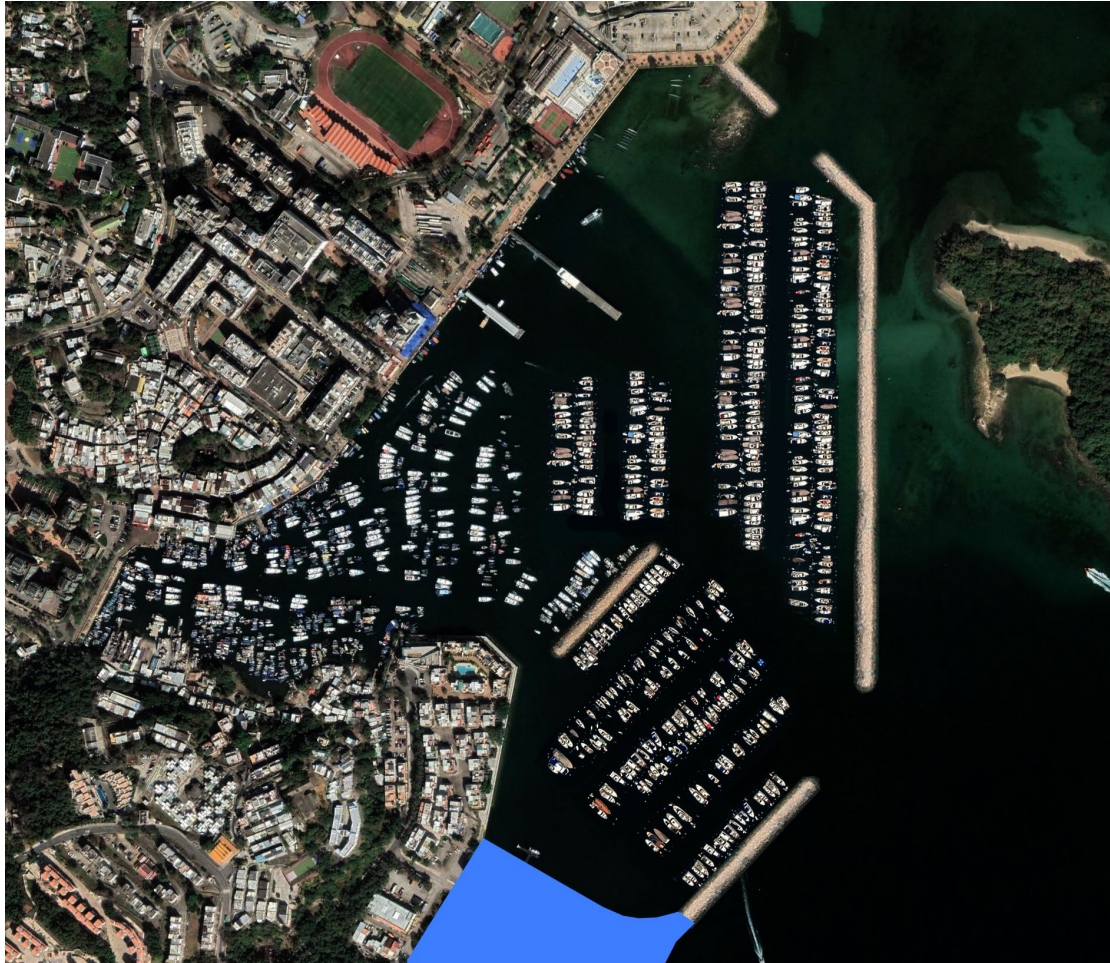
Wan Chai Basin— Potential for Marina with Water Sports Facility



Hong Kong Boating
Industry Association
香港遊艇業總會

POTENTIAL DEVELOPMENT FOR BOATING INDUSTRY

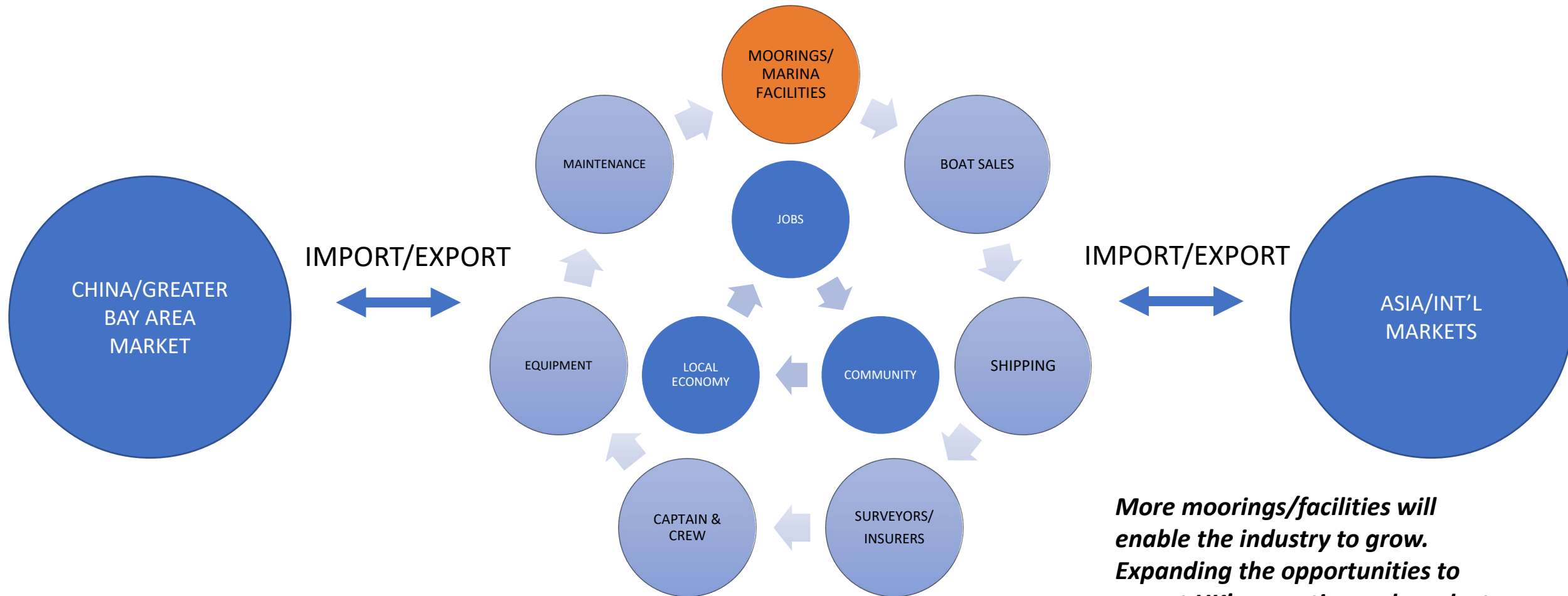
Sai Kung Typhoon Shelter — Potential for expansion



Hong Kong Boating
Industry Association
香港遊艇業總會

MOORINGS IN HK – BOTTLENECK OF THE INDUSTRY

BENEFITS OF A STRONGER BOATING INDUSTRY



More moorings/facilities will enable the industry to grow. Expanding the opportunities to export HK's expertise and products to China and the rest of the world.

RESPONSE FROM GOVT

- 2 -

of a dragon boat storage area to promote water-friendly culture.

As for Kwun Tong Typhoon Shelter, we understand that it is still required for

serving as the home
This may limit the
boats. We trust that
On your suggestion
rts and water-based
ing and facilitating
ave facilitated some
Kwun Tong Typhoon
be interested in the
ts complex at the
the paper submitted
able on the District

By Email and Post

香港特別行政區政府

The Government of the Hong Kong Special Administrative Region

發展局
起動九龍東辦事處
九龍觀塘
海濱道 122 號



Energizing Kowloon East Office
Development Bureau
No. 122, Hoi Yuen Road,
Kwun Tong,
Kowloon

本署傳真 Our reference : () in DEVB/EKEO/9-203
來信編號 Your reference :
電話號碼 Tel No. : 3904 1618
傳真號碼 Fax No. : 3904 1161

27 July 2021

Mr Lawrence CHOW
Chair, Hong Kong Boating Industry Association
Unit 702-703, 7/F, Cheung Tat Centre
18 Cheung Lee Street
Chai Wan, Hong Kong

Dear Mr Chow,

Re: Hong Kong Boating Industry Association – Industry Report

Thank you for your letter of 19 July 2021 to the Secretary for Development and the Industry Report attached to the letter. We have coordinated with the Invigorating Island South Office (IISO) and would like to reply to you on behalf of the Secretary.

Your report covering the current state and needs of the leisure boating industry in Hong Kong is informative and insightful. Thank you for sharing the report with us. There are issues falling under the purview of the Marine Department, and we understand that you have also sent the report to the Department.

As announced in the 2020 Policy Address, one of the key projects under the Invigorating Island South initiative is to explore the expansion of the Aberdeen Typhoon Shelter area and the vessel berthing area as well as providing more land facilities. IISO is working closely with the Civil Engineering and Development Department in studying the technical feasibility of expanding Aberdeen South Typhoon Shelter with a view to commencing the investigation and preliminary design of the project as soon as possible. IISO also collaborates with relevant government departments in providing additional landing facilities and formulating proposal for developing a waterfront open space in Ap Lei Chau, including possible incorporation

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of a dragon boat storage area to promote water-friendly culture.

As for Kwun Tong Typhoon Shelter, we understand that it is still required for providing shelter for local vessels under inclement weather, and serving as the home base for different types of local vessels during normal days. This may limit the possibility for designating part of it solely for mooring of leisure boats. We trust that the Marine Department would provide their views on this aspect. On your suggestion in paragraph 8.2 of the report to develop all manner of water sports and water-based recreational activities, it is in line with our commitment to introducing and facilitating more water-friendly activities in Hong Kong. For instance, we have facilitated some water sports associations in their applications for sites fronting Kwun Tong Typhoon Shelter to provide land-based supporting facilities. You may also be interested in the Government's proposal for the development of a water sports complex at the rehabilitated Shek O Quarry site. For details, you could refer to the paper submitted to the Southern District Council on 8 July 2021 which is available on the District Council's website.

Yours faithfully,

(K. C. KING)
for Head of Energizing Kowloon East Office
Development Bureau

c.c. Director of Marine
Head of IISO, DEVB
Principal Assistant Secretary (Harbour), DEVB
Chief Engineer/Port Works, CEDD



Hong Kong Boating
Industry Association
香港遊艇業總會

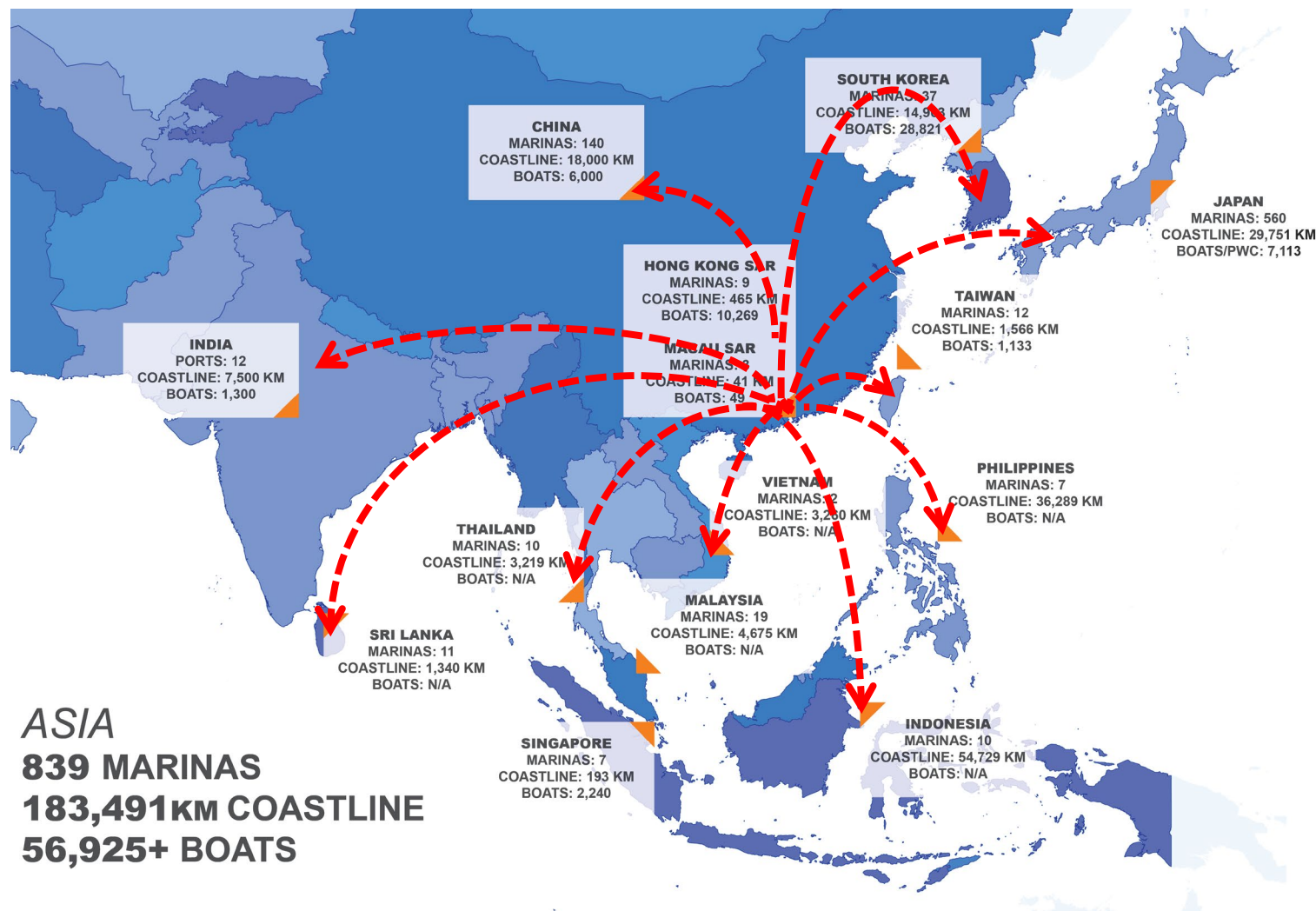
HKBIA OVERVIEW

- HONG KONG BOATING INDUSTRY ASSOCIATION (HKBIA)
- AFFILIATED ASSOCIATIONS/ORGANIZATIONS
- HKBIA LOCAL PROFILE
- HKBIA INTERNATIONAL PROFILE
- HKBIA PICO REPORT
- **HK AS THE LEADER OF THE BOATING INDUSTRY IN ASIA**
- HK BOAT SHOW

HK BOATING INDUSTRY – LEADER IN ASIA

From the broker who sells boats and the instructor who teaches the youth of Hong Kong to sail to the insurer who underwrites the risks, the HKBIA represents them all. We are a relatively young association with 32 members and represent one of the fast-growing work-force sectors in Hong Kong. As such, we hope we can work with the trade organisations to develop this industry both locally and internationally, as Hong Kong is so much more than a shipping or fishing port these days.

Hong Kong's extraordinary Harbour is the beating heart of our City, and the leisure marine industry exists to grow and develop access to the harbour and Hong Kong's spectacular and undeveloped cruising waters. Hong Kong is the leader for the leisure marine industry and can easily export this expertise and services to the neighbouring cities and countries.



Hong Kong Boating
Industry Association
香港遊艇業總會

BOATING INDUSTRY RESEARCH & DATA OVERVIEW

HKBIA shares the latest local and international leisure boating industry trends and analysis to its membership.

A great resource for our members to access up-to-date information on the industry:

- HKBIA & ICOMIA reports
- HKBIA & ICOMIA discussion forum
- Drone Survey report



BOATING INDUSTRY RESEARCH & DATA HKBIA & ICOMIA REPORTS & STATISTICS

HKBIA offers the latest international reports of the boating industry to its membership.

HKBIA | Covid-19 Impact and Government Relief Measures (Part I)

THE IMPACT OF Covid-19 AND AVAILABLE GOVERNMENT RELIEF MEASURES FOR THE LEISURE MARINE INDUSTRY

Introduction:

Hong Kong's economy has experienced decelerating growth since Q2 2018 with the full year for 2019 contracting by 1.2% year on year (y.o.y.). This was a result of sharp contractions in Q3 and Q4 of 2019 (-2.8 and -2.9% y.o.y. respectively). Whilst US-China trade disputes and a general economic downturn may have been to blame for the earlier decline, the fall in the second half of 2019 is due to the social and political unrest we have experienced. Corporate bankruptcies surged from 10,498 in October 2019 to 14,394 in November 2019. What looked like a calmer and hopeful start to 2020 was then hit hard from Chinese New Year onwards by the ongoing impact of the Covid-19. A double whammy.

China has been Hong Kong's largest trading partner since 1985 with 50.4% of HK trade being with China in 2018. Hong Kong was the Mainland's fourth largest trading partner (after the US, Japan and Korea) in 2018, and Hong Kong was the Mainland's second largest export market, taking up 12.2% of its total exports in 2018. With Covid-19, the interruptions to the supply chain, office and factory closures, travel and quarantine restrictions and cessation of normal trade with China has affected many.

In Hong Kong, the effect of this virus and the social and political reaction to it has been devastating both for social welfare and for business confidence and activity. Hong Kongers still have strong memories of the effects of SARS in 2003, and it may be their hygiene precautions as a result which have helped to limit the spread in HK. But such social isolation and limitations are not economically sustainable. Prolonged uncertainty, China trade difficulties, restrictions in local and international travel, event cancellation, staffing issues due to travel bans, quarantine, home work and school closures, combined with a lack of trust in the current government's ability to deal with the situation has resulted in dramatic drops in economic activity. Hong Kong exports dropped 22.7% in Jan20 y.o.y., the unemployment rate increased from 3.3% in the 3 months to Dec 19 to 3.4% in the 3 months to Jan20 (source: tradingeconomics.com)

Whilst Government and media attention has focused on the impact of plummeting tourist numbers, retail sales and other indicators on the retail, transport, tourist and hospitality industries, there has been a severe impact on all businesses in Hong Kong. It has left those not targeted by government relief schemes feeling left out and the Leisure Marine Industry certainly falls in to that category. Even the \$10,000 handout to all permanent HK ID holders will come too late to be of benefit now, when it is actually needed – Financial Secretary Paul Chan seems to think the quickest they can do it is "by the end of the summer".

Casual discussions with some industry members has indicated significant falls in turnover in the past couple of months, some far in excess of 50% down whilst still facing the same rent and staff cost liabilities. Most companies have private not government landlords, and therefore can argue but are unlikely to get a reduction in rent. Hong Kong landlords are notoriously difficult.

So the aim of this report is to highlight the relief measures that are in place and may be applicable to HKBIA members. It is by no way complete and not all measures may apply, but hopefully it will highlight some relevant measures that may be of use to your business. Where possible I have provided some comment and links to sites you can use to find more information. If you have experience of the listed relief measures or others not mentioned, please do contact us to share your experiences on info@hongkongbia.com

Please do also take a look at and complete the HKBIA Covid-19 impact survey we have sent out. We need as many responses as possible to give weight to our requests to the government for more redress to the Leisure Marine Industry

COVID-19 Impact & Govt Relief Report (2020)



December 2019

Quarterly EU Report



Logos has completed this report with the help and input of ICOMIA's Environmental and Technical Consultants

logos

ICOMIA Quarterly EU Report (2019)

	Sales Revenue													Trade (approximate)								Economic Outlook	
	Salvage (excluding dinghies)	Sailing dinghies	Trailerable boats	Used boat market	Motorboats: SDI	Motorboats: Outboards	Motorboats: Inboard & I/O	PWCs	Accessories	Engines: Outboard	Engines: SDI Diesel	Engines: SDI Petrol		Exports by value	Exports by unit	Imports by value	Imports by unit	Domestic market by value	Domestic market by units	Over coming 6 months			
Argentina	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		↓	↓	↓	↓	↓	↓	Argentina			
Australia	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		?	?	↓	↓	↓	↓	Australia			
Brazil	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		↓	↓	↓	↓	↓	↓	Brazil			
Canada	?	?	?	?	?	?	?	?	?	?	?	?		?	?	?	?	?	?	Canada			
Croatia	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		?	?	?	?	↓	↓	Croatia			
Czech Republic	↑	↓	↓	↓	↓	↓	↓	↓	↓	↑	↓	↓		↓	↓	↓	↑	↑	↑	Czech Republic			
Denmark	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↓	↓	↓	↑	↑	↑	Denmark			
Estonia	↑	↑	↑	↑	↑	↑	↑	↑	↑	↓	↓	↓		↑	↑	↑	↓	↓	↓	Estonia			
Finland	↑	↑	↓	↓	↓	↓	↓	↓	↓	?	?	↓		↑	↑	↑	↓	↓	↓	Finland			
France	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	France			
Germany (BVMW)	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		↑	↑	↑	↓	↓	↓	Germany (BVMW)			
Germany (DRSV)	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		↓	↓	↓	↓	↓	↓	Germany (DRSV)			
Hong Kong	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		↓	↓	↓	↓	↓	↓	Hong Kong			
Ireland	↑	↑	↑	↑	↑	↑	↑	↑	↑	↓	↓	↓		↑	↑	↑	↑	↑	↑	Ireland			
Italy	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	Italy			
Japan	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		↓	↓	↓	↓	↓	↓	Japan			
Lebanon & Gulf region	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓		↓	↓	↓	↓	↓	↓	Lebanon & Gulf region			
Netherlands	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	Netherlands			
New Zealand	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	New Zealand			
Norway	↑	↑	↑	↑	↑	↑	↑	↑	↑	↓	↓	↓		↑	↑	↑	↑	↑	↑	Norway			
Poland	↓	↓	↓	↓	↓	↓	↓	↓	↓	↑	↑	↓		↑	↑	↑	↑	↑	↑	Poland			
Singapore	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	Singapore			
South Africa	↓	↓	↓	↓	↓	↓	↓	↓	↓	↑	↑	↑		↑	↑	↓	↑	↑	↑	South Africa			
Spain	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	Spain			
Sri Lanka	↑	↑	?	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	Sri Lanka			
Sweden	↓	↓	↑	↑	↑	↑	↑	↑	↑	↑	↑	↓		↑	↑	↑	↑	↑	↑	Sweden			
Switzerland	↓	↓	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	Switzerland			
Taiwan	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↑	↑	↑	↑	Taiwan			
Turkey	↓	↓	↓	↓	↓	↓	↑	↓	↓	↓	↓	↓		↑	↑	↑	↑	↑	↑	Turkey			
United Kingdom	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑		↑	↑	↓	↑	↑	↑	United Kingdom			
United States	?	?	?	?	?	?	?	?	?	?	?	?		↑	↑	↑	↑	↑	↑	United States			

ICOMIA Half Year Trend Report (2019)

HALF YEAR TREND REPORT

KEY	↑ up	↓ down	= some	? unsure N/A
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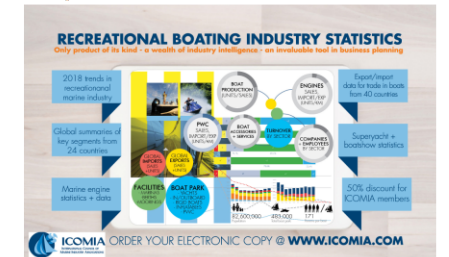
ICOMIA's Marine Industry Association (MIA) members have provided a snapshot overview of their industry for the past 6 months - 1 July 2019 to 31 December 2019 - compared to the same period of the previous year - 1 July 2018 to 31 December 2018.

Although no quantifiable data is gathered, the survey acts as a barometer to indicate recent economic trends in the global recreational boating industry as well as the general outlook for the coming year.

With the support of our members throughout the world and in conjunction with the appropriate associations, ICOMIA lobbies international authorities and major organisations, publishes documents and guidelines and produces books to facilitate the growth of the industry.

The ICOMIA Market Intelligence Taskforce coordinates the collection of international marine industry statistics. It seeks to improve the accuracy and breadth of national statistics and supervises the publication of the annual ICOMIA Recreational Boating Industry Statistics.

Members of an ICOMIA MIA receive 50% off the Recreational Boating Industry Statistics book.



Hong Kong Boating
Industry Association
香港遊艇業總會

BOATING INDUSTRY RESEARCH & DATA

ICOMIA FORUMS AND DISCUSSIONS

HKBIA contributed to international dialogue on how the industry is adapting to Covid-19 – sharing insight of how Hong Kong adapted quite successfully.

Corona Virus Crisis

By **Martinho Fortunato** on Wednesday, March 11 - 12:13pm
Dear Colleagues,

As we are all facing this 'storm' that came unexpectedly and heavily, first of all, I hope that you and your families are all safe and of good health.

Knowing that all our countries are facing the crisis in different levels and with different consequences, I really hope that we can go through this moment with all our strength and that boating and Marinas are able to overcome the difficulties.

To try and have a clearer vision of what is happening around the world, I think it will be very useful if all of you could make a small report about the situation of the Marina business in you country and if there are any specific measures or procedures for visiting yachts or for boating in general. In regards to the commercial activity of the marinas, please include (if you have the information) the percentage of marinas that have had cancellations related to the Corona virus crisis and if the market is facing a clear slowdown in terms of reservations. Also mention if events have been cancelled or delayed and until when.

Suggested by Oscar and Dan, IMG/ICOMIA will then work (subject to the approval of the ExCommittee) on a positive statement with the objective of promoting boating as a non-mass activity, where you can be on a safe/healthy environment, with a low risk of contamination. We could also include some information regarding any new procedures, or best practices, for visiting yachts.

Information is crucial for our future and lessons will be learned for sure.

Be strong and 'sail safe',

Martinho

Expand All

COMMENTS



By **Daniel Natchez** on 2020-03-11T13:13:31

Thanks

Appreciate the proactive approach

Would suggest thinking about cancelling May meeting and doing if by cool call

Am in the NY area but throughout the US the emphasis is on discouraging and cancelling group activities and implemented sanitary hygiene and deep cleaning.

Many business have gone to remote access where feasible

Companies and Governments are being encouraged not to penalize people who are ill and requesting them to stay home in voluntary or other quarantine for 2 weeks

For marinas and boating – prudence should be the first priority. Many recreational areas are implementing deep cleaning and for employees and users the use of gloves, hand sanitizers and keeping hands away from face and other body parts.

We will know a lot more about the virus and how it is spread over the next few weeks and therefore what other measures may wish to be considered.

But the current thinking is it will get a low worse before it gets better and proactive approaches are most important

Dan

REPLY UNPUBLISH



By **Martinho Fortunato** on 2020-03-11T14:26:31

Here goes the current situation in Portugal:

There are no special/new measures for visiting yachts and regarding the Corona virus crisis. The government did not declare the country quarantine.

There is a clear and abrupt slowdown in Tourism in general, mainly big cities and business/event travels. Marinas are still keeping the same occupancy rates but there is a much lower inflow of reservations and a lot less boats traveling along the coast. There are contacts made to marinas to enquire about extending stays that were initially planned for six to nine months, which means the clients are considering changing their cruising plans and not wanting or delaying travels.

Most of the events in Marinas have been cancelled until the end of May and until a more clear vision exists. Events from June onwards are on hold.

We are very worried about small nautical businesses that work using the marinas as their basis: charter businesses, sailing schools, diving companies, bars, restaurants, etc. Most of them are small family businesses that cannot survive after 4 to 5 months of no income. Obviously this will impact the industry and our Marina businesses as well.

Hoping to hear from you.

Best regards,

Martinho

REPLY UNPUBLISH



By **Roberto Peracchio** on 2020-03-11T15:03:34

Dear Martinho,

Good idea Assomadas made a survey in Italy asking marinas if they have cancellations but there are none considered that the foreign customers expect the virus to be beaten before the summer season.

Marinas just received many enquiries for information.

Only the charter business had some cancellations from foreign customers in the first phase of the alarm.

Demand for boats from italians is apparently growing because people here are planning to spend their summer vacation only in Italy and in a safe place like about used by their own family only.

REPLY UNPUBLISH



By **Alan Reid** on 2020-03-16T01:40:06

Hi All,

In Hong Kong we had the problems earlier than elsewhere. Basically all boat shows in Asia were cancelled. International Dinghy and School competition events in HK were cancelled. The Rolex China Sea was cancelled due to the 14 days quarantine the boats would have had to undertake when they arrived in the Philippines.

With the Government not allowing their staff to return to work after the Lunar New Year holiday, and the shutting down of China, many local business were also not at work. This saw an increase in people using their boats, but with less people on board. With the schools being closed there is a greater demand for children orientated sailing courses, sail training and adventure on the water courses.

Yacht Clubs and Marinas are still busy with members using their boats but Food and Beverage is taking a hit.

We, at the Royal Hong Kong Yacht Club, have drawn up contingency plans for if we have to close one of our Clubhouses for two weeks, for deep cleaning and compulsory home quarantine of all staff, due to a person with a confirmed case of the virus having used the Club facilities.

We did have a case but the person in question only walked through the car park and on to a sampan to get to and from their boat. As the person did not go inside any facility of the Club we did not close down. However we advised the sampan operator to quarantine for two weeks and we arranged for the sampan to be deep cleaned.

All the best

Alan

EDIT REPLY UNPUBLISH



Hong Kong Boating
Industry Association
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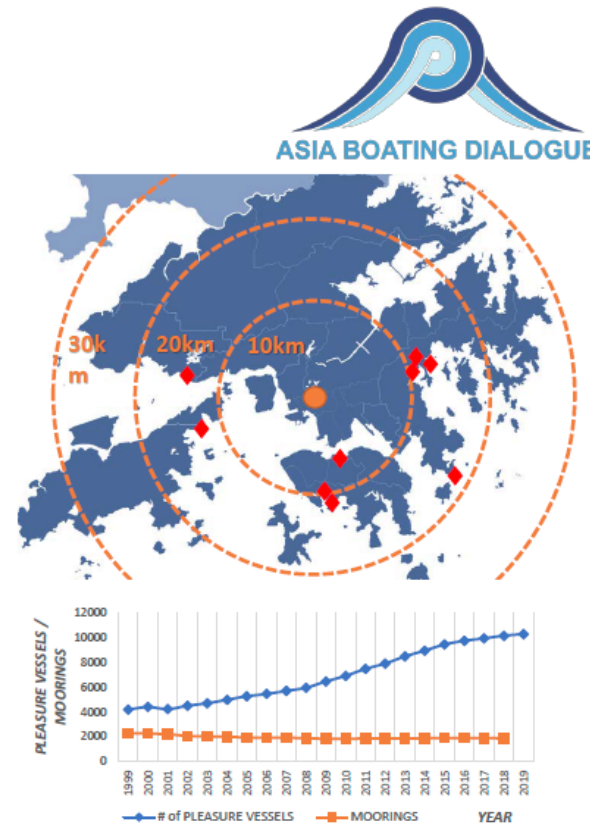
BOATING INDUSTRY RESEARCH & DATA

ASIA BOATING DIALOGUE SUMMARY & REPORTS

HKBIA has general industry information on each market in Asia.

HONG KONG S.A.R	
POPULATION	7.5 MILLION UHNWI*: 2,737 (2020) – PREDICTED 16% INCREASE FROM 2014 - 2024
GDP	US\$342 BILLION(2018)
GEOGRAPHY	465 KM OF COASTLINE. 263 ISLANDS CRUISING POSSIBLE ALL YEAR ROUND
MARINAS	9
BOATS	10,269
BOAT SHOWS	HONG KONG INT'L BOAT SHOW, HONG KONG YACHT SHOW
REGULATIONS	BOAT REGISTRATION IS STANDARDIZED (ISO STANDARDS & CLASS CLASSIFICATION ACCEPTANCE). LOCAL OPERATOR LICENCE REQUIRED TO OPERATE BOATS
KEY GOALS	
STRENGTHS	MATURE BOATING MARKET. NO TAX. FACILITIES AVAILABLE
WEAKNESSES	SHORTAGE OF MOORINGS. HIGH BARRIER TO ENTER MARKET DUE TO HIGH MOORING COSTS.
OPPORTUNITIES	NEW MARINA DEVELOPED. OPPORTUNITY FOR EXPANDING TYPHOON SHELTERS TO PROVIDE MORE MOORINGS AND BOOST LOCAL ECONOMY.
THREATS	INDUSTRY BOTTLENECK DUE TO LACK OF MOORINGS

* UHNWI = ULTRA HIGH NET WORTH INDIVIDUALS WITH US\$30M OR MORE



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BOATING INDUSTRY RESEARCH & DATA

HK DRONE SURVEY REPORT

HKBIA has a aerial view database of current typhoon shelters, berths and moorings in HK

- 46 locations
- First detailed survey in Hong Kong
- Highlighting the need for more berthing space in Hong Kong
- Identifying illegal moorings in HK
- Capturing details of potential locations for more moorings



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BOATING INDUSTRY RESEARCH & DATA

HK DRONE SURVEY REPORT

HKBIA has a high definition and to scale aerial views of key mooring areas in HK



Hong Kong Boating
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HKBIA OVERVIEW

- HONG KONG BOATING INDUSTRY ASSOCIATION (HKBIA)
- AFFILIATED ASSOCIATIONS/ORGANIZATIONS
- HKBIA LOCAL PROFILE
- HKBIA INTERNATIONAL PROFILE
- HKBIA PICO REPORT
- HK AS THE LEADER OF THE BOATING INDUSTRY IN ASIA
- **HK BOAT SHOW**

BOAT SHOWS – A SHOWCASE TO THE WORLD

Boat Shows have always been an integral part of the leisure boating industry – everyone in the industry knows the Southampton Boat Show in the UK, Boot Dusseldorf in Germany, Fort Lauderdale in the USA, METS in Amsterdam. They have become both a local and International draw and boost for their country and local markets. The strength of these shows is that they are open to and represent ALL sectors of the leisure marine industry. With the breadth of the market, services and expertise, Hong Kong could also put itself on the map in a similar way with a fully fledged boat show. Whilst there have been small privately run shows in the past, none have proven to be fully accessible for all in the industry due to cost constraints. These limitations have resulted in small shows with little international draw. HKBIA are working towards finding a solution.

With the expertise of the industry coupled with the pristine coastline, Hong Kong has the potential to become the leisure boating and nautical tourism hub of the Greater Bay Area and beyond.



Hong Kong Boating
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