

Icebreaker

The first B2B Yacht Charter Magazine

No. 03/2020

Interview

Luka Šangulin

Gordan Devivi

Charter Business

Fleet management
– key to productivity

Group Supply in Croatia

Events

Boat Shows – a year erased

ICE'20 Virtual Edition

Environment

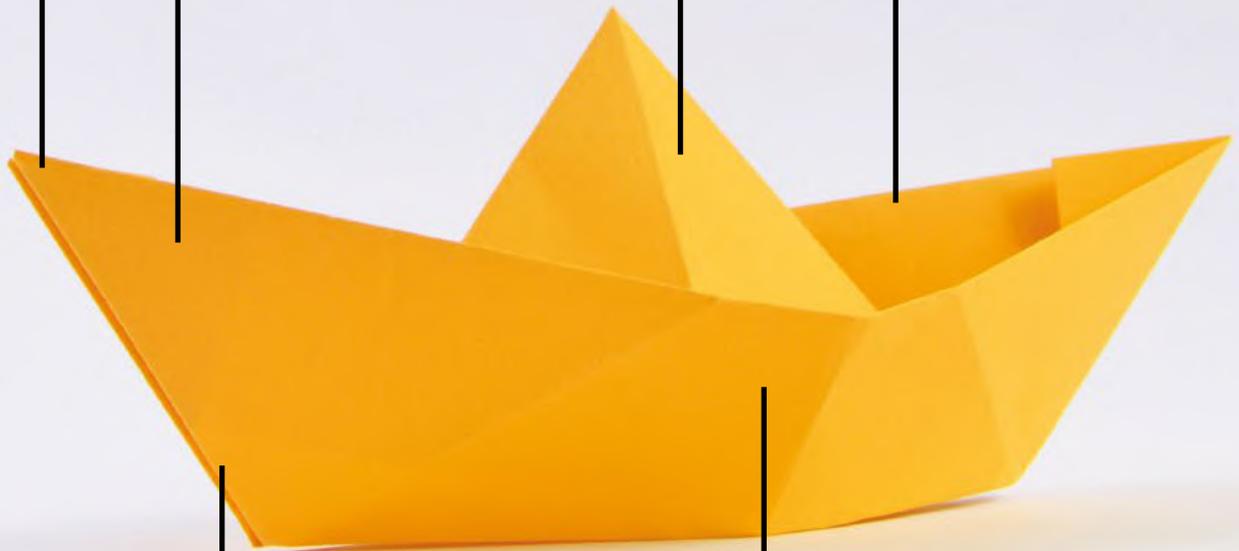
21st century water-solution

Yacht Sales

Financing charter yachts
– what has changed

Sailing Areas

Thailand – the land of cheeky
monkeys and many Buddhas





CHARTER FLEET MANAGEMENT SYSTEM

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BOATPILOT SYSTEM: FUNCTIONALITY AND ECONOMIC EFFICIENCY

The BoatPilot comprehensive solution includes several components: our own chartplotter that's available on any mobile device; the main electronic module BoatGod that includes NMEA and multiplexer server for all onboard built-in systems, as well as additional sensors manufactured by BoatPilot (including wireless sensors for batteries, black and white tanks, engine and much more), and a powerful cloud back office that offers a service of receiving, analyzing and visualizing all telemetry. This approach allows for envisioning all types of scenarios that may lead to the vessel being damaged or worn out faster than normal. It also lets you sanction violators as well as **you can authorize them and make a reasoned deposit retention based on objective control data**, in case they ignore the set rules. In many cases, the money spent on BoatPilot installation and support is paid off in just 2-3 months, helping the charter company optimize its service expenditure up to 30%.

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FLEET MONITORING

BoatPilot has real-time fleet monitoring capabilities. We collect and transmit data on the location of the vessel, the condition of its on-board systems, skipper compliance with the navigation rules and vessel operation requirements, and all types of out-of-the-ordinary situations using the vessel's standard and additional sensors.

This allows the charter company to fully control the state of its fleet at any moment, making its operations even more efficient.

SERVICE OPTIMIZATION

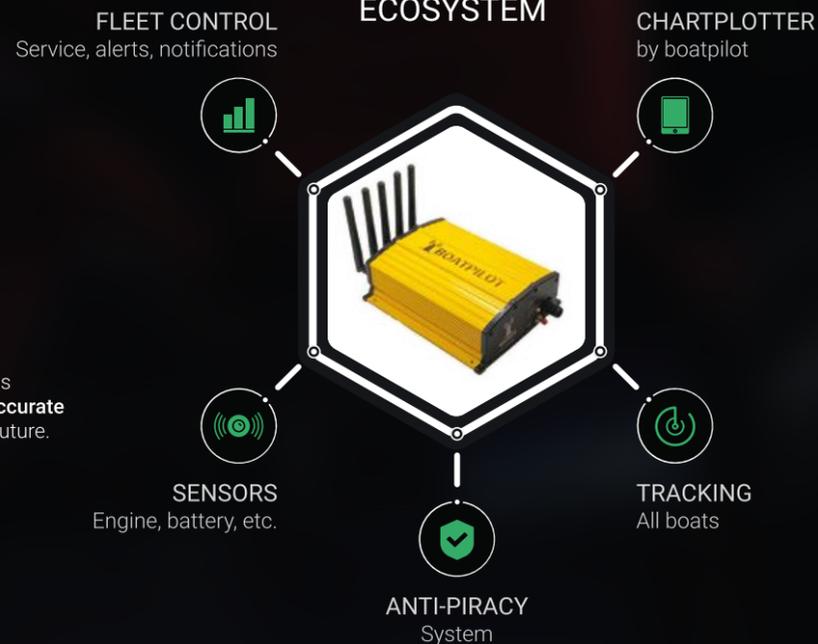
Based on the analysis of the data collected, our system compiles not only an event log, **but a service forecast and its cost - for accurate calculation of amortization costs** that will be necessary in the future.

This allows the charter company to get an assessment of the condition of every vessel in its fleet at any time, predict repair works, and plan for parts to be purchased and distributed properly, as such, minimizing downtime, lowering costs and increasing net profit.

ACTIVE AND PASSIVE SAFETY

Comprehensive BoatPilot solutions minimize the possibility of any types of incidents involving a vessel to occur. **Our application constantly monitors all surrounding parameters and gives the skipper tips on safe navigation and alerts on the condition of the ship. Even at a time when he is not on board (anchorages, marinas, etc.).** On the one hand, integration with the vessel's navigation system allows us to help the skipper using the collision avoidance system, the navigation risk assessment system, and the rules violation reminder system. On the other, the unique proactive anti-piracy system will not allow thieves to hijack your vessel, even if radio-suppression is used.

In difficult times, only intelligent solutions can keep your business afloat. We care about your money, increasing profitability to the maximum value.



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ACI Marina	1,200.00 €	-9.75%	1,063.00 €
Marina Piro	500.00 €	-9.75%	451.00 €
Dugi rat > E...	2,600.00 €	-9.75%	2,347.00 €
Dugi rat	2,600.00 €	-9.75%	2,347.00 €
Porto Mont...	1,600.00 €	-9.75%	1,444.00 €
Marina Kakt...	500.00 €	-9.75%	451.00 €
Cherbourg	1,980.00 €	-9.75%	1,787.00 €
Marina di P...	18,969.00 €	-9.75%	17,120.00 €
Cherbourg	200.00 €	-9.75%	205.00 €
ACI Marina	1,400.00 €	-9.75%	1,264.00 €
ACI Marina	540.00 €	-9.75%	487.00 €
ACI Marina	2,200.00 €	-9.75%	1,966.00 €
Bar	890.00 €	-9.75%	794.00 €
England - E...	2,600.00 €	-9.75%	2,347.00 €
Budva	22.00 €	-9.75%	20.00 €
Porto Mont...	1,280.00 €	-9.75%	1,137.00 €
Marina Lav	1,000.00 €	-9.75%	903.00 €
	2,000.00 €	-9.75%	1,805.00 €
	1,280.00 €	-9.75%	1,137.00 €
	520.00 €	-9.75%	469.00 €
		-9.75%	1,966.00 €

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How growth and quality fuels opportunity

Exit Strategy



WITH
Luka Šangulin

Increasingly fleet operators are planning exit strategies. The one who nailed the exit, decided to stay. This is the story of Luka Šangulin and Angelina Yachtcharter.

Angelina Yachtcharter is one of the largest Croatian charter fleets, managing a fleet of about 170 bareboat charter yachts. We have talked to Luka about the business, about Covid and about his successful sale of a majority stake of the company.

It all started in Biograd, and the year was 2000...

My family opened a charter business with 2 Dufour yachts that they bought

themselves, and they started chartering. I then started studying at the Faculty of Economics. My father just started the construction of the first private marina in Croatia. He was trying to build a business around the marina and so started looking into getting boats. He acquired a Dufour dealership and started chartering. He managed but was not really into the chartering thing.

The business grew slowly to 13 yachts from 2000 to 2007. It was barely profitable, since my father never really committed to it. My job was stacking ropes, helping to mend the sails, service the customers, polishing and minor maintenance. I worked in the marina periodically, as a summer job. After I finished

university, I took on a full-time job. I took over the charter company from my father in November of 2006.

I didn't get a formal marine education; I learned along the way and from my own mistakes. I think most people who created something started with small things. I was not a sailor, I played water polo, the first regatta I ever participated in, I was on a Dufour 45 and I remember I didn't even know that sails could be reefed.

Once I started taking over the business, I decided to fully commit; quickly we got to about 16 weeks per boat, on the 13 boats. All the boats were owned by investors and the new objective was to get more people to invest into boats.

interview

It seems funny now, but I have actually set a goal for myself, to get to 100 boats in 10 years. It seems that this went according to plan. It was not easy, though. For a new, unknown company, it's hard to get on the radar of the major agencies. In Dusseldorf I was completely unknown, since my father never cultivated agency relationships.

I was rounding the agency stands in Dusseldorf with my brochure and price list when it occurred to me that I need to do something different in order to stand out. I decided to start an "all-inclusive charter". No extras; we even arranged free parking at the marina, which turned heads of the agents who didn't work with us then. They were genuinely interested in the concept of chartering without the usual extra costs.

As we managed the 13 Dufour yachts, we had more and more disagreements with the Dufour shipyard and thus decided to give Bavaria a try. We ordered a couple of Bavaria 46 in 2007 and it was good; the brand was popular and offered good value for money. Even though it was a challenging year, we managed to book up to 28 weeks per boat. Luckily, we never worked with Blue Balu and were not hit by that disaster. It was a good year for us. In 2007 I also established my cooperation with Charly Kamper who became my good partner and co-owner in some respects, even though he has his own agency in Austria. He was booking our boats more than all other agents combined. We met at the Tulln Boat Show. I booked a stand there since my 4 Bavaria had almost no bookings at the time. I took the money from the deposits I got, to pay for that stand, I booked the cheapest hotel within a radius of 20km and set the goal to make at least one booking to pay for it all.

By 2008 Charly Kamper became an important partner and booked about a



Angelina Yachtcharter base

third of our fleet. Along with a good new partner in Hungary whose bookings increased quickly due to the all-inclusive deal, we were finally doing well. Kamper turned out to be a very honest, direct, electrical engineer who has a lot of patience with clients. Probably more than I will have at his age – especially on boat shows. I sincerely admire his patience and the energy he has.

Our growth during that time was fueled by Kamper's ability to finance the new charter management boats. We needed new charter yachts in order to grow but it was not easy to compete with the big charter fleets. Those were buying the boats at a lower price and consequently, the financing was easier to sell. We started to build relationships with yacht distributors and shipyards to try to compete. It seemed like a rigged game: we just couldn't compete with price against the big ones, even with lower overhead costs – the difference in purchase price of the yacht was too great. This was the major obstacle.

After roughly 10 years, in 2018, we were at about 140 boats in 4 charter bases, with an average occupancy of 23-24 weeks. It was not easy; for years I reinvested capital back into the company, I still lived in my father's two-story house,

I didn't buy a home for my family but rather invested in boats, warehouses, spare parts etc. Sometimes I had to cover the cash flow with my own salary. Since our operation grew so much, we hired a consultant in Vienna to restructure the company so it would be meaningfully allocated between Kamper and myself. After looking into the details of our business for about 20 days, the consultant called us and said the numbers are so good, he would like us to talk to a potential buyer. So we did.

There is no secret exit strategy in developing and growing a charter fleet in 10 years to 150 boats – it's just about doing the work and being there for clients. We help clients to get financing and to buy a boat at a competitive price. Again, that is crucial; you can't do sustainable charter management otherwise.



Biograd

A glance of the B2B yacht sales

With small fleet operators, to invest into charter management has lost its appeal in the last years. The demand is lower, the yachts cost more, marinas are getting more and more expensive, it makes less and less sense. Maybe if one day all fleet operators buy boats at a similar price, then the one who has better service and better maintenance, will make a profit.

The purchase price of a charter yacht is a major factor in the charter management calculation. If the price is too high, the returns cannot be good enough to attract investors. Furthermore, if one structures the charter price according to these inputs, these will not be achievable. I believe the Covid situation will bring more balance to the market by reducing the number of charter yacht offered.

Charly was slowly approaching retirement, another 5 years, I guess. He asked me what I thought about it. I did not want to lose my company after all that I invested – not just money and time, but a big part of my life. To me, Angelina was not just a project, but an actual part of me. On the other hand, I told him, I still do not own a home. I would like to, though.

We decided to offer a part of the company – a majority share. We honestly did not believe this was actually going to happen. But it did.

Of course, I was sometimes fantasizing about such a moment, and imagining a number that would reflect the value of the company. Going into the negotiation, I was surprised that the offer was higher than my ask.

Yet, I believe it was the nature of the buyer that persuaded me; it was not a buy and flip type of situation – their portfolio consisted of companies that they continue to manage with original owners, helping them achieve higher profitability. It was impressive and quite friendly. So here we are, still managing our company, like little has changed. Charly is still there, still eager - sometimes I wonder where he got that energy and

strength from. We are still 50-50 between ourselves, we still think the same way, like nothing has changed.

I still run the company in the same way as if I were a 100% owner. Except, I am more relaxed now; especially important because this year is more demanding. It's just a good feeling that you have capitalized on everything you invested during such a long time. Especially in the time of Covid; just the notion that one could lose everything, all the years of hard work... it's good to be on the other side. Regardless, Angelina is doing well, and I am confident it will prevail through Covid.

I am not worried about Angelina in the time of Covid. We keep things simple with our investors, we have good booking, and provide excellent service to our customers. But this is just the first step; the most important thing comes after – more than 80% of our investors were first our clients. We make it our priority to be on the docks on Fridays and Saturdays – just to talk to the clients. I do it myself, still.



How Boat Shows lost the fight against Covid

Boat Shows – a year erased

Austrian Boat Show in Tulln

In the world of yacht charter, the last boat show held was the Austrian Boat Show in Tulln. The Covid story had already gone viral and was part of every conversation. Nevertheless, the Austrian show opened its doors just days before the lockdown started closing Europe's travel and economy.

According to the organizer, the show featured the full number of exhibitors from the previous year, with only a few exemptions. The number of visitors was about 20% lower than in 2019. Other than the disinfectant dispensers everywhere and people not shaking hands, it was business as usual, good weather, people in high spirits and bratwurst in

the air. After Tulln it quickly became obvious that things are about to change.

The Multihull Boat Show in Le Grande Motte

The next show to announce was The Multihull Boat Show in Le Grande Motte, France. It was called a postponement, but the statement was clear; "We'll see you in 2021!". This show is important for those in yacht charter who are keen to order the first slots of a new catamaran model and those who build their multihull fleets.

Charter Meetup in Athens

Another smaller event, for just 70 companies, the Charter Meetup conference

in Athens, was also canceled. With the travel restrictions in place and full lockdown for hotels, it was the only choice.

Cannes Yachting Festival

Even with the smaller events being cancelled, everyone was looking up to the Cannes festival to see how the second half of the year is going to handle the Covid lockdowns. It looked very promising; still in July the show was boasting with opening doors against all odds, at the Vieux Port and Port Canto, just like last year. The official release said: "In the very unique context of the Covid pandemic, the boats and stands have been installed in accordance with a General Health and Safety Plan (PGSS) drawn up by the Festival and presented to the Prefecture, the City of Cannes and suppliers. This plan is based on the health measures recommended by UNIMEV (the professional federation of the events industry) and presented to the government, and the reference document that Reed Exhibitions Group

events



Austrian Boat Show 2019



Interboot

has produced for all its trade shows internationally.” The industry was already in dire need of optimism and this was a breath of fresh air. Later, in August, doubling down on the optimism, the Cannes show was supposed to, unlike any other international show, be the first event on an international scale to reopen in the post-lockdown period. All announcements were positive and optimistic about a successful show in September until on August 17th the regional administration banned the event and on September 2nd, just 6 days before the scheduled opening, the dream dissipated like Covid in high-concentration ethanol.

Interboot in Friedrichshafen

Another autumn show that yacht charter affiliates in western Europe tend to visit is Interboot in Friedrichshafen, Germany. Already in June, the organizers announced a “special edition”. In August, the announcement further defines the features of the new show: “We want to offer the water sports industry a 9-day platform that offers a safe shopping experience, an appealing selection of products and valuable specialist knowledge for water sports enthusiasts,” emphasizes Klaus Wellmann, Managing Director of Messe Friedrichshafen”. The



The Multihull Boat Show

show did indeed take place, featuring about a third of the last year’s exhibitors, with an accent on smaller watercrafts. On opening day, approx. 12.000 visitors were recorded, and after the full 9 days about 29.000 had visited the show. “The protection and hygiene concept has been extremely well received by exhibitors and visitors.” said Dirk Kreidenweiß.

Biograd Boat Show

Another local boat show managed to open doors: Biograd Boat Show. The 22nd edition, organized and hosted by Ilirija d.d., opened its doors under sun-



Biograd Boat Show 2020

ny skies with over 250 registered exhibitors and only slightly fewer vessels that 2019’s record show despite the challenging environment. The strategy of extending the show over 5 days worked very well, as the new Wednesday opening day was well attended, while Thursday was the most attended Thursday in the show’s history. Through close cooperation with the Zadar County Civil Headquarters and the Public Health Department, Ilirija met all of the public safety criteria for a safe show and added additional measures such as free masks for all participants, as well as making Covid testing available to visitors. The lifting of German, Austrian, and Slovenian travel restrictions to Zadar County had a strong impact on increasing international visitors beyond expectations.

US Sailboat Show

Europeans have still not embraced the US boat show scene in 2019 but it was getting more popular among larger fleet operators. The United States Sailboat Show stood for the largest and most

charter-oriented of the North American shows. From 2016 to 2019 a growing number of Mediterranean fleet operators was exhibiting at the Mediterranean Corner, the official part of USSS dedicated to yacht charter in the Med. Unfortunately, already in August 2020 the announcement was made: “While we have taken extraordinary measures to provide a responsible plan for the health and safety of all our guests, we unfortunately will not be allowed to move forward with the fall shows due to the current health crisis. Although we cannot welcome you to the Annapolis docks in person this year, we plan to continue supporting



United States Sailboat Show 2019

our exhibitors during a time when it is needed the most. Check our website, social channels, and future email communication for information on possible virtual specials, small dealer events, and ongoing highlights from the boating industry.”

Nautic de Paris

The autumn and winter boat shows are cancelling one after the other... After the Cannes and La Rochelle boat shows, the French Nautical Industries Federation announces on September 24th 2020 the cancellation of the Nautic de Paris.

At his press conference at the start of the new school year, Yves-Lyon Caen announced that he was working on solutions to open its doors, despite the health crisis. In particular, halls dedicated to each sector of activity, and visitor entry and exit control.

But the series of more restrictive measures announced by Health Minister Olivier Véran, notably the reduction of the maximum tonnage from 5,000 to 1,000 people for major events, has got the better of the Nautic.

“The new measures hasten our decision and leave us no choice. The consequences are going to be heavy, especially for all SMEs for whom trade fairs are key moments for their turnover. The autumn

Boat Shows in 2020

Scheduled	Boat Show	Destination	Status
January 18-26, 2020	Boot Dusseldorf	Dusseldorf, Germany	Held
March 5-8, 2020	Austrian Boat Show	Tulln, Austria	Held
April 15-19, 2020	The Multihull Boat Show	Le Grande Motte, France	Cancelled
April 24-26, 2020	Charter Meetup	Athens, Greece	Delayed
September 8-13, 2020	Cannes Yachting Festival	Cannes, France	Cancelled
September 21-29, 2020	Interboot	Friedrichshafen, Germany	Held
October 8-12, 2020	US Sailboat Show	Annapolis, USA	Cancelled
October 21-25, 2020	Biograd Boat Show	Biograd, Croatia	Held
November 17-19, 2020	Metstrade	Amsterdam, The Netherlands	Cancelled
November 26-28, 2020	ICE'20	Online	Held
December 5-13, 2020	Nautic de Paris	Paris, France	Cancelled
January 23-31, 2021	Boot Dusseldorf	Dusseldorf, Germany	Delayed
April 17-25, 2021			Cancelled

and winter trade fairs are real places of business where 70 per cent of annual orders are processed. They are essential benchmarks in our economic ecosystem. We will do our utmost to continue to help all the companies in the French boating industry as best we can to get through this new ordeal and prepare for the future by 2021”, says Yves Lyon-Caen, President of FIN.

Metstrade

The biggest trade shows for the yachting industry is certainly METSTRADE. RAI Amsterdam was ready to accommodate METSTRADE in a Covid secure way, fully in line with all health and safety guidelines. The RAI has worked tirelessly to adapt all its facilities and protocols to enable events to be held in a safe, re-

sponsible and hospitable manner. However, given the uncertain worldwide situation we believe we cannot guarantee the high-quality show in 2020 with valuable face-to-face contacts with visitors which is expected from METSTRADE.

Boot Dusseldorf

The BOOT Dusseldorf was probably the only boat show that was cancelled twice. During 2020 the organization was adamant that the show will take place, as the Caravan Salon did in July (the camping show). Nevertheless, in early December the announcement was made; cancelled, postponed and rescheduled for April. Any boatbuilder, distributor or supplier was probably thinking the same thing – “That cannot work”. Most fleet operators were thinking; “That’s a

bit late, isn’t it?”. But the wheels needed to keep turning and so they did. Until late January when it was possible no longer - the cancellation announcement could not have been an easy thing to do. “Unfortunately, the continuing high level of infection and the fact that the end of the lockdown is not in sight for the time being make a resumption of trade fair operations at the end of April seem increasingly unrealistic. Our priority is the health and planning security of our exhibitors, visitors and service providers. Therefore, we decided to cancel early.”

The year 2021 received another blow immediately; the cancellation of the next Austrian Boat Show in March. What will follow is to be seen.



Boot Düsseldorf/ctillmann



Metstrade

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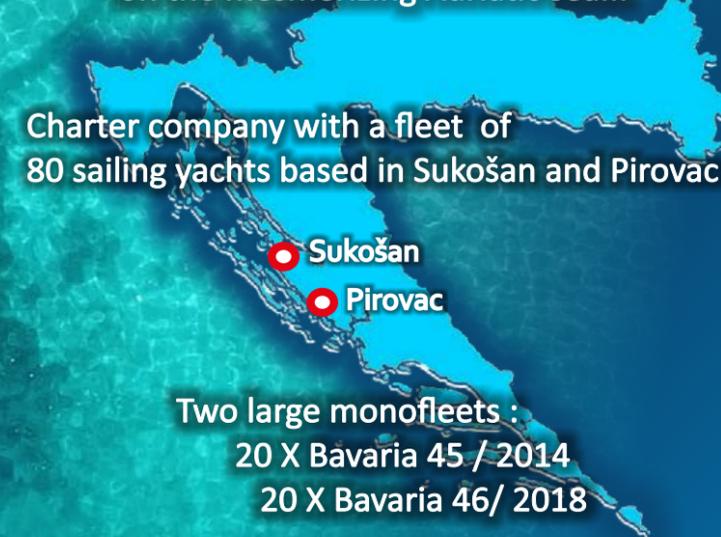
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ICE'20 – Virtual Edition

**Not the same as a personal meeting,
but highly productive and effective**

There was only one show that completely transformed into a virtual event almost immediately after the signs were clear that Covid is not going away quickly – ICE. The International Charter Expo has announced in June that the 2020 edition is to be a digital replica of the previously held Vienna trade show – ICE'19.

With very few alterations the event has conserved most of its features. The Marx Halle venue was digitalized, the booths

were replicated in the last detail, along with the original furniture and accessories. The brochure racks featured downloadable files, the graphics presented the companies, as they did in Vienna. The mounted TV sets were playing promotional videos. Even the people got to appear on the stands, as avatars; easily recognizable and familiar.

Digital ICE got to a size of about half the original event but the intensity of

ICE'20 Statistics

3800
meetings held

35+
countries
from business
representatives

5
continents

200+
companies
participated

112
booths

72
max meetings
per Handshake
account

7
halls

9
premium
presentations

50+
listeners per
presentation

meetings, scheduled in advance, did not subside; through the proprietary Handshake software and 30-minute slots, thousands of meetings took place. More than 3800 meetings were successfully held in three full days which were dedicated only on business and networking.

The cost of participation in this virtual replica is just a fraction of what it was

for the physical event. For about 20% of the cost, fleet operators and charter brokers were meeting and conferencing from the convenience of their homes. As there were no travel and accommodation costs, the cost of participation at ICE'20 was truly minimal. In average 91% of the participants stated that the price/value ratio was justified.

ICE'20 was regarded by the virtual-event-community (Virtual Events Institute) as one of the best virtual events in 2020, being an entrant for the Best Virtual Event in 2020 award.

events

#ICEbehindthescreen



Magic Sailing Charter (Italy), BE CHARTER (Spain), Prima Yachting (Greece), OrtsaSailing (Greece), ATHENIAN YACHTS (Greece), Pitter Yachtcharter (Croatia), Pablo (ICE backend), LEO Yachting (Poland), ISALOS YACHTING (Greece), ICE team (Croatia)

ICE'20 Avatars



Master Yachting



PRIMA YACHTING



BE CHARTER



Yacht-Pool International



MMK SYSTEMS - BOOKING MANAGER SYSTEM



EIS - European Insurance & Services



MG Yachts



OTP Leasing



YachtSys (YachtBooker)



Discovery Yachting



Cruising Charter



Pitter Yachtcharter

Testimonials ICE'20

I am more efficient at the virtual fair than at the "real" fair and deadlines are met much better because the software simply closes the window after 30 minutes. To be honest: it's fun.

Jens Biermann
YachtSys, Germany

Digital ICE'20 was a blast! Met great people, learned about new services that can make our business easier so thank you very much for everything! Big shout-out to the ICE team for making this possible despite the difficult circumstances!

Vagelis Baxevanis
Bax Yachting, Greece

We have been participating at ICE for some years now and every year it gets better. Despite not being able to travel this year due to Corona, ICE team came up with a brilliant idea with going digital. Despite the fact we were a little bit sceptical initially how this would work, the end result was great. We had lots of meetings, met new and old partners.

Elena Jan Lawton Papadopoulou
El Yachting, Greece

Being able to meet with my present and potential partners without traveling to a different continent saves a lot of time and effort while delivering the same results... Thank you for making that possible!

Silvia Vlakancic
Anchor & Wine, USA



MG Yachts



ISTION Yachting



ACI

Since the Virtual ICE'20 in November was well accepted and produced the needed quantity of business meeting, the next edition was moved forward to be held already in Spring. Thus, as requested by the major fleet operators and charter-brokers, **the Spring ICE'21 will be held digitally in April 27-29, 2021.**



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It has been quite a journey the last 10 years with many happy moments and successful partnerships. Our 10 year anniversary is a great opportunity for me to thank our supporting partners and customers as they are our main focus. Providing them with the best service possible is a challenge we face every day. I would also like to thank our team for their efforts and loyalty, having a wonderful young and smart group is a privilege not many leaders can have. Our team strives on creating the best possible working experience which is why we are the fastest growing yacht booking system in the world! I am very ecstatic that I'm able to celebrate with all of you our 10th anniversary!

- Goran Pavešić, CEO and Co-Founder of NauSYS

MYKONOS & THE CYCLADES

Greece



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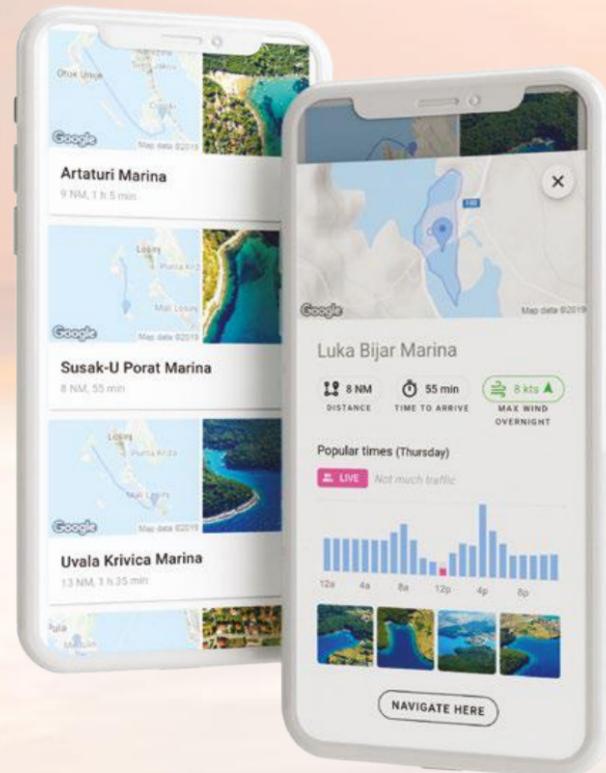
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How software can bring order from chaos

Fleet management – key to productivity

Yacht charter is a relatively young industry. It still doesn't have uniformed processes, but larger fleet operators are setting up own structures to ensure uniformed standard, financial efficiency and customer satisfaction.

When you run a car service, you must periodically change filters. It is usually well-established which filter needs a change after how many hours - there is no such thing in the charter business. At least not widely accepted.

There aren't thousand factors influencing your bottom line – it might even be less than fifty. Structuring and controlling these factors is not that complicated. The result will make the yacht charter business uniformed and reliable for the customer. Furthermore, such structuring and monitoring provides a scale on which to measure and evaluate competitors.

The main assets in yacht charter are your workforce, the yachts, the marinas, deck equipment, interior equipment, navigation, electrical and plumbing. When you consider the different worldwide fleet operators, those factors are geographically scattered and include yachts and equipment made by various brands, but they are very similar. They are made for

the same purpose, of the same materials, with mostly very similar features.

Once these categories are brought down to the common denominator, we can improve service and maintenance on a global scale. There is a general distrust in the client community towards fleet operators. There has been so much discrepancy between levels of service and maintenance that the clients just don't know what to expect. Thus, skepticism is widely present.

The Moorings was the first to start setting up their processes a while ago. From check-in and check-out, to maintenance, equipment, and customer service. Despite that, it didn't catch on in the industry. The larger fleets later started developing their own processes separately. Basically, all of them were doing the same job, but on their own case. I suppose dozens of teams have been working on the same job, without exchanging any data.

We did it ourselves. Small parts we could copy from others but most of it had to be created from scratch. We even had to develop our own software. That was a gamechanger for us. Through a centralized system and all personnel digitalized, HQ was now connected in real time



AUTHOR

Katarina Vujević Babara

to everything that is happening in the base. We effectively eliminated paper from our operations, including check-in and check-out.

The reception has direct insight into which guests arrived, which yachts were cleaned, where problems occurred and when those were fixed. We were trying to



Euronautic base

model the system to somewhat copy the hotel management software. There are many providers offering such platforms to hotels but none really for the charter bases.

Once we created order from chaos, things changed profoundly for us. The number of phone calls, the response time, the kilometers walked along the pier... it all started to be much more efficient. Basically, everybody had access to real time information they needed, and things started happening incredibly fast. When there was a defective light-bulb noticed, and noted in the system, at the very same time the storage manager sent one out towards the boat. The electrician would appear there at the same time; nobody was waiting for anybody.

Still, implementing such a system isn't easy. We have a base team of 16 people. We are still working out the kinks. There are deeply imbedded patterns of behavior - old habits to change. But once we are synced and trained to respect the system, the whole game changes for us; we can achieve more in less time and the direct result is a happy client.

Pricing in yacht charter

We all work for money. I don't want to sound cold-hearted; I hope people do what they love, I know I do. But the fact to the matter is we need to make a profit to keep wheels turning. The problem is when you wake up every morning, you go to work day by day, and in the end the money just isn't there. Then you ask

yourself where did it go? You know you earned it, but you just couldn't keep it. This is where you find out that either your product is poorly priced, or it was discounted too much, or your costs were greater than you assumed.

As I mentioned before, huge amounts of money can flow in unknown directions if you don't systematically control your operations. Just like that, there can be dire consequence if your pricing is off.

Today, we witness situations where a 3.000 EUR week is sold for 500 EUR. This is a loss for the company, and yet, they do not see it. If the managers were aware of the fixed and variable costs involved into launching this 500 EUR week, he would know that he is actually losing money. Often this ignorance goes on for years.

charter business



Euronautic base

The usual factor that leads to these neglected costs is that people are focused only on the major costs: marina fees and yacht insurance. Everybody is focused on these two costs as if those determine the outcome of your bottom line. The truth is, there are a bunch of smaller expenses that will influence your bottom line much more.

Don't get me wrong, all expenses must be monitored and controlled, the large ones especially. I'm just saying the large should not shadow the smaller ones.

Another large factor in profitability is the purchase price of a charter yacht. I hear distributors complaining about the "professional discounts" they must offer to fleet operators. These pricing corrections are necessary to make the yacht profitable in the current market. Even the financing can be denied if the yacht is purchased at full price. There must be a viable business plan behind the purchase, and a yacht at list price will just not cut it.

There is a prevailing opinion that there is too much competition. That is absolutely not true. There might as well be ten thousand fleet operators and they could all do well if they ran sustainable business practices. This begins by knowing the true cost of your service, not just watching your cash flow.



Euronautic base

The overall problem is that the fleet operators do not structure the pricing according to economic principles anymore. This is mostly done by comparison to the competition, by positioning oneself inline, under, or over other the competitor's pricing. This leads to false ideas about the value of the product. The pricing is to be structured based on inputs: the financing of the yacht, depreciation, labor costs etc. Only then is the business sustainable and productive.

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How the Covid correction may bring balance to the force

Financing – what has changed in 2020

INTERVIEW

Gordan Devivi, OTP Leasing

Q: How long have you been with OTP Leasing?

I am with OTP for 7 years now. I started as a leasing consultant in Split. Almost immediately I concluded from the analysis of the market that the nautical sector has huge potential. Some significant development was expected, and we actively started investing in this sector. Step by step, we oriented towards sailboats, catamarans, and in smaller part motorboats, including RIBs. In 2015 there was a significant increase in nautical financing activity, after a negative course in 2010 and 2011, even in 2012.

We were focused on how to come up with a model to finance startup companies and small entrepreneurs in order to boost a healthy development of the entire segment. At the end of 2018, at one point, this segment surpassed our expectations and we had a boom. At this point we started to implement certain tools in order to reduce some risk. The large number of yacht introduced into the market with limited demand caused a deviation from most business plans we previously examined.

Q: Is it possible to single out a specific category of charter yachts that was particularly affected?

It is hard to say; the effect was overall noticeable. The demand was strongest in the catamaran sector; it was a real boom in the last years. But they were not immune to the price drop. The number of new catamarans on the market was just rising too fast. The factories probably should have scaled production a bit slower. On the other hand, there was even stronger pressure on sailboats.

We really try to understand the market; as a team, we are not just bankers and financial experts, but people who live the nautical life. We try to get into the matter deeper than just from the point of financing charter yachts. Some of us are still competitive sailors and understand the nautical sector very well. Generally, the key is to truly understand the market in which one operates. The whole team has set out to visit as many clients as possible, but also as many boat- and trade-shows as possible.



Photo by Robert Matić, Yachts Croatia

We were in Dusseldorf in 2020 when the Covid situation started gathering momentum; it was unreal. On one side you had an industry gathering momentum, on the other a looming danger. I have literally seen yacht distributors giving buyers 10 minutes to decide on a purchase of a charter yacht – and behind me hearing a dark Covid prediction. It was two worlds colliding. Shortly after Dusseldorf it happened – the whole industry, in full swing, just froze.

We have already had a significant number of contracts signed with clients and we were unsure how to handle the situation. However, we communicated well with partners and clients, complied with most of their requests and needs. I con-

sider that to be the key to our future development.

Q: Before Covid, in the 7 years of prosperity, yacht charter was obviously a good sector. Still, within that sector, where did you calculate the most risk?

This market has definitely cleared up in this respect. At first, we could not know which are reliable charter companies that offer some relative security in the future, there were many entering the market, many applying for EU funds and it was hard to see the big picture. We had to take some chances. Any new company was a risk; but then you consider their partners and their business plans. We took some risk but made some good calls along the way.

Q: How did the different categories of charter yachts perform, considering only the bareboat segment? In particular how was it with smaller sailboats and sailboats over 50 ft.? How do you see the market for catamarans? Furthermore, how do motor-yachts and power-catamarans stand in your view?

Power-catamarans are still a rarity; in terms of financing still a fraction of the market. At this point we distinguish various models through brand alone, since we do not have any other statistics to use. The number of units sold is the basic metric. We are committed to support the major brands; that seems as the most secure strategy – market share ensures stability, I guess. On the other way, we carefully monitor the emerging brands, but also looking for the newcomers.

Q: Bali, Fountaine-Pajot, Lagoon-Excess, Nautitech;

they all make power-cats. Are they all perceived the same, as classic brands, or is there a difference between those?

We do not make any differences here. In the segment of power-catamarans we finance all of them. If a client applied for yacht financing, any of these we would accept. It usually comes down to the fleet operator who is managing the yacht and the purchase price – these would be the most important factors in the decision-making process.

Q: Do you see the power-cats the same you see sailing catamarans?

Not really. The power-cats are closer to the sector of motor yachts. We can't see them in the same way. Mostly because of the number of units sold – it is a huge difference. Firstly, we lack statistics, and more importantly, the secondhand market potential is still unknown. We cannot predict future demand nor future sales.

Q: What is the key differentiator?

The key difference is the number of potential weeks booked on a sailing catamaran vs. power cats – it just is not the same. I have still not seen a calculation or business plan where both can have the same number of chartered weeks. That's a major difference. We are looking into it - how to manage the risk; it will require monitoring the market, gathering statistics.

Q: Talking about sailboats; let's differentiate between the traditional range up to 50 ft and the 50+ range. In recent years there was a strong pull towards the 52-54-57 size. Thoughts?

Correct. We see it the same way – it's a trend we are monitoring closely. For us, the generally speaking low-risk vessel is in the range of 30 to 50 feet. At some point, after the increase of risk on the 50+ segment, we slightly increased the down-payment requirement. But the more important question is who is managing the charter yacht, not the type or size of the yacht itself.

Q: So, the main question is who, not what?

Absolutely. Whether the sailboat is 52 feet or 46 feet, it honestly doesn't change much. Most often, the investors are opening an ltd that has no past, no track record, no assurances. Rarely there is any creditworthiness. In these cases, other criteria must decide. The interest will not change much but the down-payment could vary by 5-10% or more, depending on who will manage the yacht. A reliable fleet operator can get a 20-30% down-payment option. It could rise significantly for a newcomer.

Q: So the down-payment varies about 10% or so, and the major question is who is buying and what they are buying?

Absolutely, the key is the buyer and what he buys. The client category means a lot. If we have a newcomer start-up, we have solutions for those clients as well. It is crucial to us who operates the vessel. If the client is an investor who has zero charter experience, and the vessel is to be managed by a fleet operator company that was founded 2 months ago, it is unlikely that we will go into business with them.

Q: Let us look at, what I call, charter on steroids – sailing catamarans. I assume that the financing of sailing catamarans were running much



smoothly than anything else in recent years. Has this been the general rule or how do you see it?

I would say that it is possible that some financing companies went in different directions. We did not make a difference; the risk category is identical as far as we see it. The height of down-payment is identical. Usually the amount to finance is higher, so the creditworthiness must be better as well. What I'm saying is that we did not have any more favorable conditions for catamarans opposed to sailboats.

Q: Do you see a difference between the sailing-cats up to 50 ft. and above?

Once the cats surpass 50 ft., they do get more specific. In this case, again, we look at the second-hand market demand. That will also correlate with the total number of units produced. Also, in a case of a larger catamaran we need to go deeper into the analysis of the client's business plan. We follow this closely and of course look at the potential the operator has. It is important who

manages the yacht. Anyway, each case is often very individual. Sometimes we must consider whether to get into business with a newcomer with no history, just an ambitious business plan. In this case, I have to say, it is also important how much the investor is paying for the yacht. If the buyer is paying full price, without at least a professional discount, the financing will be challenging. It's just not the same; an investor/operator must get a competitive purchase price on the asset, otherwise it will be very hard to capitalize on the investment.

Discounts in the Covid year

Q: In 2020 the charter industry got closed, then opened, then closed again. Most of the operators expected about 50% of the income compared to last year, as a result. What did you do?

In the first phase, we gave clients a grace period of 3 months. We used this time to make projections in order to figure out how to best approach the new situation. In this time, we consulted with partners and management on what would be the

best model for our clients to overcome the situation. After those 90 days we offered a moratorium on the financing. We did not limit them to a time period; I consider that to had been a good decision.

Q: The monthly fee for the moratorium; is it also calculated on a case-to-case basis, or is it a standard fee?

It cannot be the same for all, because not all contracts are the same. The clients basically paid only interest. We added no processing fees and no additional costs. The client could choose whether he wants to extend the timeframe of the contract or to stay in the same timeframe. However, if it stays in the same period then its interest rate changes. We had requests for both options.

Q: What is the policy on approving financing nowadays?

It is very individual. Given the circumstances that honestly change for all of us from day to day, we have no more monthly projections. If we get a request with sound foundations, we are open to it. We have already started certain conversations with existing partners but very few new ones. The fact that most of the boat shows are canceled is very inconvenient. I see a shift into digital platforms as necessary. But it's hard to know what the right solution is at this time. I know how much resistance there is to introducing innovations. Nevertheless, serious companies must do it.

Q: What are your estimates on the recovery time?

The coming season will be good, in terms of booking results. We expect a more serious, maybe total recovery in 2023. I believe the whole market has come to saturation, even before Covid. So that, by itself, would lead to a slowdown. The market will require time to settle and recover. But eventually, it will.



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21st century water-solution

A small step for the charter industry, a big change for the world

Today, over 4 billion people worldwide lack safely managed water sanitation services. It is a worsening problem and some aspects of it directly address the yachting industry. The consequences of water scarcity are not limited to lack of water; they manifest also as environmental pollution and higher cost of drinkable water.

As it is the case with most environmental issues, the problems of tomorrow must be addressed today, to even stand a chance of being solved. Pollution, but also the cost of drinkable water will become a pressing issue in the yachting and yacht-charter industry.

The world population bought 70 billion water bottles last year. For every six bottles people buy, only one is recycled. That leads to a big problem given the fact that water bottles do not biodegrade, but rather photodegrade. This means that it takes at least up to 1,000 years for every single bottle to decompose, leaking pollutants into the ocean or soil. As a result, oceans and landfills are overflowing with 5 million tons of discarded water bottles. Of those, only 12 percent are recycled. And because plastics are produced with fossil fuels, not only does that make them an en-

vironmental hazard, but also an enormous waste of valuable resources. As an example, it takes almost 2,000 times the energy to manufacture a bottle of water than it does to produce tap water. Furthermore, it takes 40,000 18-wheeler trucks on our roads just to deliver our bottled water each week.

An average person drinks in average 0,35 L of bottled water per day. This average approximately doubles in summer months, or more precisely, during a sailing holiday. An average charter yacht will thus require about 29,4 L of bottled water or about 20 plastic water bottles per week. The worldwide charter fleet, throughout a year, will consume 5 million plastic water bottles.

Plastic is one of the most polluting material for the ocean. We are talking about a material that could take up to 1,000

years to biodegrade. For the first time a study led by the prestigious magazine Science, quantifies the plastic that ends up in the oceans; more than 8 million tons of plastic bottles in the sea each year and it is estimated that in the year 2050 there will be more plastic than fish in the sea.

Abandoning plastic-bottled water at sea would have a huge impact on the environment, in countless ways, easing pressure on the already overwhelmed recycling system, saving marine life and finally preserving human health.

Our health is fundamentally linked to the oceans. Over 70% of the oxygen produced in the atmosphere is produced from marine plants (phytoplankton), despite the misconception that is primarily land-based flora. The colossal amount of plastic dumped into our oceans ends

up getting inadvertently consumed by marine life, making its way into our (human) food chain and our meals. Most of the food we source and consume from our oceans have all ingested plastic in one form or another.

Sanitizing water for human consumption through chlorination was started in the 19th century. Chlorine is a naturally occurring chemical element, one of the basic building blocks of matter. Scattered throughout the rocks of Earth's continents and concentrated in its salty oceans, chlorine is an essential nutrient for plants and animals. For over 150 years chlorine has been one of society's most potent weapons against a wide array of life-threatening infections.

Microorganisms can be found in raw water. While not all microorganisms are harmful to human health, there

are some that may cause diseases in humans. These are called pathogens. Pathogens present in water can be transmitted through a drinking water distribution system, causing waterborne disease in those who consume it.

Chlorination is one of many methods that can be used to disinfect water. It is a chemical disinfection method that uses various types of chlorine or chlorine-containing substances for the oxidation and disinfection of what will be the potable water source.

Chlorine can be toxic not only for microorganisms, but for humans as well. To humans, chlorine is an irritant to the eyes, nasal passages, and respiratory system. Chlorine gas must be carefully handled because it may cause acute health effects and can be fatal at concentrations as low as 1000 ppm. However,

The subsidiary of blueplanet Investments called ecabiotec AG based in Germany has researched for 18 years to develop a solution that is solely based on pure water and salt. The result is ANOSAN®, a highly oxidizing disinfectant that not only is non-toxic for humans and animals but also does no harm to the environment. It kills 99.995% of bacteria, viruses, fungi and spores. Additionally, it is free of alcohol, aldehydes, dyes & scents, non-staining, hypoallergenic, nonirritant and pH neutral.

environment



chlorine gas is also the least expensive form of chlorine for water treatment, which makes it an attractive choice regardless of the health threat.

In the 21st century, there has been breakthroughs in sanitizing water without chlorine. The idea is to replace all chemical, toxic, and environmentally harmful ingredients in water-based processes. These processes include water purification, disinfection, hygienic disinfection, agriculture, and food processing.

One of these ideas is water sanitation through mineral disinfectants that are 100% biodegradable and residue-free. Furthermore, the solutions must not be harmful to skin and eyes. The focus is on supplying clean and safe drinking water and improving hygiene standards on an ecological basis.

In yachting, there is already at least one solution that has all the makings of a 21st century water disinfectant. The company ecabiotec has launched

a product that can be applied to water tanks & piping systems, to eliminate biofilms and make water drinkable, with no corrosive or aggressive effect, no residual toxins or biological residue.

21st century water-solution in yacht charter

Water tanks on vessels constitute self-contained spaces with long idle times that enable the proliferation of bacteria and fungi. These contaminations of the water as well as other germs on surfaces cause bad odors and pose a threat to the health of guests and staff. Sanitizing of the tanks was always a procedure to be undertaken before or after the summer season, while during the months in operation this just was not possible.

With the new mineral solution, no interruption of operations is necessary. Disinfection of water tanks on a regular basis throughout the summer should be standard to ensure comfort and safe

drinking water for all passengers on board. Additionally, plastic waste is reduced, as water from plastic bottles can be replaced. A great step towards sustainability.

These initiatives are timely because many governments are considering policies that will potentially reform the landscape for water management and recycling. Experts say action, ambition and investment are all urgently needed to make plastic packaging recyclable, but also encourage customers to avoid plastic packaging completely.

Reforms are urgently needed to overhaul the old producer responsibility system, which is designed to meet EU targets for recycling at a low cost to industry, rather than obligate companies to collect and recycle their own packaging. Soon time will come when the producer responsibility increases multifold and then the costs of production and recycling plastic will skyrocket. Avoiding plastic will be the only way to lower cost in a sustainable way.



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- no corrosive effects
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Cruising grounds still little known to the yacht chartering community

Thailand – the land of cheeky monkeys and many Buddhas

AUTHOR

Anamaria Chiorean



Thailand, officially the Kingdom of Thailand and formerly known as Siam, is a country in Southeast Asia. There are 1,430 islands in Thailand, 35,000 temples and nearly 67 million people comprise of the population. Each year around 6 million tourists visit the country. Located at the center of the Indochinese Peninsula, it is composed of 76 provinces spanning 513,120 square kilometers, with a population of over 66 million people.

When considering sailing areas in Thailand, there is a choice between ar-

reas around Koh Chang, Koh Samui and Phuket. Even though Thailand is a popular sailing destination, it does not have the same infrastructure Europeans are used to. Fewer marinas, only scattered provisioning options, rare water refill stations, and fuel is supplied almost exclusively to coastal marinas. Consequently, nights are spent on anchor and provisioning is done on a weekly basis. Still, these are just minor details in an otherwise beautiful story about a magical land that simply cannot be described but rather must be experienced.

sailing



Thailand

Nature is widely unspoiled, food very diverse and extremely tasty, and the people ridiculously kind. The sailing area is very forgiving with few challenges, and once the tidal character of the sailing waters is well understood, nothing is in the way of a perfect sailing holiday. Obviously, in time there have been some touristic over-developments, but still quite few.

Koh Chang

Koh Chang, whose name means “Elephant Island”, is located in the Gulf of Siam; it is the second largest island of Thailand and is protected, together with the surrounding islands and the coral reef, in the Mu Ko Chang National Park. In the interior of the island, there

are some hills, which reach 744 meters (2,440 feet), and are covered by a rainforest. The rivers that originate from these hills give rise to several waterfalls, including those of Klong Plu.

The temperature is high throughout the year, in fact, average highs never drop below 30 °C (86 °F). However, from December to March, the humidity is slightly lower. During the night, temperatures rarely drop below 20 °C, although this can sometimes happen between December and March. From February to April, i.e., before the arrival of the monsoon, there is a slight increase in temperature, and March and April are usually the hottest months of the year, with temperatures quite often reaching 35/36 °C.

Did you know that Thailand is the only country in South-East Asia that has never been colonized under European power? Or that Thailand is the world's number one orchid exporter. Did you know that it is considered disrespectful to touch anyone on their head, even a child? What about driving with no shoes? Not a problem. Driving with no shirt? You could go to jail.

areas



Koh Chang

The amount of sunshine in Koh Chang is quite good in the dry season, from November to April, while during the rainy season, sunshine alternates with cloudiness, which can lead to rain showers. In August, the rainiest month, the sun is rarely seen. The sea in Koh Chang is warm enough to swim in all year round.

With 52 islands, deserted long white sandy palm tree lined beaches, secluded anchorages and many restaurants and resorts offering the best that Thai cuisine has to offer. Also, Koh Chang marine park is a must see. If snorkeling is your thing, you will find living coral reef at most anchorages and an abundance of marine life.

Beyond the abundant beaches, resorts and tropical rainforest walks, the area is of historical significance. Situated in what was once named the Gulf of Siam,

The SW Monsoon

For Koh Chang & Phuket, the wet season extends from June to October. During this time Koh Chang is closed though there remains some great off-peak sailing to be done in Phuket, which is open all year round.

For the Samui Cruising grounds however, this is prime sailing season, with all the best anchorages in the lee of the SW winds. June through August is the only time you can charter a yacht in the Samui.

The NE Monsoon

The dry period extends from October to May. With dry, sunny weather, and NE wind 5 to 20 knots it is the preferred period for yachting enthusiasts. Winds are quite stable during these months and the temperatures are around 30°C. It is dry and sunny, with ideal conditions for sailing.



Koh Tao, 30 nm from Koh Samui

and bordering Cambodia, there remains influence of the Chinese traders of old and stories of piracy, the Japanese occupation during the second world war, and the French occupation of Indochina (Laos, Cambodia, and Vietnam).

There are only around 14-15 charter yachts in the area so you can be sure that there will be no jostling for moorings. Most of the time you will have an anchorage all to yourself. A yacht entering a bay is still something that people take photos of, and fishing boats still stand and wave as you pass by.

Koh Samui

Koh Samui offers all that sailors from cooler temperate countries could dream of regarding weather conditions. The yacht charter season kicks off in April and extends through to the end of August and due to the protection of the

Indo-Malayan mountain range, Samui enjoys high-season weather conditions through the Southwest Monsoon. As all the very best beaches and anchorages are protected from the Southwest winds, this is the only time of year the cruising grounds are open for charter yachts. The cruising is safe and easy with islands ranging between 5 and 20 nautical miles apart, weather is warm and tropical.

September through to November is generally not suitable for sailing holidays. The Koh Samui cruising area includes the Ang Thong Marine Park, offering Phuket-like vistas with its turquoise waters and limestone pinnacles, the islands of Koh Phangan, well known for its edgy full moon parties, and the island of Koh Tao, a world-renowned diving destination where every year the gentle giants; whale sharks pass through, an island full of dive shops more than hap-

py to help you strap on a snorkel and get into the turquoise water with them.

Given the popularity of Koh Samui, you might think there are hundreds of yachts cruising the area. In fact, there are less than 30 yachts sailing in the area and only a handful of those are available for charter. Given that there are close to 50 islands in the area, privacy is only a keyhole bay away.

A yacht charter holiday in Koh Samui provides a unique opportunity to go sailing during the southeast monsoon period from June to September as opposed to both Phuket and Koh Chang being wet and often stormy in the same period, providing those in the northern hemisphere the opportunity to go sailing in Asia during their summer holiday, and for those from the south an opportunity to leave the winter behind and head to the tropics.



Koh Khai Nok, 10nm from Phuket

Although Samui is now almost entirely dedicated to the task of pampering the weary traveler, the beauty of the surrounding area as a yacht cruising ground remains a little known to the yacht chartering community.

Phuket

Phuket is the largest Thai island and constitutes a province together with the small islands that surround it. The Pearl

of the Andaman is located in the south of the country. With more than 130 islands to explore nearby, you can anchor in completely deserted and untouched beaches, explore undiscovered islands with crystal clear waters.

One of the most widely known factoids is that scenes from the James Bond movie 'The Man with The Golden Gun' was filmed at Phang Nga Bay, most known for its amazing limestone rocks rising up from the sea.

The climate of Phuket is tropical, hot all year round, with a rainy season due to the southwest monsoon, which lasts from May to October, and a dry season from December to March. In April, before the monsoon, there is a certain increase in showers. In November, there

can still be abundant rainfall, especially in the first part, either for any delay in the retreat of the monsoon, or because of a tropical cyclone. However, there may be some showers also in the dry season, especially in December, when occasionally, some of them can be particularly intense.

The area offers many and diverse anchorages with excellent snorkeling in the south and west side of the island and fantastic beaches with dramatic coastlines. While sailing the Andaman Sea, especially in the morning, it is likely that you will encounter local fisherman cruising around on authentic long tail boats. They will present their merchandise to you while you are cruising, offering to trade on the spot. You will be able to buy the best fresh tiger prawns, just

be sure you do not overpay – it is a strong probability.

Why sail Thailand? Thailand's beach bars can be what makes a holiday - offering a multitude of options; from driftwood shacks playing Bob Marley where bar staff become lifelong friends, to remote hippy hideouts selling psychedelic mushroom shakes and swanky places to sip cocktails and dress up for.

Thailand offers wonderful sailing diversity; a range of paradisaical islands to choose from. It will please the pickiest of beach bums, whether it is a chic cabana and waiter service you are after, or just somewhere to string a hammock.

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How grouping
together can bring
amazing benefits

Group Supply for charter fleets

Controlling your expenses is crucial in sustaining any business. The yacht charter week is the final product but the inputs that go into it are many. Every single one can be optimized and adjusted to the need of the fleet operator. When it comes to size, bigger fleets benefit in many ways - mostly through better deals. By purchasing for multiple boats, at higher value, big fleets get better deals and can often access the supply chain at a higher level. This has already created huge differences in expenses for the fleet operators. By not being able to achieve the same benefits, the smaller fleet operator is just piling up the costs, creating an ever-bigger gap between him and the large competitor. This dif-

ference can impossibly be covered by a higher sales price. Often, it is even the opposite; the small operator has to sell at a lower price.

The concept of group purchases, or buying in bulk, is not new. It has been regular practice in many industries. Some associations even organize the members on a state level and take care that all purchases are negotiated for the group, up to the smallest expenses - even fuel in some cases.

The yacht charter industry has seen significant growth, but the large fleets have led this trend. The fleets have grown, but just a few have reached corporate size

- where the opportunity arises to negotiate significant rebates in purchasing assets and operational necessities. The Group Supply initiative now offers all fleets to assemble into one Group, with no further affiliation beyond joint purchasing activities.

Once multiple goods and services start being accessible at lower prices, the cumulative effect could lead to better competitiveness between small and large fleet operators.

The Group Supply initiative was started by Yachtmaster Group in 2020 to generate savings desperately needed in the Covid era.

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