



Beyond the Gloss

The superyacht paint world is gearing up for an exciting year as competitors try to take a nibble of Awlgrip's huge market share.

BY BRANSOM BEAN

TO SUM UP IN JUST TWO WORDS what's news this year in superyacht paint: "VOCs" (volatile organic compounds) and, ironically, considering the topic is paint, "color."

These, in turn, should be seen in the context of the constant growth in number and size of yachts, which is resulting in an exponentially rising number of square meters to be covered or recovered – perfectly, of course. Remember, too, the irony, that while the business of superyachts exists for international celebri-

ties and captains of multinational industry, it still operates like a very well-funded cottage industry.

Nobody has to understand all that better than the paint makers.

"You have to remember superyachts aren't boats; they're actually sculptures, someone's very special dream," says AlexSeal's Tripp Nelson. "Everyone wants to be distinctive."

So to grasp what will be going on in the superyacht paint business in 2007, first forget Tom Sawyer,

Huckleberry Finn and that white picket fence. This is superyachts, where nothing is simple.

The current players in the business agree that the superyacht paint business is governed by:

1. An overriding quest for perfection on ever larger vessels, which by their sheer size make mistakes costlier and perfection even more difficult to achieve
2. An ongoing search for longer finish life and a truly repairable surface in a very hostile environment
3. Simplifying the application process so that, theoretically, almost anybody can do it in their backyard, because that's often the environment where yachts are painted
4. Providing aftermarket service globally, so the crew is supported wherever the vessel goes – and with expedition yachts that means anywhere...except maybe Somalia
5. All the while keeping a watchful eye on looming environmental regulations that could be a bigger concern than the bottom of owners' pockets.

THE PLAYERS

Above the waterline, you still have to say there is only one truly global player in superyacht finishes – Awlgrip. The Microsoft/FedEx/Xerox/Kleenex of the superyacht industry, Awlgrip is the only brand name to have become a verb, as in, "I want my boat Awlgrippped..." (Can you imagine if DuPont were number one?)

"Awlgrip created the market," says Blakes Paints' Jacqui Knott.

Born in the 1970s when some Americans decided that if you could do it to airplanes with AlumaGrip, you could do it to boats, Awlgrip has that special, almost unreasoned universal cache that everyone has to beat. And to the frustration of its challengers, it seems you can find a can of Awlgrip anywhere. With yachts cruising farther afield, builders and owners really need to know that if there's a scratch in Luderitz, there will be paint in Luderitz.

But as every successful businessman knows, when you're number one, there's no place to go but down – especially in a business where you're remembered for your failures. While those chasing Awlgrip can be, indeed must be, creative, Awlgrip knows it's all too easy to mess up a good, solid old brand. Remember Classic Coke or Awlgrip II, even?

Since 2002, Awlgrip has operated under Akzo Nobel's dedicated yacht division. For release this year, Awlgrip promises that its huge R&D department has stirred up some exciting new things. But they know, only too well, it has to be Awlgrip.

"You can't do everything at once," says an Awlgrip veteran from the start, David Halcomb, now vice president and general manager for Awlgrip USA, "But I'm as excited as I was in 1973 by what I see coming."

An interesting result of Akzo Nobel's acquisition of Awlgrip is that International/Interlux, once a topside

superyacht paint player, has been focused below the waterline, although its brushable/rollerable Precision products find their way aboard for top-side touchups.

Meanwhile, DuPont, Boero and those "quiet guys" at AlexSeal keep chipping away while others, including Sherwin Williams, are variously entering the market, re-entering or just thinking about it.

AlexSeal exhibits studied calm as it builds its brand around a very experienced team who has actually painted boats. Of course, it doesn't hurt to be part of an industry giant, Mankiewicz. Smaller industry stalwarts like Sterling in the U.S. soldier on, while other smaller companies try to take their own nips out of the burgeoning market.

However, unless you're truly global like AwlGrip, what your brand name is doing in one country does not necessarily signify what it's doing around the globe as demonstrated by Carol Hatch, marine marketing manager for DuPont USA.

"Sorry, I really can't answer too many questions just now," she said. "We're launching our product line in early 2007." Having her attention called to full page DuPont advertisements running in superyacht industry publications, she responded, "Oh, that's DuPont Europe..."

It turns out DuPont operates relatively autonomously around the world in three regions: North America, Europe and Asia/Pacific. Spearheaded by Neil Anderson, DuPont Europe has been growing superyacht paint market share since 2004 with its acrylic urethane IMRON brand. In fact, if DuPont USA wants to see DuPont paint on a superyacht, they need look no further than *Maltese Falcon*. And as the ozone hole seems to get fatter, it also helps to be with DuPont in the vanguard of green paint manufacturers.

Some time ago it stopped being true that what goes on in the U.S. is what's going on with superyachts worldwide, as the center of gravity shifted to Europe and future expansion is seen even farther east, the Middle East to be exact.

Norwegian Jotun, already a significant player in the Middle East, is making its presence felt in Europe with its Mega Gloss top coat, Mega Filler and Mega Fair.

Bottom line, Europe – Italy in particular – is building by far the most yachts and it's no secret that it helps to be Italian in an Italian-dominated industry, as Boero demonstrates. Frustratingly, Boero's dominance in its own country doesn't extend above the filler to the topcoat, resulting in a so-called split system.

"Because of its name, people keep asking for AwlGrip for the topcoat," says Boero's Bert Nieuwenhuizen, frustrated, for now at least, by AwlGrip's cache. "But remember, most superyachts are built in Italy and we're doing ninety percent of the Italian boats." It's not surprising then, that below the gloss of many Italian yachts you'll find Boero with AwlGrip on top.

"In the final analysis, usually a split system is



the best, but then you get into all sorts of issues with guarantee..." says Mark Conyers of Rolling Stock, a well known and very busy applicator in Palma de Mallorca.

And finally, capitalizing on its joint venture with Pettit, Boero is taking aim at the U.S., AwlGrip's home court but possibly more of a problem for Sterling. Boero and Pettit promote and sell both antifouling paints and topsides paints under the SuperNavi umbrella with Boero's Challenger Polyurethane System being available in the U.S.

KEEP YOUR PAINT ON

When most people say "paint," they're generally thinking of that perfect superyacht sheen on the top, somewhat uncreatively named "topcoat." It is almost always white, but not anymore.

To get from bare, rusting steel to that shiny topcoat is a comprehensive system – a multilayered cake that can be inches thick if the welders were having a bad day.

Hull primers lay the foundation for thick, porous but trowel-able fillers and fairers that are flexible, lightweight and corrosion- and water-resistant. Once piled on, fairers spend days scraping and sanding to create a surface that's almost perfectly smooth, which is then topped by more primer. Then comes the *pièce de résistance*, a perfect topcoat no thicker than three sheets of paper with no dust specks, runs, sags or even those tiny little dimples called orange peel, the bane of superyacht painters everywhere. On a 250-foot yacht, all of that can take up to 10 months and cost three or four million U.S. dollars.

The underlying fairing and filler needs to hang

on tight for at least 30 years. The shiny topcoat would last more than 12 years if you kept it out of the sun and salt air – not such a reasonable scenario for most superyachts. Normally, three to four years is about all you can really expect until the next re-spray.

You'd think that to extend the life of the topcoat all you'd have to do is just make it harder. And you'd be right, but for scrapes caused by a conspiracy of inconvenient crosswinds and concrete piers or simply deckhands with the dropsy's.

So today, the goal in superyacht topcoat is extended life with easy repairability – a goal similar to getting the *QEII* up to 50 miles to the gallon. It's no surprise then that the rest of the manufacturers say they are repairable, because one way to take a shot at AwlGrip is to say that AwlGrip is not.

From its start, DuPont has emphasized the repairability of its IMRON brand. But line honors may now go to AlexSeal, who thinks it's found paint nirvana in its LexSeal Premium Topcoat 501 – hard but repairable and stain resistant to boot.

Manufacturers are looking for fairing that is lighter in weight, longer lasting but, above all, easily sand-able – but not too easy. Can nothing be straightforward in superyachts?

IT'S QUITE SIMPLE – JUST PERFECTION

While paint may be a tiny fraction of the overall cost of building a superyacht, in yachting circles it's well-known that something like 70 percent of an owner's satisfaction comes from the yacht's appearance. So it must really annoy designers and naval architects who slave over the overall form and

COURTESY OF AWLGRIIP



structural guts, that, in the end, it all comes down to the topcoat – “Last on, first to blame.”

“Once upon a time, marine paint was largely functionality, a simple protective coating,” recalls Mark Billingsley, in charge of marine sales for family-owned Sterling Lacquer. “Now it’s perfection with a wow factor.”

That perfect 400-foot-long shine hides the builder’s dents, dings and wobbles. The thickness of yacht filler should average $\frac{1}{4}$ inch, but as the surface of a superyacht must be absolutely perfect, all of those holes have to be filled with globs of filler that is painstakingly sculpted with sandpaper.

One hundred and fifty feet of superyacht is likely to have 3,000 gallons of filler and only 100 gallons of shiny top-coat.

MATCH MY MAYBACH, PLEASE

As superyachts approached the size of battleships, it was only a matter of time before the search for something unique and distinctive would switch from length to color, hence the rise of dark blues and grays.

“We’re getting more calls for dark blues,” says AlexSeal’s Nelson, “There’s a massive switch to darker color.”

Dark colors and metallic paint is in. Not surprisingly, each has problems. In metallics, Dupont may have a clear edge over the competition with its years of automobile experience. Metallic’s problems center around it being difficult to repair because scratches are in spots and it’s really hard to fix just a spot in metallic. Darker also means more heat retention; thin black aluminum racing hulls have been known to buckle in the sun.

EVERYBODY’S DOING IT, ANYWHERE

“A superyacht paint job is less than ten percent product, the rest is labor,” says Boero’s Nieuwenhuizen.

In response, paint formulas are constantly being adjusted to be faster-drying, easier to sand and easier to apply. RWT, reduce work time, is AwlGrip’s mantra while AlexSeal goes to hybrid resins for ease of application.

According to Sterling’s Billingsley, “The goal is a finish that goes on easier, flows easily and lays down like a sheet of glass, and then can be maintained by detailers or the crew anywhere.”

Of course, there’s a big difference between a chemist painting a four-by-six-inch panel in an air-conditioned lab and an itinerant group of applicators painting a 300-foot hull in a drafty shed protected from winter by flapping plastic sheets.

“Painting a superyacht is challenging, hard work,” says AlexSeal’s Nelson.

Globally, there are perhaps three or four hundred applicators. That’s the front line and also the Achilles heel of the industry. Some yards employ in-house painters, but much of the work is done by independent painters. To some, these solvent-breathing vagabonds are uncharitably characterized as driving the same truck with a new magnetic sign that bears the latest corporate name in response to their last paint job gone wrong.

One industry expert puts the number of truly qualified applicators at fewer than a dozen – that’s globally.

Rolling Stock is recognized as one of the best.

“Paint jobs go wrong usually due to lack of planning at the outset and a clear understanding of the

processes involved to attain a satisfactory finish on time and budget,” says Rolling Stock’s Conyers. “If the parameters are laid down with complete clarity, honesty and professionalism from the start, in our experience there is no problem.”

Making one batch of paint look like the next batch mixed by the applicator for the same yacht was difficult enough when most of the boats were white. But now with totally unforgiving dark colors, more manufacturers are going pre-mixed, pre-packed.

Only some yards have good project planning, proper project management with clean, controlled environments. So manufacturers have to budget for applicators of all skill sets dealing with rush jobs in un-air-conditioned “spray booths” made of plastic sheets and two-by-fours where tacky fresh paint mixes with cabinetmakers sawing wood.

“Remember,” says AlexSeal’s Nelson, “The paint world stops below fifty degrees Fahrenheit.”

ANYTHING NEW UNDER THE ULTRAVIOLET?

“We don’t want that hole down there growing any bigger,” said one manufacturer, referring to the famous ozone hole. The world is beginning to realize that it’s not just yacht applicators that are sniffing solvent and ingesting heavy metals.

Volatile organic compounds (VOCs), or solvents, are becoming the most important grade on any paint manufacturer’s environmental report card.

Solvents make paint a liquid that can be brushed, rolled or sprayed, leaving behind solids with the protection and sheen. Solvents can all but be eliminated by transferring the paint solids using different electrostatic charge, something not so practical for superyachts.

As another manufacturer said, "What comes out of the (spray) gun needs to stay on the yacht."

So far, superyachts have been such a small proportion of things painted that VOCs from painting them have been under the radar of most regulators. All that is about to change with increased regulation beginning to bite in Europe and Southern California. The EU rules go hard in 2010 but

already shipyards are being surveyed to calculate how much solvent they generate each year.

"I expect the REACH program in Europe will have an effect on the industry similar to the MCA," says AwlGrip's Halcomb. "Regardless of where we think the paint is going, we don't use any raw material that's not globally registered."

It's no surprise then that European Boero and DuPont both have "green" products. Boero calls its enviro-friendly product "Challenger HS."

Why doesn't everybody push the big green button?

Any change in the industry is slow because after three to four years of costly R&D, there comes months of field trials that somehow have to be secret – not so easy on a 300-foot boat.

"Secrecy in this industry is hard," says AwlGrip's Halcomb, "Especially when somebody says, 'Hey, what's up with all those AwlGrip guys standing around staring at that yacht over there?'"

Then comes launching the new product line, which also means

stocking all of the colors before finally pushing it out into the marketplace to await the verdict – hoping and praying the market accepts it, regardless of how revolutionary the chemists think it is.

At the same time, the industry is looking externally to the equipment manufacturers for things like HVLP, high-volume-low-pressure spray guns, and the good news is much of the technology is already there from the automotive industry.

Training applicators, although seemingly intuitive, would help as Rolling Stock's Conyers confirms, "Serious applicators should embrace new technology, not run away from it."

One seemingly brilliant idea that comes up every year is painting yachts very precisely and uniformly with robots. And every year the idea seems to go right back down again.

Putting all the technology and marketing hype aside, superyacht paint above the waterline is manufacturers competitively marketing to people: applicators, those of us who have to breathe their overspray and crew, who have to maintain what, above all, is the very special dream of the owner (who pays for it all).

In the words of AlexSeal's Nelson, "...all that competition is a win-win for the crew, the builder and the owner." ★



COURTESY OF BOERO

Boero's new Challenger HS acrylic topcoat is glossy enough to tell time.

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