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*President's Message*



*Editor's Note: The final "President's Message" of the outgoing NMDA President traditionally consists of a recap of the State of the Industry survey that is taken in June and presented during S.T.E.P. Purchasing.*

My sincere thanks to our members for your participation in the 2005 S.T.E.P.

Purchasing Conference at MAATS. S.T.E.P. and MAATS have continued to gain momentum ever since the National Marine Distributors Association and the National Marine Manufacturers Association came together to co-locate their two individual aftermarket accessories events which are NMDA's S.T.E.P. Conference and NMMA's MAATS event.

Once again this year's turnout of distributors, manufacturers and manufacturer rep firms has been outstanding. I want to thank you all for attending. Your support is greatly appreciated.

As President of the NMDA it is my pleasure to give my State of the Industry Report. I would like to note that based on the responses we received back from the 2005 State of the Industry Survey, as well as 9 months of sales reporting to the NMDA by the majority of our distributor members that our members have enjoyed a reasonably good year so far.

High fuel prices and a slower economy have obviously slowed the growth that our distributor members enjoyed at this same time in 2004. After 9 months of sales, participating distributors are reporting a 6.97% increase in sales in 2005. At the same time last year participating distributors were reporting an 11.43% increase in sales. Though the industry is not doing as well as we would all hope it appears likely that 2005 will still go on record as a healthy year for our industry.

At this time I will review the responses of the 2005 NMDA State of the Industry Survey. This year we sent out 26 surveys and received 23 responses back which amounts to about an 88% return rate from our distributor members.

**State of the Industry Results**

1. Was your company's total sales volume of marine accessories up or down in 2005 compared to 2004?

Up 73.9%      Down 17.4%      Same 8.7%

Compare to the 2004 Survey

Up 88%      Down 4%      Same 8%

*Our dealers rely on us to always have the right product, to keep them competitive in the market and to provide quick, seamless service.*

Continued on page 2

*Supplier of the Year Winners*



First awarded in 1972, to Tempo and Woolsey, the NMDA Supplier of the Year has grown in importance to both distributors and suppliers alike. Throughout the years the award has changed to reflect the differences in the industry and in how various aspects of getting the product to market have evolved. Along with a Category 1 and Category 2 Supplier of the Year, we now award three Special Focus Awards.

For the 2005 Supplier of the Year we had all but one of our distributor members nominate their suppliers based on the existing NMDA membership. When it came time to vote, using the nine page instruction booklet, we were hoping that 100% of our distributors would vote but due to personnel changes, we again had all but one of the companies submit their ballots.

The ballot instruction packet suggests which departments should vote on specific areas, we offer "questions" to consider when rating each aspect of the award and we also define what each segment means to wholesale/distributors. The ballot package was sent with the scores to the finalists, if you did not receive one and you would like to see the criteria, please email [Kathy@nmdaonline.com](mailto:Kathy@nmdaonline.com) or [info@nmdaonline.com](mailto:info@nmdaonline.com) and a packet will be sent to you.

The Special Focus Awards came out of the desire of the committee to recognize certain aspects of the distribution process specifically Best All Around Packaging, Marketing

continued on page 3



Group 1 Finalists, I-r. Kevin Meister of Marinco, Krista Pennington of Meguiars, Gary Cragin of ITT Jabsco/Rule/FloJet, Marty Pinkerman of Dutton-Lainson, Jason Pajonk of TaylorMade, Brad Nysether of Sea-Dog Line and Mike Presley of Tempo. Missing from picture representatives from 3M, Perko and Teleflex Morse.



Group 2 Finalists, I-r. Bobbie Mueller of Springfield Marine, Aaron Kramer of Kwik Tek, Jim Egbert of Ancor, Tom Case of Polyform US, Fair Hyams of Bennett, Gregg Pardus & Jerry Assessor of Johnson Pumps. Missing from the photo, representatives from Anderson Marine, Hubbell and Tie Down Engineering.

2. Do you expect your company's marine accessory sales for 2006 to be up or down in comparison to 2005?

Up 82.6%      Down 4.4%      Same 13%

Compare to the 2004 Survey

Up 96%      Down 0%      Same 4%

3. Because of your sales projections for 2006, do you expect to maintain an inventory that is larger or smaller than in 2005?

Larger 43.5%      Smaller 13%      Same 43.5%

Compare to the 2004 Survey

Larger 54%      Smaller 0%      Same 46%

4. Were collections on your sales in 2005 faster or slower than in 2004?

Faster 17.4%      Slower 34.8%      Same 47.8%

Compare to the 2004 Survey

Faster 29%      Slower 13%      Same 58%

5. Do you have a Web site?

Yes 78.3%      No 13%      Plan to 8.7%

Compare to the 2004 Survey

Yes 71%      No 17%      Plan to 12%

6. Do you use E-mail as a part of your everyday business?

Yes 95.6%      No 4.4%

Compare to the 2004 Survey

Yes 96%      No 4%

7. The number of dealers you service in 2005 is up, down or the same in comparison to 2004.

Up 78.3%      Down 13%      Same 8.7%

Compare to the 2004 Survey

Up 84%      Down 4%      Same 12%

8. The average size order by your dealers in 2005 is up, down or the same in comparison to 2004.

Up 34.8%      Down 30.4%      Same 34.8%

Compare to the 2004 Survey

Up 62%      Down 13%      Same 25%

Some interesting conclusions can be drawn from this year's responses to the survey. Most of our distributor members have experienced an increase in their business this year and are optimistic enough to believe that next year will yield increases again. These increases in business come in spite of a less than robust economy which is reflected in a greater number of distributors reporting slower collection of receivables, fewer customers to service and a reduction in the size of the average order. It's also interesting to note that the use

of technology tools by our distributor members continues to increase year after year. In 2003 about 70% of the distributors that responded to the survey had a web site compared to 78% this year. It should be noted that about 9% of the respondents expect to have a web site in the near future. In 2003 about 89% of the distributors that responded to the survey used email as a part of their everyday business compared to 96% this year. Overall, of the distributors that responded to the survey, most reported that their 2005 season has been good so far and they expect the same in 2006.

I believe the accessory distributor segment of our industry will continue to face many challenges in 2006. Ongoing market consolidation will continue to cause many to question how future vendor relationships will shake out. The opening of multiple beautiful new superstores by one step retailers like Bass Pro and Cabellas in many markets will cause many dealers to question the depth of accessory inventory that they will continue to carry on the shelves. Distributors will be challenged to keep some dealers in the accessory business.

Our dealers rely on us to always have the right product, keep them competitive in the market and to provide quick, seamless service. They expect us to make the accessory buying experience as painless as possible, because most of the time the accessory department is only one part of their day to day operation. The distributor's ability to perform well for the dealer enables the dealer to do a better job at performing well for the consumer.

No doubt, as distributors we will all continue to do what we need to do!

I would like to conclude my final column by taking this opportunity to thank our members for allowing me to serve as your association president for the last two years. It has truly been a privilege. I would like to thank the NMDA Board of Directors for their participation and support. I would also like to express my heartfelt gratitude to our Executive Director, Nancy Cueroni. She does a tremendous job for this organization and we are very fortunate to have her on our team.



Robbie Vititow  
President V & V Marine

*Upcoming NMDA Events*

**2006**

**STRATEGIC PLANNING**

(To be held immediately preceding Executive Conference)

April 1- 4, 2006

San Diego/La Jolla California (Hotel to be determined)

**2006**

**EXECUTIVE CONFERENCE**

April 4 - 8, 2006

San Diego/La Jolla California (Same hotel as above)

**2006**

**S.T.E.P. PURCHASING AT MAATS**

July 17 & 18, 2006

Las Vegas Hilton

Las Vegas Nevada

*Supplier of the Year, continued*

Program and Supply Chain Standards. Working with NMMA and the Mutual Efficiency Forum, Supply Chain Standards have been developed and incorporated into this process. (If you do not have a copy of the Supply Chain Standards Manual please contact the NMDA office and one will be sent to you.)

We would like to congratulate the following winners!

**Supplier of the Year, Category 1**

Sea-Dog Line

1st Runner Up - Tempo

2nd Runner Up - Dutton-Lainson

3rd Runner Up - TaylorMade Products

**Supplier of the Year, Category 2**

Tie Down Engineering

1st Runner Up - Polyform US

2nd Runner Up - Anderson Marine

3rd Runner Up - Johnson Pumps

**Special Focus Awards**

Best All Around Packaging - Polyform US

Marketing Program - Polyform US

Supply Chain Standards - Sea-Dog Line



2005 Supplier of the Year Award winners and nominees - l to r: Mike Presley of Tempo, Marty Pinkerman of Dutton-Lainson, Shirley Bradford of Tie Down Engineering, Tom Case of Polyform US, Jerry Assessor of Johnson Pumps, Jason Pajonk of TaylorMade Products, Brad Thomas of Anderson Marine, Brad Nysether of Sea-Dog Line, Krista Pennington of Meguiars and Gary Cragin of ITT Jabsco/Rule/Flojet. Finalists/Companies not included in this photo include: Marinco, Springfield Marine, Kwik Tek, Ancor and Bennett.



Ray Lorenz of Lorenz & Jones chatting with Jon Kushner of Taco Metals at the Opening S.T.E.P. Reception in Las Vegas.



While in Las Vegas at the MAATS Show many of you were approached about the MDX program. NMMA has recognized that this will not happen with an all volunteer group so they have hired a consultant to assist in the implementation of the MDX (Marine Data Exchange) program. There are currently a "couple" of distributors and suppliers who are trading. To join them, and save money, time and aggravation, please contact Nancy at the NMDA office or Janice Ilg (jilg@nmma.org) or Bernice McArdle (bmcardle@nmma.org) at NMMA. Any of these three can put you in contact with Norm Katz and start you on your way to savings!

**Mark Your Calendars!**

The Board of Directors recently voted to hold the 23rd Annual Executive and Strategic Planning Conference from April 1 - 8, 2006 in the San Diego California area. Two hotels are currently under consideration, one in San Diego and the other in La Jolla. A contract will be signed soon and specific hotel information will be forwarded to the membership as soon as that is done.

As in the past couple of years, a Strategic Planning Conference will precede the Executive Conference. All NMDA members are invited to participate in planning the future of NMDA.

A tentative schedule is as follows:

	Saturday, April 1, 2006
AM	Day on your own
PM	Opening Reception for Strategic Planning Attendees
	Sunday, April 2, 2006
8 AM - 12 Noon	Board Meeting #1
PM	Informal Group Activities will planned
	Monday, April 3, 2006
9 AM - 12 Noon	Committee/Task Force Meetings
12 Noon - 1 PM	Lunch for those attending Strategic Planning Conference
1 PM - 5 PM	Committee/Task Force Meetings
6 PM - 10 PM	Dinner

*continued on page 4*

**New Board & Officers Elected**

At the Annual Meeting held at the recent S.T.E.P. Purchasing Conference in Las Vegas a new slate of Officers and Board was presented and elected. The Board is comprised of the following NMDA members:

Terms to Expire 2006

- Robbie Vititow of V & V Marine
- Mike Medart of Medart Marine
- Jim DelCioppo of Marine Equipment & Supply Co. (MESCO)
- Tom Wallis of Land 'N' Sea
- Dennis Zirkelbach of Teleflex

Terms to Expire 2007

- Mike Keller of Keller Marine
- Keith Brittingham of Coast
- Laura Leon of Medart Marine
- John Clarke of Moeller
- John Thommen of Ocean Marketing

Terms to Expire 2008

- Steven Pressman of Kellogg Marine
- Steve McKee of Lorenz & Jones



From left to right: Tom Wallis of Land 'N' Sea newly elected Secretary/Treasurer. Mike Medart of Medart Marine, President of NMDA. Staff Nancy Cueroni. Robbie Vititow of V & V Marine, Immediate Past President and Steve McKee of Lorenz & Jones, Vice President.

Tuesday, April 4, 2006

9 AM - 12 Noon  
PM Board Meeting #2  
Opening Reception for Executive Conference

Wednesday, April 5, 2006

8 AM - 12 Noon  
12 Noon - 6 PM  
PM Executive Conferences begin  
Golf & Fishing will be available  
On your own

Thursday, April 6, 2006

8 AM - 12 Noon  
12 Noon - 1 PM  
1 PM - 6 PM  
PM Executive Conferences continue  
Lunch will be served  
Conferences resume  
On your own

Friday, April 7, 2006

8 AM - 12 Noon  
12 Noon - 1 PM  
1 PM - 6 PM  
PM Executive Conferences begin  
Lunch will be served  
Conferences resume  
On your own

Saturday, April 8, 2006

AM Hotel Check Out

We have had numerous calls about the return of the Executive Conference and we anticipate the turnout will be among the best ever. Please consider using the Supplier of the Year criteria when meeting with your suppliers or distributors. Several of our members have done so in the past and it has proven to be a very beneficial tool - for all parties involved.

The San Diego area has much to offer including a world famous zoo, beaches, the Birch Aquarium at Scripps Institute, baseball and much more. It's not too early to look into flights and start making your plans to attend!



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Distributor Show Dates

**Fox Marine Dealer Show**

September 22, 2005  
Marriott Renaissance Esmeralda Resort  
Rancho Mirage, CA

**Bell Industries Dealer Show**

September 28 & 29, 2005  
Kalahari Resort  
Wisconsin Dells, WI

**C.C. Marine Distributors Dealer Show**

October 2 & 3, 2005  
International Centre  
Mississauga ON Canada

**Northern Wholesale**

October 4 & 5, 2005  
Embassy Suites  
Bloomington, MN

**Ellett Brothers**

October 5 - 7, 2005  
Ellett Facility  
Chapin, SC

**Medart Marine Dealer Show**

October 12 & 13, 2005  
St. Charles Convention Center  
St. Charles, MO

**Land 'N' Sea**

October 23 - 26, 2005  
Radisson Hotel at Star Plaza  
Merrillville, IN

**Keller Marine Dealer Show**

October 25 & 26, 2005  
Radisson Valley Forge Hotel & Convention Center  
Valley Forge, PA

**Vita-Plate Dealer Show**

November 2, 2005  
Camp Perry Clubhouse  
Port Clinton, OH

**MESCO & Seacoast Dealer Show**

42nd Annual Dealer Trade Show  
November 2 & 3, 2005  
Location to be determined

**Marine 1One Dealer Show**

November 7 & 8, 2005  
Stardust Hotel  
Las Vegas, NV

**Morgan Recreational Supply**

November 9 & 10, 2005  
Turning Stone Resort  
Verona, NY

**Payne's Marine Supply Group**

November 12 & 13, 2005  
Victoria Conference Centre  
Victoria, BC Canada

**Kellogg Marine Supply Dealer Trade Show**

November 16 - 18, 2005  
Mohegan Sun Casino  
Uncasville, CT

**Coast Distribution Dealer Show**

February 8 & 9, 2006  
Rio Suites  
Las Vegas, NV

If your show is not listed here, please let us know when it is and we'll add it to the list.