



FEDERAL PUBLIC SERVICE
MOBILITY AND TRANSPORT
DG SHIPPING

RESULTS OF THE SURVEY ON CIRCULAR ECONOMY FOR RECREATIONAL SHIPPING 2023



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In 2022, DG Shipping, with the support of a consultant, conducted a preliminary study to identify the various possible options for achieving a circular economy in the Belgian recreational craft sector both at sea and on inland waterways. In this context, a literature review and a benchmark study were conducted as well as several bilateral interviews. Moreover, two roundtable discussions also took place with the various stakeholders to identify the different options. On 14 June 2023, DG Shipping launched a survey targeting pleasure boaters. The purpose of this survey was to sound pleasure boaters out and to get them thinking about the issue of end-of-life (EOL) and/or abandoned pleasure boats

INTRODUCTION

PURPOSE

The purpose of the survey was to sound pleasure boaters out and to get them thinking about the issue of end-of-life and/or abandoned pleasure boats. For example, we tried to find out what the obstacles are for recycling and where abandoned boats are mainly located. The results should show the extent to which pleasure boaters are familiar or confronted with the issue, what actions they are ready to take and what role they see for public authorities. The results and insights gained, together with the preliminary study and the outcome of the roundtable discussions, will be taken into account in the further steps of the project.

TARGET GROUP

The survey targets the group of Belgian pleasure boaters, no matter whether they own a pleasure boats or not. The questions were drafted in such a way that non-owners had to answer them based on the boat they sail the most.

QUESTIONS

The questions for the survey were drafted with the support of the consultant Igneos. The questions can be divided into four categories, namely:

- Profile of respondents
- Pleasure boat of respondents
- View on EOL/abandoned boats
- View on a circular economy for recreational shipping

The results will therefore be presented in 4 subjects in this report.

DISTRIBUTION

The survey was distributed through various possible channels of the FPS (website, Facebook...). With the help of the federations concerned (WWSV and FFYB), it was also disseminated to their members through various channels such as member lists, newsletters and websites. Moreover, the Belgian water sports magazines Varen and Yachting Sud placed the call to fill in the survey in their newsletter.

PROFILE RESPONDENTS

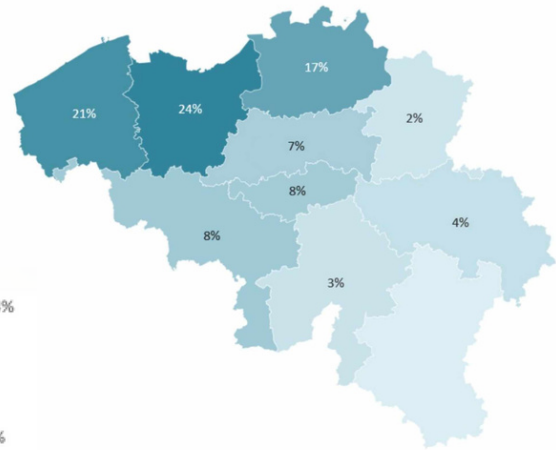


471
PLEASURE BOATERS

GEOGRAPHIC DISTRIBUTION

FR
30%

NL
70%



18.5%

is director of a club of marina

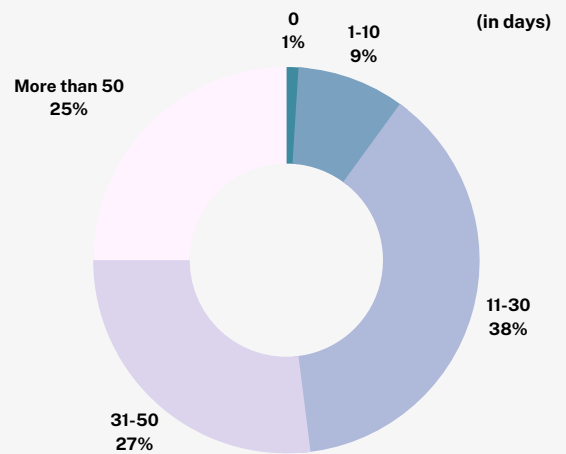
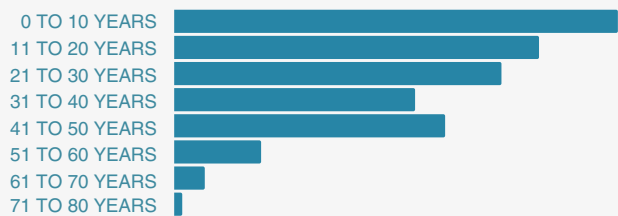
9 OP 10

is a (co-)owner of a boat



SAILING EXPERIENCE

on average, the respondent has a sailing experience of 26 years



WHERE DO THEY SAIL?



21.9%
Lakes



38.5%
Sea



39.5%
Rivers and canals

52%

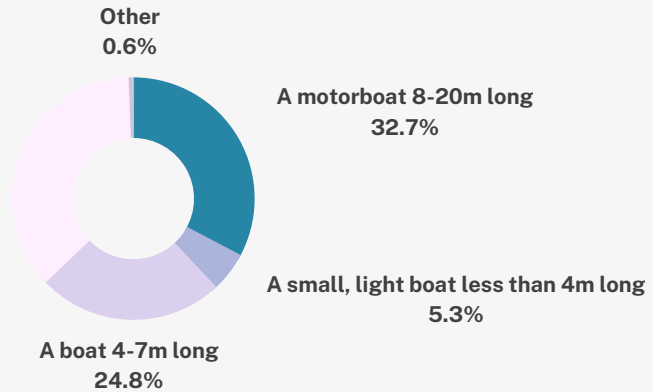
sails more than 31 days per season

PLEASURE BOATS FROM RESPONDENTS

TYPE OF PLEASURE BOAT

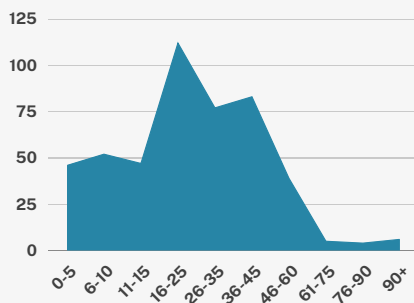


A sailing boat 8-20m long
36.5%

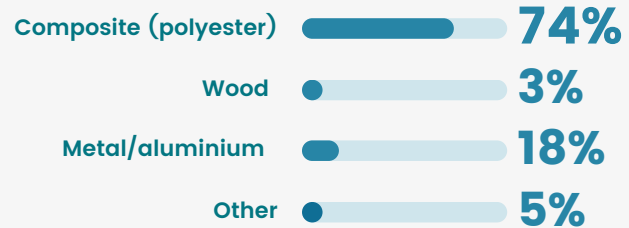


AGE OF BOATS

16-25 YEARS



WHICH MATERIAL?



CONDITION OF THE BOATS



The majority of respondents indicate that the boat is 100% in working order and has no defects. And 23% state that the boat has some minor defects but is still in a good condition to sail.

As regards the moment when pleasure boaters will stop sailing,

55%

say that they will sell their pleasure boat directly to a third party through a website or word-of-mouth.

22%

say that they would sell their pleasure boat to a third party through a dealer or a yacht broker.

It is important to emphasise here that the question was focused on stopping sailing, which does not indicate that the boat are EOL.

VIEW ON EOL/ABANDONED RECREATIONAL BOATS

WHERE DO YOU MOST OFTEN SEE WRECKS OR PLEASURE BOATS IN POOR CONDITION THAT HAVE REACHED THE END OF THEIR USEFUL LIFE?

	YES	NO
On land along rivers and canals	23%	77%
In the water along rivers and canals	38%	62%
In the water in coastal marinas	20%	80%
In the water in inland marinas	28%	72%
On private property of individuals or companies	34%	66%
On public property	5%	95%

End-of-life boats or boats in poor condition are most often seen **in water along rivers and canals**. Besides, they are also often seen **on private property of individuals or companies**.

“On all above-mentioned places, there are in every marina some yachts that are EOL or ready for dismantling.”

“On boat parks”

“On sites of yacht clubs or ‘winter storage’ places”

“No idea actually, everywhere but in a very small proportion, I find that it is not too bad”

“I see no wrecks”

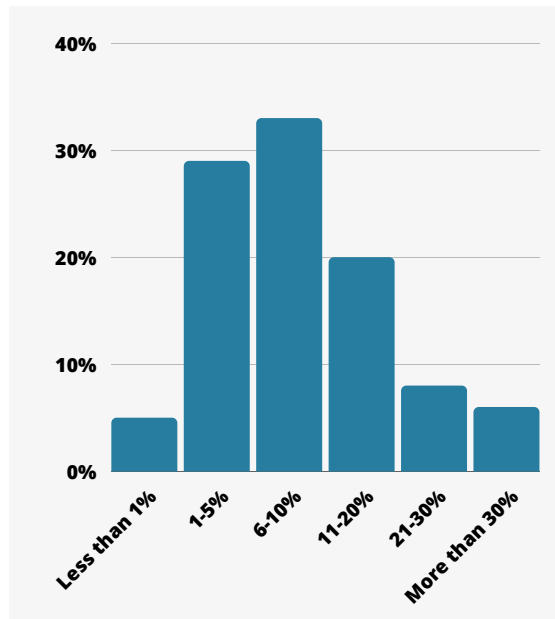
“Some old boats on inland water areas”

IN YOUR OPINION, HOW LARGE IS THE NUMBER OF END-OF-LIFE BOATS THAT ARE NO LONGER IN A CONDITION TO SAIL?

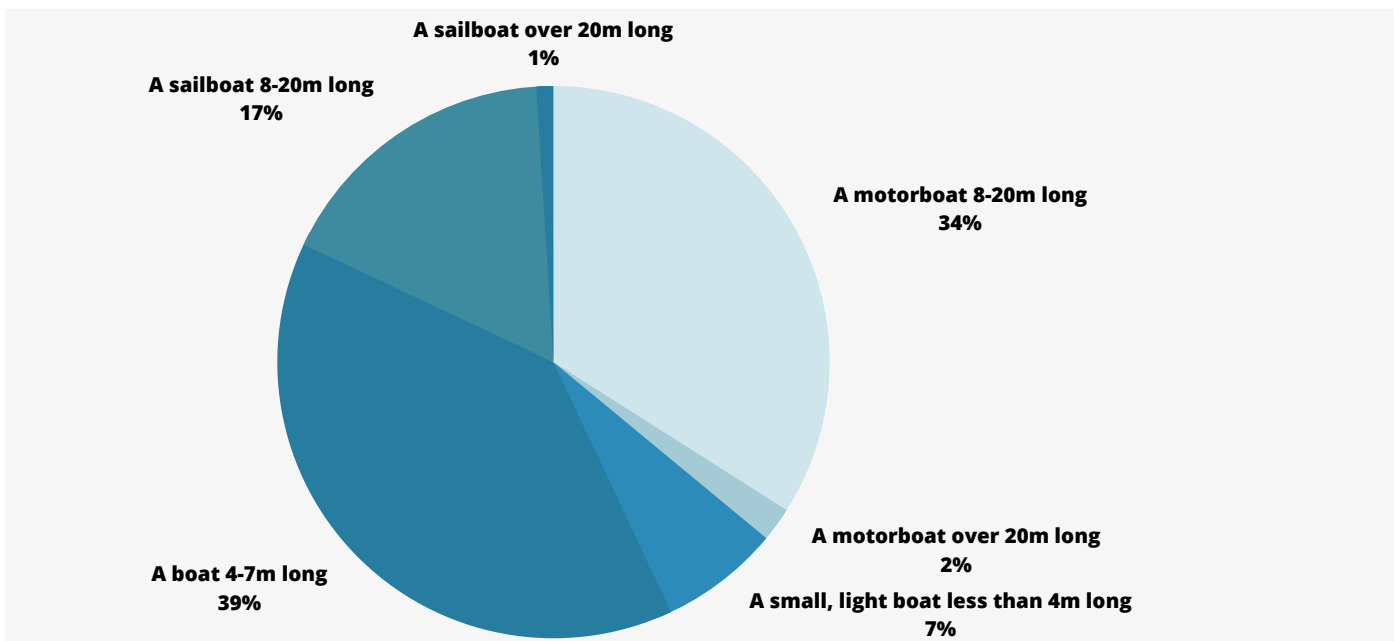
Respondents estimate that **6-10%** of Belgian pleasure boats have reached the end of their useful life and are no longer in a condition to sail. Overall, **67% of respondents estimate that the percentage is below 10%** (see figure on the next page).

VIEW ON EOL/ABANDONED BOATS

Estimation amount of EOL boats



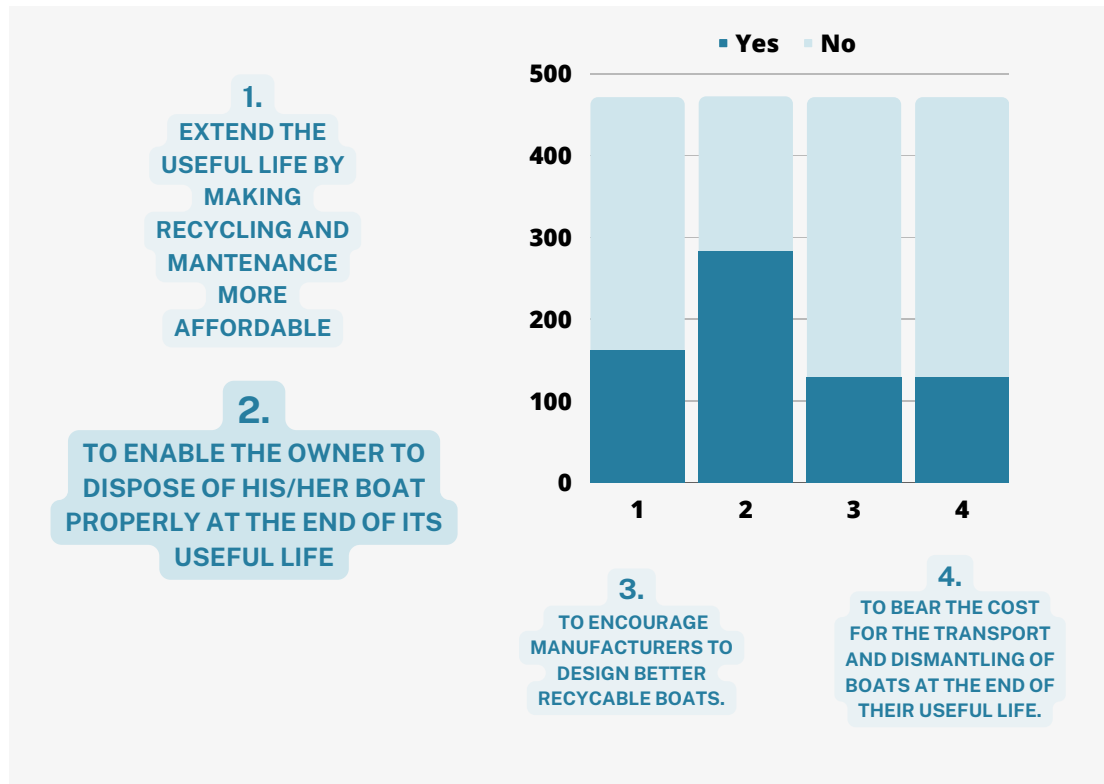
WHICH TYPE OF BOAT YOU THINK ARE MOST OFTEN IN POOR CONDITION OR HAVE REACHED THE END OF THEIR USEFUL LIFE AND ARE NO LONGER IN A CONDITION TO SAIL?



A boat 4-7m long is the type of boat **most often expected to be in poor condition** or to have reached the end of its useful life. **A motorboat 8-20m long** is also often estimated to be in poor condition or end-of-life. **Boats over 20m long**, whether sail or motor boats, would be the **least in poor condition or end-of-life**, according to respondents.

VIEW ON A CIRCULAR ECONOMY FOR RECREATIONAL SHIPPING

WHAT DO YOU THINK SOLUTIONS SHOULD BE WORKED OUT FOR?



60% are of the opinion that a solution should be worked out **to enable the owner to dispose of his/her boat properly at the end of its useful life.**

A solution to bear the costs and the idea of encouraging manufacturers to design better recyclable boats are the least mentioned options.

IF YOUR BOAT OR THE BOAT YOU SAIL MOST OFTEN REACHES THE END OF ITS USEFUL LIFE AND NEEDS TO BE DISMANTLED, WHAT ARE THE MAIN OBSTACLES FOR YOU?

The following results indicate that **45%** of respondents consider **not knowing where to dismantle** to be the main obstacle. In second place comes the **cost**, which accounts for **21%**.

It is important to note here that respondents could only give one answer. A few indicate that they face several obstacles but have indicated the main one.

VIEW ON A CIRCULAR ECONOMY FOR RECREATIONAL SHIPPING

Interestingly, when explaining the category 'other', a number of respondents report that they are not worried about this issue because the useful life of their boat will be longer than their own life or that their boat will be sold before it is in too poor a condition to sail.

I don't know who can dismantle my boat	45%
It is too expensive	21%
I find it difficult to have my boat dismantled because I have become emotionally attached to it.	13%
It is difficult to transport the boat to the dismantling centre	11%
Other	10%

“With proper maintenance, the useful life of the boat will be longer than my own life”

“I think it's normal to pay for a dismantling, but not everyone does”

“I see no obstacles”

“the 4 answers, with a preference for the logistical point of view”

“I opt for cost and then transport difficulty”

“Knowing that this boat always has a cost, we let it rot, thinking that we'll sail with it again in the future or sell it.”

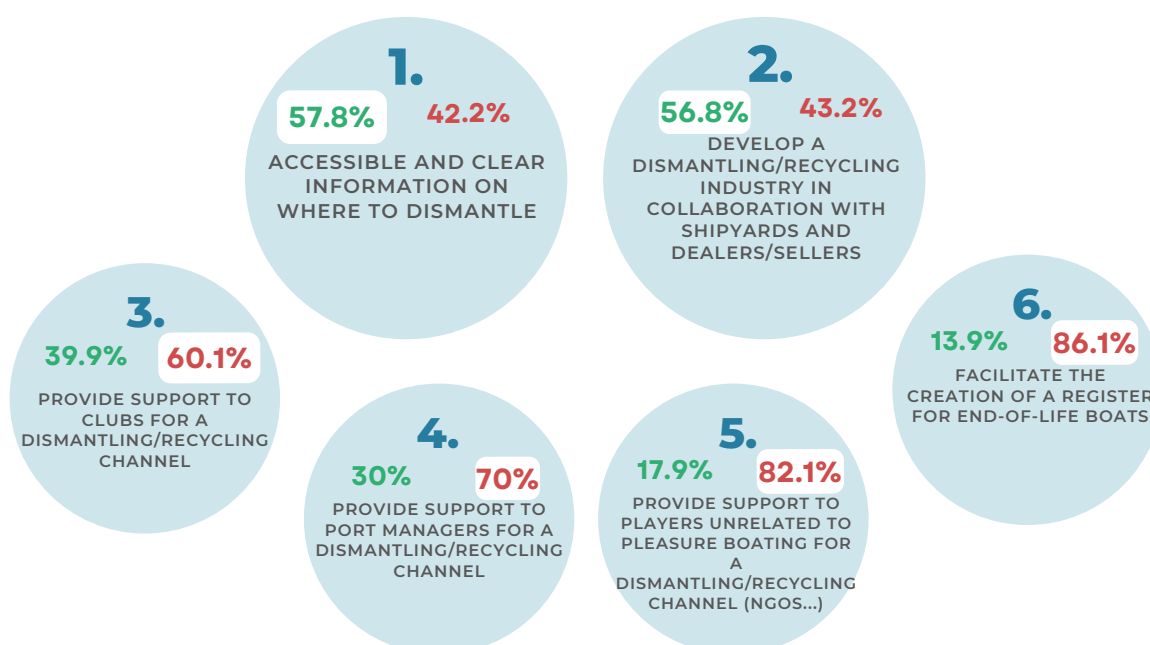
“Who offers this service (for an affordable price)?”

THE OWNER IS RESPONSIBLE FOR HAVING HIS OR HER END-OF-LIFE BOAT DISMANTLED. WHAT ROLE DO YOU THINK PUBLIC AUTHORITIES SHOULD PLAY IN THIS REGARD?

The following figure shows the order (from 1 to 6) of what role is expected from public authorities. **Providing accessible and clear information on the channels and operators responsible for dismantling end-of-life boats** gets the most 'yes' answers. In addition, respondents are of the opinion that public authorities should be responsible for **developing a dismantling/recycling industry in collaboration with shipyards and dealers/sellers of new and used boats.**

VIEW ON A CIRCULAR ECONOMY FOR RECREATIONAL SHIPPING

However, respondents are of the opinion that the government should **not do so by offering support** to clubs, port operators or players unrelated to recreational shipping to set up a dismantling/recycling channel. **Facilitating the establishment of a registry** (e.g. to share the costs of transport and dismantling) was **least** indicated.



WHAT OTHER SUGGESTIONS DO YOU HAVE AROUND THE ISSUE OF END-OF-LIFE BOATS?

A first suggestion often made concerns the maintenance of a pleasure boat. Many are of the opinion that, provided proper maintenance, a boat can last 'a lifetime'. But maintenance costs would be high. For instance, it is proposed to **set up low-cost boat maintenance centres or to improve the production quality** to keep boats in **good condition for a longer time**, thus with lower maintenance costs.

A second item mentioned several times is **facilitating the exchange of spare parts**. In this regard, respondents mention the possibility of introducing an inspection, for boats reported for dismantling, by specialists confirming the need for dismantling. If the boat is still in good condition, it or its parts could be sold.

VIEW ON A CIRCULAR ECONOMY FOR RECREATIONAL SHIPPING

'Orphaned' boats appear to be another important issue. Respondents stress the **need for a regulatory/legal framework to enable expropriation**. It should be made possible to dismantle abandoned (EOL) boats based on objective criteria (e.g. no valid registration letter, no insurance, risk to safety, etc.) without risk of legal sanctions afterwards. But also for boats whose owners are known, set up a system where, if boats are neglected, owners are warned to take action (maintenance or dismantling) and if not acted upon, expropriation is possible.

Respondents also often talk of a **premium** for owners who submit their boat for dismantling, as an **incentive** but also to **partly cover the costs**. As regards the cost, respondents also indicate that it should **not be borne solely by the last owner**.

The question was also raised whether an EOL boat cannot be **given a new use**, such as, for example, as a tiny house or playground module.

Finally, respondents also stress the importance of inheritances. Many boats are transferred to heirs upon the death of their owner. Heirs often have no shipping knowledge or experience and do not have any information on how to maintain and/or what to do with an EOL boat.

Summary

As indicated above, the intention was to sound pleasure boaters out and make them reflect on a circular economy for the Belgian recreational craft sector. By finding out, among other things, to what extent pleasure boaters are familiar with this issue and what actions they are ready to take and what role they see for public authorities, we want to gain insights that can be taken into account in further steps.

To begin with, the preliminary study revealed that the high cost of recycling is one of the obstacles. However, the survey shows that there is some willingness to pay, if one has the opportunity to dispose of the boat. Finding a solution to bear the costs, both of dismantling and transport, is considered the least important by respondents. Moreover, in the preliminary study, one of the levers mentioned was to improve the design of pleasure boats, but the idea of encouraging manufacturers to design better recyclable boats does not find support among respondents.

Another obstacle to enabling a viable model for a circular economy of pleasure boats is, according to the preliminary study, that there is no direct obligation or incentive for owners to maintain their boat and keep it in good condition (as long as the equipment and general state of safety is adequate). This is also mentioned by the respondents themselves. For instance, the cost of maintenance would be high, and they suggest finding a solution to this such as creating low-cost maintenance centres. Respondents also mention the issue of orphaned boats, which needs a legal framework.

The key finding is that respondents consider it more important to be able to dispose of their end-of-life boat properly. Currently, they have no idea who or where to turn to for this. In this regard, they are of the opinion that public authorities should be responsible for developing a dismantling/recycling industry in cooperation with shipyards and traders, while also providing accessible and clear information on dismantling options.

Interestingly, before completing the survey, the recycling of abandoned or end-of-life pleasure boats was a topic that a number of pleasure boaters did not consider. Many point out that, provided proper maintenance, the useful life of a boat is longer than that of a human being, which makes it seem like an issue of little interest for some respondents. It is important to note that the active recreational boater was reached with the survey that gives due attention to the condition of his/her vessel. One of the aims of the survey was to raise awareness, and we can hereby state that it was successful. This is also shown by the interest of 200 respondents in the survey results and the follow-up steps. Furthermore, 100 respondents would like to be selected for a brainstorming session on the subject.



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