

# **IMPACT OF BP OIL SPILLAGE ON RECREATIONAL MARINE MANUFACTURING**

**Study conducted by NMMA Industry Research and Statistics  
August, 2010**

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## **Introduction**

An online survey of NMMA member boat, engine, and accessory manufacturers was conducted by the NMMA Department of Industry Statistics and Research to better understand the effect of the BP Oil Spillage, April 22, 2010 – July 15, 2011, on the recreational marine industry.

## **Objective**

The objective of this survey was to assess the impact of the Oil Spillage on sales and operations on recreational marine manufacturers.

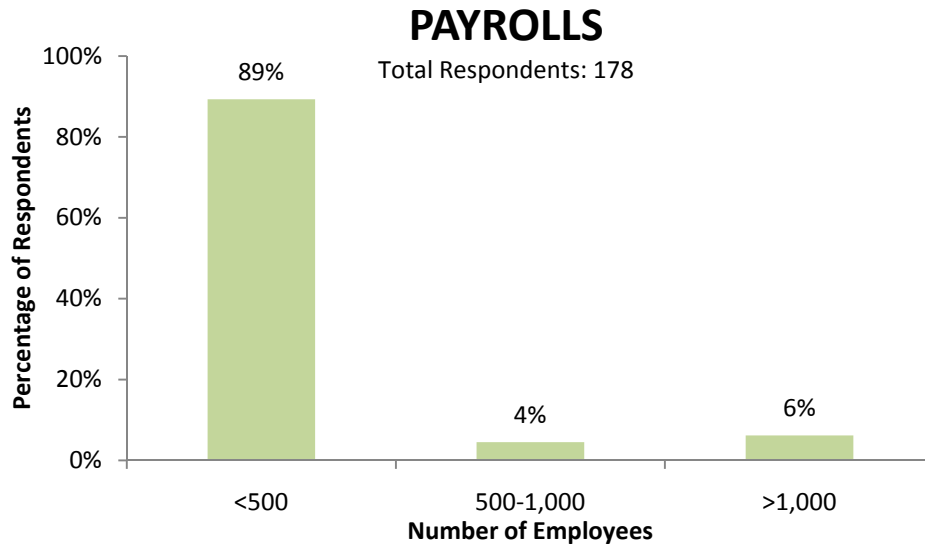
## **Methodology**

178 NMMA member chief executives were surveyed from June 29, 2010– July 22, 2010. Survey results have a confidence interval of  $\pm 7\%$  at the 95% confidence level.

## **Highlights**

- 3 of 5 recreational marine businesses have been affected by the Oil Spillage.
- Nearly 4 of 5 companies anticipate some effect from the Oil Spillage on their business through the remainder of the year.
- 76% of companies had forecasted sales growth in 2010 prior to the Oil Spillage.
- 70% of companies have downwardly revised their 2010 sales projection as a direct result of the Oil Spillage.
- 64% of these companies downwardly revised their projections by 5-20%.
- 68% of companies were told that a cancellation was directly due to the Oil Spillage.
- 90% of companies have less than 500 employees.

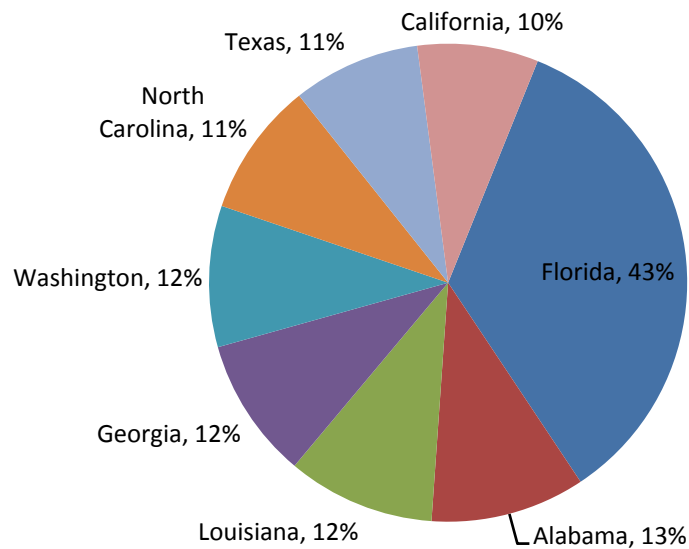
## Executive Summary



- At the time the survey was completed, nearly 9 in 10 companies employed less than 500 people.
- 6% employed over 1,000 people while 4% employed 500 – 1,000 people.

### TOP FACILITY LOCATIONS

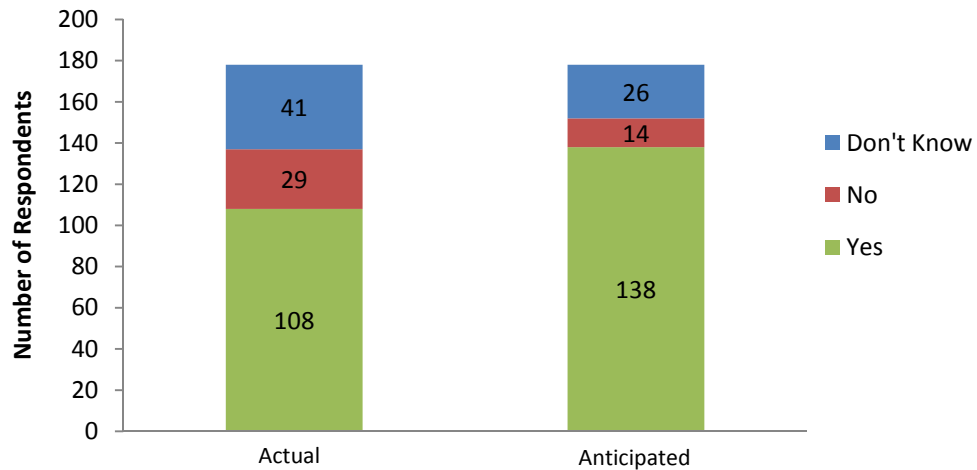
Total Respondents: 178



- Over 2 in 5 or 43% of manufacturers have facilities in Florida, followed by Alabama (13%), and Louisiana (12%).
- Over 1 in 4 manufacturers had facilities in states along the Gulf Coast. That includes Alabama, Florida, Louisiana, Mississippi, and Texas.

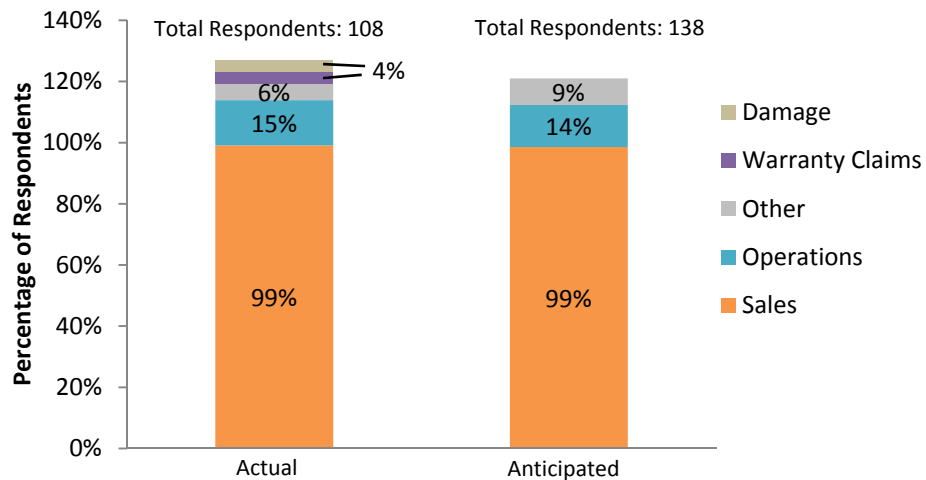
## AFFECTED BY OIL SPILLAGE

Total Respondents: 178



- Over 3 in 5 companies have been affected either directly or indirectly by the BP Oil Spill.
- Nearly 4 in 5 of companies anticipate its continued effect through the remainder of 2010.

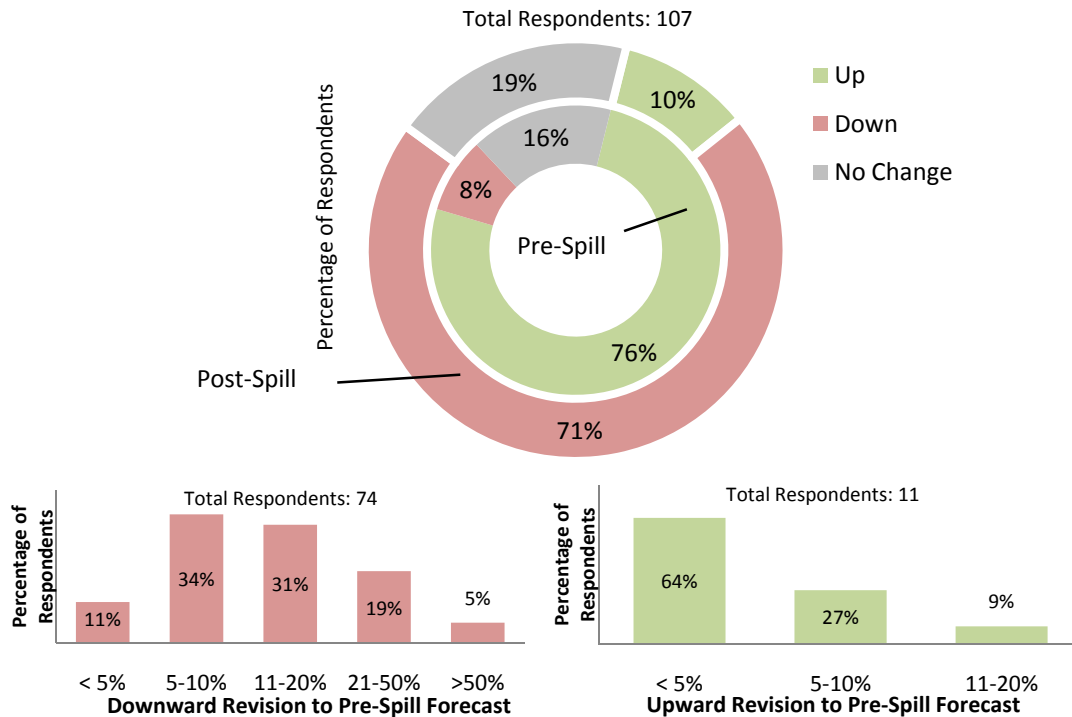
## BUSINESS ASPECT AFFECTED



- Nearly all companies affected reported that their sales were impacted and expect that impact to continue through the remainder of 2010.
- 15% of companies reported that the Oil Spillage impacted their operations.
- 4% of companies reported a rise in warranty claims.
- 4% of companies reported physical damage to unsold product(s) and/or facility(ies).

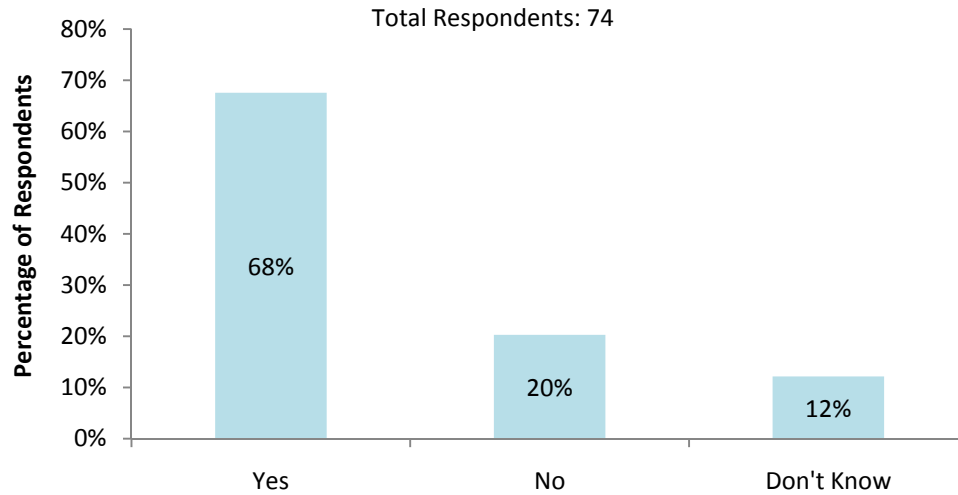
## 2010 SALES PROJECTIONS

Resulting solely from the Oil Spillage, 71% of respondents have downwardly revised their 2010 sales projections. Of those, the majority (65%) had revised their projections down by 5-20%.



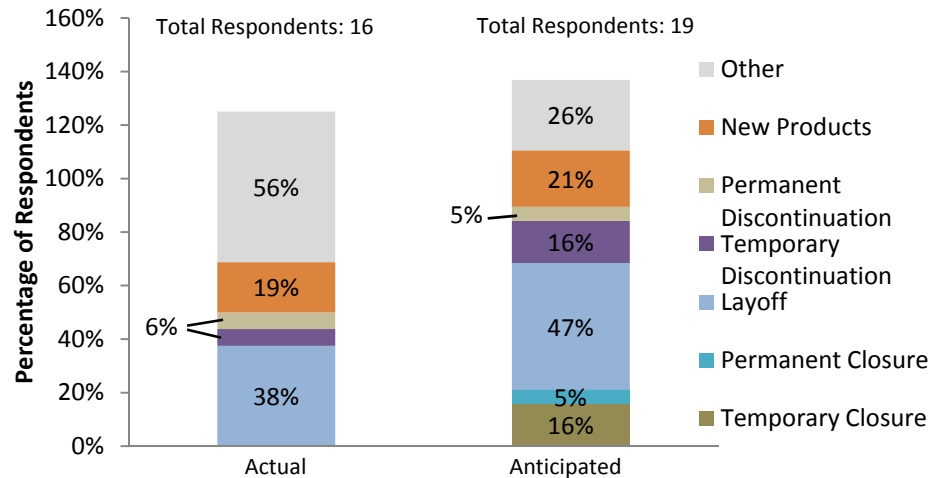
- Prior to the Oil Spillage, over 3 in 4 companies forecasted sales growth in 2010 while 8% forecasted a decline in sales and 16% expected the year to be flat.
- Since the Oil Spillage, over 7 in 10 companies have downwardly revised their initial forecasts solely on account of the Oil Spillage. Nearly 2 in 10 companies did not change their forecast and 1 in 10 companies reported that the Oil Spillage had a positive effect on their sales forecast.
- Of the 74 companies that downwardly revised their sales forecasts, the majority (65%) of them had lowered their forecasts by 5-20%. 1 in 20 companies were severely affected by the Oil Spillage, reducing their 2010 forecasts by more than half.
- Of the 11 companies that gained from the Oil Spillage, sales forecasts were increased by no more than 20% and in the majority of instances, no more than 5%.

## SALES DECLINE DIRECTLY CORRELATED TO OIL SPILLAGE



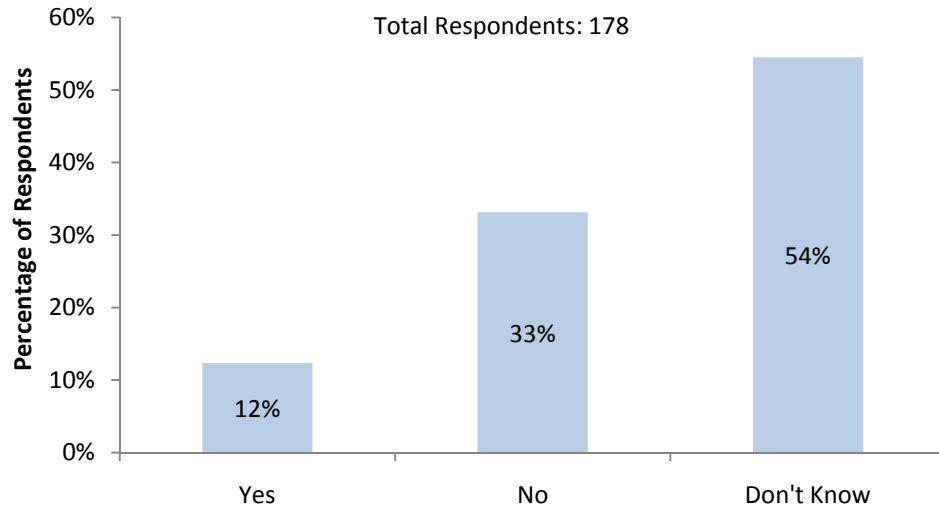
- Nearly 7 in 10 companies that had downwardly revised their 2010 sales projects were told that the Oil Spillage was a reason for an order cancellation or reduction.

## OPERATIONS AFFECTED



- Nearly half of the 16 companies whose operations were affected by the Oil Spill have laid off employees, in some instances concurrent with facility closures.
- Over half of the 19 companies that expect their operations to be affected by the Oil Spillage through the remainder of 2010 anticipate laying off employees and/or closing facilities.
- Approximately 1 in 5 companies have or anticipate new product lines in response to the Oil Spillage.
- On the other hand, 12% have discontinued product(s) and 21% anticipate the discontinuation of product(s) sometime before the year ends.

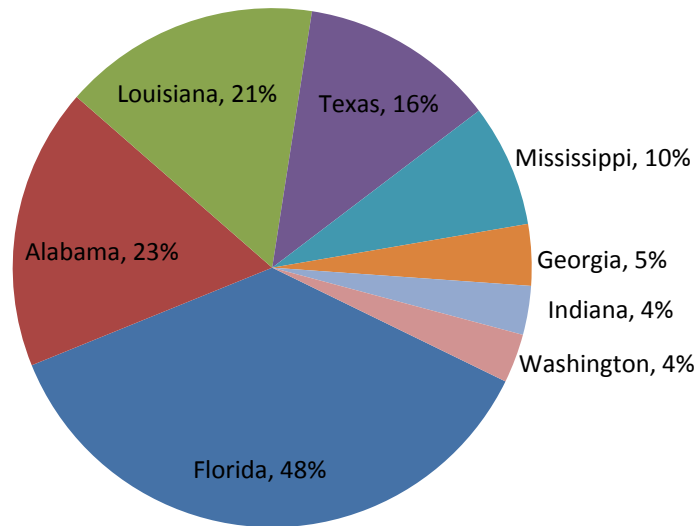
### PHYSICAL DAMAGE FROM OIL SPILL



- Over 1 in 10 companies report that their dealers experienced physical damage to their facilities and/or unsold product from the Oil Spillage.

### FACILITIES AFFECTED

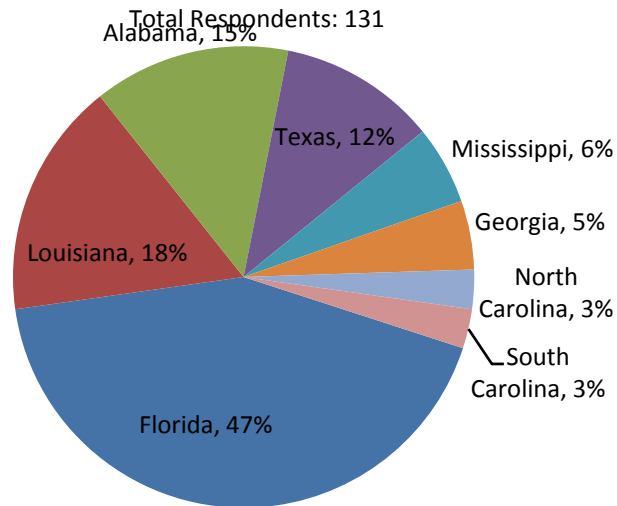
Total Respondents: 101



- Nearly half of companies reported that their facilities in Florida have been most affected by the Oil Spillage, followed by Alabama (23%), Louisiana (21%), Texas (16%), and Mississippi (10%).

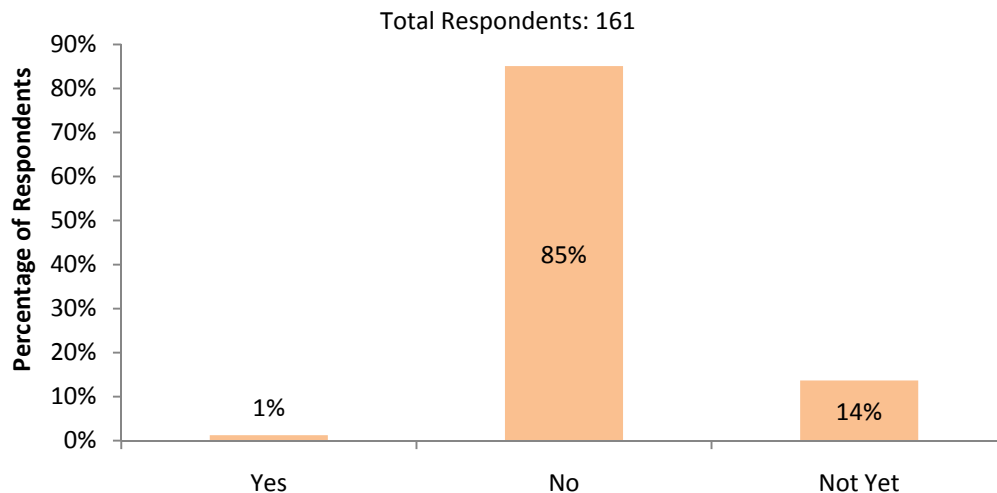


## FACILITIES ANTICIPATED TO BE AFFECTED



- Nearly half or 47% of companies expect their facilities in Florida to be affected by the Oil Spillage through the remainder of 2010, followed by Louisiana (18%), Alabama (15%), Texas (12%), and Mississippi (6%).

## COMPANIES THAT HAVE FILED CLAIMS WITH BP



- 1% of companies had filed claims with BP and as of the time of this survey, those claims were still pending BP's response.
- At the time of this survey, nearly 15% of companies planned on filing claims with BP within the next 3 months.

Has the BP Oil Spillage that started in the Gulf of Mexico on April, 22, 2010 had any effect, direct or indirect, on your business to date?		
	N=	178 100%
Yes		108 61%
No		29 16%
Don't Know		41 23%
Do you anticipate the Oil Spillage will have any effect, direct or indirect, on your business through the remainder of 2010?		
	N=	20 890%
Yes		138 690%
No		14 70%
Don't Know		26 130%
What areas of your business has the Oil Spillage affected?		
	N=	108 127% *
Sales		107 99%
Operations		16 15%
Other		6 6%
Warranty Claims		4 4%
Damage		4 4%
What areas of your business do you anticipate the Oil Spillage will affect?		
	N=	138 121% *
Sales		136 99%
Operations		19 14%
Other		12 9%
What other area(s) of your business has the Oil Spillage impacted?		
	N=	2 100%
		<i>Inventory Relocation Costs</i> 1 50%
		<i>Repairs Excluding Warranty Claims, Unsold Product, and Facilities</i> 1 50%
What other areas of your business, aside from sales and operations, do you anticipate the Oil Spillage will impact?		
	N=	10 90%
		<i>Reduced Demand</i> 2 20%
		<i>Repairs Excluding Warranty Claims, Unsold Product, and Facilities</i> 1 10%
		<i>Potential Product Problems Not Covered by Warranty</i> 1 10%
		<i>Potentially All</i> 1 10%
		<i>Rising Material Cost</i> 1 10%
		<i>Service/Repair</i> 2 20%
		<i>Technical Support</i> 1 10%
What was your 2010 sales projection prior to the Oil Spillage?		
	N=	107 100%
Increase		81 76%
Decrease		9 8%
Flat		17 16%
Don't Know		0 0%
How has your 2010 sales projections changed since the Oil Spillage?		
	N=	106 100%
Up		11 10%
Down		75 71%
No Change		20 19%
What other impact has the Oil Spillage had on your 2010 sales to date?		
	N=	15
		<i>Slight Sales Increase</i> 8
		<i>Reduced Demand but Little Impact on Overall Sales</i> 3
		<i>Slight Sales Decrease</i> 3
		<i>Sales Redirection</i> 1
		<i>Rise in Business Costs</i> 1
By what percentage have you downwardly revised your 2010 sales forecast due to the Oil Spillage?		
	N=	74 100%
< 5%		8 11%
5-10%		25 34%
11-20%		23 31%
21-50%		14 19%
>50%		4 5%
Have you been told that a reason for an order cancellation or reduction was due to the Oil Spillage?		
	N=	74 100%
Yes		50 68%
No		15 20%
Don't Know		9 12%

\*Respondents were allowed to select multiple choices.

By what percentage have you upwardly revised your 2010 sales forecast due to the Oil Spillage?		
	N=	11 100%
< 5%		7 64%
5-10%		3 27%
11-20%		1 9%
21-50%		0 0%
>50%		0 0%
What was your 2010 sales projection prior to the Oil Spillage?		
	N=	136 100%
Increase		104 76%
Decrease		6 4%
Flat		23 17%
Don't Know		3 2%
How has your 2010 sales projections changed since the Oil Spillage?		
	N=	136 100%
Up		11 8%
Down		86 63%
No Change		39 29%
What other impact do you anticipate the Oil Spillage will have on your sales in 2010?		
	N=	0
By what percentage have you upwardly revised your 2010 sales forecast due to the Oil Spillage?		
	N=	11 100%
< 5%		5 45%
5-10%		4 36%
11-20%		2 18%
21-50%		0 0%
>50%		0 0%
By what percentage have you downwardly revised your 2010 sales forecast due to the Oil Spillage?		
	N=	86 100%
< 5%		11 13%
5-10%		30 35%
11-20%		26 30%
21-50%		15 17%
>50%		4 5%
How has the Oil Spillage affected your business operations?		
	N=	16 125% *
Temporary Closure		0 0%
Permanent Closure		0 0%
Layoff		6 38%
Temporary Discontinuation		1 6%
Permanent Discontinuation		1 6%
New Products		3 19%
Other		9 56%
In what other way has the Oil Spillage affected your business operations?		
	N=	9 78%
<i>Flawed Inventory Forecasts From Overseas</i>		1 11%
<i>Reduced Demand</i>		3 33%
<i>Heightened Demand</i>		1 11%
<i>Higher Travel Costs</i>		1 11%
<i>Lower Production</i>		1 11%
How do you anticipate the Oil Spillage will affect your business operations?		
	N=	19 137% *
Temporary Closure		3 16%
Permanent Closure		1 5%
Layoff		9 47%
Temporary Discontinuation		3 16%
Permanent Discontinuation		1 5%
New Products		4 21%
Other		5 26%
In what other way do you anticipate the Oil Spillage will affect your business operations?		
	N=	5 100%
<i>Relocate Staff and Products</i>		1 20%
<i>Reduced Demand</i>		1 20%
<i>Lower Production</i>		1 20%
<i>Heightened Demand</i>		1 20%

\*Respondents were allowed to select multiple choices.

Unpredictability 1 20%

Have your dealer(s) experienced any physical damage to their facilities and/or unsold product from the Oil Spillage directly?

	N=	178	401% *
Yes		22	12%
No		59	33%
Don't Know		97	54%

In which state(s) are your facilities located?

	N=	178	301% *
N/A		6	3%
Alabama		23	13%
Alaska		4	2%
Arizona		6	3%
Arkansas		6	3%
California		18	10%
Colorado		4	2%
Connecticut		9	5%
Delaware		4	2%
Florida		76	43%
Georgia		21	12%
Hawaii		3	2%
Idaho		4	2%
Illinois		12	7%
Indiana		16	9%
Iowa		5	3%
Kansas		6	3%
Kentucky		5	3%
Louisiana		22	12%
Maine		8	4%
Maryland		11	6%
Massachusetts		11	6%
Michigan		17	10%
Minnesota		9	5%
Mississippi		9	5%
Missouri		8	4%
Montana		4	2%
Nebraska		4	2%
Nevada		4	2%
New Hampshire		6	3%
New Jersey		10	6%
New Mexico		4	2%
New York		8	4%
North Carolina		20	11%
North Dakota		4	2%
Ohio		13	7%
Oklahoma		4	2%
Oregon		6	3%
Pennsylvania		10	6%
Rhode Island		6	3%
South Carolina		13	7%
South Dakota		4	2%
Tennessee		12	7%
Texas		19	11%
Utah		4	2%
Vermont		5	3%
Virginia		11	6%
Washington		21	12%
West Virginia		5	3%
Wisconsin		11	6%
Wyoming		4	2%

Which of those state(s) where you have facilities were most affected by the Oil Spillage?

	N=	101	175% *
N/A		26	26% 0
Alabama		23	23%
Alaska		0	0%
Arizona		0	0%
Arkansas		0	0%
California		1	1%
Colorado		0	0%

\*Respondents were allowed to select multiple choices.

Connecticut	0	0%
Delaware	0	0%
Florida	48	48%
Georgia	5	5%
Hawaii	0	0%
Idaho	0	0%
Illinois	1	1%
Indiana	4	4%
Iowa	0	0%
Kansas	1	1%
Kentucky	0	0%
Louisiana	21	21%
Maine	0	0%
Maryland	2	2%
Massachusetts	2	2%
Michigan	1	1%
Minnesota	0	0%
Mississippi	10	10%
Missouri	1	1%
Montana	0	0%
Nebraska	0	0%
Nevada	0	0%
New Hampshire	0	0%
New Jersey	0	0%
New Mexico	0	0%
New York	1	1%
North Carolina	1	1%
North Dakota	0	0%
Ohio	3	3%
Oklahoma	0	0%
Oregon	0	0%
Pennsylvania	0	0%
Rhode Island	0	0%
South Carolina	2	2%
South Dakota	0	0%
Tennessee	2	2%
Texas	16	16%
Utah	0	0%
Vermont	0	0%
Virginia	1	1%
Washington	4	4%
West Virginia	0	0%
Wisconsin	1	1%
Wyoming	0	0%

Please list the zip codes of all facilities that have been affected by the Oil Spillage.

	N=	108	111% *
<i>Not Readily Available</i>		37	34%
02745	1	1	1%
19468	1	1	1%
27834	1	1	1%
27932	1	1	1%
28560	1	1	1%
28715	1	1	1%
29630	1	1	1%
29651	1	1	1%
31639	1	1	1%
32073	1	1	1%
32141	1	1	1%
32328	1	1	1%
32405	1	1	1%
32413	1	1	1%
32541	1	1	1%
32547	2	2	2%
32561	1	1	1%
33004	2	2	2%
33035	1	1	1%
33036	1	1	1%
33054	1	1	1%
33312	1	1	1%

\*Respondents were allowed to select multiple choices.

33315	1	1%
33404	1	1%
33462	1	1%
33710	1	1%
33762	1	1%
33767	1	1%
33773	1	1%
33781	1	1%
33908	1	1%
34145	2	2%
34208	1	1%
34221	1	1%
34231	1	1%
34293	1	1%
34475	1	1%
34736	1	1%
34761	1	1%
34946	1	1%
34990	1	1%
34997	2	2%
35501	1	1%
36523	1	1%
36549	1	1%
36561	2	2%
36605	1	1%
36607	1	1%
36670	1	1%
37015	1	1%
37885	1	1%
37914	1	1%
44144	1	1%
44234	1	1%
46516	1	1%
46809	1	1%
54153	1	1%
60133	1	1%
61614	1	1%
62056	1	1%
66757	1	1%
70037	1	1%
70094	1	1%
70123	2	2%
70130	2	2%
70648	1	1%
72651	1	1%
76111	1	1%
77031	1	1%
77058	1	1%
77565	1	1%
85207	1	1%
90259	1	1%
95354	1	1%
98032	1	1%
98036	1	1%

Which of those state(s) where you have facilities do you anticipate will be most affected by the Oil Spillage?

	N=	131	163% *
Alabama	20		15%
Alaska	1		1%
Arizona	2		2%
Arkansas	1		1%
California	1		1%
Colorado	0		0%
Connecticut	0		0%
Delaware	1		1%
Florida	62		47%
Georgia	7		5%
Hawaii	0		0%
Idaho	0		0%
Illinois	1		1%

\*Respondents were allowed to select multiple choices.

Indiana	1	1%
Iowa	0	0%
Kansas	1	1%
Kentucky	1	1%
Louisiana	24	18%
Maine	0	0%
Maryland	1	1%
Massachusetts	2	2%
Michigan	3	2%
Minnesota	0	0%
Mississippi	8	6%
Missouri	2	2%
Montana	0	0%
Nebraska	0	0%
Nevada	0	0%
New Hampshire	0	0%
New Jersey	1	1%
New Mexico	0	0%
New York	2	2%
North Carolina	4	3%
North Dakota	0	0%
Ohio	1	1%
Oklahoma	0	0%
Oregon	1	1%
Pennsylvania	0	0%
Rhode Island	1	1%
South Carolina	4	3%
South Dakota	0	0%
Tennessee	1	1%
Texas	16	12%
Utah	0	0%
Vermont	0	0%
Virginia	2	2%
Washington	1	1%
West Virginia	0	0%
Wisconsin	1	1%
Wyoming	0	0%
N/A	40	31%

Please list the zip codes of all facilities that you anticipate will be affected by the Oil Spillage.

<i>N=</i>	138	109% *
<i>Not Readily Available</i>	47	34%
02745	1	1%
06413	1	1%
24579	1	1%
27834	1	1%
27932	1	1%
28560	1	1%
28715	1	1%
29223	1	1%
29630	1	1%
29651	1	1%
30165	1	1%
31639	1	1%
32073	1	1%
32084	1	1%
32131	1	1%
32328	1	1%
32405	1	1%
32413	1	1%
32541	1	1%
32561	1	1%
33004	3	2%
33035	1	1%
33036	1	1%
33054	1	1%
33069	1	1%
33169	1	1%
33178	1	1%
33312	1	1%

\*Respondents were allowed to select multiple choices.

33315	1	1%
33410	1	1%
33441	1	1%
33462	1	1%
33619	1	1%
33760	2	1%
33762	1	1%
33767	1	1%
33773	1	1%
33781	1	1%
33908	2	1%
33967	1	1%
34102	1	1%
34145	2	1%



34208	1	1%
34221	2	1%
34231	1	1%
34243	1	1%
34293	1	1%
34475	1	1%
34736	1	1%
34761	1	1%
34946	1	1%
34990	1	1%
34997	3	2%
36523	1	1%
36535	1	1%
36549	1	1%
36561	2	1%
36605	1	1%
36607	1	1%
36670	1	1%
37015	1	1%
37885	1	1%
37914	1	1%
40324	1	1%
44144	1	1%
46514	1	1%
46733	1	1%
46809	1	1%
48001	1	1%
48103	1	1%
54153	1	1%
60133	1	1%
61614	1	1%
62056	1	1%
66757	1	1%
70004	1	1%
70094	1	1%
70123	1	1%
70130	1	1%
70435	1	1%
70454	1	1%
70648	1	1%
71115	1	1%
72651	1	1%
76034	1	1%
76111	1	1%
77031	1	1%
77565	1	1%
78382	1	1%
85207	1	1%
90249	1	1%
95354	1	1%
98032	1	1%
98036	1	1%

How many total employees do you have on your payroll as of today?		
	N=	178 100%
<500		159 89%
500-1,000		8 4%
>1,000		11 6%
Have you filed any claims with the BP Claims Process?		
	N=	161 100%
Yes		2 1%
No		137 85%
Not Yet		22 14%
What is the status of your claim(s)?		
	N=	2 100%
Paid In Full		0 0%
Reduced		0 0%
No Response		2 100%
Other		0 0%
Please elaborate on the status of your claim(s) with BP.		
	N=	0

\*Respondents were allowed to select multiple choices.

## Survey Respondents

### BMD

AB Inflatables  
Advanced Marine Inflatables  
Albemarle Boats, Inc.  
APEX Inflatables  
Avalon & Tahoe Mfg., Inc.  
AZIMUT-BENETTI SPA  
BRP, US Inc.  
Brunswick Corporation  
Carolina Skiff, LLC  
Chaparral Boats, Inc.  
Concept Boats, Inc.  
Contender Boats, Inc.  
Correct Craft, Inc.  
Cruisers Yachts Div. KCS International, Inc.  
Dusky Marine, Inc.  
Egg Harbor Yachts  
Fisher Marine Div. Tracker Marine  
Fleming Yachts Construction (HK) Ltd.  
Fluid Motion LLC  
Glacier Bay Catamarans, LLC  
Hake Yachts, LLC  
Hewes Boats  
Hobie Cat Company  
Hunt Yachts, Inc.  
Intrepid Powerboats, Inc.  
Island Packet Yachts  
Jupiter Marine International

### EMD

Caterpillar Marine Division  
Cummins MerCruiser Diesel  
Honda Marine American Honda Motor Co.  
Ilmor Marine LLC  
Marine Power, Inc.  
Steyr Motors North America  
Yanmar Marine USA Corp.

### AMD

303 Products, Inc.  
Ace Boat Lifts, LLC  
AmbientNAV  
Ameri-Kart Corp.  
Aqua Air Mfg. Div. J.D. Nall Co., Inc.  
Aquatic AV, Inc.  
Arid Bilge Systems, Inc.  
ASA Electronics  
Attwood Corporation  
Barnegat Light Marine Products Div. Ziamatic  
Barr Marine by EDM  
BCH Image Inc.  
Beachcomber Fiberglass Technology, Inc.  
Beede Electrical Instrument Co., Inc.  
Black Bart International  
Blue Sea Systems  
BMS International, Inc.  
C.P.S. Distributors, Inc.  
Captain Harry's Fishing Supply  
Challenger Hardware Co.  
Charles Industries, Ltd. Marine Group  
Commercial Products Int'l, Inc.  
Connect-A-Dock Inc.  
Craft Originators Inc.  
CRC Industries, Inc.  
Cummins Onan  
Datrex, Inc.  
Denedios Industries, Inc.  
Dometic Corp. - Marine Air  
Duramax Marine  
E.S. Ritchie & Sons  
Eaton Corp. - Marina Power & Lighting, Inc.  
Edson International  
EPCO Products, Inc.  
E-Tec Marine Products, Inc.  
EZ Loader Boat Trailers, Inc.  
FCI Watermakers  
Craft Originators Inc.  
Forespar Products Corp.  
Gem Products, Inc.  
General Propeller Company Inc.  
Gold Eagle Company  
Greenfield Products, Inc.  
Gulfstream Gear by Supergrafix  
Hayn Enterprises, LLC  
IMAR Products, LLC  
IMTRA Corporation  
International Dock Products, Inc.  
IPS Weld-On Corporation  
ITW Evercoat  
Jeppesen Marine  
Johnson Outdoors Marine Electronics, Inc.  
Johnson Pump, An SPX Process Equipment Operation  
Kenyon International, Inc.  
King Plastic Corp.  
King Trailers, Inc.  
Larand Products  
Lasdrop  
Linear Devices Corporation T/A Lectrotab

Mariah Boats  
Maritec Industries, Inc.  
Maritimo Offshore Pty. Ltd.  
Marlow Marine Sales, Inc. and Marlow Yachts Limited, Inc.  
MasterCraft Boat Company  
Midnight Express Powerboats, Inc.  
Nautic Global Group  
Premier Marine, Inc.  
Pursuit Boats  
Rampage Sport Fishing Yachts Division of KCS International  
Regulator Marine, Inc.  
S2 Yachts  
Sabre Yachts  
Sea Eagle Boats  
Seminole Marine  
Silverton Marine Corp.  
Splendor Boats LLC  
Stingray Boat Company  
Sunsation Powerboats  
Thunderbird/Formula  
Triton Boat Company  
Triton Industries, Inc. Manitou Pontoon Boats  
Win Marine Ventures LLC  
World Cat  
Yamaha - Newnan  
Zodiac of North America

Llebroc Industries  
Load Rite Trailers, Inc.  
M & G Electronics Corp.  
Magic Tilt Trailers, Inc.  
Mallory Marine Products (a Mr. Gasket Performance Group Co.)  
Maretron LLP  
Marine Accessories Corp.  
Marine Audio Engineering & Sales, Inc.  
Marine Concepts  
Marine Systems, Inc.  
MarinePC  
Marvair  
Mastervolt Inc.  
Mastry Engine Center  
Maxwell America LLC  
Meguiar's, Inc.  
Mustang Survival, Inc.  
Nobeltec, Inc.  
NSME, Inc. DBA Si-Tex Marine Electronics  
Omni Specialty Packaging  
P.Y.I., Inc.  
Pettit Marine Paint Division of Kop-Coat  
Polyform U.S., Ltd.  
Pretech Company  
Quality Boat Lifts  
Quick USA  
Racor Division Parker Hannifin Corp.  
Raritan Engineering Co., Inc.  
Road King Trailers, Inc.  
Rupp Marine, Inc.  
Scandvik, Inc.  
Schuman Boat & Yacht Detailing  
Sea Hawk Paints  
Shakespeare Electronic Products  
Shields Marine Hose Div of Teleflex  
SHURflo, LLC  
Shurhold Industries, Inc.  
SmartPlug Systems, LLC  
Spradling International Marine  
Stainless Marine, Inc.  
Sta-Lok Terminals Inc.  
Stoltz Industries, Inc.  
Sunshine Marine Tanks  
Syntec Industries  
Taylor Made Products  
Teak Isle Mfg.  
The Coleman Company  
Thetford-Norcold Corp.  
Trac Ecological of America Inc.  
Tuff Torq Corporation  
Veethree Electronics & Marine, LLC  
Velvet Drive Transmissions  
Vetus Inc.  
Waterland Manufacturing, Inc.  
West System Inc  
Westerbeke Corp.  
Wet Sounds  
Windsor Industries, Inc.