

Recreational Boat Market - Global Outlook and Forecast 2020-2025

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Abstracts

Get an in-depth analysis of COVID-19 impact on global recreational boat market.

The global recreational boat market by revenue is expected to grow at a CAGR of over 11% during the period 2019–2025.

Europe and North America are expected to witness high demand for recreational boats during the forecast period as the commercial adoption of boats has increased in these regions. With over 23,000 miles of inland waterways and over 43,500 miles of coastline, Europe offers its 48-million citizens a perfect ecosystem to participate in recreational marine activities annually. Countries such as Belgium and Croatia have witnessed significant growth in the recreational boat market. There are an estimated 6 million boats kept in European waters, and over 10,000 marinas offer more than 1 million berths both inland and in coastal areas.

The marine industry is witnessing an increasing appeal of technologically-advanced features such as joystick docking control, automatic trim controls, and digital throttle and shift among end-users. With a hectic lifestyle, end-users have less time to develop driving skills and compile practical experience on the water. Thus, their reliance on automatic controls is growing at an unprecedented rate. The marine industry has witnessed some of the significant development in marine technology, especially for outboard engines in the past two decades. The year 2018 witnessed a plethora of technological advancements in outboard and inboard engine technology, ranging from technologically advanced, light-weight, easier-to-use outboard engines and power systems along with advancements in inboards, diesel, and control systems. Hence, advances in marine technology are likely to drive the recreational boat market during the forecast period.

The following factors that are expected to contribute to the growth of the recreational boat market during the forecast period:

Advancement in Marine Technology

Growth in the Electric Boat Industry

High Participation in Leisure Boating Activities in Europe

The study considers the present scenario of the recreational boat market and its dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report covers both the demand and supply sides of the market. It profiles and examines leading companies and other prominent companies operating in the market.

Recreational Boat Market: Segmentation

This research report includes a detailed segmentation by product, power, activity, and geography. Regulations have played a significant role in increasing the demand for outboard boats. The push toward single-fuel policies to promote safety in the industrial, military and other markets is expected to drive outboard high-powered diesel model. Further, significant upgrades in engine technology over the last 10–15 years and the introduction of four-stroke engines and two-stroke direct fuel injection have resulted in light engines with better strength and fuel efficiency.

Inboard boats are a relatively higher price than outboard models, which have significantly affected the growth of the segment. Although the market growth in terms of unit shipment despite several challenges in the past five years, the inboard segment continues to account for the largest revenue share.

The personal watercraft (PWC) segment has witnessed traction in the tourism sector as these boats provide a simple and affordable way to get out on the water. The global sale has risen significantly in the past five years. North America has emerged as one of the major regions in terms of demand. Factors such as affordability, ease of operation, and low cost of ownership have increased the demand for PWC.

The demand for engine-powered engines on account of the growing coastal tourism

worldwide. Developing high-powered motors will further promote the use of these engines in tourist vessels. Also, the increase in family tour boat rental practices would boost demand during the expected period. 4-stroke engines are likely to retain supremacy due to high-power output and reduced environmental impact. Therefore, stringent emission standards imposed by regulatory bodies across the globe will further support growth in the segment.

A spurt of tourism across the globe has boosted the sale of sail-powered boats. The increasing youth participation in sports and leisure activities and rising health awareness are driving the segment. Another factor, which is likely to drive the growth of the man-powered segment, is the growing outdoor participation of youth across the globe. However, the lack of technological innovations and the need for a long-term time commitment, the high maintenance cost of sailboats are major factors contributing to the segment's declining sales.

The growth in cruising activities is expected to drive the recreational boating industry during the forecast period. The ocean cruise ship capacity is likely to increase by 48% from 2018 to 2027, which is expected to provide the push to the cruise industry. These activities are expected to push the sale of recreational boats across the globe. Moreover, the growth in the number of cruise tourists worldwide increased significantly, reaching 31 million in 2019 from 18 million passengers in 2009.

Market Segmentation by Product

Outboard

Inboard/Sterndrive

Personal Watercrafts (PWC)

Superyachts

Others

Market Segmentation by Power

Engine-powered

Man-powered

Sail-propelled

Market Segmentation by Activity

Cruising

Watersports

Fishing

Insights by Geography

The presence of major manufacturing facilities in the region is a major driver for the growth of the US recreational boat market. With rising consumer confidence, the manufacturers are introducing new products to attract the younger generation. New sales and recreational boating expenditure grew for the eighth consecutive year in 2019, and this trend is expected to continue in 2020. Low-interest rates, rising disposable income, consumer spending, and healthy growth in the housing market are expected to have a positive impact on leisure activities during the forecast period.

The high spending power among Europeans is a major factor propelling the growth of the European recreational boat market. Since the Brexit referendum in June 2016, British recreational, superyacht, and small-scale commercial maritime sectors have recorded improvements in business performance. However, the dearth of skilled staff is a persistent challenge in the European maritime industry, especially in the UK.

Market Segmentation by Geography

APAC

China

Japan

Australia

New Zealand

South Korea

India

Malaysia

Europe

UK

Germany

France

Italy

Spain

Netherlands

Norway

Poland

Latin America

Brazil

Mexico

Argentina

MEA

UAE

South Africa

North America

US

Canada

Key Vendor Analysis

The global recreational boat market is fragmented due to the presence of local as well as global players. Ferretti and Sunseeker International are the key leading vendors. The competition is intense across the globe. The market concentration in developed countries such as the US and other Western European countries is high, while the market in developing economies such as China and India is stable because of the entry of several global brands. The competition among vendors is based on offerings and pricing. Vendors are using new business models and focusing on developing product portfolios to drive growth. The focus is heavily shifting from yachts to luxury products, which are likely to provide vast opportunities to vendors.

Key Vendors

Brunswick Corporation

Groupe Beneteau

Azimut-Benetti Group

Bombardier Recreational Products

Ferretti

Other Prominent Market

Prince Yachts

Marine Products Corporation

MCBC Holdings Inc.

Malibu Boats Inc.

Hanse yachts

BAVARIA Yachtbau

Bertram Yachts

Boston Whaler Boats

Chaparral Boats

Grady-White Boats

Lund Boat Company

White River Marine Group

Yamaha Motor Corporation

Viking Yacht

Grand Banks Yachts

Porter

Maverick Boat Group Inc.

Correct Craft

Baja Marine

Pacific Asian Enterprises

Albemarle Boats

Marlow Hunter

Catalina Yachts

Hobie Cat Corporation

Zodiac Marine & Pool SAS

Sunseeker International

Fountain Powerboat Industries Incorporated

Godfrey Marine

Thunder Jet

Explorer Industries

Custom Weld

Duckworth Boats

High Caliber

Key Market Insights

The report provides the following insights into the recreational boat market for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market

Includes a detailed analysis of growth drivers, challenges, and investment opportunities

Delivers a complete overview of segments and the regional outlook of the market

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage

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