

Global Yacht Market: Analysis By Propulsion, By Category, By Type, By Length, By Region Size And Trends With Impact Of COVID-19 And Forecast up to 2026

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Abstracts

The global yacht market in 2021 was valued at US\$10.80 billion. The market is anticipated to reach US\$15.15 billion by 2026. A yacht is a sea vessel that is used strictly for recreational or pleasure purposes like cruising, entertaining, water sports, fishing, or year-round accommodations. Yachts are usually large enough to have some form of sleeping quarters on board for overnight trips as well as a kitchen and a bathroom. They are also large enough that they require more than human inputs (i.e. rowing) to propel forward.

Much of the expertise in the luxury yachtbuilding market is concentrated in only a few countries, including Italy, Turkey, the Netherlands, the US and Germany. The Italian manufacturers benefit from a worldwide reputation for quality and style. This market's customer base is composed of extremely wealthy individuals who can afford the significant purchasing price of a large yacht as well as the maintenance costs. An increase in income inequality, higher disposable income, and a positive macroeconomic scenario are some of the factors driving the market growth. The market is expected to grow at a CAGR of 7% during the forecast period of 2022-2026.

Market Segmentation Analysis:

By Propulsion: The report provides the bifurcation of the yacht market into three segments based on propulsion: Outboard & Inflatables, Inboard, and Sailing. In 2021, the outboard & inflatables segment accounted for the maximum share of approximately 45% in the global yacht market owing to benefits such as high speed, power, and large

distance coverage, among others. The Inboard segment is further segmented into three categories: Composite, Made-to-measure, and Super. The global made-to-measure inboard yacht market is expected to experience significant growth during the forecasted period with a CAGR of 13.6% driven by the increasing awareness and acceptance of yachting culture in the Asia Pacific and a series of favorable policies supporting the yacht industry promulgated in major countries.

By Type: The report provides the segmentation on the basis of type: Super Yacht, Sport Yacht, Flybridge Yacht, Long Range Yacht, and Others. The super yacht segment is holding the major share of 32% in the market in 2021. The growth of the market is driven by the increase in the number of potential end customers i.e., VHNWIs and UHNWIs.

By Length: The report further provided the segmentation based on the length of the yacht: Below 20 meters, 20-50 meters, and Above 50 meters. The global above 50-meter yacht segment would grow at the highest CAGR of 7.23% during the year 2022-2026, owing to the increasing leisure trips and voyages taken by generation Z along with the growing preference to live a luxury life.

By Region: In the report, the global yacht market is divided into five regions: Europe, North America, Asia Pacific, Latin America, and Middle East & Africa. Europe dominated the market in 2021 with almost 36.4% share of the global market. Europe is one of the main destinations for marine culture, especially Northern Europe, which has a very rich ecosystem for yacht charter. Countries like Italy, Ireland, Scotland, Denmark, Sweden, Germany and Russia offer a variety of options to choose from including crewed yachts, luxury yachts and motor yachts.

Unlike the Luxury Goods coverage, where Asia Pacific represents around 50% of sales, the yacht market is still in its initial stages in Asia Pacific, which represents approx. 20% of sales. The Asia Pacific would provide lucrative opportunities to the overall market during the forecast period, due to the rising popularity of recreational activities and increased marine tourism in nations such as Thailand, Malaysia, Singapore, China, Japan, and Australia.

Global Yacht Market Dynamics:

Growth Drivers: One of the most important factors impacting the yacht market is the increase in the UHNWI population. As the HNWI increases, the addressable customer base of the yacht industry also increases. This provides a strong tailwind for the

manufacturers of yachts. In addition to a growing customer base of UHNWIs, the size of their wealth is also expected to grow in the coming years. This would translate into an increasing average size of yachts or customers shifting towards models with a higher degree of customization and premium features. In both cases, this should support growth in the average selling price of yachts. Therefore, the market would experience tremendous growth. Furthermore, the market has been growing over the past few years, due to factors such as growing demand for luxury tourism, rising construction of super yachts, growing number of boat shows, favorable government initiatives, and increasing demand for yacht charter, etc.

Challenges: However, the market has been confronted with some challenges specifically, high investments and upkeep costs associated with yachts, cyclicity of the yachting industry, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as customization and personalization, acute focus on eco-friendly and sustainable products, the internet of things, yachts run quieter due to tech advances, explorer yachts are continuing to rise in popularity, etc. Explorer yachts are a popular demand for yacht enthusiasts. Whether a client is keen to purchase or charter, explorer yachts are among the most demanded vessels, due to their peculiarity, great cruising performance, an immense ability to travel in remote locations. Changing demographics among HNW and UHNW individuals have ushered in a new and exciting demand for explorer yachts and adventure travel excursions. This trend is expected to further propel the growth of the yacht industry in the coming years.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has adversely affected the yacht market in the first half of 2020. However, COVID-19 has changed the way target customers live. People tend to start spending more on leisure activities. This has increased the sale of both motor yachts and sailing yachts in the year 2021. Moreover, as the number of billionaires grows and COVID-19 has added to incentives for avoiding crowds, the multi-billion-dollar global yacht industry is rebounding fast after near-paralysis at the onset of the pandemic. On the other hand, the pandemic has prompted digitalization initiatives in the market.

Competitive Landscape:

The global yacht market is moving toward consolidation. Following the 2008 financial

crisis, some yacht companies went bankrupt (e.g. Aicon, Rodriguez, Royal Denship, etc.), others were rescued (e.g. Ferretti itself, Baglietto, Bavaria, Dalla Piet?, Perini) or decided to join forces together with other smaller shipyards and form a larger conglomerate (e.g., Tecnomar, Admiral, Cantieri Apuania combined as Italian Sea Group). As a matter of fact, it has been witnessed increasing concentration in the industry, with a declining number of shipyards and increasing number of orders, leading to a higher number of deliveries per shipyard.

The key players of the global yacht market are:

HanseYachts AG

LVMH Mo?t Hennessy Louis Vuitton (Princess Yachts Ltd.)

Lurssen Yachts

Sanlorenzo S.p.a

Ferretti Group

Azimut Yachts

Sunseeker International Ltd.

Westport LLC

Alexander Marine Co., Ltd. & Subsidiaries

Feadship Yachts

Bilgin Yachts

Oceanco

The Italian Sea Group

In the inboard segment (30ft to 141ft, excluding super yachts), the top 5 players account for a 43% share of the market in 2021. Ferretti Group held a share of approximately

13% in the inboard yacht market, followed by Azimut Benetti, Sanlorenzo, Princess, and Sunseeker, respectively. The key strategy of the market players to expand their market share is merger and acquisition. For instance, in 2019, Ferretti Group acquired Wally Yachts, with the objective of strengthening the company's position in the inboard market and creating an incubator for innovative product development. In 2021, Perini (in bankruptcy proceedings) was bought by The Italian Sea Group.

Scope of the Report:

The report titled "Global Yacht Market: Analysis By Propulsion, By Category, By Type, By Length, By Region Size And Trends With Impact Of COVID-19 And Forecast up to 2026", includes:

An in-depth analysis of the global yacht market by value, by propulsion, by category, by type, by length, by export, by operational fleet, by region, etc.

The regional analysis of the yacht market, including the following regions:

Europe (Italy, Netherlands, Germany, UK, France, and Rest of Europe)

North America (The US and Canada)

Asia Pacific (China, Japan, and the Rest of the Asia Pacific)

Latin America

Middle East & Africa

Comprehensive information about emerging markets. This report analyses the market for various segments across geographies.

Provides an analysis of the COVID-19 impact on the global yacht market.

Assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. Growth of the overall yacht market has also been forecasted for the period 2022-2026, taking into consideration the previous growth patterns, the growth drivers, and the current and future trends.

Evaluation of the potential role of yacht services to improve the market status.

Identification of new technological developments, R&D activities, and product launches occurring in the yacht market.

In-depth profiling of the key players, including the assessment of the business overview, market strategies, regional and business segments of the leading players in the market.

The recent developments, mergers and acquisitions related to mentioned key players are provided in the market report.

The in-depth analysis provides an insight into the market, underlining the growth rate and opportunities offered in the business.

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