

# Global Sailing Processor Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Sailing Processor market size is expected to reach \$ 760 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

The Sailing Processor is the core computing and integration unit in modern marine electronic systems, primarily used for real-time acquisition, calculation, integration, and decision output of data such as vessel speed, heading, wind speed and direction, attitude, position, route planning, and hull motion. These products are typically deployed in sailboats, racing yachts, high-end pleasure craft, and some special-purpose vessels, acting as the "data and algorithm hub" connecting sensor networks (wind sensors, GPS, IMU, compass), display terminals (multifunction displays, tactical displays), and execution systems (autopilots, steering gears). From a system perspective, the Sailing Processor is not an isolated device, but a core node in the marine electronic system architecture. Its real-time computing capabilities, algorithm stability, and multi-source data fusion capabilities directly determine the accuracy of navigation decisions and the level of safety redundancy. In 2025, global sales of Sailing Processors are projected to reach approximately 320,000 units, with an average unit price of US\$1,540. System-level prices for high-end racing and professional marine applications can exceed US\$2,500 per set. In typical applications, a medium-to-large ocean-going sailboat usually has one main Sailing Processor, connected to 6-12 sensor nodes via a bus (NMEA 2000/Ethernet); racing yachts or high-end blue-water cruising sailboats often feature a dual-processor architecture (one main and one backup) to meet redundancy and high reliability requirements. As onboard electronic systems evolve from "display-driven" to "algorithm-driven," the value and system importance of the Sailing Processor are continuously increasing.

## Supply Chain

The upstream supply chain for the Sailing Processor primarily includes industrial-grade SoC/MCU, inertial measurement units (IMUs), high-speed communication chips, storage devices, high-reliability PCBs, industrial-grade connectors, and embedded navigation algorithm software. The computing chips and algorithm software development costs account for 55%-70% of the overall BOM cost, requiring extremely high demands on long-term supply stability, anti-interference capabilities, and real-time computing performance. Typical upstream suppliers include: NXP Semiconductors, STMicroelectronics, Texas Instruments, Analog Devices, and Infineon Technologies.

### Manufacturer Characteristics

Comprehensive marine electronics manufacturers such as Navico Group, Garmin, Raymarine, and Furuno have advantages in system integration capabilities, global channels, and brand penetration; while specialized manufacturers such as Orca, Sailmon, and NKE Marine differentiate themselves through their expertise in navigation algorithms, competition-grade data modeling, and user experience.

### Applications

The Sailing Processor is primarily used in auxiliary navigation systems for ocean-going cruising sailboats, high-end racing yachts, blue-water sailing yachts, training and teaching sailing platforms, and some special mission vessels. Typical downstream customers include: Beneteau, Jeanneau, Hanse Yachts, Nautor's Swan, Baltic Yachts, and other boat manufacturers, as well as high-end refitting and system integrators.

### Breakthrough Point

The real breakthrough point is not in further increasing the sampling frequency or the number of interfaces, but in the depth of algorithmic understanding of "real sailing conditions." For example, Navico Group, in its high-end Sailing Processor platform, deeply couples wind field changes, hull attitude, historical sailing trajectories, and polar diagrams, enabling the processor to dynamically correct speed and course prediction results in scenarios involving crosswinds, gusts, and continuous course corrections. Compared to traditional methods based on fixed polar diagrams and static wind angles, this mechanism significantly reduces cumulative errors and reliance on human judgment over long voyages. In the technical specifications of a certain international high-end sailing project tender, it was explicitly required that the Sailing Processor must support dynamic polar diagram correction, multi-source data redundancy verification,

and navigation decision consistency verification. This requirement directly incorporates algorithmic capabilities into the selection criteria, transforming the Sailing Processor from a "high-end optional accessory" into a "core system module that affects sailing efficiency and safety margins." This shift marks a transition in industry competition from being driven by hardware specifications to a stage centered on the value of system-level algorithms.

## Market Influencing Factors

The growth of the Sailing Processor market is primarily driven by the recovery of the high-end sailing market, improved maritime safety standards, and increasing demand for intelligent navigation data. On the one hand, the increasing demands for data reliability and decision-making accuracy in offshore and competitive sailing have elevated the processor's position within the system; on the other hand, user concerns about navigation risks, fuel efficiency, and route planning have prompted manufacturers to increase investment in algorithms and system-level capabilities. Regionally, Europe remains the market with the highest concentration of technology and high-end demand, while North America has advantages in brand and channel scale. In the overall competitive landscape, simply relying on hardware stacking is no longer sufficient to create a competitive barrier. The ability to continuously validate algorithm value in real-world sailing scenarios and deeply integrate into the entire vessel and maritime ecosystem will be the core determining factor for the long-term competitiveness of Sailing Processor manufacturers.

This report studies the global Sailing Processor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Sailing Processor and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Sailing Processor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Sailing Processor total production and demand, 2021-2032, (K Units)

Global Sailing Processor total production value, 2021-2032, (USD Million)

Global Sailing Processor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Sailing Processor consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Sailing Processor domestic production, consumption, key domestic manufacturers and share

Global Sailing Processor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Sailing Processor production by Ethernet Port, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Sailing Processor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Sailing Processor market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Navico Group (Public, Egersund, Norway), A+T Instruments (Private, Hampshire, UK), Orca (Private, Oslo, Norway), Sailmon (Private, Den Haag, Netherlands), Garmin (Public, Olathe, USA), Raymarine (Public, Hudson, USA), Furuno (Public, Hyogo, Japan), Alphatron Marine (Public, Tokyo, Japan), FaRo (Private, Navarra, Spain), Assured Systems (Private, Stone, UK), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Sailing Processor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Ethernet Port, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and

2027-2032 as the forecast year.

#### Global Sailing Processor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Sailing Processor Market, Segmentation by Ethernet Port:

1 x 100Mbit

2 x 100Mbit

#### Global Sailing Processor Market, Segmentation by Calculation Period:

?10 ms

10–50 ms

?100 ms

#### Global Sailing Processor Market, Segmentation by Integration Capabilities:

Single-source Integration Type

Multi-source Integration Type

#### Global Sailing Processor Market, Segmentation by Application:

Cruiser Boats

Racing Boats

Other

#### Companies Profiled:

Navico Group (Public, Egersund, Norway)

A+T Instruments (Private, Hampshire, UK)

Orca (Private, Oslo, Norway)

Sailmon (Private, Den Haag, Netherlands)

Garmin (Public, Olathe, USA)

Raymarine (Public, Hudson, USA)

Furuno (Public, Hyogo, Japan)

Alphatron Marine (Public, Tokyo, Japan)

FaRo (Private, Navarra, Spain)

Assured Systems (Private, Stone, UK)

Coursemaster Autopilots (Private, Sydney, Australia)

COMNAV Marine (Private, Richmond, Canada)

Anschuetz (Private, Kiel, Germany)

Sperry Marine (Public, Charlottesville, USA)

Navis (Private, Vantaa, Finland)

Humminbird (Public, Eufaula, USA)

CSSC (Private, Shanghai, China)

Lida Navigation (Private, Shanghai, China)

Sea Machines Robotics (Private, Boston, USA)

AMI TMQ International (Private, Murarrie, Australia)

NKE Marine (Private, Hennebont, France)

#### Key Questions Answered:

1. How big is the global Sailing Processor market?
2. What is the demand of the global Sailing Processor market?
3. What is the year over year growth of the global Sailing Processor market?
4. What is the production and production value of the global Sailing Processor market?
5. Who are the key producers in the global Sailing Processor market?
6. What are the growth factors driving the market demand?

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