

Small Marine Engines Market By Type (Gasoline, Diesel), By Placement (Outboard, Inboard), By Displacement (Upto 2 L, 2–4 L, 4–6 L), By Application (Recreational Boats, Support Vessels, Coastal Boats, Fishing Boats), By Region, By Competition Forecast & Opportunities, 2018-2028F

<https://marketpublishers.com/r/S0AC8AD8FC9EEN.html>

Date: October 2023

Pages: 189

Price: US\$ 4,500.00 (Single User License)

ID: S0AC8AD8FC9EEN

Abstracts

The Global Small Marine Engines Market has achieved a valuation of USD 6.08 billion in 2022, and it is poised for robust growth in the forecast period, with an expected Compound Annual Growth Rate (CAGR) of 4.19% through 2028.

The Small Marine Engines market is a specialized segment within the broader marine industry. It is dedicated to the production, distribution, and application of compact propulsion systems designed explicitly for small to medium-sized waterborne vehicles. These engines find primary use in a diverse array of vessels, including recreational boats, fishing boats, sailboats, yachts, and smaller commercial and industrial watercraft.

Small marine engines are characterized by their compact physical dimensions, typically spanning a power range from a few horsepower to several hundred horsepower. This range caters to the specific power requirements of vessels falling within this size category. These engines are of paramount importance as they provide the essential thrust and propulsion necessary for the efficient and safe navigation of water bodies.

The market encompasses a variety of engine types, including conventional internal combustion engines that operate on fuels like gasoline, diesel, or liquefied natural gas (LNG). It also includes innovative, environmentally friendly technologies such as electric propulsion, hybrid systems, and hydrogen fuel cells. These engines play a pivotal role in

facilitating water-based transportation, recreational activities, and commercial operations, establishing them as an integral and indispensable component of the global maritime sector.

In summary, the Small Marine Engines market is dedicated to the advancement, manufacture, and application of compact propulsion systems tailored specifically to meet the unique requirements of smaller watercraft. These engines drive improvements in efficiency, safety, and functionality for vessels operating within this size category.

Key Market Drivers

Rising Demand for Recreational Boating

Recreational boating has become a popular leisure activity worldwide, contributing significantly to the growth of the global Small Marine Engines market. As disposable incomes rise and people seek outdoor experiences, the demand for recreational boats has surged. Small marine engines, which power a wide range of boats, from speedboats to sailboats, are at the forefront of this trend. In recent years, the COVID-19 pandemic further accelerated the interest in recreational boating. With international travel restrictions and a desire for safe outdoor activities, many turned to boating as a means of escape. This boosted boat sales and, consequently, the demand for small marine engines. Moreover, the appeal of waterfront properties and marina communities has grown, creating a continuous market for small marine engines. People who live near water bodies are more likely to invest in boats, leading to sustained demand.

Expansion of the Fishing Industry

The global fishing industry heavily relies on small marine engines to power various types of fishing vessels, from small trawlers to longliners. As the global population continues to grow, so does the demand for seafood. This surge in demand places considerable pressure on the fishing industry to increase its catch. To meet this demand, the fishing industry is modernizing its fleet, replacing older engines with more efficient and eco-friendly small marine engines. These engines not only provide the necessary power but also help vessels comply with stricter environmental regulations. Furthermore, innovations in fishing techniques, such as longlining and purse seining, require specialized boats with reliable engines. Small marine engine manufacturers are continually developing engines tailored to these specific needs, further driving market growth.

Advancements in Engine Technology

Technological advancements play a pivotal role in the evolution of the small marine engines market. Engine manufacturers are constantly striving to enhance engine efficiency, reduce emissions, and improve overall performance. This drive for innovation has led to breakthroughs like electronic fuel injection systems, hybrid propulsion solutions, and the use of lightweight materials. Electronic fuel injection, for instance, has improved fuel efficiency and reduced emissions, making small marine engines more eco-friendly and cost-effective. Hybrid propulsion systems, combining traditional engines with electric power, offer increased fuel savings and reduced environmental impact. These innovations attract boat manufacturers and operators looking to minimize their carbon footprint while maintaining high performance.

Stringent Environmental Regulations

Global environmental concerns have led governments to implement increasingly strict emissions standards and regulations, directly impacting the small marine engines market. As environmental consciousness grows, marine engine manufacturers must adapt to comply with these regulations. Engines must meet stringent emission limits, which encourage manufacturers to invest in research and development for cleaner and more efficient engines. This regulatory pressure fosters innovation and drives the adoption of advanced technologies like catalytic converters, particulate filters, and exhaust gas recirculation systems in small marine engines. Manufacturers that can produce engines that meet or exceed these environmental standards gain a competitive advantage in the market, attracting environmentally conscious customers and government contracts.

Growth in Coastal Tourism

Coastal tourism has become a major driver of the small marine engines market. Tourists worldwide seek coastal destinations for activities such as snorkeling, diving, island hopping, and sightseeing. Small marine engines power the boats used for these recreational activities, driving demand in coastal regions. The appeal of coastal tourism isn't limited to traditional vacationers; it also attracts adventure seekers and nature enthusiasts. Small marine engines enable tour operators to provide safe and efficient transportation for these experiences, further bolstering the market.

Expansion of Commercial Shipping

While larger vessels dominate the commercial shipping industry, small marine engines serve critical auxiliary functions on ships. They power lifeboats, dinghies, onboard generators, and other essential equipment. The expansion of global trade and maritime transport creates a continuous need for reliable auxiliary engines, thus contributing to the growth of the small marine engines market. Commercial ships must adhere to strict safety regulations, which often require the presence of fully operational lifeboats and rescue equipment. Small marine engines are essential components in ensuring these safety measures are met. In conclusion, the global Small Marine Engines market is influenced by a variety of factors, each contributing to its growth and development. The rising demand for recreational boating, the expansion of the fishing industry, advancements in engine technology, stringent environmental regulations, coastal tourism growth, and the expansion of commercial shipping are all key drivers shaping this industry's future. As these drivers continue to evolve, the small marine engines market will see further innovation and adaptation to meet the changing demands of the maritime sector.

Government Policies are Likely to Propel the Market

Emission Standards and Environmental Regulations

Government policies around the world are increasingly focused on reducing emissions and mitigating the environmental impact of various industries, including the marine sector. In the global Small Marine Engines market, governments have introduced stringent emission standards and environmental regulations to curb air and water pollution caused by marine engines. These policies set limits on the amount of pollutants, such as nitrogen oxides (NOx), sulfur oxides (SOx), and particulate matter, that marine engines can emit. To comply with these standards, engine manufacturers are required to invest in research and development to design engines that are more fuel-efficient and emit fewer harmful pollutants. For example, the International Maritime Organization (IMO) has implemented the International Convention for the Prevention of Pollution from Ships (MARPOL) Annex VI, which sets strict limits on emissions from ship engines. These regulations have led to the development of cleaner-burning fuels and the adoption of technologies like exhaust gas cleaning systems (scrubbers) in the marine industry. Government policies promoting emission reduction not only drive innovation in the Small Marine Engines market but also encourage the adoption of cleaner technologies, benefiting both the environment and the industry's long-term sustainability.

Subsidies and Incentives for Green Technologies

Many governments worldwide recognize the importance of transitioning to more eco-friendly and sustainable technologies in the marine industry. To accelerate this transition, they offer subsidies, tax incentives, and financial support to encourage the adoption of green technologies in Small Marine Engines. These policies often target engine manufacturers, shipbuilders, and vessel operators, providing financial incentives to invest in cleaner engine technologies, such as hybrid propulsion systems, LNG (liquefied natural gas) engines, and electric propulsion. In some cases, governments may also offer grants or low-interest loans to facilitate research and development efforts focused on eco-friendly marine engines. Countries like Norway have been at the forefront of promoting green maritime technologies, offering substantial incentives for vessels powered by alternative fuels and emissions-reducing technologies. Such policies not only drive demand for environmentally friendly Small Marine Engines but also contribute to reducing the industry's carbon footprint.

Fuel Quality Regulations

The quality of fuel used in marine engines has a direct impact on emissions and engine performance. Governments worldwide have implemented fuel quality regulations to ensure that marine fuels meet specific standards, such as sulfur content limits. These regulations aim to reduce the emission of harmful pollutants from marine engines and improve air quality in port cities and coastal regions. For instance, the IMO's MARPOL Annex VI sets limits on the sulfur content of marine fuels, progressively reducing sulfur levels over time. This has prompted engine manufacturers to develop engines capable of running on low-sulfur fuels or alternative, cleaner-burning fuels like LNG. Fuel quality regulations not only benefit the environment but also influence the design and engineering of Small Marine Engines, making them more adaptable to varying fuel specifications.

Safety and Certification Standards

Safety is paramount in the marine industry, and governments play a crucial role in ensuring that Small Marine Engines and the vessels they power meet stringent safety and certification standards. These standards cover various aspects, including engine design, materials, and performance, to ensure the reliability and safety of marine engines. Government agencies and international organizations, such as the United States Coast Guard (USCG) and the European Union's European Maritime Safety Agency (EMSA), establish and enforce these standards. Compliance with safety and certification regulations is mandatory for engine manufacturers to sell their products in

global markets. These policies not only protect the safety of passengers and crew but also foster trust in Small Marine Engines, encouraging their adoption by shipbuilders and vessel operators.

Trade Tariffs and Import Regulations

Government policies related to trade tariffs and import regulations can significantly impact the global Small Marine Engines market. Trade disputes, tariff changes, and import restrictions can disrupt supply chains, increase manufacturing costs, and affect the affordability of marine engines in various regions. For example, trade tensions between the United States and China have led to the imposition of tariffs on certain goods, including marine engines. These tariffs can lead to higher prices for imported engines, affecting the competitiveness of foreign manufacturers in the market.

Navigating trade policies and tariffs is a key consideration for both engine manufacturers and buyers in the global Small Marine Engines market, as these policies can influence market dynamics, pricing strategies, and the choice of suppliers.

Support for Research and Development

Government policies that support research and development (R&D) initiatives in the Small Marine Engines sector play a vital role in driving innovation and competitiveness. Many governments provide funding, grants, and incentives to promote R&D efforts aimed at developing more advanced and efficient marine engine technologies. These policies encourage collaboration between engine manufacturers, research institutions, and universities to explore cutting-edge technologies, such as hydrogen fuel cells, battery-electric propulsion, and advanced materials for engine components. By investing in R&D, governments aim to position their countries as leaders in the global Small Marine Engines market while contributing to technological advancements that benefit the industry as a whole.

In conclusion, government policies have a profound impact on the global Small Marine Engines market. Emission standards, green technology incentives, fuel quality regulations, safety standards, trade policies, and R&D support all influence the development, adoption, and competitiveness of small marine engines. As governments worldwide continue to address environmental concerns and seek to enhance the sustainability of the maritime industry, these policies will play an increasingly pivotal role in shaping the market's future.

Key Market Challenges

Environmental Regulations and Emissions Compliance

One of the foremost challenges confronting the global Small Marine Engines market is the increasing stringency of environmental regulations and emissions compliance standards. Governments and international organizations are placing greater emphasis on reducing the environmental impact of the maritime industry, particularly with respect to emissions of pollutants and greenhouse gases. Small marine engines, like their larger counterparts, are subject to a complex web of regulations aimed at curbing emissions of harmful substances such as sulfur oxides (SO_x), nitrogen oxides (NO_x), particulate matter, and carbon dioxide (CO₂). These regulations are designed to mitigate air and water pollution, protect coastal ecosystems, and combat climate change. The International Maritime Organization (IMO) has been at the forefront of setting global standards through its International Convention for the Prevention of Pollution from Ships (MARPOL) Annex VI, which establishes limits on emissions from marine engines. Regional authorities, such as the European Union and the United States Environmental Protection Agency (EPA), have also implemented strict emissions control areas and emissions reduction requirements.

Compliance with these regulations poses several challenges for the Small Marine Engines market:

Technology and Innovation: Engine manufacturers must invest heavily in research and development to design and produce engines that meet or exceed the increasingly stringent emissions limits. This involves developing advanced emission control technologies, optimizing combustion processes, and exploring alternative fuels and power sources like LNG and electric propulsion.

Cost Implications: Meeting emissions standards often requires the incorporation of additional equipment, such as exhaust gas cleaning systems (scrubbers) or selective catalytic reduction (SCR) systems. These technologies can significantly increase the cost of marine engines, potentially impacting affordability for boat builders and operators.

Market Adaptation: The transition to cleaner engines can be challenging for existing vessels and infrastructure. Retrofitting older vessels with emissions control systems or replacing engines can be costly and logistically complex.

Global Harmonization: Varying emissions standards across regions can create

challenges for engine manufacturers and vessel operators operating in international waters. Achieving global harmonization of emissions regulations remains a complex endeavor.

Regulatory Updates: Frequent changes and updates to emissions regulations can make long-term planning and compliance challenging for the industry.

Navigating these regulatory hurdles while maintaining competitiveness and environmental responsibility is a pressing challenge for stakeholders in the Small Marine Engines market. Engine manufacturers must strike a delicate balance between meeting emissions targets, cost-effectiveness, and performance, all while adapting to evolving regulatory landscapes.

Technological Advancements and Innovation

While technological advancements are often seen as opportunities, they also present significant challenges within the global Small Marine Engines market. The rapid pace of innovation and the constant introduction of new technologies can create both opportunities and complexities for manufacturers, shipbuilders, and operators.

Here are the key facets of this challenge:

Complexity of Choice: The Small Marine Engines market is witnessing a surge in technological options. Engine manufacturers are developing and offering a wide range of propulsion solutions, including traditional diesel engines, LNG-powered engines, electric propulsion systems, hybrid solutions, and hydrogen fuel cell technology. This abundance of options can be overwhelming for buyers who must navigate the selection process based on factors like cost, efficiency, and environmental impact.

Integration Challenges: Integrating advanced technologies into existing vessels or designing new vessels around innovative propulsion systems can be complex. Compatibility, retrofitting, and vessel modifications can add significant costs and engineering challenges for shipbuilders and operators.

Maintenance and Training: The introduction of new technologies often requires specialized training for maintenance and operation. Ship crews and engineers must acquire the necessary skills to operate and maintain advanced propulsion systems effectively. Failure to do so can result in downtime and increased maintenance costs.

Market Fragmentation: The proliferation of technology options can lead to market fragmentation, with various manufacturers specializing in different propulsion types. This can make it challenging for customers to find standardized solutions and service providers, potentially affecting competition and economies of scale.

Evolving Standards: As technology advances, industry standards and regulations must adapt. Ensuring that these standards keep pace with innovation while maintaining safety and environmental protection can be a complex and ongoing process.

Cost Management: While new technologies can offer long-term cost savings, the initial investment can be high. Manufacturers and operators must carefully assess the return on investment and balance the upfront costs with the expected benefits over the engine's lifecycle.

In conclusion, while technological advancements hold great promise for the Small Marine Engines market, they also present challenges related to complexity, integration, training, market fragmentation, evolving standards, and cost management. Stakeholders in the industry must navigate these challenges strategically to harness the benefits of innovation while ensuring reliability, efficiency, and compliance with evolving regulations.

Segmental Insights

Recreational Boats Insights

The Recreational boats segment had the largest market share in 2022 & expected to maintain in the forecast period. Recreational boats cater to a diverse range of leisure activities, such as cruising, fishing, water sports, and relaxation. Their adaptability to various purposes makes them a popular choice among individuals seeking different recreational experiences on the water. As disposable incomes rise and people increasingly prioritize experiences over possessions, the demand for leisure and travel activities has surged. Recreational boating offers a unique way to explore coastal regions, waterways, and islands, aligning with the growing trend of experiential travel. Recreational boats come in various sizes and price ranges, making them accessible to a wide range of consumers. From smaller vessels like kayaks and personal watercraft to larger yachts and sailboats, there is an option for every budget and preference. Boating offers an opportunity for families and friends to bond and create lasting memories. The sense of adventure and shared experiences on the water contribute to the social appeal of recreational boating. The desire for a healthier and more active

lifestyle has led many individuals to embrace outdoor activities. Recreational boating aligns with this wellness-oriented mindset, providing a way to stay active, enjoy fresh air, and connect with nature. Water has a calming effect, and recreational boating provides an escape from the stresses of daily life. The soothing sound of waves and the tranquility of being on the water contribute to stress relief and relaxation. Coastal tourism has witnessed significant growth as travelers seek picturesque destinations and unique experiences. Recreational boating plays a pivotal role in coastal tourism, offering travelers the chance to explore hidden coves, snorkel in clear waters, and visit remote islands. Advancements in technology have enhanced the boating experience, making it more accessible and enjoyable. From navigation systems and onboard entertainment to safety features and efficient engines, technology has made recreational boating safer and more appealing. Boating communities and events foster a sense of belonging among enthusiasts. Boat shows, races, and gatherings provide opportunities for like-minded individuals to connect, share stories, and exchange knowledge.

Outboard Insights

The Outboard segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Outboard engines have established a dominant presence within the global Small Marine Engines market due to a combination of factors that contribute to their widespread popularity and success. These engines, characterized by their external positioning on the transom of watercraft, have emerged as frontrunners for several compelling reasons. First and foremost, outboard engines offer exceptional versatility and ease of use. Their portable and detachable nature allows for effortless installation and removal, enabling boat owners to swiftly adapt their vessels for various activities and conditions. This adaptability appeals to a broad spectrum of users, from recreational boaters seeking leisurely outings to anglers and watersports enthusiasts requiring specialized performance. Furthermore, the technological advancements in outboard engine design have led to remarkable improvements in efficiency and performance. Manufacturers have invested heavily in research and development, leading to innovations in fuel efficiency, reduced emissions, and enhanced power output. These advancements resonate with environmentally conscious consumers and regulatory frameworks emphasizing cleaner marine propulsion solutions. The convenience factor also significantly contributes to the outboard engine's dominance. Routine maintenance, repairs, and servicing are more accessible compared to inboard engines due to the accessibility of the outboard's external components. This translates to reduced downtime and lower maintenance costs, enhancing the overall ownership experience and further endearing the outboard engine to a wide user base. Additionally, the global market's increasing demand for

compact and lightweight solutions aligns perfectly with the attributes of outboard engines. These engines offer a favorable power-to-weight ratio, making them suitable for a diverse range of watercraft sizes and types. As marine enthusiasts seek more nimble and efficient options, outboard engines emerge as a natural choice, driving their sustained dominance.

Regional Insights

Asia Pacific

The Asia Pacific region is the largest market for small marine engines and is expected to continue to dominate the market during the forecast period. This is due to the following factors:

Increasing disposable income of people in the region,

Rising tourism

Increasing demand for boats and other marine vessels

Growing popularity of water sports

Expansion of the marine tourism industry

Increasing government support for the marine industry

China is the largest market for small marine engines in the Asia Pacific region, followed by India and Japan. The growth of the market in China is driven by the increasing disposable income of people, the growing popularity of water sports, and the expansion of the marine tourism industry. India is the second largest market for small marine engines in the region, driven by the increasing demand for boats and other marine vessels. Japan is the third largest market for small marine engines in the region, driven by the growing popularity of boating and other water sports.

Europe

Europe is expected to grow at the fastest CAGR during the forecast period, owing to the following factors:

Increasing demand for fuel-efficient engines

Increasing popularity of boating

Stringent emission regulations

Germany is the largest market for small marine engines in Europe, followed by Italy and the United Kingdom. The growth of the market in Germany is driven by the increasing demand for fuel-efficient engines and the increasing popularity of boating. Italy is the second largest market for small marine engines in the region, driven by the increasing popularity of boating. The United Kingdom is the third largest market for small marine engines in the region, driven by the stringent emission regulations.

Key Market Players

Yamaha Motor Corporation

Honda Motor Company, Ltd.

Brunswick Corporation

Suzuki Motor Corporation

Torqeedo GmbH

Volvo Penta

Cummins Inc

MAN SE

Doosan Corporation

Rolls-Royce Holdings PLC

Report Scope:

In this report, the Global Small Marine Engines Market has been segmented into the

Small Marine Engines Market By Type (Gasoline, Diesel), By Placement (Outboard, Inboard), By Displacement (Upt...

following categories, in addition to the industry trends which have also been detailed below:

Small Marine Engines Market, By Type:

Gasoline

Diesel

Small Marine Engines Market, By Placement:

Outboard

Inboard

Small Marine Engines Market, By Displacement:

Upto 2 L

2–4 L

4–6 L

Small Marine Engines Market, By Application:

Recreational Boats

Support Vessels

Coastal Boats

Fishing Boats

Small Marine Engines Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Small Marine Engines Market.

Available Customizations:

Global Small Marine Engines market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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- 13.3. Brunswick Corporation
- 13.4. Suzuki Motor Corporation
- 13.5. Torqeedo GmbH
- 13.6. Volvo Penta
- 13.7. Cummins Inc
- 13.8. MAN SE
- 13.9. Doosan Corporation
- 13.10. Rolls-Royce Holdings PLC

14. STRATEGIC RECOMMENDATIONS

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