

Recreational Boat Market - Global Outlook and Forecast 2022-2027

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Report description:

The global recreational boat market is expected to grow at a CAGR of 7.48% during 2022-2027.

A recreational boat is used for activities, including cruising, watersports, and fishing. Cruising is the most popular and preferable activity in developed regions such as North America and Europe. The demand and adoption of boating activities are high due to numerous reasons, such as increased urbanization and a rise in living standards. These existing and upcoming demands can generally be classified into product, activity, and power segments. The established markets of Europe and North America will witness high demand for recreational boats during the forecast period since the commercial adoption of boats has increased in these regions. This offers vendors many opportunities during the forecast period. In addition, the demand for marine infrastructure arises due to the changing market dynamics, such as a higher number of recreational boat users. The global recreational boating market is witnessing shipments of 1.08 million units in 2027.

TECHNOLOGICAL ADVANCEMENTS

Some technological advancements that are expected to affect the future of the recreational boating market are:

Boats with Inbuilt Tracking Devices: This technology uses GPS to track a boat. The boat monitoring systems are beneficial in emergency cases, where emergency services can reach the desired spot in less time as the exact location is known through GPS. According to Arizton Advisory & Intelligence's global boat monitoring market report, the boat tracking market crossed USD 425.18 million in 2021.

Joystick Steering: This technology aims to attract the younger generation as they can relate this experience to playing a game. This system centralizes the helm controls of the boat in a single location and allows to tilt and twist the controller to move the boat in water whenever necessary.

Self-sailing boats are the future of sailing where boaters can enjoy their time with family while the sailboat drives itself on a

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pre-defined route. For instance, MIT and the Amsterdam Institute for Advanced Metropolitan Solutions have demonstrated a self-sailing boat named Roboat.

Automatic Positioning Systems: This system acts as a virtual anchor for the boat. This boat technology uses GPS satellites to maintain the current position of a boat. This system helps boaters explore the surrounding areas without worrying much about leaving their boat unattended.

Digital Dashboard and Touch-Enabled Devices: The introduction of digital dashboards with touchscreen displays enable users to control the boat by just touching the screens. The fly-by-wire technology introduced in digital throttles and shifts is more reliable than moving mechanical parts.

MARKET TRENDS

Growing Opportunities in Electric Boat Industry

With several technological advancements, the market for electric boats has witnessed significant growth over the past years. Electric boats, particularly hybrid ones where the electric motor doubles as a mechanically spun generator, are now experiencing more uptake in the leisure sector. Electric propulsion for boats has grown in popularity, inspired by a desire to reduce emissions and noise and because it is cheaper to operate and easier to maintain.

Market Drivers

The demand for boating and consumer interest is increasing as people seek boating as an outdoor activity, particularly as other leisure activities, travel, and sports continue to be impacted by COVID-19. According to National Marine Manufacturers Association (NMMA), the retail unit sales of new powerboats surpassed 300,000 units in 2021, for the second consecutive year, and a% increased in the five-year average sales.

Restraints: Pollution Caused by Boating

Boating has an adverse environmental impact. Powerboats are one of the primary reasons causing long-term harm to ocean species. It has several harmful effects, such as a decline in water health, damage to aquatic species, and causes air pollution. Moreover, chemicals used to clean, protect, and run watercraft mix with water, leading to the death of marine wildlife due to poisoning.

SEGMENT ANALYSIS

- Outboard boats are one of the largest selling boats in the North American region. In addition, with technological improvement, the demand for outboard boats has been mostly driven based on the performance of boats. Outboard boats cater to various advantages, including versatile nature, improved performance, ease of use, and diversified options.
- Due to growing coastal tourism worldwide, commercial applications of engine-powered boats are likely to witness significant growth in the demand for outboard engines. Developing high-powered motors will further promote the use of these engines in tourist boats. Engine-powered boats are among the most used boats in the global recreational boating market.
- Developing regions such as the APAC have emerged as one the key regions witnessing a significant increase in passenger base. For instance, Mainland China dominates the Asian market, accounting for around 50% of the Asian passenger volume in 2021. Several factors are driving the cruise industry's growth across the globe, including strong economic recovery and growth of cruise ship capacity.
- 30-50 feet size boats have more storage space, leading to more amenities and larger tank sizes. The tanks in these boats are sufficient for long-term cruising and allow for additional extra tanks required. Several boats come under this category: cabin cruisers, express cruisers, and performance boats.
- Currently, internal combustion engines (ICEs) are the leading technology in marine propulsion. An internal combustion engine

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(ICE) is a heat engine where fuel is ignited to produce heat, producing motion and mechanical energy. The system includes micro-explosions of a compressed mixture of air and fuel, high-pressured fuel, and friction among metal parts.

Segmentation by Type

- Outboard Boats
- Inboard/Stern-drive Boats
- Personal Watercraft Boats (PWC)
- Superyachts
- Other Boats

Segmentation by Power

- Engine-Powered Boats
- Sail-Propelled Boats
- Man-Powered Boats

Segmentation by Activity

- Cruise Tourism
- Watersports
- Fishing

Segmentation by Boat Size

- 30-50 Feet Boats
- >50 Feet Boats

Segmentation by Engine Type

- Ice and Electric
- Hybrid

GEOGRAPHICAL ANALYSIS

There has been a noticeable new sales demand in established markets such as Europe and North America. However, there is still significant rental demand for boating services. On the other hand, emerging markets such as APAC, Middle East and Africa, and Latin America are still developing markets. Over the last two years, these markets have gained a significant share in the global market. North America was the largest market for recreational boats in 2021, with a revenue share of 46.24%. In the US, the demand for recreational boats accounted for a revenue share of 91.72% in 2021. In APAC, Japan is one of the developed markets for recreational boats, whereas countries such as China, India, and South Korea are still developing their markets in terms of demand. Moreover, the global market has been witnessing intense competition in recent years regarding new product launches and product pricing.

Segmentation by Region

- North America
 - o□ US
 - o□ Canada
- Europe
 - o□ Italy
 - o□ The Netherlands
 - o□ UK

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- o Germany
- o France
- o Poland
- o Spain
- o Norway
- APAC
- o Japan
- o China
- o Australia
- o New Zealand
- o India
- o South Korea
- o Malaysia
- Middle East & Africa
- o South Africa
- o UAE
- Latin America
- o Mexico
- o Brazil
- o Argentina

COMPETITIVE LANDSCAPE

The global recreational boat market is fragmented, and the degree of fragmentation is expected to accelerate during the forecast period. There are a significant number of global and domestic vendors across the geographies.

The prominent vendors in the market are:

- Azimut-Benetti Group
- Bombardier Recreational Products (BRP)
- Brunswick Corporation
- Ferretti
- Groupe Beneteau

The competition among these key players has intensified in recent years. The market concentration in developed countries such as the US and other Western European countries is high, while the market is growing in developing economies such as China and India because of the entry of several international brands in these countries. The competition among vendors is based on product offerings and pricing. Vendors are using new business models and focusing on developing the portfolio of their established products to drive growth. The focus on yachts is heavily shifting towards luxury products, which will likely provide vast opportunities to the vendors during the forecast period.

Key Vendors

- Azimut-Benetti Group
- Bombardier Recreational Products (BRP)
- Brunswick Corporation
- Ferretti
- Groupe Beneteau

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Other Prominent Vendors

- []Albemarle Boats
- []Baja Marine
- []Bavaria Yachts
- []Bertram Yachts
- []Princess Yachts
- []Boston Whaler Boats
- []Catalina Yachts
- []Correct Craft
- []Custom Weld Boats
- []Duckworth Boats
- []Explorer Industries
- []Fountain Powerboats
- []Godfrey
- []Grady-White Boats
- []Grand Banks Yachts
- []HanseYachts
- []High Caliber
- []Hobie
- []Lund
- []Malibu
- []Marine Products Corporation
- []Marlow Hunter
- []Maverick Boat Group
- []MCBC Holdings
- []Pacific Asian Enterprises
- []Porter
- []Sunseeker
- []Thunder Jet
- []Viking Yacht
- []White River Marine Group
- []Yamaha
- []Zodiac Marine & Pool

KEY QUESTIONS ANSWERED

- 1.[]HOW BIG IS THE GLOBAL RECREATIONAL BOAT MARKET?
- 2.[]WHAT IS THE GROWTH RATE OF THE GLOBAL RECREATIONAL BOAT MARKET?
- 3.[]WHO ARE THE KEY PLAYERS IN THE RECREATIONAL BOATING MARKET?
- 4.[]WHAT ARE THE GROWTH ENABLERS IN THE GLOBAL RECREATIONAL BOAT MARKET?
- 5.[]WHAT ARE THE LATEST TRENDS IN THE GLOBAL RECREATIONAL BOAT MARKET?
- 6.[]WHICH REGION HOLDS THE LARGEST SHARE IN THE RECREATIONAL BOAT MARKET?

Table of Contents:

- 1 RESEARCH METHODOLOGY
- 2 RESEARCH OBJECTIVES
- 3 RESEARCH PROCESS

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- 4 SCOPE & COVERAGE
 - 4.1 MARKET DEFINITION
 - 4.1.1 INCLUSIONS
 - 4.1.2 EXCLUSIONS
 - 4.1.3 MARKET ESTIMATION CAVEATS
 - 4.2 BASE YEAR
 - 4.3 SCOPE OF THE STUDY
 - 4.4 MARKET SEGMENTS
 - 4.4.1 MARKET SEGMENTATION BY TYPE
 - 4.4.2 MARKET SEGMENTATION BY POWER
 - 4.4.3 MARKET SEGMENTATION BY ACTIVITY
 - 4.4.4 MARKET SEGMENTATION BY BOAT SIZE
 - 4.4.5 MARKET SEGMENTATION BY GEOGRAPHY

- 5 REPORT ASSUMPTIONS & CAVEATS
 - 5.1 KEY CAVEATS
 - 5.2 CURRENCY CONVERSION
 - 5.3 MARKET DERIVATION

- 6 MARKET AT A GLANCE
- 7 PREMIUM INSIGHTS
 - 7.1 MARKET OVERVIEW
 - 7.2 TECHNOLOGICAL ADVANCES
 - 7.3 MARKET DYNAMICS: KEY TRENDS, DRIVERS, AND RESTRAINTS
 - 7.3.1 MARKET TRENDS
 - 7.3.2 MARKET DRIVERS
 - 7.3.3 MARKET RESTRAINTS
 - 7.4 SEGMENT ANALYSIS
 - 7.5 GEOGRAPHICAL ANALYSIS
 - 7.6 COMPETITIVE LANDSCAPE
 - 7.7 ABOUT THE REPORT

- 8 INTRODUCTION
 - 8.1 OVERVIEW
 - 8.2 OVERVIEW OF RECREATIONAL BOAT
 - 8.3 TECHNOLOGICAL ADVANCES IN RECREATIONAL BOATING
 - 8.4 DAWN OF ELECTRIC AND HYBRID ENGINES
 - 8.5 LUXURY MARKET
 - 8.5.1 OVERVIEW
 - 8.6 IMPACT OF COVID-19

- 9 MARKET OPPORTUNITIES & TRENDS
 - 9.1 ADVANCES IN MARINE TECHNOLOGY
 - 9.2 EXPECTED GROWTH IN CONSUMER CONFIDENCE
 - 9.3 GROWING OPPORTUNITIES IN THE ELECTRIC BOAT INDUSTRY
 - 9.4 GROWTH IN THE MARINE TOURISM INDUSTRY

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10 MARKET GROWTH ENABLERS

- 10.1 RISING DEMAND FOR OUTBOARD POWER BOATS
- 10.2 INCREASING PARTICIPATION IN LEISURE BOATING ACTIVITIES IN EUROPE
- 10.3 RISING EXPENDITURE ON LUXURY PRODUCTS AND SERVICES
- 10.4 GROWING BOAT MARKET

11 MARKET RESTRAINTS

- 11.1 ENVIRONMENTAL POLLUTION CAUSED BY BOATING
- 11.2 CONCEPT OF RENTAL AND USED BOAT SERVICES
- 11.3 FAILURE TO ATTRACT MILLENNIALS

12 VALUE CHAIN ANALYSIS

- 12.1 VALUE CHAIN OVERVIEW
 - 12.1.1 OVERVIEW
 - 12.1.2 RAW MATERIAL / DESIGN / EQUIPMENT SUPPLIERS
 - 12.1.3 MANUFACTURERS
 - 12.1.4 DISTRIBUTORS / DEALERS
 - 12.1.5 RETAILERS
 - 12.1.6 END-USERS

13 MARKET LANDSCAPE

- 13.1 MARKET OVERVIEW
 - 13.1.1 HISTORICAL DATA 2017-2020
- 13.2 MARKET SIZE & FORECAST
- 13.3 KEY FACTORS IMPACTING RECREATIONAL BOAT MARKET
- 13.4 SUPERYACHT ORDER BOOK
 - 13.4.1 OVERVIEW
- 13.5 FIVE FORCES ANALYSIS
 - 13.5.1 THREAT OF NEW ENTRANTS
 - 13.5.2 BARGAINING POWER OF SUPPLIERS
 - 13.5.3 BARGAINING POWER OF BUYERS
 - 13.5.4 THREAT OF SUBSTITUTES
 - 13.5.5 COMPETITIVE RIVALRY

14 TYPE

- 14.1 MARKET SNAPSHOT & GROWTH ENGINE (REVENUE)
- 14.2 MARKET SNAPSHOT & GROWTH ENGINE (UNITS)
- 14.3 MARKET OVERVIEW
- 14.4 OUTBOARD BOAT
 - 14.4.1 MARKET SIZE & FORECAST
 - 14.4.2 MARKET BY GEOGRAPHY (REVENUE)
 - 14.4.3 MARKET BY GEOGRAPHY (UNITS)
- 14.5 INBOARD/STERNDRIVE BOAT
 - 14.5.1 MARKET SIZE & FORECAST
 - 14.5.2 MARKET BY GEOGRAPHY (REVENUE)
 - 14.5.3 MARKET BY GEOGRAPHY (UNITS)

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14.6 PERSONAL WATERCRAFT BOAT (PWC)

14.6.1 MARKET SIZE & FORECAST

14.6.2 MARKET BY GEOGRAPHY (REVENUE)

14.6.3 MARKET BY GEOGRAPHY (UNITS)

14.7 YACHTS

14.7.1 MARKET SIZE & FORECAST

14.7.2 MARKET BY GEOGRAPHY (REVENUE)

14.7.3 MARKET BY GEOGRAPHY (UNITS)

14.8 OTHER BOATS

14.8.1 MARKET SIZE & FORECAST

14.8.2 MARKET BY GEOGRAPHY (REVENUE)

14.8.3 MARKET BY GEOGRAPHY (UNITS)

15 POWER

15.1 MARKET SNAPSHOT & GROWTH ENGINE (REVENUE)

15.2 MARKET SNAPSHOT & GROWTH ENGINE (UNITS)

15.3 MARKET OVERVIEW

15.4 ENGINE-POWERED BOATS

15.4.1 MARKET SIZE & FORECAST

15.4.2 MARKET BY GEOGRAPHY (REVENUE)

15.4.3 MARKET BY GEOGRAPHY (UNITS)

15.5 SAIL-PROPELLED BOATS

15.5.1 MARKET SIZE & FORECAST

15.5.2 MARKET BY GEOGRAPHY (REVENUE)

15.5.3 MARKET BY GEOGRAPHY (UNITS)

15.6 MAN-POWERED BOATS

15.6.1 MARKET SIZE & FORECAST

15.6.2 MARKET BY GEOGRAPHY (REVENUE)

15.6.3 MARKET BY GEOGRAPHY (UNITS)

16 ACTIVITY

16.1 MARKET SNAPSHOT & GROWTH ENGINE (REVENUE)

16.2 MARKET SNAPSHOT & GROWTH ENGINE (UNITS)

16.3 MARKET OVERVIEW

16.4 CRUISE TOURISM

16.4.1 MARKET SIZE & FORECAST

16.4.2 MARKET BY GEOGRAPHY (REVENUE)

16.4.3 MARKET BY GEOGRAPHY (UNITS)

16.5 WATER SPORTS

16.5.1 MARKET SIZE & FORECAST

16.5.2 MARKET BY GEOGRAPHY (REVENUE)

16.5.3 MARKET BY GEOGRAPHY (UNITS)

16.6 FISHING

16.6.1 MARKET SIZE & FORECAST

16.6.2 MARKET BY GEOGRAPHY (REVENUE)

16.6.3 MARKET BY GEOGRAPHY (UNITS)

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- 17 BOAT SIZE
 - 17.1 MARKET SNAPSHOT & GROWTH ENGINE (REVENUE)
 - 17.2 MARKET SNAPSHOT & GROWTH ENGINE (UNITS)
 - 17.3 MARKET OVERVIEW
 - 17.4 30-50 FEET BOATS
 - 17.4.1 MARKET SIZE & FORECAST
 - 17.4.2 MARKET BY GEOGRAPHY (REVENUE)
 - 17.4.3 MARKET BY GEOGRAPHY (UNITS)
 - 17.5 <30 FEET BOATS
 - 17.5.1 MARKET SIZE & FORECAST
 - 17.5.2 MARKET BY GEOGRAPHY (REVENUE)
 - 17.5.3 MARKET BY GEOGRAPHY (UNITS)
 - 17.6 >50 FEET BOATS
 - 17.6.1 MARKET SIZE & FORECAST
 - 17.6.2 MARKET BY GEOGRAPHY (REVENUE)
 - 17.6.3 MARKET BY GEOGRAPHY (UNITS)

- 18 GEOGRAPHY
 - 18.1 MARKET SNAPSHOT & GROWTH ENGINE (REVENUE)
 - 18.2 MARKET SNAPSHOT & GROWTH ENGINE (UNITS)
 - 18.3 GEOGRAPHIC OVERVIEW
 - 18.3.1 MARKET BY GEOGRAPHY (REVENUE)
 - 18.3.2 MARKET BY GEOGRAPHY (UNITS)

- 19 NORTH AMERICA
 - 19.1 MARKET OVERVIEW
 - 19.1.1 HISTORICAL DATA 2017-2020
 - 19.2 PEST ANALYSIS
 - 19.2.1 POLITICAL
 - 19.2.2 ECONOMIC
 - 19.2.3 SOCIAL
 - 19.2.4 TECHNOLOGY
 - 19.3 MARKET SIZE & FORECAST
 - 19.4 TYPE
 - 19.4.1 MARKET SIZE & FORECAST (REVENUE)
 - 19.4.2 MARKET SIZE & FORECAST (UNITS)
 - 19.5 POWER
 - 19.5.1 MARKET SIZE & FORECAST (REVENUE)
 - 19.5.2 MARKET SIZE & FORECAST (UNITS)
 - 19.6 ACTIVITY
 - 19.6.1 MARKET SIZE & FORECAST (REVENUE)
 - 19.6.2 MARKET SIZE & FORECAST (UNITS)
 - 19.7 BOAT SIZE
 - 19.7.1 MARKET SIZE & FORECAST (REVENUE)
 - 19.7.2 MARKET SIZE & FORECAST (UNITS)
 - 19.8 KEY COUNTRIES (REVENUE)
 - 19.9 KEY COUNTRIES (UNITS)

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19.9.1 US: MARKET SIZE & FORECAST

19.9.2 CANADA: MARKET SIZE & FORECAST

20 EUROPE

20.1 MARKET OVERVIEW

20.1.1 HISTORICAL DATA 2017-2020

20.2 PEST ANALYSIS

20.2.1 POLITICAL

20.2.2 ECONOMIC

20.2.3 SOCIAL

20.2.4 TECHNOLOGY

20.3 MARKET SIZE & FORECAST

20.4 TYPE

20.4.1 MARKET SIZE & FORECAST (REVENUE)

20.4.2 MARKET SIZE & FORECAST (UNITS)

20.5 POWER

20.5.1 MARKET SIZE & FORECAST (REVENUE)

20.5.2 MARKET SIZE & FORECAST (UNITS)

20.6 ACTIVITY

20.6.1 MARKET SIZE & FORECAST (REVENUE)

20.6.2 MARKET SIZE & FORECAST (UNITS)

20.7 BOAT SIZE

20.7.1 MARKET SIZE & FORECAST (REVENUE)

20.7.2 MARKET SIZE & FORECAST (UNITS)

20.8 KEY COUNTRIES (REVENUE)

20.9 KEY COUNTRIES (UNITS)

20.9.1 ITALY: MARKET SIZE & FORECAST

20.9.2 THE NETHERLANDS: MARKET SIZE & FORECAST

20.9.3 UK: MARKET SIZE & FORECAST

20.9.4 GERMANY: MARKET SIZE & FORECAST

20.9.5 FRANCE: MARKET SIZE & FORECAST

20.9.6 POLAND: MARKET SIZE & FORECAST

20.9.7 SPAIN: MARKET SIZE & FORECAST

20.9.8 NORWAY: MARKET SIZE & FORECAST

21 APAC

21.1 MARKET OVERVIEW

21.1.1 HISTORICAL DATA 2017-2020

21.2 PEST ANALYSIS

21.2.1 POLITICAL

21.2.2 ECONOMIC

21.2.3 SOCIAL

21.2.4 TECHNOLOGY

21.3 MARKET SIZE & FORECAST

21.4 TYPE

21.4.1 MARKET SIZE & FORECAST (REVENUE)

21.4.2 MARKET SIZE & FORECAST (UNITS)

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- 21.5 POWER
 - 21.5.1 MARKET SIZE & FORECAST (REVENUE)
 - 21.5.2 MARKET SIZE & FORECAST (UNITS)
- 21.6 ACTIVITY
 - 21.6.1 MARKET SIZE & FORECAST (REVENUE)
 - 21.6.2 MARKET SIZE & FORECAST (UNITS)
- 21.7 BOAT SIZE
 - 21.7.1 MARKET SIZE & FORECAST (REVENUE)
 - 21.7.2 MARKET SIZE & FORECAST (UNITS)
- 21.8 KEY COUNTRIES (REVENUE)
- 21.9 KEY COUNTRIES (UNITS)
 - 21.9.1 JAPAN: MARKET SIZE & FORECAST
 - 21.9.2 CHINA: MARKET SIZE & FORECAST
 - 21.9.3 AUSTRALIA: MARKET SIZE & FORECAST
 - 21.9.4 NEW ZEALAND: MARKET SIZE & FORECAST
 - 21.9.5 INDIA: MARKET SIZE & FORECAST
 - 21.9.6 SOUTH KOREA: MARKET SIZE & FORECAST
 - 21.9.7 MALAYSIA: MARKET SIZE & FORECAST

22 MIDDLE EAST & AFRICA

- 22.1 MARKET OVERVIEW
 - 22.1.1 HISTORICAL DATA 2017-2020
- 22.2 PEST ANALYSIS
 - 22.2.1 POLITICAL
 - 22.2.2 ECONOMIC
 - 22.2.3 SOCIAL
 - 22.2.4 TECHNOLOGY
- 22.3 MARKET SIZE & FORECAST
- 22.4 TYPE
 - 22.4.1 MARKET SIZE & FORECAST (REVENUE)
 - 22.4.2 MARKET SIZE & FORECAST (UNITS)
- 22.5 POWER
 - 22.5.1 MARKET SIZE & FORECAST (REVENUE)
 - 22.5.2 MARKET SIZE & FORECAST (UNITS)
- 22.6 ACTIVITY
 - 22.6.1 MARKET SIZE & FORECAST (REVENUE)
 - 22.6.2 MARKET SIZE & FORECAST (UNITS)
- 22.7 BOAT SIZE
 - 22.7.1 MARKET SIZE & FORECAST (REVENUE)
 - 22.7.2 MARKET SIZE & FORECAST (UNITS)
- 22.8 KEY COUNTRIES (REVENUE)
- 22.9 KEY COUNTRIES (UNITS)
 - 22.9.1 SOUTH AFRICA: MARKET SIZE & FORECAST
 - 22.9.2 UAE: MARKET SIZE & FORECAST

23 LATIN AMERICA

- 23.1 MARKET OVERVIEW

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- 23.1.1 HISTORICAL DATA 2017-2020
- 23.2 PEST ANALYSIS
 - 23.2.1 POLITICAL
 - 23.2.2 ECONOMIC
 - 23.2.3 SOCIAL
 - 23.2.4 TECHNOLOGY
- 23.3 MARKET SIZE & FORECAST
- 23.4 TYPE
 - 23.4.1 MARKET SIZE & FORECAST (REVENUE)
 - 23.4.2 MARKET SIZE & FORECAST (UNITS)
- 23.5 POWER
 - 23.5.1 MARKET SIZE & FORECAST (REVENUE)
 - 23.5.2 MARKET SIZE & FORECAST (UNITS)
- 23.6 ACTIVITY
 - 23.6.1 MARKET SIZE & FORECAST (REVENUE)
 - 23.6.2 MARKET SIZE & FORECAST (UNITS)
- 23.7 BOAT SIZE
 - 23.7.1 MARKET SIZE & FORECAST (REVENUE)
 - 23.7.2 MARKET SIZE & FORECAST (UNITS)
- 23.8 KEY COUNTRIES (REVENUE)
- 23.9 KEY COUNTRIES (UNITS)
 - 23.9.1 MEXICO: MARKET SIZE & FORECAST
 - 23.9.2 BRAZIL: MARKET SIZE & FORECAST
 - 23.9.3 ARGENTINA: MARKET SIZE & FORECAST

- 24 COMPETITIVE LANDSCAPE
 - 24.1 COMPETITION OVERVIEW
 - 24.2 MARKET SHARE ANALYSIS

- 25 KEY COMPANY PROFILES
 - 25.1 AZIMUT-BENETTI GROUP
 - 25.1.1 BUSINESS OVERVIEW
 - 25.1.2 BUSINESS SEGMENTS
 - 25.1.3 AZIMUT-BENETTI GROUP IN GLOBAL RECREATIONAL BOAT MARKET
 - 25.1.4 PRODUCT OFFERINGS
 - 25.1.5 KEY STRATEGIES
 - 25.1.6 KEY STRENGTHS
 - 25.1.7 KEY OPPORTUNITIES
 - 25.2 BOMBARDIER RECREATIONAL PRODUCTS
 - 25.2.1 BUSINESS OVERVIEW
 - 25.2.2 BOMBARDIER RECREATIONAL PRODUCTS IN GLOBAL RECREATIONAL BOAT MARKET
 - 25.2.3 PRODUCT OFFERINGS
 - 25.2.4 KEY STRATEGIES
 - 25.2.5 KEY STRENGTHS
 - 25.2.6 KEY OPPORTUNITIES
 - 25.3 BRUNSWICK CORPORATION
 - 25.3.1 BUSINESS OVERVIEW

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- 25.3.2 BUSINESS SEGMENTS
- 25.3.3 BRUNSWICK CORPORATION IN GLOBAL RECREATIONAL BOAT MARKET
- 25.3.4 PRODUCT OFFERINGS
- 25.3.5 KEY STRATEGIES
- 25.3.6 KEY STRENGTHS
- 25.3.7 KEY OPPORTUNITIES
- 25.4 FERRETTI
- 25.4.1 BUSINESS OVERVIEW
- 25.4.2 SUBSIDIARIES
- 25.4.3 FERRETTI IN GLOBAL RECREATIONAL BOAT MARKET
- 25.4.4 PRODUCT OFFERINGS
- 25.4.5 KEY STRATEGIES
- 25.4.6 KEY STRENGTHS
- 25.4.7 KEY OPPORTUNITIES
- 25.5 GROUPE BENETEAU
- 25.5.1 BUSINESS OVERVIEW
- 25.5.2 GROUPE BENETEAU IN GLOBAL RECREATIONAL BOAT MARKET
- 25.5.3 PRODUCT OFFERINGS
- 25.5.4 KEY STRATEGIES
- 25.5.5 KEY STRENGTHS
- 25.5.6 KEY OPPORTUNITIES

- 26 OTHER PROMINENT VENDORS
- 26.1 ALBEMARLE BOATS
- 26.1.1 BUSINESS OVERVIEW
- 26.1.2 PRODUCT OFFERINGS
- 26.2 BAJA MARINE
- 26.2.1 BUSINESS OVERVIEW
- 26.2.2 PRODUCT OFFERINGS
- 26.3 BAVARIA YACHTS
- 26.3.1 BUSINESS OVERVIEW
- 26.3.2 PRODUCT OFFERINGS
- 26.4 BERTRAM YACHTS
- 26.4.1 BUSINESS OVERVIEW
- 26.4.2 PRODUCT OFFERINGS
- 26.5 BOSTON WHALER BOATS
- 26.5.1 BUSINESS OVERVIEW
- 26.5.2 PRODUCT OFFERINGS
- 26.6 CATALINA YACHTS
- 26.6.1 BUSINESS OVERVIEW
- 26.6.2 PRODUCT OFFERINGS
- 26.7 CORRECT CRAFT
- 26.7.1 BUSINESS OVERVIEW
- 26.7.2 PRODUCT OFFERINGS
- 26.8 CUSTOM WELD BOATS
- 26.8.1 BUSINESS OVERVIEW
- 26.8.2 PRODUCT OFFERINGS

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- 26.9 DUCKWORTH BOATS
 - 26.9.1 BUSINESS OVERVIEW
 - 26.9.2 PRODUCT OFFERINGS
- 26.10 EXPLORER INDUSTRIES
 - 26.10.1 BUSINESS OVERVIEW
 - 26.10.2 PRODUCT OFFERINGS
- 26.11 FOUNTAIN POWERBOATS
 - 26.11.1 BUSINESS OVERVIEW
 - 26.11.2 PRODUCT OFFERINGS
- 26.12 GODFREY
 - 26.12.1 BUSINESS OVERVIEW
 - 26.12.2 PRODUCT OFFERINGS
- 26.13 GRADY-WHITE BOATS
 - 26.13.1 BUSINESS OVERVIEW
 - 26.13.2 PRODUCT OFFERINGS
- 26.14 GRAND BANKS YACHTS
 - 26.14.1 BUSINESS OVERVIEW
 - 26.14.2 PRODUCT OFFERINGS
- 26.15 HANSEYACHTS
 - 26.15.1 BUSINESS OVERVIEW
 - 26.15.2 PRODUCT OFFERINGS
- 26.16 HIGH CALIBER
 - 26.16.1 BUSINESS OVERVIEW
 - 26.16.2 PRODUCT OFFERINGS
- 26.17 HOBIE
 - 26.17.1 BUSINESS OVERVIEW
 - 26.17.2 PRODUCT OFFERINGS
- 26.18 LUND
 - 26.18.1 BUSINESS OVERVIEW
 - 26.18.2 PRODUCT OFFERINGS
- 26.19 MALIBU
 - 26.19.1 BUSINESS OVERVIEW
 - 26.19.2 PRODUCT OFFERINGS
- 26.20 MARINE PRODUCTS CORPORATION
 - 26.20.1 BUSINESS OVERVIEW
 - 26.20.2 PRODUCT OFFERINGS
- 26.21 MARLOW HUNTER
 - 26.21.1 BUSINESS OVERVIEW
 - 26.21.2 PRODUCT OFFERINGS
- 26.22 MAVERICK BOAT GROUP
 - 26.22.1 BUSINESS OVERVIEW
 - 26.22.2 PRODUCT OFFERINGS
- 26.23 MCBC HOLDINGS
 - 26.23.1 BUSINESS OVERVIEW
 - 26.23.2 PRODUCT OFFERINGS
- 26.24 PACIFIC ASIAN ENTERPRISES
 - 26.24.1 BUSINESS OVERVIEW

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- 26.24.2 PRODUCT OFFERINGS
- 26.25 PORTER
 - 26.25.1 BUSINESS OVERVIEW
 - 26.25.2 PRODUCT OFFERINGS
- 26.26 PRINCESS YACHTS
 - 26.26.1 BUSINESS OVERVIEW
 - 26.26.2 PRODUCT OFFERINGS
- 26.27 SUNSEEKER
 - 26.27.1 BUSINESS OVERVIEW
 - 26.27.2 PRODUCT OFFERINGS
- 26.28 THUNDER JET
 - 26.28.1 BUSINESS OVERVIEW
 - 26.28.2 PRODUCT OFFERINGS
- 26.29 VIKING YACHT
 - 26.29.1 BUSINESS OVERVIEW
 - 26.29.2 PRODUCT OFFERINGS
- 26.30 WHITE RIVER MARINE GROUP
 - 26.30.1 BUSINESS OVERVIEW
 - 26.30.2 PRODUCT OFFERINGS
- 26.31 YAMAHA
 - 26.31.1 BUSINESS OVERVIEW
 - 26.31.2 PRODUCT OFFERINGS
- 26.32 ZODIAC MARINE & POOL
 - 26.32.1 BUSINESS OVERVIEW
 - 26.32.2 PRODUCT OFFERINGS

- 27 REPORT SUMMARY
 - 27.1 KEY TAKEAWAYS
 - 27.2 STRATEGIC RECOMMENDATIONS

- 28 QUANTITATIVE SUMMARY
 - 28.1 MARKET BY GEOGRAPHY
 - 28.1.1 MARKET BY GEOGRAPHY (REVENUE)
 - 28.1.2 MARKET BY GEOGRAPHY (UNITS)
 - 28.2 NORTH AMERICA
 - 28.2.1 TYPE (REVENUE & UNITS)
 - 28.2.2 POWER (REVENUE & UNITS)
 - 28.2.3 ACTIVITY (REVENUE & UNITS)
 - 28.2.4 BOAT SIZE (REVENUE & UNITS)
 - 28.3 EUROPE
 - 28.3.1 TYPE (REVENUE & UNITS)
 - 28.3.2 POWER (REVENUE & UNITS)
 - 28.3.3 ACTIVITY (REVENUE & UNITS)
 - 28.3.4 BOAT SIZE (REVENUE & UNITS)
 - 28.4 APAC
 - 28.4.1 TYPE (REVENUE & UNITS)
 - 28.4.2 POWER (REVENUE & UNITS)

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- 28.4.3 ACTIVITY (REVENUE & UNITS)
- 28.4.4 BOAT SIZE (REVENUE & UNITS)
- 28.5 MIDDLE EAST & AFRICA
 - 28.5.1 TYPE (REVENUE & UNITS)
 - 28.5.2 POWER (REVENUE & UNITS)
 - 28.5.3 ACTIVITY (REVENUE & UNITS)
 - 28.5.4 BOAT SIZE (REVENUE & UNITS)
- 28.6 LATIN AMERICA
 - 28.6.1 TYPE (REVENUE & UNITS)
 - 28.6.2 POWER (REVENUE & UNITS)
 - 28.6.3 ACTIVITY (REVENUE & UNITS)
 - 28.6.4 BOAT SIZE (REVENUE & UNITS)
- 28.7 TYPE
 - 28.7.1 REVENUE
 - 28.7.2 UNITS
 - 28.7.3 OUTBOARD BOAT (REVENUE)
 - 28.7.4 OUTBOARD BOAT (UNITS)
 - 28.7.5 INBOARD/STERNDRIVE BOAT (REVENUE)
 - 28.7.6 INBOARD/STERNDRIVE BOAT (UNITS)
 - 28.7.7 PERSONAL WATERCRAFT BOAT (REVENUE)
 - 28.7.8 PERSONAL WATERCRAFT BOAT (UNITS)
 - 28.7.9 YACHTS (REVENUE)
 - 28.7.10 YACHTS (UNITS)
 - 28.7.11 OTHER BOATS (REVENUE)
 - 28.7.12 OTHER BOATS (UNITS)
- 28.8 POWER
 - 28.8.1 REVENUE
 - 28.8.2 UNITS
 - 28.8.3 ENGINE-POWERED BOATS (REVENUE)
 - 28.8.4 ENGINE-POWERED BOATS (UNITS)
 - 28.8.5 SAIL-PROPELLED BOATS (REVENUE)
 - 28.8.6 SAIL-PROPELLED BOATS (UNITS)
 - 28.8.7 MAN-POWERED BOATS (REVENUE)
 - 28.8.8 MAN-POWERED BOATS (UNITS)
- 28.9 ACTIVITY
 - 28.9.1 REVENUE
 - 28.9.2 UNITS
 - 28.9.3 CRUISE TOURISM (REVENUE)
 - 28.9.4 CRUISE TOURISM (UNITS)
 - 28.9.5 WATER SPORTS (REVENUE)
 - 28.9.6 WATER SPORTS (UNITS)
 - 28.9.7 FISHING (REVENUE)
 - 28.9.8 FISHING (UNITS)
- 28.10 BOAT SIZE
 - 28.10.1 REVENUE
 - 28.10.2 UNITS
 - 28.10.3 30-50 FEET BOAT (REVENUE)

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28.10.4 30-50 FEET BOAT (UNITS)
28.10.5 <30 FEET BOAT (REVENUE)
28.10.6 <30 FEET BOAT (UNITS)
28.10.7 >50 FEET BOAT (REVENUE)
28.10.8 >50 FEET BOAT (UNITS)

29 APPENDIX

29.1 ABBREVIATIONS

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