

North America Recreational Vehicle - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The North America Recreational Vehicle Market size is estimated at USD 21.41 billion in 2025, and is expected to reach USD 31.45 billion by 2030, at a CAGR of 7.99% during the forecast period (2025-2030).

The North American RV (recreational vehicle) market is a dynamic and flourishing industry, driven by various factors, such as the rising disposable income among consumers, enabling them to invest in leisure activities such as travel and outdoor adventures. There is a growing preference for outdoor recreation and camping, especially among millennials and families, fostering increased demand for RVs as a means to explore nature and enjoy the freedom of the open road.

However, the market also faces certain restraints, including the high initial cost of purchasing an RV, which may deter price-sensitive consumers. Fluctuating fuel prices also impact the affordability of RV travel, influencing consumer decisions regarding leisure activities. Moreover, regulatory challenges such as licensing requirements and zoning restrictions can pose barriers to entry and operation in certain regions, potentially limiting the market's growth.

Despite these challenges, the North American RV market presents numerous opportunities for growth and innovation. The rise of the sharing economy has led to the emergence of peer-to-peer RV rental platforms and shared ownership models, providing consumers with more flexible and affordable options for experiencing RV travel. Furthermore, expanding into new markets, such as younger demographics, urban dwellers, and international markets, can diversify the customer base and stimulate market expansion.

Major players such as Thor Industries, Forest River Inc., Winnebago Industries, and REV Group dominate the North American RV market. These companies compete on various factors such as product innovation, brand reputation, pricing, and distribution

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networks to maintain market share and gain a competitive edge. Smaller players and niche manufacturers contribute to market diversity by offering specialized RVs tailored to specific customer preferences and needs, further enriching the overall market landscape.

North America RV Market Trends

Motorized RVs are the Largest Segment by Type

With travel and tourism gaining popularity worldwide, people are seeking unique and adventurous experiences. The desire for experiential and immersive travel experiences has contributed to the increased demand for motorized RVs. The shortage of available campgrounds in many countries has also contributed to the demand for motorized RVs.

Furthermore, motorhomes are witnessing a significant growth in demand across North American countries like the United States and Canada. The increasing number of HNWIs and the availability of widespread parking areas for RVs are driving their adoption in North America.

The demand for recreational vehicles has boomed after the COVID-19 pandemic, as most people started planning their holidays while avoiding public transportation due to safety precautions. Several recreational vehicle companies across North America witnessed significant booking growth during the COVID-19 pandemic.

Over the past few years, the demand for Class B and Class C motorhomes has also increased due to their advantages. The population of the United States participating in camping has seen an upward trajectory over the last few years.

- In 2023, the number of users opting for camping in the United States stood at over 57 million compared to the figure of around 55 million in 2022.
- In 2023, The US wholesale shipments of motorhomes from manufacturers to dealers amounted to approximately 45.9 thousand.

All these factors combined are expected to boost the demand for motorized RVs during the forecast period in the region.

United States Expected to Dominate the Market

The increase in campgrounds in the country illustrates the increasing preference for recreational travel with motorhomes. The United States has more than 230 chain outlets and local motorhome dealers are trading motorhomes to meet the increasing demand for them. These dealers provide a range of state-of-the-art motorhomes and the latest-model-year second-hand motorhome units preferred by most fleet operators. To compete in the growing electrical vehicle era, most of the RV manufacturing companies are manufacturing electric recreational vehicles to stay ahead in the market.

- For instance, in March 2023, Harbinger, a Southern California-based automotive manufacturer, delivered a purpose-built medium-duty EV chassis to THOR Industries. THOR plans to upgrade the chassis into an electrified class A RV at its THOR US Innovation Lab in Elkhart, Indiana.

The quick and steady recovery of the United States from the COVID-19 pandemic and the availability of a healthier financing

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environment drove the motorhome market in the United States. Currently, the country forms the largest market for RVs globally.

Motorhomes are widely used in the country for travels during vacations and for tailgating, traveling with pets, and business. They are also a preferred mode of transportation in outdoor sports and other leisure activities.

These vehicles provide campers with comfortable sleeping quarters and all the necessities, along with some luxurious features, such as a refrigerator, hot water, air conditioning, and heating. However, they miss out on some features, such as a full-sized entertainment system and laundry facilities, owing to their small size.

The factors mentioned above are expected to contribute to the market's overall development during the forecast period.

North America RV Industry Overview

The major players in the North American RV market are Thor Industries Inc., Forest River Inc., Winnebago Industries, and REV Group. The recreational vehicle market is highly competitive amongst the dominant players. The companies are continually competing with each other and are opting for strategies, like acquisitions and heavy investment in R&D projects, while offering more luxurious services in the vehicle.

- April 2023: First Hydrogen introduced a novel zero-emission recreational vehicle (RV), utilizing fuel cell technology in collaboration with the EDAG Group. This partnership seeks to apply fuel cell electric technology to larger vehicles, showcasing the advantage of handling higher payloads and achieving longer ranges compared to battery electric vehicles (BEVs) for RVs. Their inaugural van is designed to cover distances ranging from 249 to 373 miles (400 to 600 kilometers) on a single five-minute refueling, with the expected range for the Gen 2 vehicle yet to be disclosed.
- January 2023: Winnebago Industries debuted its inaugural fully electric RV, the "eRV2," at the Florida RV SuperShow in Tampa. This emission-free model operates all systems, both house and powertrain, on electricity, supporting up to seven days of "boondocking" solely on batteries.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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