
Lucintel, the premier global management consulting and market research firm creates your equation for growth — whether you need to understand market dynamics, identify new opportunities, or increase your profitability.

Published: August 2014
Background:
The global boat market is expected to grow to $25.2 billion in 2019. The major drivers for growth in
global boat market are high replacement rate, change in technologies, increased boat size, and
high net-worth population increase.

Lucintel, a leading global management consulting and market research firm, has analyzed the
global boat market by segments and has come up with a comprehensive research report “Global
Recreational Boating Industry Analysis and Forecast 2014-2019”. This report provides an
analysis of the global recreational boat market including an analysis of market trends, competitive
landscapes, company profiles, emerging trends, and key drivers of the industry growth. The study
also includes trends and forecasts for the global recreational boat market through 2019, segmented
by engine types and regions which are listed below.

The global boat market by engine type:
- Sailboat
- Inboard & Sterndrive
- Outboard
- Others

Global boat market by region:
- NA
- Europe
- APAC
- Rest of the World

On the basis of its comprehensive research, Lucintel forecasts that the global boat market will grow
moderately over 2014-2019. Brunswick, Platinum Equity, Group Beneteau, Ferretti, Azimut-Benetti,
Sunseeker, Rodriguez, Bavarian, Princess, Sealine are among the major suppliers of boats to this
industry. The regular innovation of products is very important for companies to sustain their
successful positions in the market.

This unique report from Lucintel will provide you with valuable information, insights and tools
needed to identify new growth opportunities and operate your business successfully in this market.
This report will save hundreds of hours of your own personal research time and will significantly
benefit you in expanding your business in this market. In today’s stringent economy, you need
every advantage that you can find.

Features of This Report:
To make business, investment, or strategic decisions, you need timely and adequate information.
This market report fulfills this core need. This is a vital reference guide for boat builders (OEMs),
boat part builders, investors, researchers, executives, distributors and many more, who are dealing
with the boat market. Some of the features of this market report are:
Global Recreational Boating Industry Analysis and Forecast

- **Global boat market intelligence** with special emphasis on various types of boats, boat makes, manufacturing processes and materials used.
- **Market size estimates** in terms of $ value and number of units in various types of boats in the boat industry.
- **Regional Analysis:** Boat market breakdown ($ and units estimates) by regions such as North America, Europe and rest of the world and by countries.
- **Competitive analysis:** Market shares of the industry leaders in the global boat industry as well as in various regions of the world.
- **Growth trends (2008-2013) and forecasts (2014-2019)** in terms of dollar shipment and units delivered for the total boat market and also by types of boats.

More than 160 figures/charts and 17 tables are provided in this roughly 210 page report. Sample charts with random data are presented below
Global Recreational Boating Industry Analysis and Forecast

Global Boat Market by Major Countries in terms of $M Shipment in 2013 Total Shipment: $M - Random Data

<table>
<thead>
<tr>
<th>Country</th>
<th>Shipment</th>
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<tbody>
<tr>
<td>USA</td>
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<td>UK</td>
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<td>France</td>
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<td>Italy</td>
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<td>Germany</td>
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<td>Taiwan</td>
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<td>Australia</td>
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<td>Japan</td>
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<td>Others</td>
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Global Boat Market Distribution (%) by Boat Type in Terms of Unit Sold in 2013 Total Shipment: Units - Random Data

<table>
<thead>
<tr>
<th>Boat Type</th>
<th>Units</th>
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<tbody>
<tr>
<td>Outboard</td>
<td></td>
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<tr>
<td>Inboard Runabouts</td>
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<tr>
<td>Inboard Cruisers</td>
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<tr>
<td>Sterndrive</td>
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<td>PWC</td>
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The US Boat Market (Fiberglass and Aluminum) Distribution (%) by Length in terms of Units Sold in 2004 - Random Data

<table>
<thead>
<tr>
<th>Length</th>
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<tbody>
<tr>
<td>Sailboat</td>
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<td>13’ &amp; Under</td>
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<td>14’</td>
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<td>20’</td>
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Market Share of Industry Brand in 2013 for Fiberglass Boats (all length) - Random Data

<table>
<thead>
<tr>
<th>Brand</th>
<th>Market Share</th>
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<tbody>
<tr>
<td>Sea-Doo including boat</td>
<td></td>
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<tr>
<td>Yamaha Jet</td>
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<tr>
<td>Sea Ray</td>
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<tr>
<td>Honda</td>
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<tr>
<td>Bayliner</td>
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<tr>
<td>Ranger</td>
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<tr>
<td>Triton Boats</td>
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<tr>
<td>Glastron</td>
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<td>Four Winns</td>
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<td>Malibu</td>
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**Average Annual Growth in Different Boat Types ($M) During 2008-2013 for the Global Boat Market - Random Data**

<table>
<thead>
<tr>
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<th>Average Annual Growth in Different Boat Types ($M) During 2008-2013 for the Global Boat Market - Random Data</th>
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<td>Sailboat</td>
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<tr>
<td>Inboard &amp; Sterndrive</td>
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<table>
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**Global Boat Market by Types of Boat - Random Data**

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<th>2009</th>
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<th>2011</th>
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**Global Market by Types of Boat - Random Data**

<table>
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<th>2016</th>
<th>2017</th>
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Benefits of a Lucintel Report:
Lucintel’s core competency is in market research and management consulting. In last 15 years, Lucintel has worked on hundreds of market & economic research studies. Lucintel’s market reports offer the following benefits:

Enhance your growth strategy with the information of key market segments and growth applications.
Fine tune your business expansion with analysis of trend and forecast and key emerging trends in the industry.
Explore business opportunities and ascertain new market entry with analysis of emerging geographies.

Know the business environment with the competitive intensity of the industry, new developments and merger and acquisition deals.

Please see below comments from our customers on how they benefited from our market reports.

“We found great value in Lucintel’s research both from a commercial and technology standpoint. Not only did we gain insights into the value chain and the key players in each industry segment, but we also were able to understand their future plans. Lucintel helped us better align our products with the needs of the market.” Genaro Gutierrez, PhD, Business Development Manager – Dow Chemical

“The information is so comprehensive and detailed, that it has allowed us to identify and focus our new business development efforts. This one report has saved months of leg-work.” Bill Barz, L&L Products, Inc.

“With more than 20 years experience in the industry, this is the first time we have come across such an extensive and detailed market analysis for our industry.” Ven Cote, CEO, ZCL Composites

“The report from Lucintel is useful not only for business planners, but also for the technology officers wanting to create a roadmap of who uses which technology” Dr. Giulio Ranzo, Booz Allen Hamilton Consulting

“Lucintel’s has saved precious time and resources brought together in a concise and informative manner. The report clearly outlines the key markets and segments, but also highlights those with potential. This helps assist with decisions to cement our current position within our own market but also formulate long term strategies to realize the potential for global growth that can be achieved. The most detailed report of its nature in the market place at present.” Paul Everley, Peters & May Ltd.

“We bought Lucintel report because it is the best report about our industry…a complete and appropriate analysis.” Cesare Andrenacci – Ferretti Group

Who Can Benefit From This Report?
This study is intended for material suppliers, parts fabricators, OEMs, investors, executives and consultants. This multi-client market study from Lucintel is used by small to multi-national Fortune 500 companies and utilized for a variety of reasons as follows.

Business development
Strategic planning
Research Methodology:
Lucintell has been closely tracking and conducting research on and for the composites and other segments since 1998. Lucintell has also forayed into economics and other verticals such as industry analysis and company profiles. This study is a culmination of seven months of full-time effort performed by Lucintell's analyst team. Our analysts used the following sources for the creation and completion of this valuable report:

- Personal and telephone interviews of more than 100 boat builders around the globe.
- In-depth research on more than 200 companies involved in the boat market. Some of the leaders investigated / surveyed during this study.
- In-depth secondary research from financial statements and annual reports of the competitors.
- Extensive search of current published literature, market and database information including industry news, company press releases, and customer intentions.
- A compilation of the experiences, judgments, and insights of Lucintell's professionals, who have analyzed and tracked composites market over the years.

Lucintell collects a significant amount of uninterpreted data from a variety of sources and converts this into intelligent data as follows. The intelligent data is used by our clients for making confident business decisions. The figure below is a graphical representation of the end-to-end Lucintell research process.
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