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# Recreational Vehicles: United States

April 2018



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# Table of Contents

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<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>5</b>
Historical Trends	5
Key Economic Indicators	7
Trade	8
Regulatory & Safety Issues	9
Licensing & Taxation	9
Safety Standards	9
Recreational Vehicle Ownership Costs	11
<b>3. Segmentation &amp; Forecasts</b>	<b>12</b>
Products	12
Conventional Travel Trailers	13
Fifth-Wheel Travel Trailers	14
Class A Motorhomes	15
Class B Motorhomes	15
Class C Motorhomes	16
Folding Camping Trailers	17
Truck Campers	17
<b>4. Industry Structure</b>	<b>19</b>
Industry Characteristics	19
Market Share	20
Thor Industries	20
Forest River	21
Winnebago	22
<b>5. About This Report</b>	<b>23</b>
Scope & Method	23
Sources	24
Industry Codes	24
Resources	25

# List of Tables & Figures

---

Figure 1   Key Trends in the US Recreational Vehicle Market, 2017 – 2022	4
Figure 2   US Recreational Vehicle Demand Trends, 2007 – 2017	6
Table 1   Key Indicators for US Recreational Vehicle Demand, 2007 – 2022	7
Figure 3   US Recreational Vehicle Trade, 2007 – 2022 (US\$ mil)	8
Table 2   US Recreational Vehicle Trade, 2007 – 2022 (US\$ mil)	8
Figure 4   US Recreational Vehicle Demand by Product, 2007 – 2022 (US\$ mil)	12
Table 3   US Recreational Vehicle Demand by Product, 2007 – 2022 (US\$ mil)	12
Figure 5   US Recreational Vehicle Demand by Product, 2007 – 2022 (%)	18
Figure 6   US Recreational Vehicle Market Share by Company, 2017 (%)	20
Table 4   Leading Suppliers to the US Recreational Vehicle Market by Product	20
Table 5   Industry Codes Related to Recreational Vehicles	24

# About This Report

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## Scope & Method

This report forecasts to 2022 US recreational vehicle demand and shipments in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- conventional travel trailers
- fifth-wheel travel trailers
- class A motorhomes
- class B motorhomes
- class C motorhomes
- folding camping trailers
- truck campers

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; shipments and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

Conversion vans, personal off-road vehicles (such as ATVs, snowmobiles, and dirt bikes) and manufactured housing for long-term residence (including park trailers and mobile homes) are not included in the scope of this report. Re-exports of recreational vehicles are excluded from demand and trade figures.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Recreational Vehicles: United States* (FF85031) is based on *Recreational Vehicles in the US*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 5 | Industry Codes Related to Recreational Vehicles

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
336213	Motorhome Manufacturing	3716	Motorhomes
336214	Travel Trailer and Camper Manufacturing	3792	Travel Trailers and Campers

Source: US Census Bureau

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## Resources

### The Freedonia Group

*Recreational Vehicles in the US*, April 2018

### Freedonia Industry Studies

*Recreational Boating in the US*, March 2018

*North American Medium- & Heavy-Duty Truck Aftermarket*, February 2018

*North America Automotive Aftermarket Competitor Analysis*, November 2017

*North America Automotive Aftermarket*, November 2017

*Global Diesel Engine Market*, January 2017

*Fiber-Reinforced Plastic Composites Market in the US*, January 2017

*Battery Markets in the US*, December 2016

### Freedonia Focus Reports

*Global Light Vehicles*

*Lodging Services: United States*

*Medium- & Heavy-Duty Trucks & Buses: United States*

*Motor Vehicles: United States*

*Recreation: United States*

*Recreational Boating: United States*

*Transport Equipment: United States*

### Freedonia Custom Research

### Trade Publications

*Go RVing*

*MotorHome Magazine*

*RV Life*

*RV Business*

*RV PRO*

### Agencies & Associations

American National Standards Institute

National Fire Protection Association

National Park Service

National RV Dealers Association

Recreational Vehicle Industry Association

United States Census Bureau

United States Bureau of Labor Statistics

United States Environmental Protection Agency

United States International Trade Commission