INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Recreational Boating

Industry Study with Forecasts for **2016 & 2021**

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Hurt by the economic and housing market downturns, the recreational boating industry will rebound by 2016 based on greater disposable incomes and pent-up demand.

Economic downturn decimates boating industry

The recreational boating industry was decimated by the economic and housing market downturns that began in 2007, because boating products are luxury items and the market depends on consumer spending and access to credit. The effects of the slowdown included rising unemployment, sharp declines in house values, and deterioration of the broader financial markets. For the US boating industry, these factors combined to not only reduce consumer spending and the ability of individuals to secure credit for boats, but also meant that many boat dealers and boatbuilders had difficulty funding operations, with the result being a number of bankruptcies among industry suppliers and dealers.

US market to increase 8% annually through 2016

By 2016, the recreational boating market (including boats, propulsion systems, and accessories) is forecast to rebound, with demand increasing 8.0 percent per year to $10.1 billion. The market will be driven by gains in consumer spending and disposable income and the rising strength of the financial sector. The boating industry's efforts to expand the boating market to women and minorities will also boost sales of entry level boats. Growth in the 55-64 age bracket will support demand, since boat purchases become more likely near the onset of retirement (although they tend to decline shortly thereafter). Despite the rapid sales growth, the market in 2016 will be only about two-thirds of what it was in 2006, and is not expected to recover to the pre-downturn levels for the foreseeable future.

Traditional powerboats to present fastest growth

Demand for traditional powerboats will post the fastest gains, rebounding from especially sharp declines beginning in 2008 as credit conditions made financing expensive boats difficult. This segment will be supported by pent-up demand from consumers who delayed purchases during the downturn, as well as strong demand for larger, more expensive boats. Powerboat demand will also be fueled by technological advances, such as newer propulsion systems and controls that simplify handling.

South to remain largest regional market

The West will see the fastest increases in recreational boating demand of the four US census regions. Growth will be aided by above average gains in the 45 or older population segment and by rapid increases in both regional GDP and consumer spending. The South will also see above average growth in recreational boating product demand and will remain the largest regional market through 2016. In addition to demographic and economic factors driving gains, boating demand in the South will continue to be aided by the region's mild climate, long warm water coastline, and the popularity of boating and fishing in the region.

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Sample Text, Table & Chart

MATERIAL CONSUMPTION

Plastic

Demand for plastic materials used in the production of r
boating products is expected to [SAMPLE TEXT] lly
million pounds in 2016. The m rel
the production of boats from th n,
fiberglass boats were especially d
they are expected to post above rd
logical advancements, includin ne
and new combinations of these e o
However, some of these new material combinations will resu
weight and thinner gauge composite materials. While these p
desirable because of cost and fuel savings, and the improved
mance that they provide, the increased use of lighter weight p
terials will necessarily reduce the amount of material used. C
from other materials, including balsa, plywood, and closed c
will also restrict growth.

Plastics, particularly fiberglass reinforced plastic materi
popular in boats because of their light weight, ability to with
elements under heat and cold, and capacity to resist corrosion
both salt water and atmospheric pollution. Boat components
reinforced plastics include decks, hulls, cabins, rudders, engine covers, and cockpit liners. Numerous firms are involved in producing resins and reinforcing materials for reinforced plastic used in marine applications. However, most boat manufacturers produce their own reinforced plastic hulls, typically using custom-designed molds. Important pro
of reinforced plastic boats include Brunswick, Catalina Yach
International, Marine Products, MasterCraft Boat, PBH Mar
and Tracker Marine. Most personal watercraft also feature fi
reinforced plastic hulls, so producers such as Bombardier Re
Products, Kawasaki Heavy Industries, and Yamaha Motor ar
portant suppliers in this segment. In addition, some manufac

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TABLE V-12

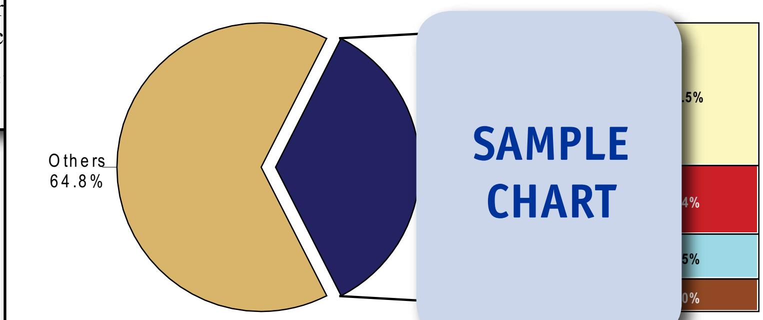
SOUTH: RECREATIONAL BOATING DEMAND BY SUBREGION & PRODUCT (million dollars)

SAMPLE TABLE

Item	2001	2006	2011	2016	2021
South GDP (bil $)					
per capita GDP					
South Population (mil persons)					
% over 45					
South Population over 45 (mil persons)					
$ boating/000$ GDP					
$ boating/capita					
$ boating/capita over 45					
South Recreational Boating Demand					
By Subregion:					
South Atlantic					
East South Central					
West South Central					
By Product:					
Boats					
Propulsion Systems					
Accessories					
% South					
US Recreational Boating Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

CHART VI-1

US RECREATIONAL BOATING PRODUCT MARKET SHARE ($6.9 billion, 2011)



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Sample Profile, Table & Forecast

TABLE IV-14

OUTBOARD PROPULSION SYSTEM SUPPLY & DEMAND

Item	2001	2006	2011	2016	2021
Recreational Boats in Use (mil units)					
outboard systems/000 boats					
Outboard Propulsion Systems (000 units)					
Under 30 hp					
30 hp - under 100 hp					
100 hp & over					
000$/unit					
Outboard Propulsion Systems (mil $)					
Under 30 hp					
30 hp - under 100 hp					
100 hp & over					
- net imports					
Outboard Propulsion System Shpts (mil $)					

SAMPLE TABLE

COMPANY PROFILES

Catalina Yachts Incorporated
21200 Victory Boulevard
Woodland Hills, CA 91367
818-884-7700
http://www.ca

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Catalina ... ailboats ranging in length from 12 to 47 feet. The Company is privately held.

The Company participates in the US recreational boating industry via the production and sale of fiberglass sailboats through the SPORT, CRUISER, and OCEAN product lines. Catalina Yachts conducts manufacturing operations at a plant in Largo, Florida that occupies 275,000 square feet of space. In the US, the Company markets fiberglass sailboats via a network of authorized dealers.

Catalina Yachts' SPORT product line encompasses sailboats that range in length from 12 to 25 feet. Models include the CATALINA EXPO 14.2 sailboat, which is equipped with a SMARTRIG system configuration that consists of a tapered carbon fiber mast and deck stepped boom: and the CATALINA 22 CAPRI, which features a flared deck profile and full length reclining seats. In addition, the Company makes the CATALINA 16.5 sailboat, which features a one-piece, hand laminated deck and is available in keel and centerboard models. Of these, the keel model has a molded-in sealed bilge sump, and can be stored on a mooring or dock; and the centerboard version incorporates a fiberglass centerboard and rudder, and a stable hull form.

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"Demand for outboard propulsion systems will increase 5.7 percent per annum to $1.7 billion in 2016. The rebound in outboard boat demand will support gains, since many outboard boats are sold with a choice of engines. For this reason, the new boat market is more important to the separately sold outboard market than it is for inboard or sterndrive engines, where the boat and engine are more commonly sold to the dealer as a single item. However, ..."
--Section IV, pg. 130

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Other Studies

World Tractors

World demand for tractors will rise 6.8 percent annually through 2016 to $122 billion. Gains in the Asia/Pacific region will be more than twice that of any other region, with China alone claiming nearly one-third of the global total. Agricultural tractors will remain the largest segment, followed by tractors for construction and mining applications. This study analyzes the $88 billion world tractor industry, with forecasts for 2016 and 2021 by market, product, world region and for 23 countries. The study also evaluates company market share and profiles industry participants.

#2984 .... February 2013 .... $6300

World Robots

Global robot demand will rise 10.5 percent annually through 2016 to $20.2 billion. Five countries -- the US, Japan, Germany, China, and South Korea -- will continue to dominate demand, with the US remaining the largest national market. Smaller, less expensive service robots will outpace more sophisticated, high-value industrial and medical robots. This study analyzes the $12.3 billion world robot industry, with forecasts for 2016 and 2021 by type, market, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2950 ....December 2012 .... $6100

World Motorcycles

The global market for motorcycles, including electrically-powered machines, will grow 7.2 percent annually to 134.5 million units in 2016. China will remain by far the largest national market, followed by India and Indonesia. Sales of e-bikes and e-cycles will grow roughly in line with internal combustion engine (ICE) motorcycle demand. This study analyzes the 95 million unit world motorcycle industry, with forecasts for 2016 and 2021 by type, world region and for 23 countries. The study also evaluates company market share and profiles industry players.

#2972 ....January 2013 .... $6300

Lawn & Garden Consumables

US packaged lawn and garden consumables demand will rise 3.3 percent yearly to $8.8 billion in 2016. Pesticides and fertilizers will remain the top segments, with fertilizers, seeds and growing media the fastest growing. Organic formulations will outpace conventional types, but from a much smaller base. This study analyzes the $7.5 billion US lawn and garden consumables industry, with forecasts for 2016 and 2021 by product, formulation, market, application, end user and US region. The study also evaluates company market shares and profiles industry players.

#2891 .... May 2012 .... $5100

Outdoor Furniture & Grills

US demand for outdoor furniture and grill products is expected to rise 4.0 percent annually to nearly $7 billion in 2015. The grill and related accessories segment will see the fastest growth, followed by the larger outdoor furniture and accessories segment. An expected rebound in the housing market will offer opportunities in the dominant residential sector. This study analyzes the $5.7 billion US outdoor furniture and grill industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2828 ....January 2012 .... $4900

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