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Recreational Vehicles

US Industry Study with Forecasts for **2017 & 2022**

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Recreational Vehicles

US Industry Study with Forecasts for ***2017 & 2022***

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Table of Contents

Recreational Vehicles

US Industry Study with Forecasts for ***2017 & 2022***

List of Tables

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

MATERIALS

PRODUCTS

REGIONS

INDUSTRY STRUCTURE

List of Charts

MARKET ENVIRONMENT

PRODUCTS

REGIONS

INDUSTRY STRUCTURE

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Gains will be fueled by a rebounding economy, increased consumer confidence, improved discretionary spending, a healthier financing environment and favorable demographic trends.

US demand to rise 4.8% annually through 2017

The US recreational vehicle (RV) market is expected to increase 4.8 percent annually to $10.7 billion in 2017. The market contracted sharply in the 2007-2012 period, affected by the 2007-2009 economic recession and its resulting rise in unemployment, drop in credit availability, and deterioration of general financial markets. Following this collapse, the industry has begun to improve but will not approach pre-recession total sales for another decade. Going forward, a rebounding economy will support increased consumer confidence and improved discretionary spending. That, coupled with a healthier financing environment, should spur sales of recreational vehicles. Advances will be further aided by demographic trends, including continued growth in the 55 to 64-year-old cohort, the traditional purchasers of recreational vehicles, as well as rising interest among younger customers. Competition from a vast used recreational vehicle market will restrain further growth to a degree.

US Recreational Vehicle Demand
($10.7 billion, 2017)

Motor homes, camper/camping trailer segments to grow the fastest

Recreational vehicle demand will grow the fastest in the motor home and camper and camping trailer segments, as sales of both will rebound from the double-digit annual declines of the 2007-2012 period. However, neither segment is expected to reach pre-recession levels in the next decade. Technological advances that improve fuel economy and ease of handling, coupled with the inclusion of a growing array of entertainment and comfort options, will also propel sales. The improvement in demand for travel trailers will be less dramatic since sales were better supported over the recession, as these types are typically more affordable than self-propelled versions. Trailers are also available in a variety of sizes and styles amenable to those seeking more basic accommodations and those wanting home-like amenities on the road. Sales of conversion vehicles, however, are projected to continue a long term downward trend in light of competition from class B motor homes and the availability of many similar features in conventional vans and sport utility vehicles.

Sales rebound supported by high-end market

Gains in value terms will outperform those in unit terms for all types of recreational vehicles as prices continue to rise. Much of the rebound in sales will continue to be supported by the high-end market as more affluent consumers demonstrate ongoing preference for recreational vehicles with high-tech accessories and more home-like amenities.

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Sample Text, Table & Chart

TABLE V-4

NORTHEAST RECREATIONAL VEHICLE DEMAND
(million dollars)

Item	2002	2007	2012	2017	2022
Northeast Population (mil persons)					
% over 45					
NE Population Over 45 (mil persons)					
$ GDP/capita					
Northeast GDP (bil $)					
$ RV/capita					
$ RV/capita over 45					
$ RV/000$ GDP					
Northeast Recreational Vehicle Deman					
New England					
Middle Atlantic					
% Northeast					
US Recreational Vehicle Demand					

SAMPLE TABLE

MARKETS

Campers & Camping Trailers

Demand for campers and camping trailers is projected t
million in 2017, rebounding hea
es of the recession-impacted 2
s and camping trailers is also e
ith shipments expected to rise
5 million. Production will rema
s such the trade surplus will exp
million in 2017. As with other
recreational vehicles, the bulk of exports will be to Canada,
countries' proximity and to the popularity of camping in Can
parks.

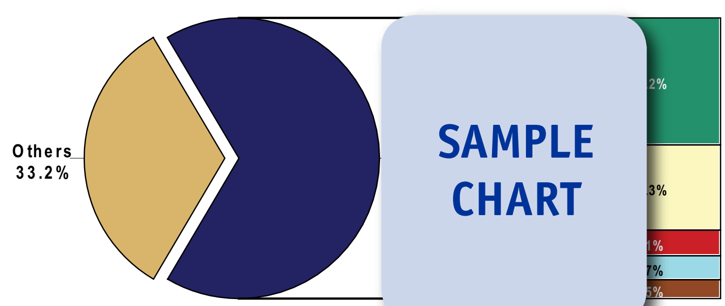
SAMPLE TEXT

Consumers are displaying increasing preference for larg
of camping vehicles with more home-like amenities, enhanci
popularity of such well equipped vehicle types as conventional travel trailers and self-propelled motor homes at the expense of smaller, more basic campers and camping trailers. The primary competition will arise from conventional travel trailers, which do not cost much more for the increased amount of space and additional features. Further loss of share will be limited by the continuing popularity of light trucks and other light tow vehicles, which will likely expand the potential customer base for campers and camping trailers. Additionally, growing personal disposable income levels and renewed interest in camping will support a widening market for these entry-level recreational vehicles. Campers and camping trailers will also benefit from their affordability, which a
younger, first-time consumers. However, gains will be limit
growth in population levels in the prime age group, 35 to 44
for purchasing entry-level recreational vehicles.

In general, owners of folding camping trailers and truc
tend to be younger than other recreational vehicle owners, l

CHART VI-1

RECREATIONAL VEHICLE MARKET SHARE
($8.5 billion, 2012)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE IV-9

CLASS A MOTOR HOME DEMAND

Item	2002	2007	2012	2017	2022
Resident Population (mil persons)					
class A motor homes/mil capita					
Class A Motor Home Demand (000 u					
Under 30 Feet					
30-38 Feet					
Over 38 Feet					
$/unit					
Class A Motor Home Demand (mil $)					
% class A					
Motor Home Demand (mil $)					

SAMPLE TABLE

COMPANY PROFILES

Foretravel Incorporated
1221 Northwest Stallings Drive
Nacogdoches, TX 75964
936-564-8367
http://wv

Annual S
Employi

Key Pro

For class A luxury motor homes. N by the Company at a facility in Nacogdoches, Texas.

SAMPLE PROFILE

The Company competes in the US recreational vehicle industry through the production of class A luxury motor homes. These motor homes, which are sold under the IH-45, PHENIX, and NIMBUS brand names, are built on Foretravel's proprietary TRAVEL RIDE or TRAVEL RIDE II chassis. For example, IH-45 models are built on TRAVEL RIDE II chassis, which is designed to offer enhanced driving stability and smoothness. Among these motor homes' external features are dual pane tinted and insulated windows, fiberglass roofs and subfloors, light emitting diode (LED) marker lights, two sliding cargo trays, two GIRARD (Girard Systems Incorporated) roof mounted electric patio awnings , parallel storage doors, stainless steel lined utility bays, and electric television antennas with boosters. Interior features for IH-45 motor homes include electric windshields with privacy shades and sunblocks, built in alarm clocks in bedrooms, electric cooktops, LED lighting, home theater speaker systems, electric refrigerators with ice and water dispensers, washer/dryer connections, china toilets, natural quartz countertops, stainless steel kitchen sinks, tile floors, handcrafted

224

STUDY COVERAGE

This Freedonia industry study, ***Recreational Vehicles***, provides historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 by product and region of the US. In addition, the study examines key market environment factors, analyzes the industry structure, evaluates company market share and profiles 28 competitors in the US recreational vehicle industry.

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Other Studies

World Motorcycle Components

World demand for motorcycle components, including those for electric bicycles (e-bikes) and motorcycles (e-cycles), will grow 7.5 percent annually to $119.5 billion in 2017. Engine and drivetrain parts will remain the largest category, while tires will grow the fastest. The Asia/Pacific region will remain the dominant market. This study analyzes the $83.2 billion world motorcycle component industry, with forecasts for 2017 and 2022 by market, product, world region, and for 20 countries. The study also evaluates company market share and profiles industry participants.

#3061 .... August 2013 .... $5900

Motorcycles in China

Demand for motorcycles in China is projected to increase 5.5 percent per annum through 2016 to 57.7 million units. Electric motorcycles will outpace gas motorcycles, with mopeds the most popular electric model because they are faster than electric bicycles and cost less than scooters. This study analyzes the 44.1 million unit motorcycle industry in China, with forecasts for 2016 and 2021 by product, gas engine displacement, electric battery type, market and geographic region. The study also evaluates company market share and profiles industry participants.

#2988 .... February 2013 .... $5400

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

World Buses

The world market for buses will grow 5.0 percent annually to 632,000 units in 2016. Type C school buses will lead gains, due largely to rapidly expanding use in China. Transit bus demand will rise at the next fastest rate. The Asia/Pacific region will offer the best growth opportunities, with China and India alone accounting for three-fifths of all new bus demand. This study analyzes the 495,000 unit global bus market, with forecasts for 2016 and 2021 by type, world region and for 25 countries. The study also evaluates company market share and profiles industry participants.

#2933 .... November 2012 .... $6100

Recreational Boating

US demand for recreational boats, propulsion systems and accessories is forecast to grow 8.0 percent annually to $10.1 billion in 2016. Demand for traditional powerboats will lead gains, rebounding from especially sharp declines beginning in 2008. Powerboats will also benefit from newer propulsion systems and controls that simplify handling. This study analyzes the $6.9 billion US recreational boating industry, with forecasts for 2016 and 2021 by material, product and region. The study also evaluates company market share and profiles industry competitors.

#2897 ....June 2012 .... $5100

About The Freedonia Group

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