



**IC Market Forecast<sup>®</sup>**  
**Boats Worldwide 2023**

## Company Profiles



## Interactive Dashboards



## Market Drivers



automatically updated



# more than just a report – A TOOL FOR SUCCESS!

*defining growth potential since 1998*

## Detecting Market Potential



## GEO-Maps



## Benchmarks



## Strategic Workshops



on request

# What Do You Get - Your Benefits at a Glance

## Content of the Report

### Market Data, Insights and Expertise...



#### MARKET ANALYSIS

- Historical market data from 2019 – 2022 for the total market development as well as
  - Boat Types
  - Boat Sizes
  - Engine Types
  - Customer Segments
- Forecasts from 2023 – 2026 for the total market as well as each analyzed product group, product type, cooling type and cooling segment
- Annual updates of the data

#### MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labor market, demographics, etc.
- Continuous updates of the data



#### Market Analysis

Market Volume

Market Growth

Trends

Market Shares

# What Do You Get - Your Benefits at a Glance

## Presentation of the Data and Deliverables

### Market Intelligence Tool Access and Deliverables

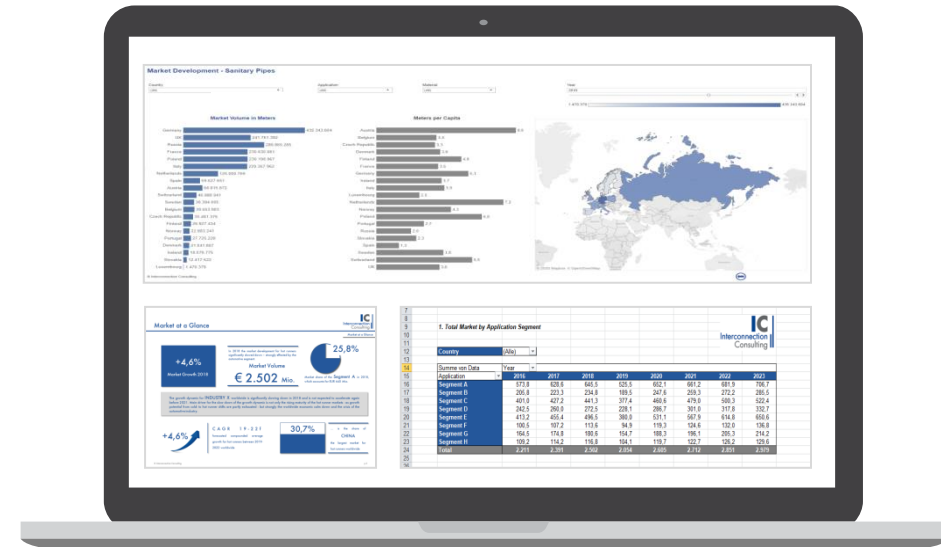


#### ONLINE-COCKPITS

- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

#### EXECUTIVE REPORTS

- Executive summary dashboards including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts



### Market Intelligence Tool and Reports



Online Dashboards

Executive Reports

## Market Structure

### Boat Types & Sizes

Motor Pleasure+Sport Fishing

Sail

Catamarans

### Size

10ft - 25ft

43ft - 50ft

26ft - 30ft

51ft - 80ft

31ft - 36ft

Super Yachts > 80ft

37ft - 42ft

### Engines Types for

Motor

Catamarans

Outboard

Inboard

Diesel

Diesel

Reg. Gasoline

Reg. Gasoline

Electric

Electric

Hybrid & Others

Hybrid & Others

### Customer Segments

By Boat Types

Private person

Charters & Others

## Available Countries/Regions



- Portugal
- Spain
- France
- Italy
- Croatia
- UK
- Germany
- Nordics
- Baltics
- EMR
- Benelux
- Turkey
- Israel & Lebanon
- Gulf Area
- Russia
- China
- Big South East Asia
- Other Asia
- USA
- Canada
- Brazil
- Argentina & Chile
- Caribbean
- North West Africa
- South East Africa
- Australia
- Pacific

# Market Structure - Interpretation

## Market Structure

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- Market data are available for each country/region separately as well as aggregated for the package purchased.
- Each country/region report includes data for the boat types and sizes, customer segments and engine types separately, as well as aggregated for the total market of boats in terms of value and quantity.
  - Engine types and customer segments shown in terms of quantity.
  - Boat sizes are shown for each boat type separately.
- Engine types are further broken down by outboard and inboard categories, shows for both motor boats and catamarans separately.

## Definitions - Regions

- EMR: Hungary, Slovenia, Slovakia, Czech Republic, Greece, Cyprus, Malta, Austria & Switzerland
- Baltics: Poland, Latvia, Lithuania, Estonia
- Nordics: Iceland, Sweden, Norway, Finland, Denmark
- Caribbean: Guyana, Venezuela, Columbia, Panama, Costa Rica, Nicaragua, Honduras, Belize, Guatemala, Cuba, Dominican Republic, Jamaica + Smaller Islands, Mexico
- Other Asia: India, Japan, Sri Lanka, South Korea
- Big South East Asia: Thailand, Malaysia, Brunei, Singapore, Philippine, Bangladesh, Vietnam
- South East Africa: South Africa, Mozambique, Tanzania, Kenya, Madagascar, Mauritius
- North West Africa: Egypt, Tunisia, Morocco, Algeria, Senegal, Guinea, Ivory Coast, Nigeria, Cameroon
- Gulf Area: Jordan, Saudi Arabia, UAE, Kuwait, Bahrain, Oman, Qatar
- Pacific: Papua New Guinea, New Zealand, Melanesia, Micronesia, Polynesia

# Definitions and Demarcations

## Market Data

- All the company figures are based on primary research among the top producers in Western and Eastern Europe and other regions if defined. The reliability of the collected information was tested by further inquiries with the respective companies if necessary, and through interviews with industry experts and distributors
- Companies that refused to provide information have been estimated according to their own statements, information of traders, competitors, press releases and other associations. All data is cross-checked with experts

## Units of Measurement:

- Turnover is stated in € 1.000
- Sales Volume is reported in 1.000 units

## Definitions

- Interconnection refers to the nautical year, starting on august 1<sup>st</sup> and ending on July 31<sup>st</sup>  
     2021 = 01.08.2020 - 31.07.2021  
     2022 = 01.08.2021 - 31.07.2022
- no boats under 10.000,-€ manufacturer price are considered, also no basic fishing boats or transport boats



# The Unique Mix of Methods and Approaches for Reliable Market Analysis



## SELL-IN

The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



## Survey with Manufacturers & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturers as well as interviews with industry experts.

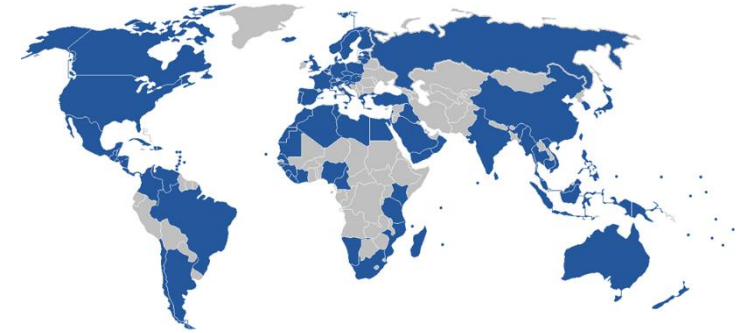
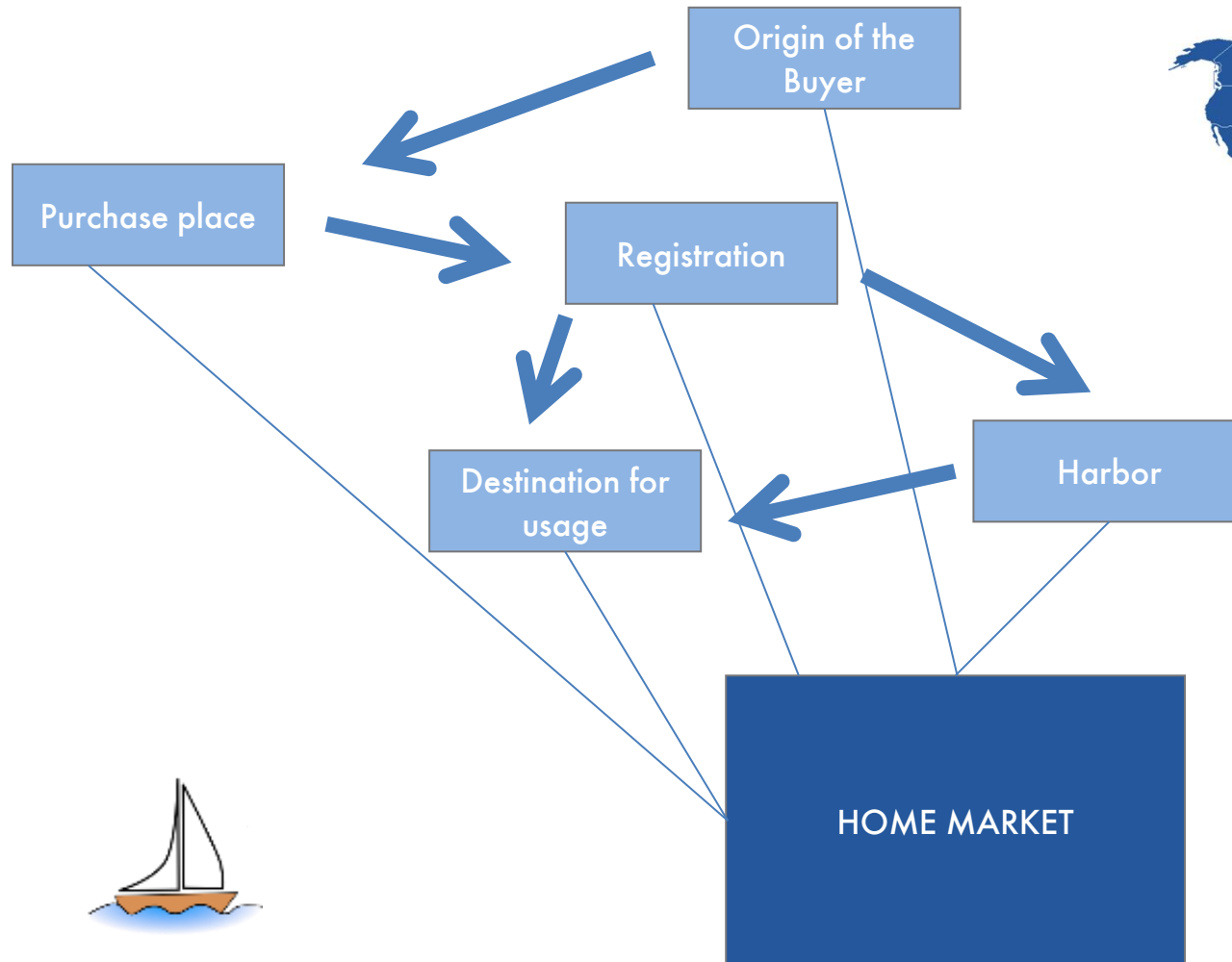


## Market Calculation Model

Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our **USP**  
“Only who talks with the industry knows what’s going on!”

# What Is the “Home Market” in Global Environment?



Home market or market by country for (larger pleasure) boats in global environment is quite challenging to define. Interconnection is considering all the main factors entering the process of calculation of the home market. Considering all 5 main factors, in case that they are all different, we consider the purchase place as the key for placement.



# The Market Intelligence Tool

## Dashboards - The Best Way to Work with Data

A picture says more  
than 1000 words

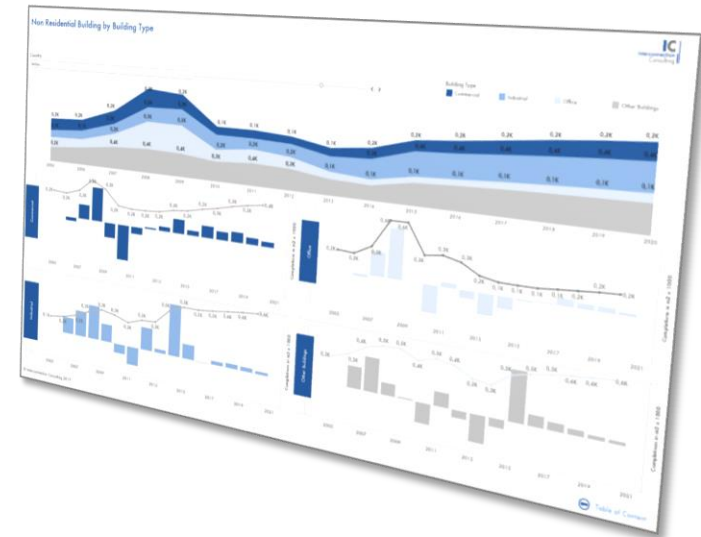
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online  
accessibility

- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file

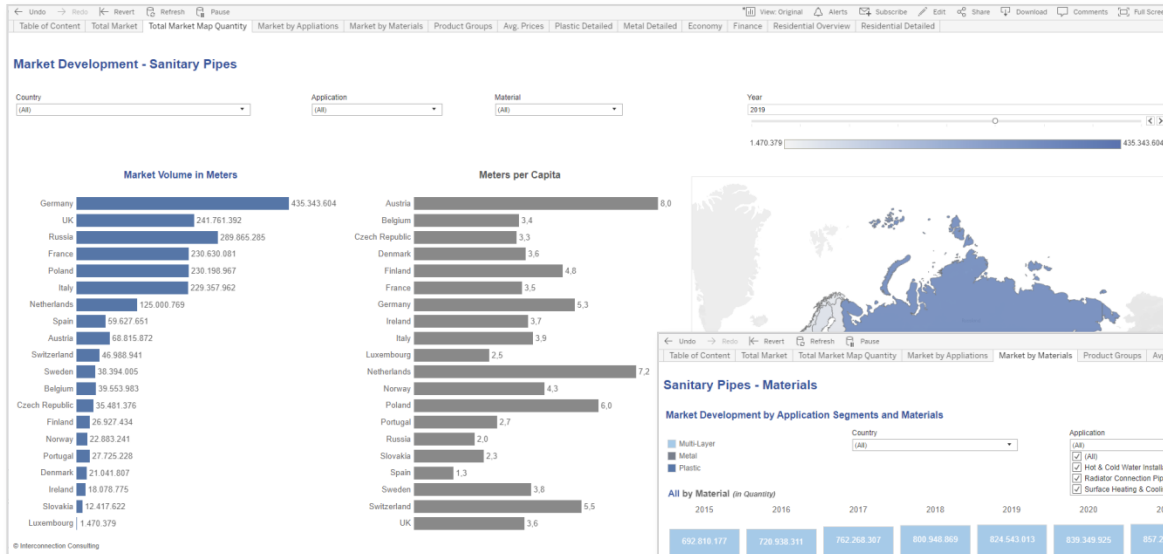


# Usability of the Market Intelligence Tool

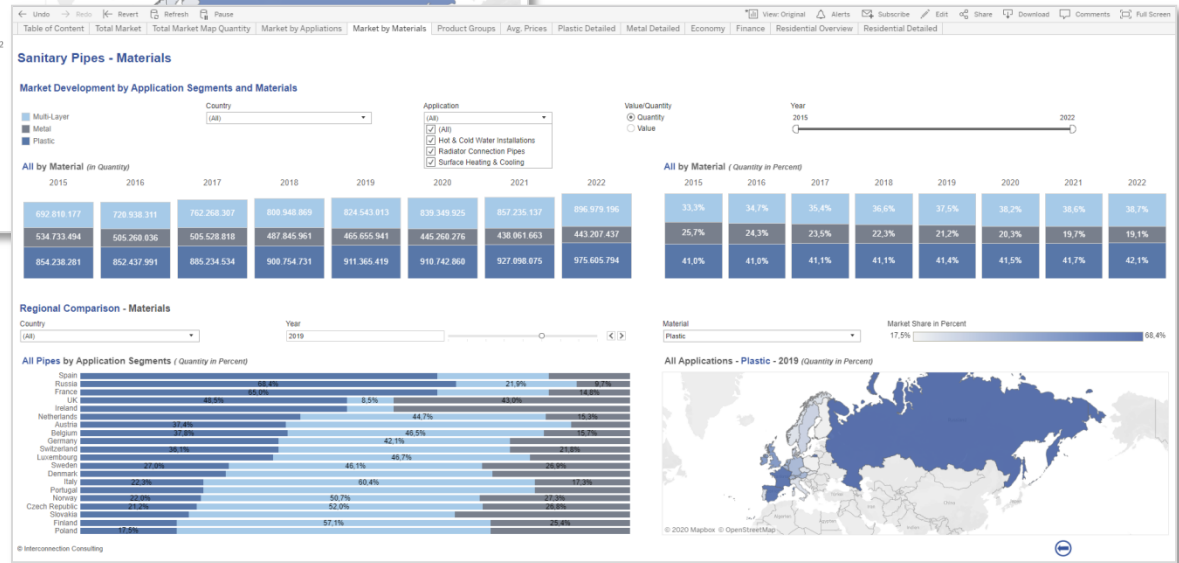
## Let's Put it in a Video...



# Sample Cockpits for Market Analysis Data

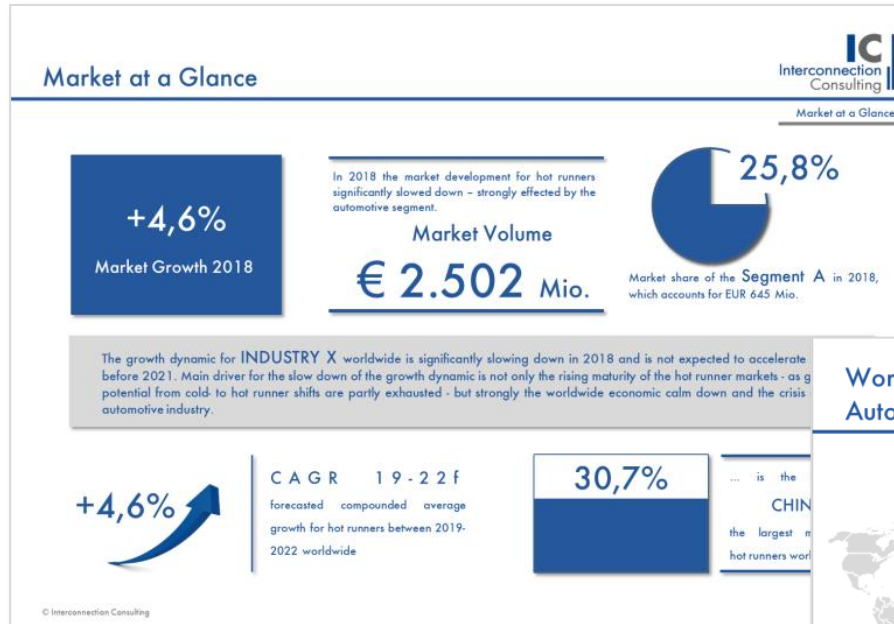


*This chart contains fictive data*

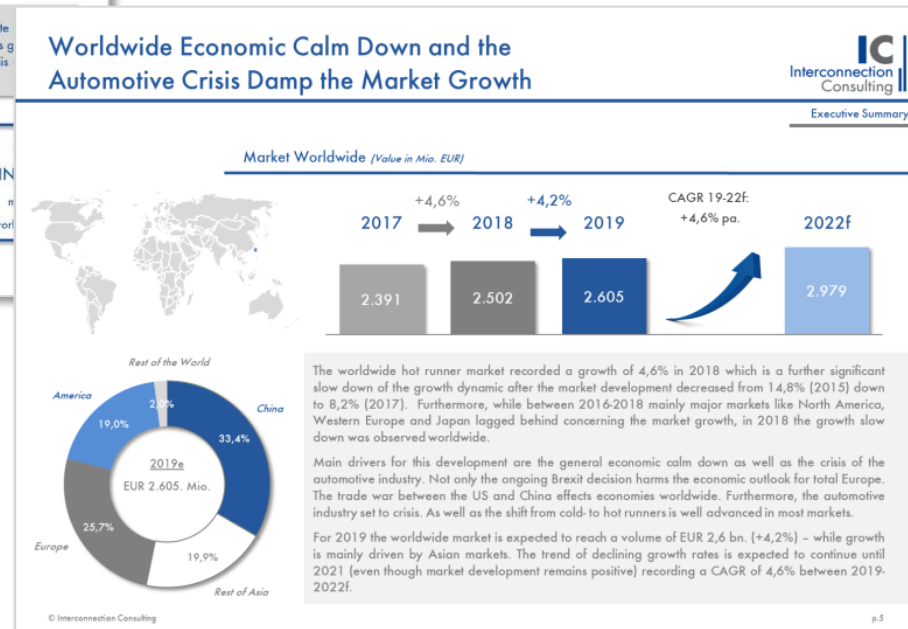


# Additional Deliverables

## Executive Summary and Pivot-Tables



Executive Summary as part of Tableau (fictive data)



Executive Summary as part of Tableau (fictive data)

# Investment Plan for Your Market Research

	Subscription*	Available Countries/Regions
1 Country/Region	€ 2.999,-	<ul style="list-style-type: none"> <li>Italy</li> <li>France</li> <li>Nordics</li> <li>Croatia</li> <li>Portugal</li> <li>Spain</li> <li>UK</li> <li>Baltics</li> <li>EMR</li> <li>Benelux</li> <li>Germany</li> <li>Turkey</li> <li>USA</li> <li>Canada</li> </ul>
3 Regions of Your Choice	€ 6.499,-	<ul style="list-style-type: none"> <li>Brazil</li> <li>Argentina &amp; Chile</li> <li>Caribbean</li> <li>Russia</li> <li>Israel &amp; Lebanon</li> <li>Gulf Area</li> <li>South East Africa</li> <li>North West Africa</li> <li>China</li> <li>Big South East Asia</li> <li>Other Asia</li> <li>Australia</li> <li>Pacific</li> </ul>
7 Regions of Your Choice	€ 11.499,-	
10 Regions of Your Choice	€ 14.999,-	
Full Worldwide Package	€ 39.499,-	

- **Subscription:** 25% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is automatically extended by one more year. The price is the individual price for each year. Price changes must be announced by Interconnection at least six weeks before 31st December.

The price includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of an subscription.

# Chosen References

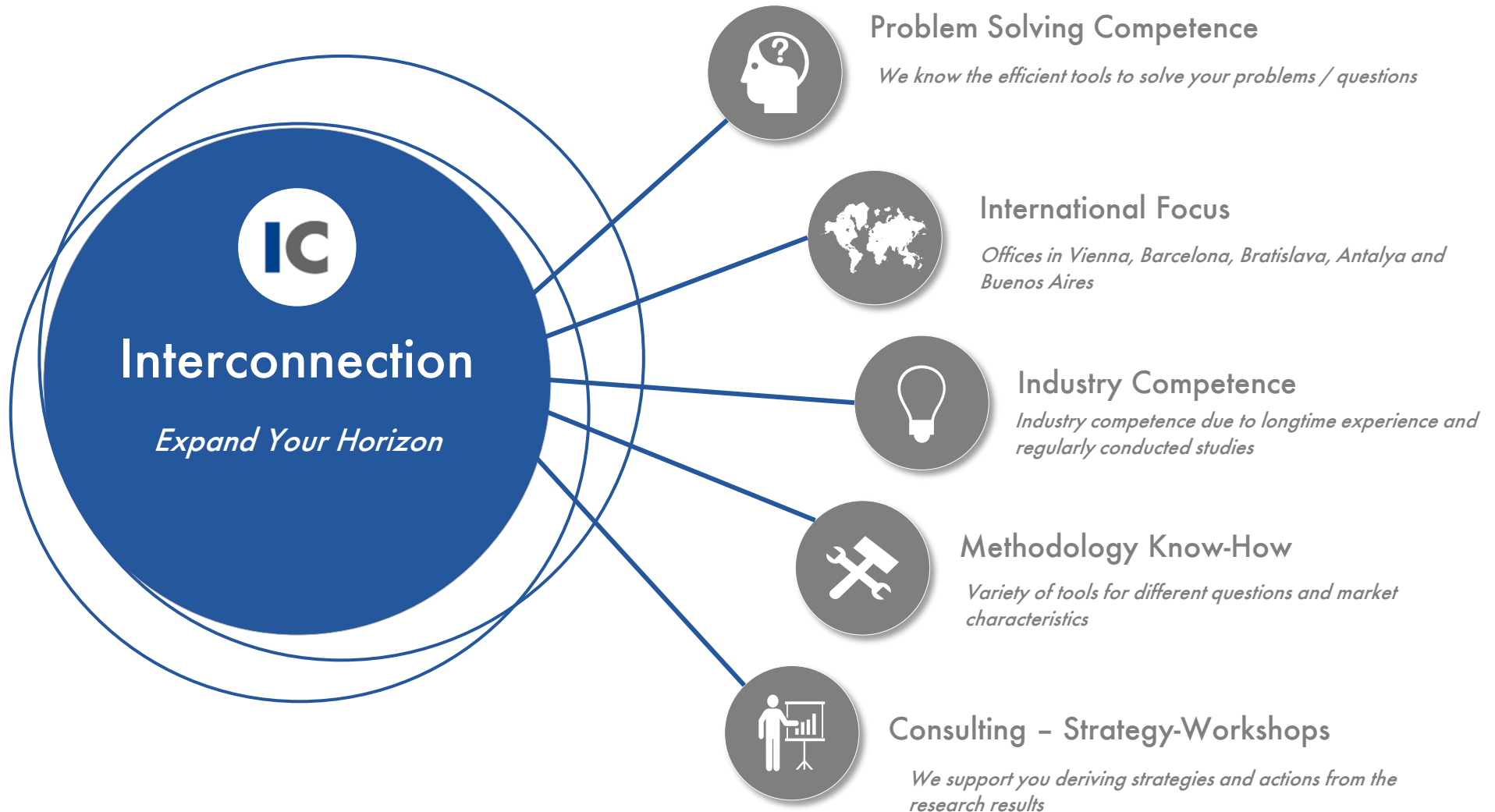
*"IC is a permanent partner of ours and provides helpful data for decisions."*

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe







# Our Market-Intelligence Tools



If there are any questions please  
do not hesitate to contact us!

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Defining Growth Potential Since 1998

## Yes, we would like to order the IC Market Forecast® Boats Worldwide 2023

(Please, print out the order form and mark your desired products)

Please, choose from the available countries and package selection

- |                                   |  |  |   |
|-----------------------------------|--|--|---|
| <input type="checkbox"/> Portugal | <input type="checkbox"/> Croatia             | <input type="checkbox"/> USA               |   |
| <input type="checkbox"/> Spain    | <input type="checkbox"/> Benelux             | <input type="checkbox"/> Canada            |   |
| <input type="checkbox"/> France   | <input type="checkbox"/> Turkey              | <input type="checkbox"/> Brazil            | <input type="checkbox"/> 1 Country/Region* .....EUR 2.999,- |
| <input type="checkbox"/> Italy    | <input type="checkbox"/> Israel & Lebanon    | <input type="checkbox"/> Argentina & Chile | <input type="checkbox"/> 3 Regions* .....EUR 6.499,-        |
| <input type="checkbox"/> Germany  | <input type="checkbox"/> Gulf Area           | <input type="checkbox"/> Caribbean         | <input type="checkbox"/> 7 Regions* .....EUR 11.499,-       |
| <input type="checkbox"/> UK       | <input type="checkbox"/> Russia              | <input type="checkbox"/> North West Africa | <input type="checkbox"/> 10 Regions* .....EUR 14.999,-      |
| <input type="checkbox"/> Nordics  | <input type="checkbox"/> China               | <input type="checkbox"/> South East Africa | <input type="checkbox"/> All Regions* .....EUR 39.499,-     |
| <input type="checkbox"/> Baltics  | <input type="checkbox"/> Big South East Asia | <input type="checkbox"/> Australia         |   |
| <input type="checkbox"/> EMR      | <input type="checkbox"/> Other Asia          | <input type="checkbox"/> Pacific           |   |

	Single Issue	Subscription*
25% price advantage		✓
IC Cockpit – Online Dashboard Solution	✓	✓
Full Flexibility – Within the sum of the subscription available country reports can be changed without any additional costs		✓
Web-Conference with the analyst free of charge		✓

### Billing Address

Company: \_\_\_\_\_ Name: \_\_\_\_\_  
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Date	Name	Signature
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In case of interest in single issue (+25 %), please contact the responsible analyst.

#### \*Subscription:

The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31<sup>st</sup> December. The subscription can be cancelled after two purchases of the study, but not later than 31<sup>st</sup> December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of a subscription.

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