



**Global Main Sail Industry Research Report, Growth  
Trends and Competitive Analysis 2023-2029**

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Maia Research

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[Click on the following text to jump to the corresponding chapter](#)



<b>1</b> <b>Report Overview</b>	<b>8</b> <b>Europe</b>
<b>2</b> <b>Global Main Sail Production</b>	<b>9</b> <b>Asia Pacific</b>
<b>3</b> <b>Global Main Sail Sales</b>	<b>10</b> <b>Latin America</b>
<b>4</b> <b>Competitive Landscape by Manufacturers</b>	<b>11</b> <b>Middle East and Africa</b>
<b>5</b> <b>Estimates and Forecasts by Type</b>	<b>12</b> <b>Company Profiles</b>
<b>6</b> <b>Market Size by Application</b>	<b>13</b> <b>Value Chain and Sales Channels Analysis</b>
<b>7</b> <b>North America</b>	<b>14</b> <b>Appendix</b>

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# Market Segments

Company	Type
<ul style="list-style-type: none"> <li>○ North Sails Sailmaking</li> <li>○ Quantum Sails</li> <li>○ Doyle</li> <li>○ Hyde sails</li> <li>○ Elvstrom Sails</li> <li>○ UK-Halsey International</li> <li>○ Ullman Sails</li> <li>○ Neilpryde Sails</li> <li>○ Jeckells</li> <li>○ Lidgard Sailmakers</li> <li>○ The Sail Service</li> <li>○ Loong Sails</li> <li>○ Horizon Sails</li> <li>○ Precision Sails</li> <li>○ Olympic Sails</li> <li>○ SAILONET</li> <li>○ South East Asia Sails</li> </ul>	<ul style="list-style-type: none"> <li>○ Polyester Main Sail</li> <li>○ Carbon Main Sail</li> <li>○ Aramid Main Sail</li> <li>○ Nylon Main Sail</li> <li>○ Cotton Main Sail</li> </ul>
	Application
	<ul style="list-style-type: none"> <li>○ Professional Sports</li> <li>○ Amateur Leisure</li> </ul>

## Unit Explanation in This Report

- Value: Refers to the market size of the product, measured in currency units: M USD = Million U.S. dollars=1000000 dollars
- Volume: Refers to the quantity or weight of the product, K Units = kilo Units=1000 Units

# Research Outline

## DATA POINTS

1500+

Exhaustive coverage of data points including segment markets; most detailed dissection of the market.

## EXPERT INTERVIEWS

20+

Interviews with key opinion leaders, industry experts, and people from both supply and demand sides.

## NO. OF TABLES

100+

A combination of multiple dimensions and dynamics in the form of quants; a crisscrossing of multiple segments and estimations through factor analysis.

## COMPETITIVE ANALYSIS

10+

In-depth analysis of key market players focusing on financial information, product/service portfolios, recent developments, and strategies.

## MAJOR COUNTRIES

20+

Study on data points of major contributing regions.

## QUALITATIVE ANALYSIS

Overall indicators for market movements throughout the value and supply chain, including regulations, consumer behaviors, cost analysis, and product benchmarking.



Data



Estimations



Insights



Road Map

## Content Covered



### Research Outline

- Data points
- Expert interviews
- NO. of tables
- Competitors analysis
- Major countries
- Qualitative analysis

### Market Segments

- By Type
- By Application
- By Region
- By Players



### Basic Information

- Market size
- Segment-market size
- Competitive landscape
- Recent status
- Development trends

### Factors Considered

- Technological innovation and advancement
- Market dynamics (drivers, restraints, opportunities)
- New product release
- Impact of COVID-19
- Regional conflicts
- Carbon neutrality

# Research Methodology

Top-down  
Methodology

Bottom-up  
Methodology

Supply-side  
Estimation

Demand-side  
Estimation

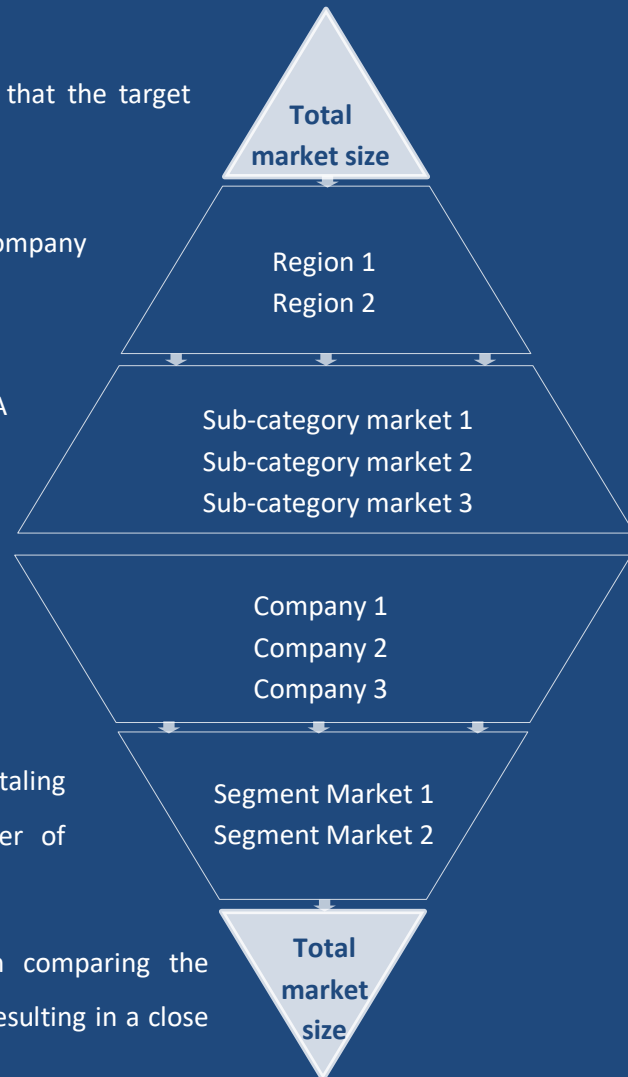
Research methodology is a way to systematically solve research problems that we apply during the process of the research. The major ones amongst of them are **top-down and bottom-up approach, supply-side estimation and demand-side estimation.**

## 1. Top-down Methodology

- By using a broad market size figure and the percentage that the target market represents.
- By using demographical data such as human population, company size, location, age, income, etc.
- Published statistics from UN, OECD, the World Bank, CIA World Factbook, white papers, etc.

## 2. Bottom-up Methodology

- Beginning with a subset of a localized situation to build “up” to the wider market opportunity.
- It extrapolates up the Total Addressable Market (TAM) by totaling the main granular level variables, such as the number of customers, volume of products, and unit prices.
- Computing the market through multiple models, then comparing the differences between the outcome of each model, finally resulting in a close estimate of the market size through all methods.



## 3. Supply Side Estimation

Obtaining the market size by looking Sources for company data the supply side of the industry and summing up the business volume of all tie companies who sell the product/service.

  
Companies  
House

Sources for company data

  
Websites

  
Experts  
Interviews

## 4. Demand Side Estimation



Using the data related to end-users and the product to create a formula to estimate market size.



Bottom-up forecasting is a forecast provided by individuals (typically salespeople), and these forecasts are then aggregated to calculate a higher-level forecast.

## Table of Content

<b>1 Report Overview .....</b>	<b>1</b>
1.1 Study Scope .....	1
1.2 Market Analysis by Type.....	1
1.2.1 Global Main Sail Market Size (M USD) and CAGR (%) by Type: 2018 VS 2023 VS 2029 .....	1
1.2.2 Polyester Main Sail .....	2
1.2.3 Carbon Main Sail .....	3
1.2.4 Aramid Main Sail .....	4
1.2.5 Nylon Main Sail.....	5
1.2.6 Cotton Main Sail .....	6
1.3 Market Analysis by Application .....	6
1.3.1 Global Main Sail Market Size (M USD) and CAGR (%) by Application: 2018 VS 2023 VS 2029.....	6
1.3.2 Professional Sports .....	7
1.3.3 Amateur Leisure .....	7
1.4 Study Objectives.....	8
1.5 Years Considered .....	8
<b>2 Global Main Sail Production.....</b>	<b>9</b>
2.1 Global Main Sail Production (2018-2029) .....	9
2.2 Global Main Sail Production by Region .....	9
2.2.1 Global Main Sail Historic Production by Region (2018-2023) .....	9
2.2.2 Global Main Sail Forecasted Production by Region (2024-2029) .....	10
2.3.3 North America .....	10
2.3.4 Europe .....	11
2.3.5 Asia Pacific.....	11
2.4 Industry Trends.....	12
2.4.1 Main Sail Industry Trends .....	12
2.4.2 Main Sail Market Drivers .....	13
2.4.3 Main Sail Market Challenges .....	16
2.4.4 Main Sail Market Restraints .....	17
<b>3 Global Main Sail Sales .....</b>	<b>19</b>
3.1 Global Main Sail Sales Estimates and Forecasts 2018-2029.....	19
3.2 Global Main Sail Revenue Estimates and Forecasts 2018-2029 .....	20
3.3 Global Main Sail Revenue by Region: 2018 VS 2023 VS 2029 .....	20

3.4 Global Top Main Sail Regions by Sales.....	20
3.4.1 Global Top Main Sail Regions by Sales (2018-2023) .....	20
3.4.2 Global Top Main Sail Regions by Sales (2024-2029) .....	21
3.5 Global Top Main Sail Regions by Revenue.....	21
3.5.1 Global Top Main Sail Regions by Revenue (2018-2023) .....	21
3.5.2 Global Top Main Sail Regions by Revenue (2024-2029) .....	21
3.5.3 North America .....	22
3.5.4 Europe .....	23
3.5.5 Asia-Pacific.....	24
3.5.6 Latin America.....	25
3.5.7 Middle East & Africa.....	26

#### **4 Competitive Landscape by Manufacturers ..... 27**

4.1 Global Main Sail Sales by Manufacturers .....	27
4.1.1 Global Top Main Sail Manufacturers by Sales (2018-2023).....	27
4.2.2 Global Top Main Sail Manufacturers Market Share by Sales (2018-2023) .....	27
4.2.3 Global Top 10 and Top 5 Companies by Main Sail Sales Market Share in 2022 .....	28
4.2 Global Main Sail Revenue by Manufacturers .....	29
4.2.1 Global Top Main Sail Manufacturers by Revenue (2018-2023) .....	29
4.2.2 Global Top Main Sail Manufacturers Market Share by Revenue (2018-2023) .....	30
4.2.3 Global Top 10 and Top 5 Companies by Main Sail Revenue Market Share in 2022.....	31
4.3 Global Main Sail Sales Price by Manufacturers .....	31
4.4 Analysis of Competitive Landscape .....	32
4.4.1 Global Main Sail Manufacturers Geographical Distribution.....	32

#### **5 Estimates and Forecasts by Type ..... 34**

5.1 Global Main Sail Sales by Type .....	34
5.1.1 Global Main Sail Historical Sales by Type (2018-2023).....	34
5.1.2 Global Main Sail Forecasted Sales by Type (2024-2029) .....	34
5.1.3 Global Main Sail Sales Market Share by Type (2018-2029) .....	34
5.2 Global Main Sail Revenue by Type .....	35
5.2.1 Global Main Sail Historical Revenue by Type (2018-2023) .....	35
5.2.2 Global Main Sail Forecasted Revenue by Type (2024-2029) .....	35
5.2.3 Global Main Sail Revenue Market Share by Type (2018-2029) .....	36

#### **6 Market Size by Application..... 37**

6.1 Global Main Sail Sales by Application.....	37
6.1.1 Global Main Sail Historical Sales by Application (2018-2023) .....	37
6.1.2 Global Main Sail Forecasted Sales by Application (2024-2029) .....	37
6.1.3 Global Main Sail Sales Market Share by Application (2018-2029) .....	37



6.2 Global Main Sail Revenue by Application.....	38
6.2.1 Global Main Sail Historical Revenue by Application (2018-2023) .....	38
6.2.2 Global Main Sail Forecasted Revenue by Application (2024-2029).....	38
6.2.3 Global Main Sail Revenue Market Share by Application (2018-2029).....	38
6.3 Global Main Sail Price by Application.....	39
6.3.1 Global Main Sail Price by Application (2018-2023) .....	39
6.3.2 Global Main Sail Price Forecast by Application (2024-2029).....	39
<b>7 North America.....</b>	<b>40</b>
7.1 North America Main Sail Market Size by Company.....	40
7.1.1 North America Main Sail Revenue by Company (2018-2023) .....	40
7.2 North America Main Sail Market Size by Type .....	40
7.2.1 North America Main Sail Sales by Type (2018-2029) .....	40
7.2.2 North America Main Sail Revenue by Type (2018-2029).....	41
7.3 North America Main Sail Market Size by Application.....	41
7.3.1 North America Main Sail Sales by Application (2018-2029).....	41
7.3.2 North America Main Sail Revenue by Application (2018-2029).....	42
7.4 North America Main Sail Market Size by Country .....	42
7.4.1 North America Main Sail Revenue by Country (2018-2029) .....	42
7.4.2 United States .....	43
7.4.3 Canada.....	43
<b>8 Europe.....</b>	<b>44</b>
8.1 Europe Main Sail Market Size by Company.....	44
8.1.1 Europe Main Sail Revenue by Company (2018-2023) .....	44
8.2 Europe Main Sail Market Size by Type .....	44
8.2.1 Europe Main Sail Sales by Type (2018-2029) .....	44
8.2.2 Europe Main Sail Revenue by Type (2018-2029).....	45
8.3 Europe Main Sail Market Size by Application.....	45
8.3.1 Europe Main Sail Sales by Application (2018-2029).....	45
8.3.2 Europe Main Sail Revenue by Application (2018-2029) .....	46
8.4 Europe Main Sail Market Size by Country .....	46
8.4.1 Europe Main Sail Revenue by Country (2018-2029) .....	46
8.4.2 Germany .....	47
8.4.3 France .....	47
8.4.4 U.K. ....	48
8.4.5 Italy .....	48
8.4.6 Russia.....	49
<b>9 Asia Pacific .....</b>	<b>50</b>

9.1 Asia Pacific Main Sail Market Size by Type .....	50
9.1.1 Asia Pacific Main Sail Sales by Type (2018-2029) .....	50
9.1.2 Asia Pacific Main Sail Revenue by Type (2018-2029) .....	50
9.2 Asia Pacific Main Sail Market Size by Application.....	51
9.2.1 Asia Pacific Main Sail Sales by Application (2018-2029).....	51
9.2.2 Asia Pacific Main Sail Revenue by Application (2018-2029).....	51
9.3 Asia Pacific Main Sail Market Size by Country .....	52
9.3.1 Asia Pacific Main Sail Revenue by Country (2018-2029) .....	52
9.3.2 China.....	53
9.3.3 Japan .....	53
9.3.4 South Korea .....	54
9.3.5 India.....	54
9.3.6 Australia.....	55
9.3.7 Southeast Asia .....	55
<b>10 Latin America .....</b>	<b>56</b>
10.1 Latin America Main Sail Market Size by Type .....	56
10.1.1 Latin America Main Sail Sales by Type (2018-2029) .....	56
10.1.2 Latin America Main Sail Revenue by Type (2018-2029) .....	56
10.2 Latin America Main Sail Market Size by Application .....	57
10.2.1 Latin America Main Sail Sales by Application (2018-2029) .....	57
10.2.2 Latin America Main Sail Revenue by Application (2018-2029) .....	57
10.3 Latin America Main Sail Market Size by Country.....	58
10.3.1 Latin America Main Sail Revenue by Country (2018-2029) .....	58
10.3.2 Mexico .....	59
10.3.3 Brazil.....	59
10.3.4 Argentina.....	60
<b>11 Middle East and Africa .....</b>	<b>61</b>
11.1 Middle East and Africa Main Sail Market Size by Type.....	61
11.1.1 Middle East and Africa Main Sail Sales by Type (2018-2029).....	61
11.1.2 Middle East and Africa Main Sail Revenue by Type (2018-2029) .....	61
11.2 Middle East and Africa Main Sail Market Size by Application .....	62
11.2.1 Middle East and Africa Main Sail Sales by Application (2018-2029) .....	62
11.2.2 Middle East and Africa Main Sail Revenue by Application (2018-2029) .....	63
11.3 Middle East and Africa Main Sail Market Size by Country.....	63
11.3.1 Middle East and Africa Main Sail Revenue by Country (2018-2029).....	63
11.3.2 Turkey .....	64
11.3.3 Saudi Arabia.....	64

11.3.4 U.A.E.....	65
<b>12 Company Profiles .....</b>	<b>66</b>
12.1 North Sails Sailmaking .....	66
12.1.1 North Sails Sailmaking Corporation Information.....	66
12.1.2 Business Overview.....	66
12.1.3 Main Sail Products and Services.....	67
12.1.4 North Sails Sailmaking Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	68
12.1.5 North Sails Sailmaking Recent Development .....	69
12.1.6 North Sails Sailmaking Main Sail SWOT Analysis.....	69
12.2 Quantum Sails .....	69
12.2.1 Quantum Sails Corporation Information .....	69
12.2.2 Business Overview.....	70
12.2.3 Main Sail Products and Services.....	70
12.2.4 Quantum Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .	70
12.2.5 Quantum Sails Recent Development.....	71
12.2.6 Quantum Sails Main Sail SWOT Analysis .....	71
12.3 Doyle .....	72
12.3.1 Doyle Corporation Information .....	72
12.3.2 Business Overview.....	72
12.3.3 Main Sail Products and Services.....	73
12.3.4 Doyle Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	73
12.3.5 Doyle Recent Development.....	74
12.3.6 Doyle Main Sail SWOT Analysis .....	75
12.4 Hyde sails.....	75
12.4.1 Hyde sails Corporation Information .....	75
12.4.2 Business Overview.....	75
12.4.3 Main Sail Products and Services.....	76
12.4.4 Hyde sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	77
12.4.5 Hyde sails Main Sail SWOT Analysis .....	77
12.5 Elvstrom Sails.....	78
12.5.1 Elvstrom Sails Corporation Information .....	78
12.5.2 Business Overview.....	78
12.5.3 Main Sail Products and Services.....	78
12.5.4 Elvstrom Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) ..	79
12.5.5 Elvstrom Sails Recent Development.....	80
12.5.6 Elvstrom Sails Main Sail SWOT Analysis .....	80

12.6 UK-Halsey International .....	81
12.6.1 UK-Halsey International Corporation Information .....	81
12.6.2 Business Overview.....	81
12.6.3 Main Sail Products and Services.....	81
12.6.4 UK-Halsey International Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	82
12.6.5 UK-Halsey International Main Sail SWOT Analysis .....	83
12.7 Ullman Sails .....	83
12.7.1 Ullman Sails Corporation Information.....	83
12.7.2 Business Overview.....	84
12.7.3 Main Sail Products and Services.....	84
12.7.4 Ullman Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023).....	85
12.7.5 Ullman Sails Main Sail SWOT Analysis.....	85
12.8 Neilpryde Sails .....	86
12.8.1 Neilpryde Sails Corporation Information.....	86
12.8.2 Business Overview.....	86
12.8.3 Main Sail Products and Services.....	86
12.8.4 Neilpryde Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023).....	87
12.8.5 Neilpryde Sails Main Sail SWOT Analysis.....	88
12.9 Jeckells.....	89
12.9.1 Jeckells Corporation Information .....	89
12.9.2 Business Overview.....	89
12.9.3 Main Sail Products and Services.....	89
12.9.4 Jeckells Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	90
12.9.5 Jeckells Main Sail SWOT Analysis .....	91
12.10 Lidgard Sailmakers.....	91
12.10.1 Lidgard Sailmakers Corporation Information .....	91
12.10.2 Business Overview.....	92
12.10.3 Main Sail Products and Services.....	92
12.10.4 Lidgard Sailmakers Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	92
12.10.5 Lidgard Sailmakers Main Sail SWOT Analysis.....	93
12.11 The Sail Service.....	94
12.11.1 The Sail Service Corporation Information .....	94
12.11.2 Business Overview.....	94
12.11.3 Main Sail Products and Services.....	95
12.11.4 The Sail Service Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	95

12.11.5 The Sail Service Main Sail SWOT Analysis .....	96
12.12 Loong Sails.....	97
12.12.1 Loong Sails Corporation Information .....	97
12.12.2 Business Overview.....	97
12.12.3 Main Sail Products and Services.....	97
12.12.4 Loong Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) ....	98
12.12.5 Loong Sails Main Sail SWOT Analysis.....	99
12.13 Horizon Sails .....	99
12.13.1 Horizon Sails Corporation Information.....	99
12.13.2 Business Overview.....	99
12.13.3 Main Sail Products and Services.....	100
12.13.4 Horizon Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)	101
12.13.5 Horizon Sails Recent Development .....	101
12.13.6 Horizon Sails Main Sail SWOT Analysis.....	102
12.14 Precision Sails .....	102
12.14.1 Precision Sails Corporation Information.....	102
12.14.2 Business Overview.....	103
12.14.3 Main Sail Products and Services.....	103
12.14.4 Precision Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)	104
12.14.5 Precision Sails Main Sail SWOT Analysis.....	105
12.15 Olimpic Sails .....	106
12.15.1 Olimpic Sails Corporation Information .....	106
12.15.2 Business Overview.....	106
12.15.3 Main Sail Products and Services.....	106
12.15.4 Olimpic Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)	107
12.15.5 Olimpic Sails Main Sail SWOT Analysis.....	108
12.16 SAILONET .....	109
12.16.1 SAILONET Corporation Information.....	109
12.16.2 Business Overview.....	109
12.16.3 Main Sail Products and Services.....	109
12.16.4 SAILONET Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) ....	110
12.16.5 SAILONET Main Sail SWOT Analysis.....	110
12.17 South East Asia Sails .....	111
12.17.1 South East Asia Sails Corporation Information.....	111
12.17.2 Business Overview.....	111
12.17.3 Main Sail Products and Services.....	112
12.17.4 South East Asia Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-	

2023) .....	112
12.17.5 South East Asia Sails Main Sail SWOT Analysis .....	113
<b>13 Value Chain and Sales Channels Analysis .....</b>	<b>114</b>
13.1 Main Sail Value Chain Analysis .....	114
13.2 Main Sail Key Raw Materials .....	115
13.2.1 Key Raw Materials .....	115
13.2.2 Raw Materials Key Suppliers .....	115
13.3 Main Sail Production Mode & Process .....	117
13.4 Main Sail Sales and Marketing .....	118
13.4.1 Main Sail Sales Channels .....	118
13.4.2 Main Sail Distributors .....	120
13.5 Main Sail Customers .....	121
<b>14 Appendix .....</b>	<b>122</b>
14.1 Methodology .....	122
14.2 Research Data Source .....	122
14.2.1 Secondary Data .....	122
14.2.2 Primary Data .....	123
14.2.3 Market Size Estimation .....	124
14.2.4 Legal Disclaimer .....	126

## List of Tables and Figures

Figure Main Sail Picture.....	1
Table Global Main Sail Market Size (M USD) and CAGR (%) by Type: 2018 VS 2023 VS 2029...	2
Figure Polyester Main Sail Figures.....	2
Figure Carbon Main Sail Figures.....	3
Figure Aramid Main Sail Figures.....	4
Figure Nylon Main Sail Figures.....	5
Figure Cotton Main Sail Figures.....	6
Table Global Main Sail Market Size (M USD) and CAGR (%) by Application: 2018 VS 2023 VS 2029.....	6
Figure Professional Sports Case Studies.....	7
Figure Amateur Leisure Case Studies.....	7
Figure Years Considered for the Study.....	8
Figure Global Main Sail Production (K Units) (2018-2029).....	9
Table Global Main Sail Historic Production (K Units) by Region (2018-2023).....	9
Table Global Main Sail Forecasted Production (K Units) by Region (2024-2029).....	10
Figure North America Main Sail Production (K Units) and Growth Rate (2018-2029).....	10
Figure Europe Main Sail Production (K Units) and Growth Rate (2018-2029).....	11
Figure Asia Pacific Main Sail Production (K Units) and Growth Rate (2018-2029).....	11
Table Main Sail Industry Trends.....	12
Table Main Sail Market Drivers.....	13
Table Main Sail Market Challenges.....	16
Table Main Sail Market Restraints.....	17
Figure Global Main Sail Sales (K Units) Estimates and Forecasts 2018-2029.....	19
Figure Global Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029.....	20
Table Global Main Sail Revenue (M USD) by Region: 2018 VS 2023 VS 2029.....	20
Table Global Top Main Sail Regions by Sales (K Units) (2018-2023).....	20
Table Global Top Main Sail Regions by Sales (K Units) (2024-2029).....	21
Table Global Top Main Sail Regions by Revenue (M USD) (2018-2023).....	21
Table Global Top Main Sail Regions by Revenue (M USD) (2024-2029).....	21
Figure North America Main Sail Sales (K Units) Estimates and Forecasts 2018-2029.....	22
Figure North America Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029.....	22
Figure Europe Main Sail Sales (K Units) Estimates and Forecasts 2018-2029.....	23

Figure Europe Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029 .....	23
Figure Asia-Pacific Main Sail Sales (K Units) Estimates and Forecasts 2018-2029 .....	24
Figure Asia-Pacific Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029 .....	24
Figure Latin America Main Sail Sales (K Units) Estimates and Forecasts 2018-2029 .....	25
Figure Latin America Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029 .....	25
Figure Middle East & Africa Main Sail Sales (K Units) Estimates and Forecasts 2018-2029....	26
Figure Middle East & Africa Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029 .....	26
Table Global Top Main Sail Manufacturers by Sales (K Units) (2018-2023) .....	27
Table Global Top Main Sail Manufacturers Market Share by Sales (K Units) (2018-2023) .....	27
Table Global Top 10 Companies by Main Sail Sales Market Share in 2022 .....	28
Table Global Top 5 Companies by Main Sail Sales Market Share in 2022 .....	29
Table Global Top Main Sail Manufacturers by Revenue (M USD) (2018-2023) .....	29
Table Global Top Main Sail Manufacturers Market Share by Revenue (M USD) (2018-2023) .....	30
Figure Table Global Top 10 Companies by Main Sail Revenue Market Share in 2022.....	31
Figure Table Global Top 5 Companies by Main Sail Revenue Market Share in 2022.....	31
Table Global Main Sail Sales Price (USD/Unit) by Manufacturers .....	31
Table Global Main Sail Manufacturers Geographical Distribution .....	32
Table Global Main Sail Sales (K Units) by Type (2018-2023) .....	34
Table Global Main Sail Sales (K Units) Forecast by Type (2024-2029) .....	34
Table Global Main Sail Sales Market Share by Type (2018-2029) .....	34
Table Global Main Sail Historical Revenue (M USD) by Type (2018-2023) .....	35
Table Global Main Sail Forecasted Revenue (M USD) by Type (2024-2029) .....	35
Table Global Main Sail Revenue Market Share by Type (2018-2029).....	36
Table Global Main Sail Sales (K Units) by Application (2018-2023).....	37
Table Global Main Sail Sales (K Units) Forecast by Application (2024-2029) .....	37
Table Global Main Sail Sales Market Share by Application (2018-2029).....	37
Table Global Main Sail Revenue (M USD) by Application (2018-2023) .....	38
Table Global Main Sail Revenue (M USD) Forecast by Application (2024-2029).....	38
Table Global Main Sail Revenue Market Share by Application (2018-2029) .....	38
Table Global Main Sail Price (USD/Unit) by Application (2018-2023) .....	39
Table Global Main Sail Price (USD/Unit) Forecast by Application (2024-2029) .....	39
Table North America Main Sail Revenue (M USD) by Company (2018-2023) .....	40
Table North America Main Sail Sales (K Units) by Type (2018-2029) .....	40
Table North America Main Sail Revenue (M USD) by Type (2018-2029).....	41



Table North America Main Sail Sales (K Units) by Application (2018-2029) .....	41
Table North America Main Sail Revenue (M USD) by Application (2018-2029) .....	42
Table North America Main Sail Revenue (M USD) by Country (2018-2029) .....	42
Figure United States Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million) .....	43
Figure Canada Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	43
Table Europe Main Sail Revenue (M USD) by Company (2018-2023) .....	44
Table Europe Main Sail Sales (K Units) by Type (2018-2029) .....	44
Table Europe Main Sail Revenue (M USD) by Type (2018-2029).....	45
Table Europe Main Sail Sales (K Units) by Application (2018-2029).....	45
Table Europe Main Sail Revenue (M USD) by Application (2018-2029) .....	46
Table Europe Main Sail Revenue (M USD) by Country (2018-2029) .....	46
Figure Germany Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	47
Figure France Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	47
Figure U.K. Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million) .....	48
Figure Italy Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	48
Figure Russia Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million) .....	49
Table Asia Pacific Main Sail Sales (K Units) by Type (2018-2029) .....	50
Table Asia Pacific Main Sail Revenue (M USD) by Type (2018-2029) .....	50
Table Asia Pacific Main Sail Sales (K Units) by Application (2018-2029) .....	51
Table Asia Pacific Main Sail Revenue (M USD) by Application (2018-2029).....	51
Table Asia Pacific Main Sail Revenue (M USD) by Country (2018-2029) .....	52
Figure China Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million) .....	53
Figure Japan Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million) .....	53
Figure South Korea Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	54
Figure India Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	54
Figure Australia Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million) .....	55
Figure Southeast Asia Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	55
Table Latin America Main Sail Sales (K Units) by Type (2018-2029).....	56
Table Latin America Main Sail Revenue (M USD) by Type (2018-2029) .....	56
Table Latin America Main Sail Sales (K Units) by Application (2018-2029).....	57
Table Latin America Main Sail Revenue (M USD) by Application (2018-2029).....	57
Table Latin America Main Sail Revenue (M USD) by Country (2018-2029).....	58
Figure Mexico Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	59
Figure Brazil Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	59
Figure Argentina Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	60

Table Middle East and Africa Main Sail Sales (K Units) by Type (2018-2029).....	61
Table Middle East and Africa Main Sail Revenue (M USD) by Type (2018-2029) .....	61
Table Middle East and Africa Main Sail Sales (K Units) by Application (2018-2029) .....	62
Table Middle East and Africa Main Sail Revenue (M USD) by Application (2018-2029).....	63
Table Middle East and Africa Main Sail Revenue (M USD) by Country (2018-2029) .....	63
Figure Turkey Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million) .....	64
Figure Saudi Arabia Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million) .....	64
Figure U.A.E Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million).....	65
Table North Sails Sailmaking Corporation Information .....	66
Table Main Sail Products and Services .....	67
Table North Sails Sailmaking Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	68
Figure North Sails Sailmaking Revenue in Main Sail Business (2018-2023) .....	68
Table North Sails Sailmaking Recent Development.....	69
Table North Sails Sailmaking SWOT Analysis.....	69
Table Quantum Sails Corporation Information .....	69
Table Main Sail Products and Services .....	70
Table Quantum Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	70
Figure Quantum Sails Revenue in Main Sail Business (2018-2023) .....	71
Table Quantum Sails Recent Development .....	71
Table Quantum Sails SWOT Analysis .....	71
Table Doyle Corporation Information.....	72
Table Main Sail Products and Services .....	73
Table Doyle Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023).....	73
Figure Doyle Revenue in Main Sail Business (2018-2023).....	74
Table Doyle Recent Development .....	74
Table Doyle SWOT Analysis .....	75
Table Hyde sails Corporation Information.....	75
Table Main Sail Products and Services .....	76
Table Hyde sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023).....	77
Figure Hyde sails Revenue in Main Sail Business (2018-2023).....	77
Table Hyde sails SWOT Analysis.....	77
Table Elvstrom Sails Corporation Information.....	78
Table Main Sail Products and Services .....	78
Table Elvstrom Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023).....	79

Figure Elvstrom Sails Revenue in Main Sail Business (2018-2023).....	80
Table Elvstrom Sails Recent Development .....	80
Table Elvstrom Sails SWOT Analysis.....	80
Table UK-Halsey International Corporation Information.....	81
Table Main Sail Products and Services .....	81
Table UK-Halsey International Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	82
Figure UK-Halsey International Revenue in Main Sail Business (2018-2023).....	83
Table UK-Halsey International SWOT Analysis .....	83
Table Ullman Sails Corporation Information .....	83
Table Main Sail Products and Services .....	84
Table Ullman Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	85
Figure Ullman Sails Revenue in Main Sail Business (2018-2023) .....	85
Table Ullman Sails SWOT Analysis .....	85
Table Neilpryde Sails Corporation Information .....	86
Table Main Sail Products and Services .....	86
Table Neilpryde Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	87
Figure Neilpryde Sails Revenue in Main Sail Business (2018-2023) .....	88
Table Neilpryde Sails SWOT Analysis.....	88
Table Jeckells Corporation Information.....	89
Table Main Sail Products and Services .....	89
Table Jeckells Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023).....	90
Figure Jeckells Revenue in Main Sail Business (2018-2023).....	90
Table Jeckells SWOT Analysis.....	91
Table Lidgard Sailmakers Corporation Information.....	91
Table Main Sail Products and Services .....	92
Table Lidgard Sailmakers Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)....	92
Figure Lidgard Sailmakers Revenue in Main Sail Business (2018-2023) .....	93
Table Lidgard Sailmakers SWOT Analysis.....	93
Table The Sail Service Corporation Information.....	94
Table Main Sail Products and Services .....	95
Table The Sail Service Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023).....	95
Figure The Sail Service Revenue in Main Sail Business (2018-2023).....	96
Table The Sail Service SWOT Analysis.....	96
Table Loong Sails Corporation Information.....	97

Table Main Sail Products and Services .....	97
Table Loong Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	98
Figure Loong Sails Revenue in Main Sail Business (2018-2023) .....	98
Table Loong Sails SWOT Analysis.....	99
Table Horizon Sails Corporation Information .....	99
Table Main Sail Products and Services .....	100
Table Horizon Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	101
Figure Horizon Sails Revenue in Main Sail Business (2018-2023) .....	101
Table Horizon Sails Recent Development.....	101
Table Horizon Sails SWOT Analysis.....	102
Table Precision Sails Corporation Information .....	102
Table Main Sail Products and Services .....	103
Table Precision Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	104
Figure Precision Sails Revenue in Main Sail Business (2018-2023) .....	105
Table Precision Sails SWOT Analysis.....	105
Table Olimpik Sails Corporation Information .....	106
Table Main Sail Products and Services .....	106
Table Olimpik Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	107
Figure Olimpik Sails Revenue in Main Sail Business (2018-2023) .....	108
Table Olimpik Sails SWOT Analysis .....	108
Table SAILONET Corporation Information .....	109
Table Main Sail Products and Services .....	109
Table SAILONET Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	110
Figure SAILONET Revenue in Main Sail Business (2018-2023) .....	110
Table SAILONET SWOT Analysis.....	110
Table South East Asia Sails Corporation Information .....	111
Table Main Sail Products and Services .....	112
Table South East Asia Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023) .....	112
Figure South East Asia Sails Revenue in Main Sail Business (2018-2023) .....	113
Table South East Asia Sails SWOT Analysis .....	113
Figure Industry Chain Analysis of Main Sail.....	114
Table Upstream Raw Material Suppliers of Main Sail with Contact Information.....	115
Figure Production Process of Main Sail.....	117
Figure Sales Channel: Direct Channel vs Indirect Channel.....	118

Figure Direct Channel Pros & Cons.....	119
Figure Indirect Channel Pros & Cons.....	120
Table Main Sail Distributors.....	120
Table Main Sail Customers .....	121
Key Data from Secondary .....	123
Key Data from Primary .....	124
Figure Industry Insight from Professional Leaders .....	124
Figure Market Size Estimation: Top-down and Bottom-up Approach.....	126

# 1 Report Overview

## 1.1 Study Scope

This report mainly elaborates the definition, types, applications and major players of Global Main Sail Industry in details. Deep analysis about market status (2018-2029), enterprise competition pattern, advantages and disadvantages of enterprise products will be given. The report also means to identify the major factors that affect the development of the industry, forecast the future development trend of the industry. In a word, this report will present you an overview of the Global Main Sail Industry.

### Figure Main Sail Picture



Source: Maia Research Analysis

The mainsail is a sail rigged on the main mast of a sailing vessel which is an important part of a sailboat, used to control the speed and direction of the boat. On a square-rigged vessel, it is the lowest and largest sail on the main mast. On a fore-and-aft rigged vessel, it is the sail rigged aft of the main mast. The sail's foot is normally attached to a boom.

## 1.2 Market Analysis by Type

### 1.2.1 Global Main Sail Market Size (M USD) and CAGR (%) by Type: 2018 VS 2023 VS 2029

Based on the product type, the Main Sail is primarily split into Polyester Main Sail, Carbon Main Sail, etc.

The table below visually and clearly details the market size of Main Sail, in value (US\$ Million), market share and growth trend of each type in 2023 and 2029.

The CAGR (2023-2029) is based on the value of Main Sail for each type and the overall market.

**Table Global Main Sail Market Size (M USD) and CAGR (%) by Type: 2018 VS 2023 VS 2029**

	2018	2023	2029	CAGR (2023-2029)
Polyester Main Sail	125.86	140.15	158.72	2.09%
Woven polyester	78.45	84.30	91.40	1.36%
Laminated polyester	47.41	55.85	67.32	3.16%
Carbon Main Sail	39.59	49.25	64.45	4.58%
Aramid Main Sail	35.51	40.22	46.68	2.52%
Nylon Main Sail	34.18	39.66	47.12	2.92%
Cotton Main Sail	12.25	13.87	15.96	2.36%
Others	24.26	29.94	38.44	4.25%
Total	271.64	313.09	371.37	2.89%

Source: Maia Research Analysis

## 1.2.2 Polyester Main Sail

**Figure Polyester Main Sail Figures**



Source: Maia Research Analysis

Polyester is a synthetic material that is strong, durable, and resistant to UV degradation. This makes it an ideal material for sailmaking, as it can withstand the harsh conditions of sun, wind, and

saltwater that the sail is inevitably exposed to.

### 1.2.3 Carbon Main Sail

Figure Carbon Main Sail Figures



Source: Maia Research Analysis

Carbon is a strong, lightweight material that is known for its stiffness and durability. Carbon main sails are typically used by high-performance racing boats or cruisers looking for maximum performance. They are much lighter than polyester sails, which means they require less wind to generate speed and can be adjusted more quickly. This allows the boat to respond more instantly to changes in wind conditions, giving the sailor greater control over the vessel.



## 1.2.4 Aramid Main Sail

Figure Aramid Main Sail Figures



Source: Maia Research Analysis

Aramid mainsails are typically used by high-performance racing boats or cruisers looking for a sail with excellent strength and durability. Aramid fibers are stronger than polyester sailcloth and can resist stretching much better, maintaining their shape better and giving a flatter, smoother sail shape compared to polyester sails. They also have a high modulus of elasticity, which means they're great at holding their shape, even under high loads.

## 1.2.5 Nylon Main Sail

Figure Nylon Main Sail Figures



Source: Maia Research Analysis

A nylon mainsail is a type of sail used on sailboats that are constructed of nylon fibers. Nylon is a synthetic polymer that is known for its high strength, toughness, and excellent resistance to abrasion and UV rays. Nylon mainsails are popular among cruisers and recreational sailors because they are cost-effective and offer good performance in light to moderate wind conditions. Nylon is a relatively lightweight material, which means that it can be used to create larger mainsails that provide ample power to drive a sailboat forward.

## 1.2.6 Cotton Main Sail

Figure Cotton Main Sail Figures



Source: Maia Research Analysis

A cotton main sail is a type of sail made from cotton fabric. It is typically used on smaller sailboats and is known for its durability and affordability. Cotton sails are not as efficient as modern synthetic sails, but they are still popular among sailors who prefer the traditional look and feel of cotton. Cotton sails require more maintenance than synthetic sails, as they are more prone to mildew and rot. However, with proper care, a cotton main sail can last for many years.

## 1.3 Market Analysis by Application

### 1.3.1 Global Main Sail Market Size (M USD) and CAGR (%) by Application: 2018 VS 2023 VS 2029

Based on the Main Sail Application, the Main Sail market is segmented into several major parts, like Professional Sports, Amateur Leisure, etc.

This section displays the forecast of the market size of each Application from 2023 to 2029. The CAGR (2023-2029) is based on the value of Main Sail for each Application and the overall market.

**Table Global Main Sail Market Size (M USD) and CAGR (%) by Application: 2018 VS 2023 VS 2029**

	2018	2023	2029	CAGR (2023-2029)
Amateur Leisure	85.52	102.79	128.35	3.77%
Professional Sports	186.12	210.30	243.01	2.44%
Total	271.64	313.09	371.37	2.89%

Source: Maia Research Analysis

## 1.3.2 Professional Sports

### Figure Professional Sports Case Studies



Source: Maia Research Analysis

Sailing is a sport in which athletes sail a boat to compete in speed within a specified field. Sailing, in which the athletes rely on the natural wind force to sail and drive the ship forward, is a sports event integrating competition, entertainment, viewing and exploration.

## 1.3.3 Amateur Leisure

### Figure Amateur Leisure Case Studies



Source: Maia Research Analysis

Sailing is a new water sport between sailing and surfing. Turn over water by changing the sail's center of wind and the body's center of gravity.

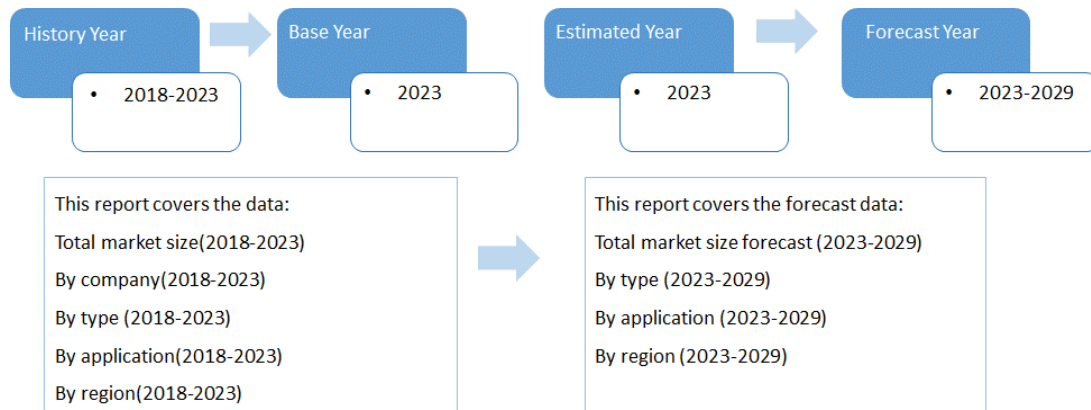
## 1.4 Study Objectives

### Study Objectives

- To analyze global status, future forecast, growth opportunity, key market, and key players.
- To present development in key regions in the world
- To strategically profile the key players and comprehensively analyze their development plan and strategies.
- To define, describe and forecast the market by Type, and key regions.

## 1.5 Years Considered

### Figure Years Considered for the Study



Source: Maia Research Analysis

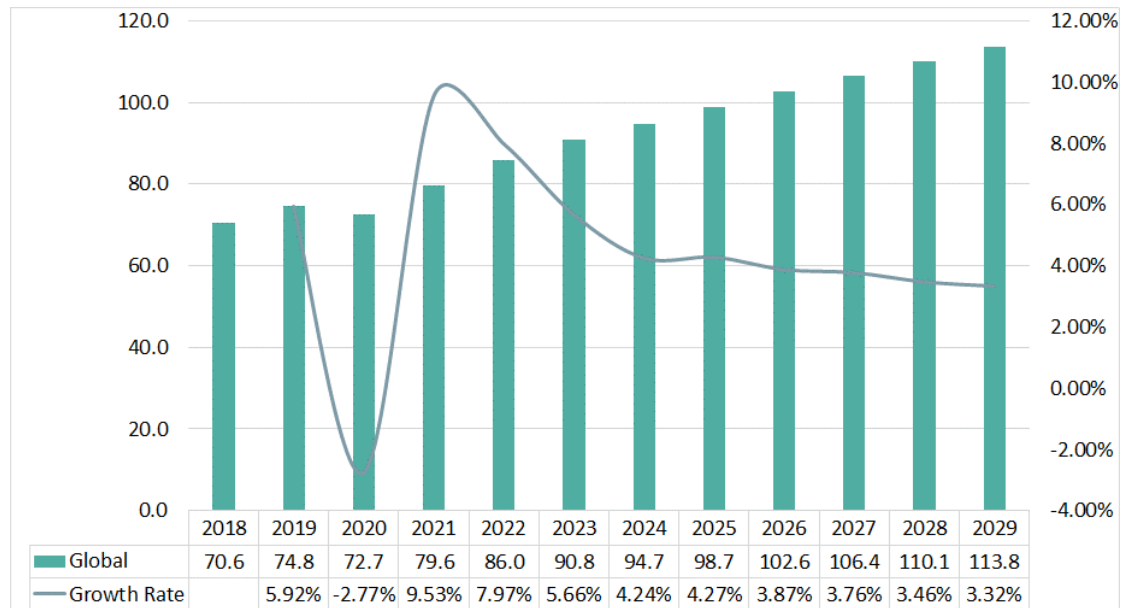
In this study, 2022 has been considered as the base year; and 2023 to 2029 is as the forecast period to estimate the market size for Collectible Card Game.

The base year used for company profiles is 2022; where information was not available for the base year, the previous year was considered.

## 2 Global Main Sail Production

### 2.1 Global Main Sail Production (2018-2029)

Figure Global Main Sail Production (K Units) (2018-2029)



Source: Maia Research Analysis

### 2.2 Global Main Sail Production by Region

#### 2.2.1 Global Main Sail Historic Production by Region (2018-2023)

Table Global Main Sail Historic Production (K Units) by Region (2018-2023)

	2018	2019	2020	2021	2022	2023
North America	17.9	18.9	18.4	20.1	21.7	22.9
Europe	15.9	16.7	16.2	17.6	18.9	19.9
Asia Pacific	34.4	36.5	35.6	39.1	42.3	44.7
Others	2.4	2.6	2.6	2.8	3.1	3.3
Total	70.6	74.8	72.7	79.6	86.0	90.8

Source: Maia Research Analysis

## 2.2.2 Global Main Sail Forecasted Production by Region (2024-2029)

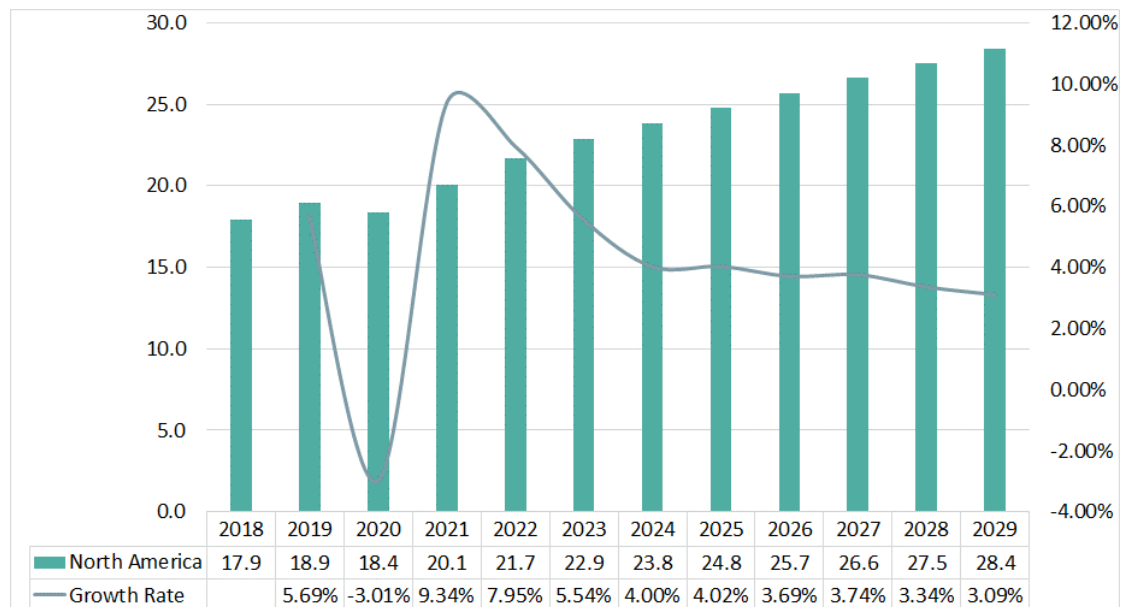
Table Global Main Sail Forecasted Production (K Units) by Region (2024-2029)

	2024	2025	2026	2027	2028	2029
North America	23.8	24.8	25.7	26.6	27.5	28.4
Europe	20.7	21.4	22.1	22.8	23.6	24.2
Asia Pacific	46.7	48.8	50.8	52.8	54.7	56.6
Others	3.5	3.7	3.9	4.2	4.3	4.5
Total	94.7	98.7	102.6	106.4	110.1	113.8

Source: Maia Research Analysis

## 2.3.3 North America

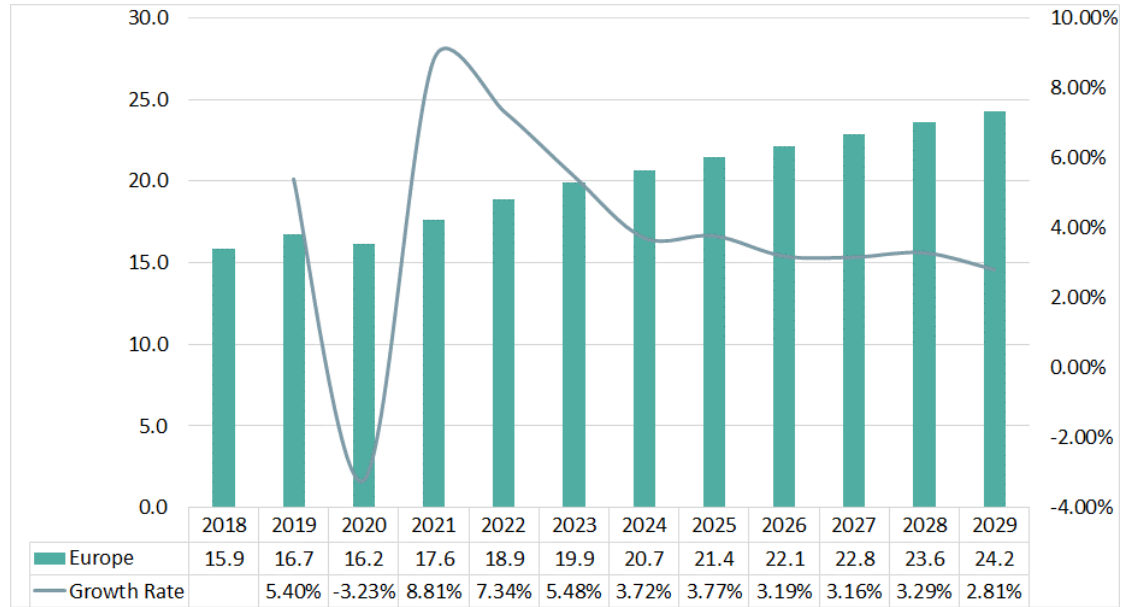
Figure North America Main Sail Production (K Units) and Growth Rate (2018-2029)



Source: Maia Research Analysis

### 2.3.4 Europe

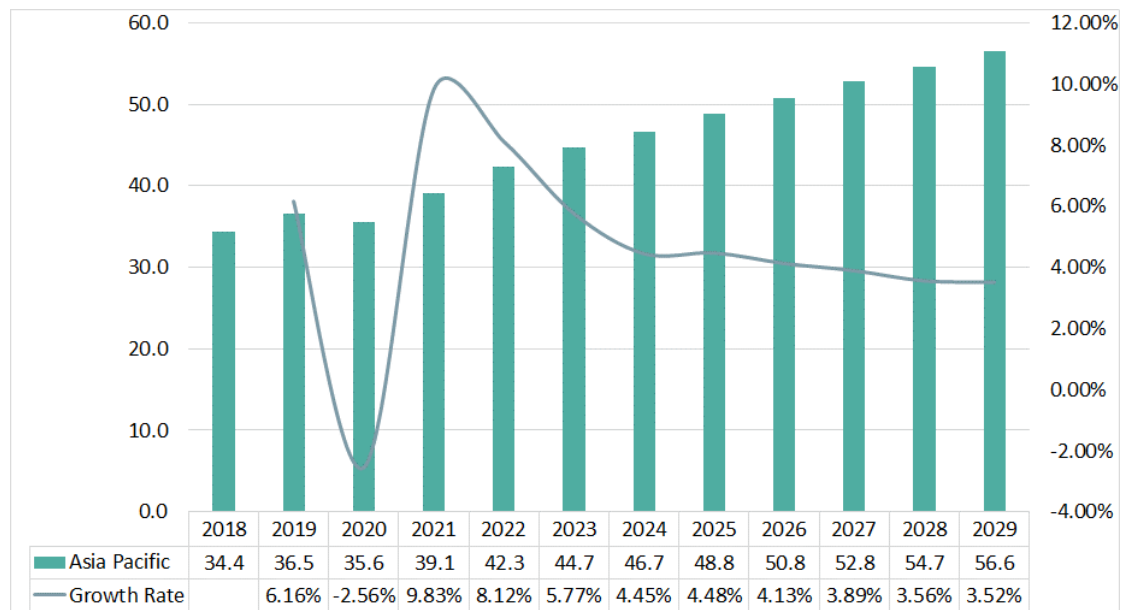
Figure Europe Main Sail Production (K Units) and Growth Rate (2018-2029)



Source: Maia Research Analysis

### 2.3.5 Asia Pacific

Figure Asia Pacific Main Sail Production (K Units) and Growth Rate (2018-2029)



Source: Maia Research Analysis



## 2.4 Industry Trends

### 2.4.1 Main Sail Industry Trends

Table Main Sail Industry Trends

Industry Trends	Description
<p><b>Sustainable, automated, digital and customized development</b></p>	<p>Various new technologies brought about by the fourth Industrial revolution, such as artificial intelligence (AI), augmented/virtual reality (AR/VR), 3D modeling, and other Industry 4.0 projects, are driving economic benefits and helping the global manufacturing sector to flourish. The Industrial Internet of Things strategy also has great potential in terms of sustainable and green production practices and supply chain traceability, enabling autonomous judgment and business operations on a digital and networked basis, boosting productivity, reducing labor intensity, and improving safety. The application of digital, automation, and other tools in sail design and production is more and more common, which makes sail development more accurate and efficient. Therefore, the development and cross-utilization of these new technologies have brought new vitality to the mainsail industry. Mainsail manufacturing materials are mostly polymer materials, although with high-quality characteristics, but in the production, use, waste has a negative impact on the environment, with the promotion of environmental protection concept, and sustainable development into the main sail manufacturers manufacturing trend. Such as recycling sails at the end of their useful lives and developing more energy-efficient manufacturing processes.</p> <p>With the increasing availability of mainsail manufacturing technology, more precise sail design and manufacture can be achieved. Including customization, color, material, graphics, and sail shape and size. Using computer-aided design (CAD) software and 3D printing, sail manufacturers can create highly customized sails to meet the specific needs of an individual sailor. This technology enables more accurate sail designs and faster production times, making customization more accessible to a wider range of sailors. Plus, sailors have unique needs and preferences when sailing. Customization allows sailors to</p>

	<p>tailor their sails to their specific requirements, resulting in better performance and a more enjoyable sailing experience. By offering bespoke sails, manufacturers can differentiate themselves from their competitors and offer products that are tailored to the specific needs of an individual sailor. This can lead to increased customer loyalty and a stronger brand image. Therefore, digitalization, automation, customization, and sustainability are the trends of the mainsail industry in the future.</p>
<p><b>The use of synthetic materials has increased</b></p>	<p>Modern sailcloth begins life as industrial fiber and film. The ideal sailcloth fiber would last for decades of use, stand up to the harsh sailing environment (toughness and structural durability), would not stretch under load (modulus and shape holding), and would be low in cost. In general, the most commonly used materials are polyester, nylon, and aramid. Due to the characteristics of mainsails requiring lightweight, high tensile, high strength, high shrinkage, strong corrosion resistance, and strong resistance to UV damage, in recent years, major players in the world of mainsail actively develop new materials for the manufacture of mainsails, such as Ultra PE (UHMWPE) is highly processed polyethylene which offers very good UV resistance, very low stretch, and very high breaking strength. Ultra PE fiber does exhibit some tendency to “creep” (elongate over time when kept under sustained high load). As a result, the Ultra PE mass in the sailcloth needs to be relatively high compared to the expected sail load, which has been used primarily on larger cruising boats where reasonable weight, strength, and durability are paramount. Ultra PE fiber is expensive, but a very long sail life ensures high value in these sails. As technology advances, synthetic materials such as polyester, nylon, and carbon fiber are becoming more popular in the maritime industry. These materials offer better performance and durability than traditional cotton sails. The development and application of new materials is an opportunity for mainsail market development.</p>

Source: Maia Research Analysis

## 2.4.2 Main Sail Market Drivers

Table Main Sail Market Drivers

Market Drivers	Description
----------------	-------------

**Developed countries are keen on sports**

Emerging water leisure sports have been widely favored in developed countries and regions. Participants can use this kind of equipment to achieve short water travel while taking active activities such as fishing, rafting, sightseeing, and so on. It is the fastest-growing and most active water leisure sport in recent years. Take the United States as an example. According to the data of the Outdoor Leisure Sports Participation Report in the United States published by the Outdoor Foundation over the years, the number of newly developed water leisure sports in the United States has generally increased from 2013 to 2020, and the increase is particularly obvious in 2020 when the number of participants reaches 47.695 million. An increase of 7.03% over 2019. Outdoor leisure activities in the United States have high popularity, rich categories, and developed industries. According to the statistics of the Bureau of Economic Analysis of the U.S. Department of Commerce, the size of the major outdoor leisure market in the United States grew from \$183.033 billion in 2012 to \$233.877 billion in 2019, a cumulative increase of 27.78%. The compound annual growth rate was 3.56%. The United States has become one of the most popular and participatory countries in the world for water recreational sports, and the market is expected to continue growing in the future. As the birthplace of leisure sports, developed countries such as Europe and the United States still maintain vitality and toughness in their sports leisure market, especially the water leisure sports market. As the downstream market of sail continues to flourish, promoting the development of the global mainsail industry.

**The boom in sailing competitions has boosted the global mainsail industry**

Sailing is a water sport. Sailing is more attractive because of its special environment: the open water, the changeable wind, the uncontrolled waves, the cooperation between man and nature, and the cooperation between man and man. All these are the challenges and addictiveness of sailing events. There are many well-known sailing events in the world. For example, the America's Cup, which has been held for 35 years, is the most influential and prestigious event among sailing events. Together with the Olympic Games, World Cup football and

	<p>Formula One racing, it is called "the four traditional sports events with the most influential in the world". The America's Cup is held irregularly. Since 2000, it has been held every three or four years. The World Regatta was first held in 1660 and has been held annually since 1988. The Regatta attracts some of the world's best sailors with great skills. Because the Regatta is close to the shore and has a short course, it is more conducive to the promotion and dissemination of the technological era of sailing. The Olympic regatta is known as a breeding ground for great sailors, with more than one million viewers following the event. The boom in sailing competitions has boosted the global mainsail industry.</p>
<p><b>Emerging countries are attaching more and more importance to sports</b></p>	<p>In recent years, with the popularity of the concept of social health and the tide of consumption upgrading under the increase of national income, the types of outdoor leisure activities have been increasing, the residents' participation has been increasing, and the consumption power has also been gradually enhanced. As a result, the expenditure on sports and outdoor leisure in new countries has increased. For example, in China, in order to promote the development of national fitness at a higher level, The State Council of China has formulated the National fitness Plan (2021-2025) according to the national fitness guidelines. In this plan, it is proposed to build and improve related facilities and expand the supply of sports tourism products and services through the popularization of ice and snow, water and other outdoor sports. In China's 14th Five-Year Plan also put forward the goal of sports power. Thanks to the support of policies and the popularity of health concepts, China's leisure sports market is developing rapidly. According to the data released by COCA, the Outdoor Products Branch of China Textile Commercial Association, the domestic outdoor products market was only 500 million yuan in 2003, and has since entered a period of rapid development. By 2019, the total retail sales of outdoor goods in China reached 25.02 billion yuan, with a cumulative growth rate of 49 times in 16 years and a compound annual growth rate of</p>

	<p>27.70%. The outdoor sports market in China has huge potential. The total number of participants in China reaches 130 million every year, and the penetration rate is about 9%. There is still broad room for growth. Thus, with the development of macroeconomic level, the progress of consumer awareness, the diversification of market channels and the enrichment of emerging sports, the new national outdoor leisure products market with huge development potential is expected to be further expanded in the future, which is bound to drive the further development of the global mainsail market industry.</p>
--	---

Source: Maia Research Analysis

### 2.4.3 Main Sail Market Challenges

Table Main Sail Market Challenges

Market Challenges	Description
<p><b>Brand technology barrier</b></p>	<p>Different from the general sporting goods industry, mainsail supplies have functional characteristics, belong to a higher degree of specialization industry, consumers are more loyal to the product and brand. With the popularity of consumer awareness of outdoor products, product quality and brand in the eyes of consumers will be more and more important. In the fierce market competition environment, brand attention and recognition is one of the key factors to stand out among many competitive brands. Such as Woven polyester sailcloth is often called “dacron”, in reference to the brand name given by DuPont to their Type 52 Dacron yarn, which was developed specifically for sailcloth and was the industry standard for years. Therefore, brand building is a systematic project, which requires enterprises to be customer-centric and demand-oriented, and invest a lot of manpower, material resources, financial resources and long-term accumulation in product design, product quality, brand positioning and marketing network and many other aspects. The maintenance of the brand requires the enterprise to continuously improve the research and development force, expand the marketing network, improve the level of public relations management, and carefully plan all kinds of marketing activities, in order to maintain the brand attention and recognition. Therefore, brands are one of the biggest barriers to entry in the outdoor goods industry.</p>
<p><b>Raw material price risk</b></p>	<p>For the Main Sail industry, the cost of its raw materials accounts</p>

for a relatively large proportion of all costs. As the most basic means of production for Main Sail products, raw materials are rising in price, which means that they start to rise from the source of the supply chain. This will cause prices in various industries along the entire chain to rise, and production and operations will be affected. For example, in 2020, in response to the epidemic, various countries around the world have introduced various stimulus policies to support economic development. Due to the over-issue of currencies in the US dollar area and the euro area, inflation has intensified and spread and radiated to the world, leading to an overall increase in global prices, including carbon fiber. The rising cost of carbon fiber has intensified the cost pressure of enterprises, and put some pressure on most Main Sail enterprises. If prices increase, manufacturers and distributors will be forced to bear the price increase or pass it on to consumers to maintain profits. The cost of materials such as carbon fiber, Kevlar and mylar used in sail manufacturing fluctuates with market supply and demand. Thus, the price fluctuation of raw materials affects the development of the industry. This affects the cost of building the mainsail and directly affects the final pricing of the product.

Source: Maia Research Analysis

## 2.4.4 Main Sail Market Restraints

Table Main Sail Market Restraints

Market Restraints	Description
<b>Weather and environmental conditions</b>	Sailing is driven by wind, and it is an offshore project. If the wind is too small, the project will not be carried out. If the wind is too large, the safety will not be guaranteed. Sailing competitions are not only affected by wind but also by fog or high tidal range. Safety must be ensured if sailing is to be carried out, and bad weather is a very adverse effect. For example, sailing competitions in 1896 were canceled because of bad weather conditions. Sailing cannot be carried out in the high wind, wind hours cannot be, the best wind speed is between 3~20 meters/second, wind swings within 50 degrees, and visibility is more than 1500 meters is the most suitable conditions for a sailing competition. The leisure and sports industry is sensitive to consumer confidence and is affected by nature and weather. Unpredictable weather and environmental conditions, such as sudden gusts, high winds, or poor sea conditions, can pose challenges for major sail manufacturers. It restricts the operating window of the sailboat, resulting in limited opportunities for use.

**Intensifying competition**

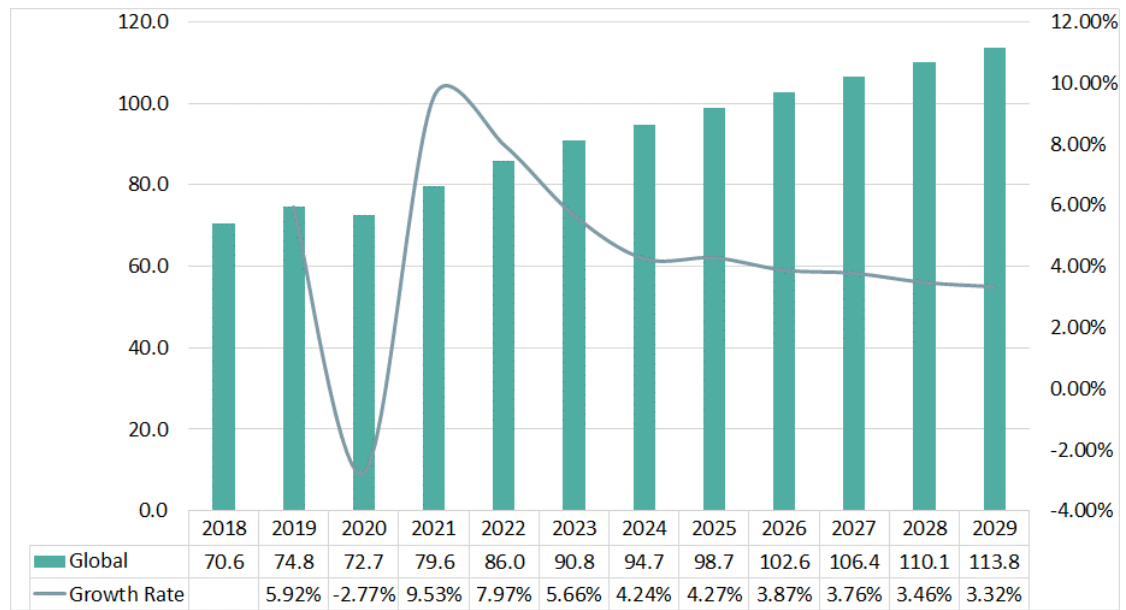
With the rapid development of the outdoor goods industry and the continuous embodiment of the industry potential, traditional sports goods enterprises, enterprises with the background of OEM factories and e-commerce brands and other related industries began to enter the industry. These enterprises have their own advantages in marketing channels, financial strength, production technology, operating costs and other aspects. As a consumer goods industry, mainsail will be affected by macro-economy to some extent. As a professional-outdoor-products, it is greatly affected by macro-economy due to its relatively single market positioning and high retail price. Their entry has intensified competition across the outdoor goods industry, with a number of established and emerging manufacturers jockeying for market share. Newcomers with cutting-edge technology or low-cost production processes can intensify competition. In addition, different types of outdoor equipment companies imitate each other in terms of product performance, appearance, marketing methods and brand positioning, leading to homogenization, which further intensifies the competition in the global mainsail industry.

Source: Maia Research Analysis

## 3 Global Main Sail Sales

### 3.1 Global Main Sail Sales Estimates and Forecasts 2018-2029

Figure Global Main Sail Sales (K Units) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis



## 3.2 Global Main Sail Revenue Estimates and Forecasts 2018-2029

Figure Global Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

## 3.3 Global Main Sail Revenue by Region: 2018 VS 2023 VS 2029

Table Global Main Sail Revenue (M USD) by Region: 2018 VS 2023 VS 2029

	2018	2023	2029	CAGR (2023-2029)
North America	102.55	116.24	136.26	2.68%
Europe	95.28	106.81	122.42	2.30%
Asia Pacific	57.12	68.83	84.61	3.50%
Latin America	9.82	12.32	15.96	4.41%
Middle East and Africa	6.86	8.89	12.12	5.30%
Total	271.64	313.09	371.37	2.89%

Source: Maia Research Analysis

## 3.4 Global Top Main Sail Regions by Sales

### 3.4.1 Global Top Main Sail Regions by Sales (2018-2023)

Table Global Top Main Sail Regions by Sales (K Units) (2018-2023)

	2018	2019	2020	2021	2022	2023
--	------	------	------	------	------	------

North America	26.2	27.7	26.8	29.3	31.6	33.3
Europe	24.6	25.9	25.0	27.2	29.1	30.7
Asia Pacific	15.2	16.2	15.9	17.6	19.1	20.2
Latin America	2.7	2.9	2.9	3.2	3.5	3.7
Middle East and Africa	1.9	2.1	2.1	2.3	2.6	2.8
Total	70.6	74.8	72.7	79.6	86.0	90.8

Source: Maia Research Analysis

### 3.4.2 Global Top Main Sail Regions by Sales (2024-2029)

Table Global Top Main Sail Regions by Sales (K Units) (2024-2029)

	2024	2025	2026	2027	2028	2029
North America	34.7	36.0	37.3	38.7	40.0	41.2
Europe	31.9	33.0	34.1	35.1	36.2	37.2
Asia Pacific	21.2	22.3	23.4	24.3	25.2	26.3
Latin America	3.9	4.2	4.4	4.6	4.8	5.1
Middle East and Africa	3.0	3.2	3.4	3.6	3.8	4.0
Total	94.7	98.7	102.6	106.4	110.1	113.8

Source: Maia Research Analysis

## 3.5 Global Top Main Sail Regions by Revenue

### 3.5.1 Global Top Main Sail Regions by Revenue (2018-2023)

Table Global Top Main Sail Regions by Revenue (M USD) (2018-2023)

	2018	2019	2020	2021	2022	2023
North America	102.55	105.78	99.79	107.16	113.35	116.24
Europe	95.28	98.16	92.40	98.81	103.98	106.81
Asia Pacific	57.12	59.67	57.19	62.30	66.54	68.83
Latin America	9.82	10.35	9.98	10.97	11.82	12.32
Middle East and Africa	6.86	7.26	7.05	7.78	8.50	8.89
Total	271.64	281.23	266.41	287.01	304.19	313.09

Source: Maia Research Analysis

### 3.5.2 Global Top Main Sail Regions by Revenue (2024-2029)

Table Global Top Main Sail Regions by Revenue (M USD) (2024-2029)

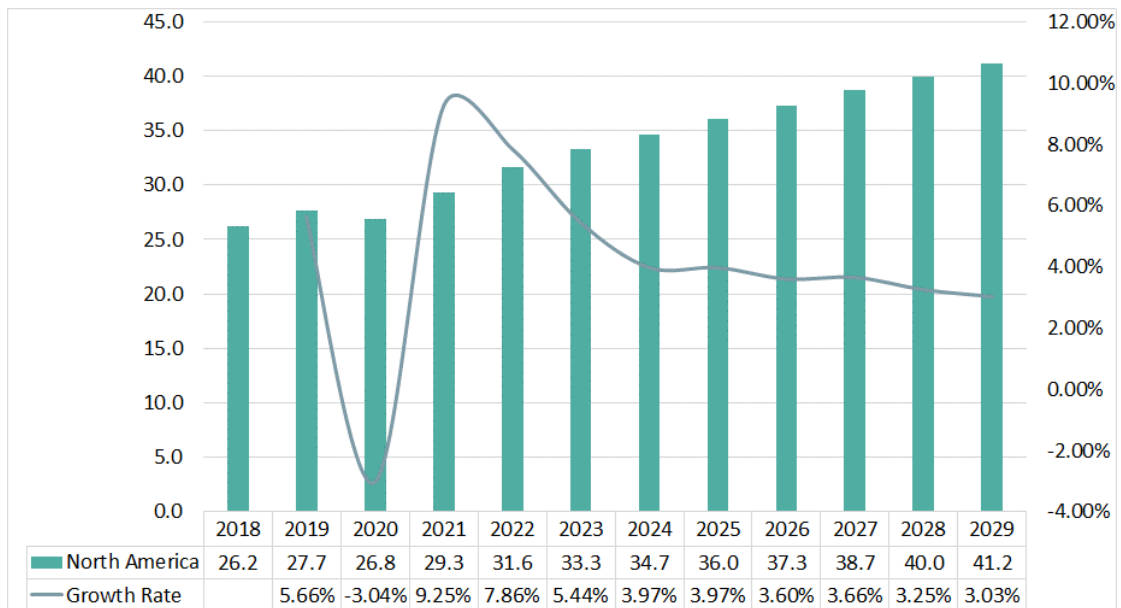
	2024	2025	2026	2027	2028	2029
North America	119.11	120.72	122.69	125.88	130.74	136.26
Europe	109.15	110.20	111.40	113.57	117.93	122.42

Asia Pacific	71.09	72.79	74.75	77.11	80.37	84.61
Latin America	12.85	13.26	13.74	14.32	15.05	15.96
Middle East and Africa	9.33	9.71	10.13	10.72	11.34	12.12
<b>Total</b>	<b>321.54</b>	<b>326.69</b>	<b>332.71</b>	<b>341.61</b>	<b>355.42</b>	<b>371.37</b>

Source: Maia Research Analysis

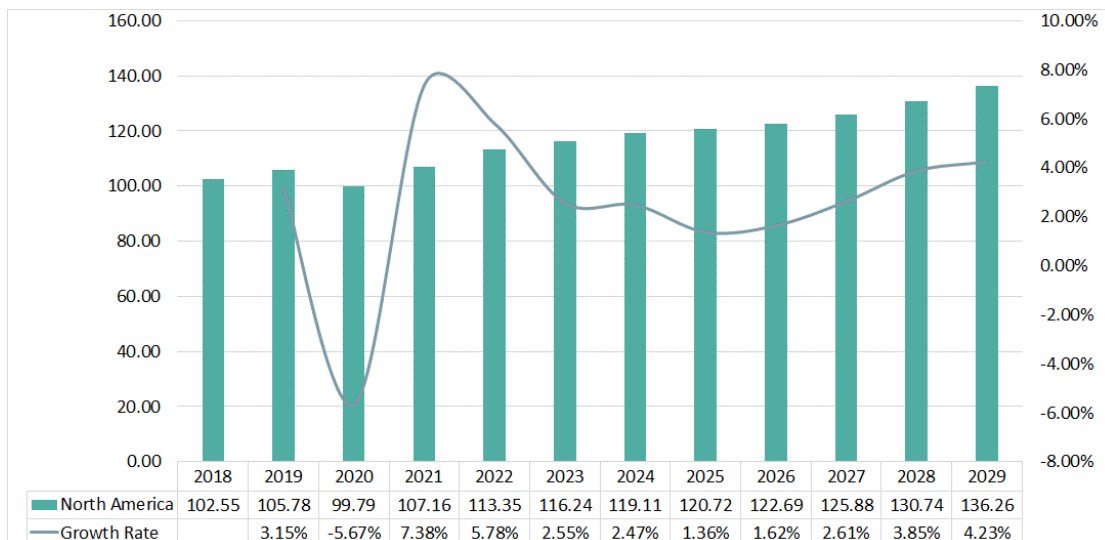
### 3.5.3 North America

Figure North America Main Sail Sales (K Units) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

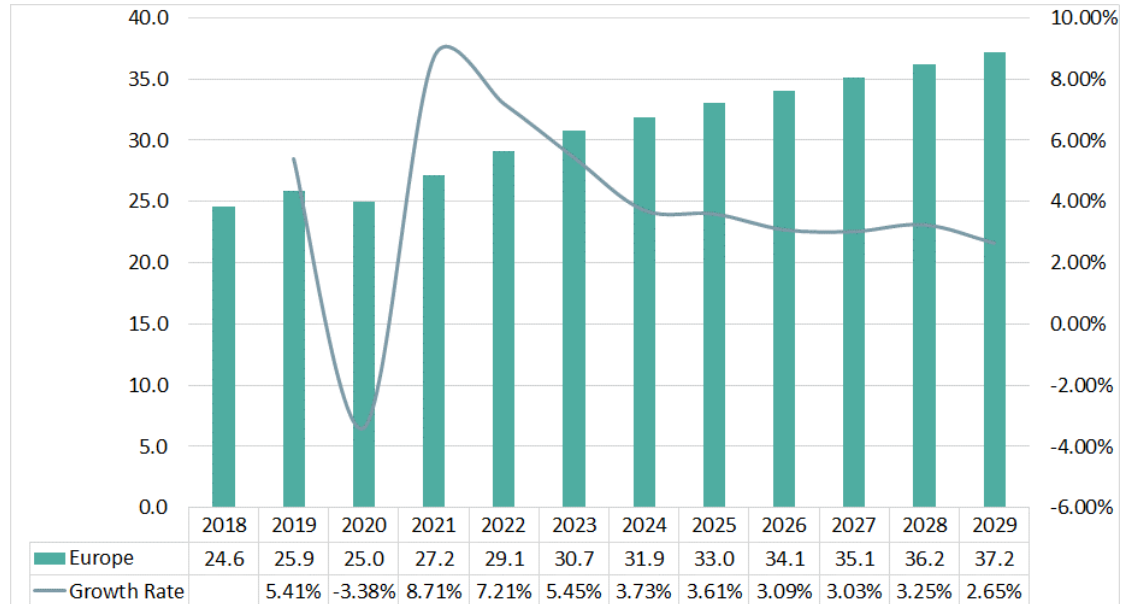
Figure North America Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

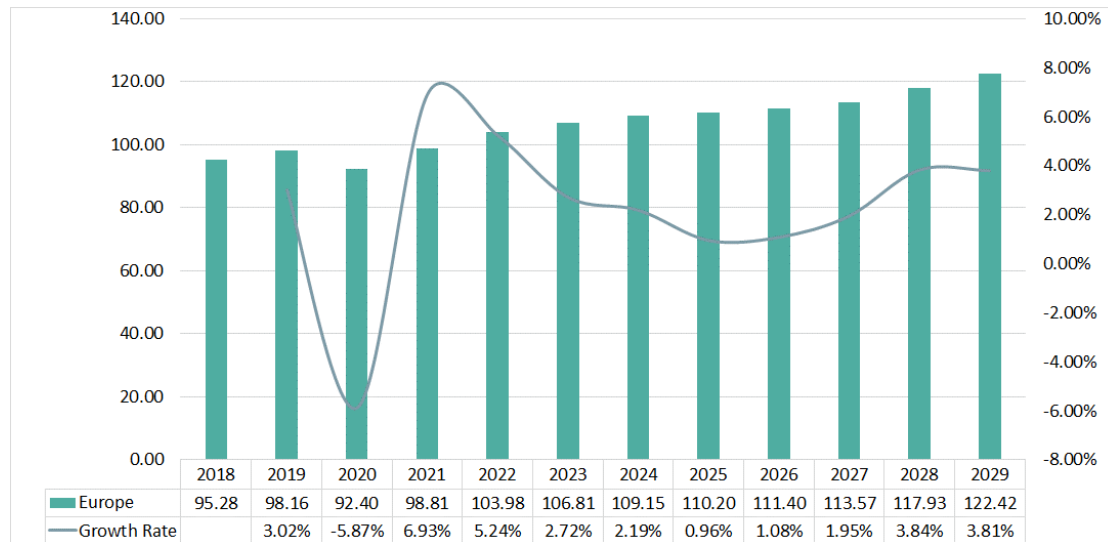
### 3.5.4 Europe

Figure Europe Main Sail Sales (K Units) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

Figure Europe Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

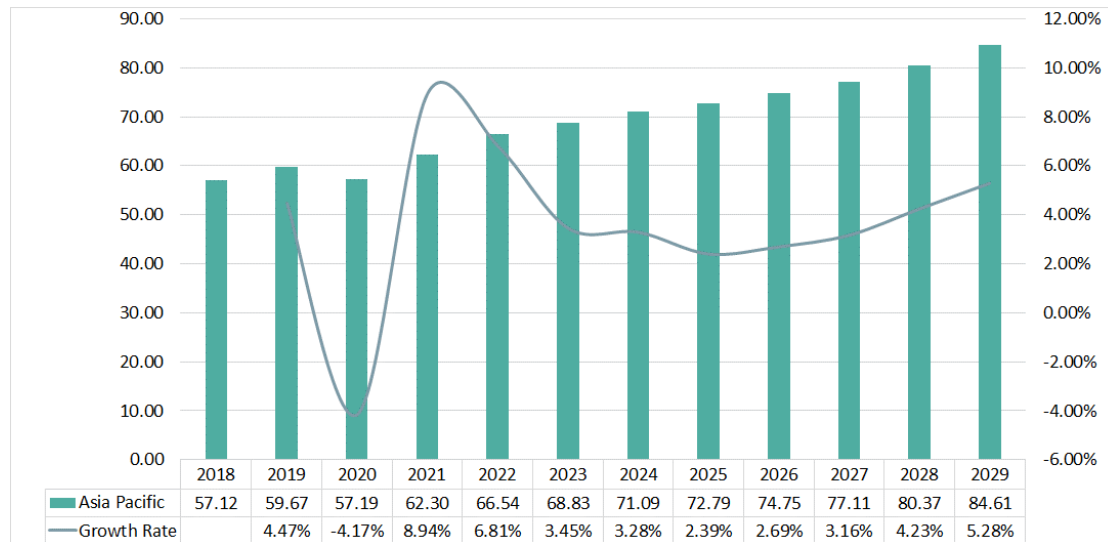
### 3.5.5 Asia-Pacific

Figure Asia-Pacific Main Sail Sales (K Units) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

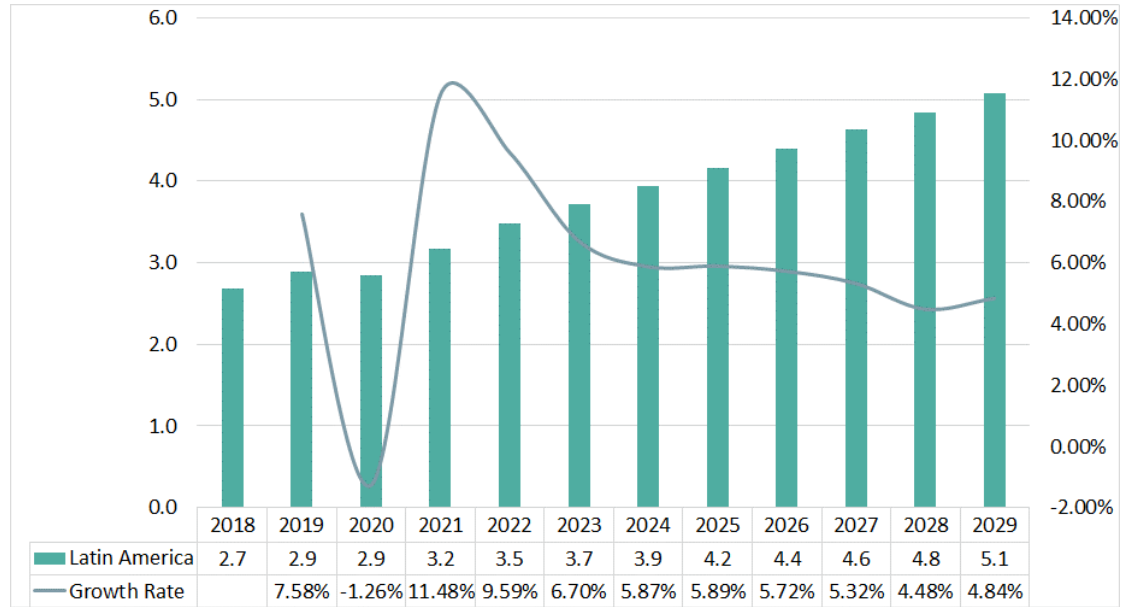
Figure Asia-Pacific Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

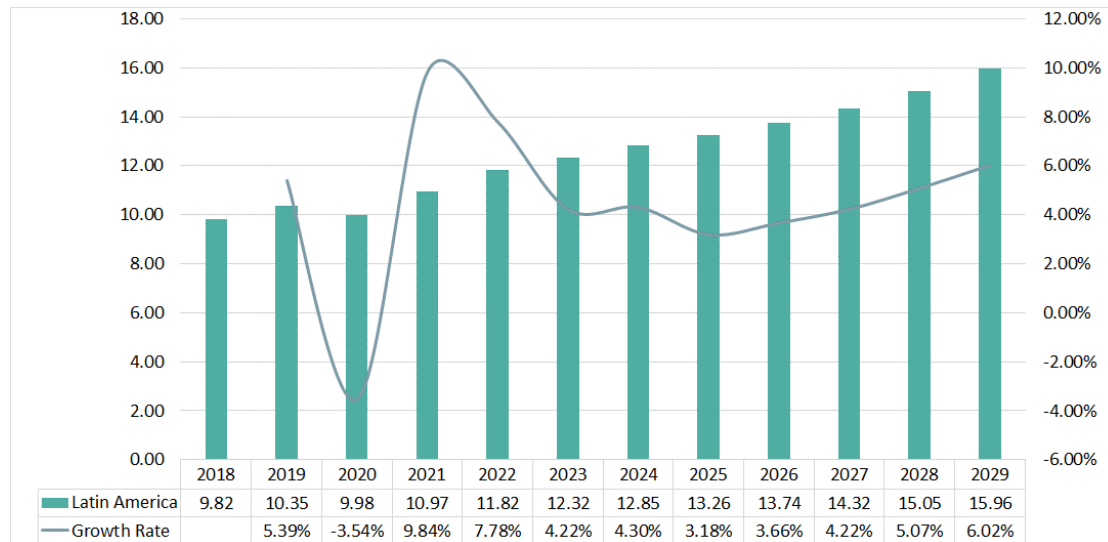
### 3.5.6 Latin America

Figure Latin America Main Sail Sales (K Units) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

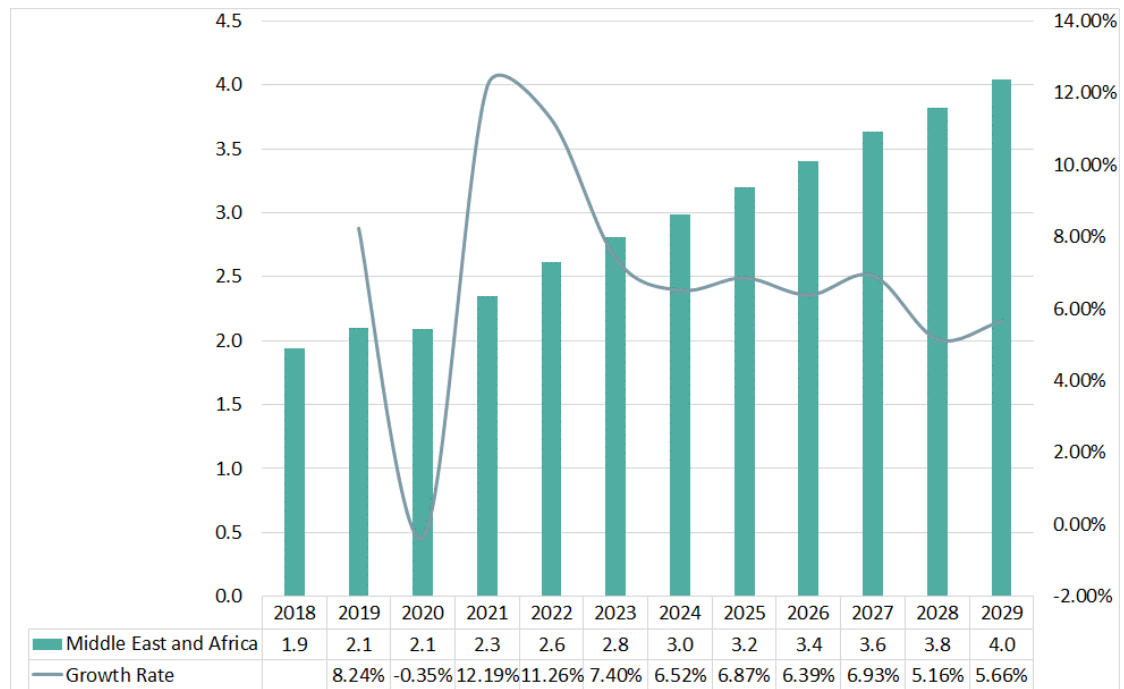
Figure Latin America Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

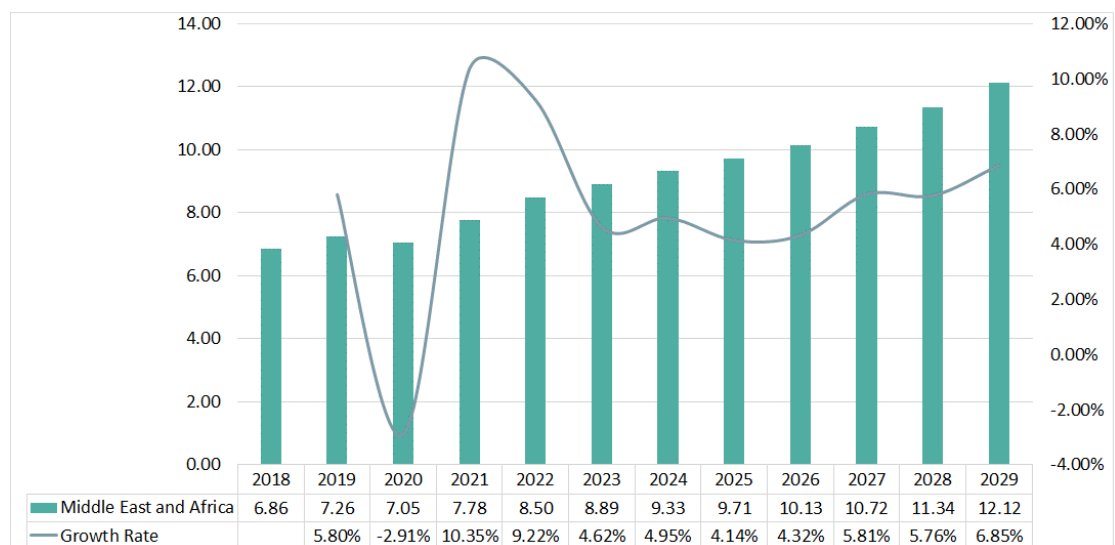
### 3.5.7 Middle East & Africa

Figure Middle East & Africa Main Sail Sales (K Units) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

Figure Middle East & Africa Main Sail Revenue (M USD) Estimates and Forecasts 2018-2029



Source: Maia Research Analysis

## 4 Competitive Landscape by Manufacturers

### 4.1 Global Main Sail Sales by Manufacturers

#### 4.1.1 Global Top Main Sail Manufacturers by Sales (2018-2023)

Table Global Top Main Sail Manufacturers by Sales (K Units) (2018-2023)

	2018	2019	2020	2021	2022	2023
North Sails Sailmaking	23.8	25.6	25.0	27.6	29.6	31.1
Quantum Sails	7.5	7.9	7.6	8.3	9.0	9.7
Doyle	5.8	6.3	6.0	6.7	7.6	8.2
Hyde sails	11.7	12.2	11.9	12.5	13.4	13.9
Elvstrom Sails	3.3	3.5	3.4	3.8	4.1	4.2
UK-Halsey International	2.5	2.7	2.7	3.0	3.2	3.5
Ullman Sails	2.1	2.1	2.0	2.2	2.3	2.4
Neilpryde Sails	0.9	0.9	0.9	1.0	1.1	1.1
Jeckells	1.1	1.1	1.1	1.2	1.3	1.5
Lidgard Sailmakers	0.7	0.8	0.7	0.8	0.9	0.9
The Sail Service	0.9	0.9	0.9	1.0	1.1	1.3
Loong Sails	0.6	0.7	0.7	0.7	0.8	0.9
Horizon Sails	0.5	0.6	0.5	0.6	0.6	0.7
Precision Sails	0.6	0.7	0.6	0.7	0.7	0.8
Olimpic Sails	0.2	0.3	0.3	0.3	0.3	0.3
SAILONET	0.3	0.3	0.3	0.3	0.4	0.4
South East Asia Sails	0.3	0.4	0.4	0.4	0.4	0.5
Others	7.6	7.8	7.7	8.7	9.2	9.6
Total	70.6	74.8	72.7	79.6	86.0	90.8

Source: Maia Research Analysis

#### 4.2.2 Global Top Main Sail Manufacturers Market Share by Sales (2018-2023)

Table Global Top Main Sail Manufacturers Market Share by Sales (K Units) (2018-2023)

	2018	2019	2020	2021	2022	2023
North Sails Sailmaking	33.70%	34.23%	34.32%	34.68%	34.44%	34.19%
Quantum Sails	10.64%	10.59%	10.44%	10.38%	10.52%	10.63%
Doyle	8.20%	8.36%	8.30%	8.37%	8.81%	9.06%

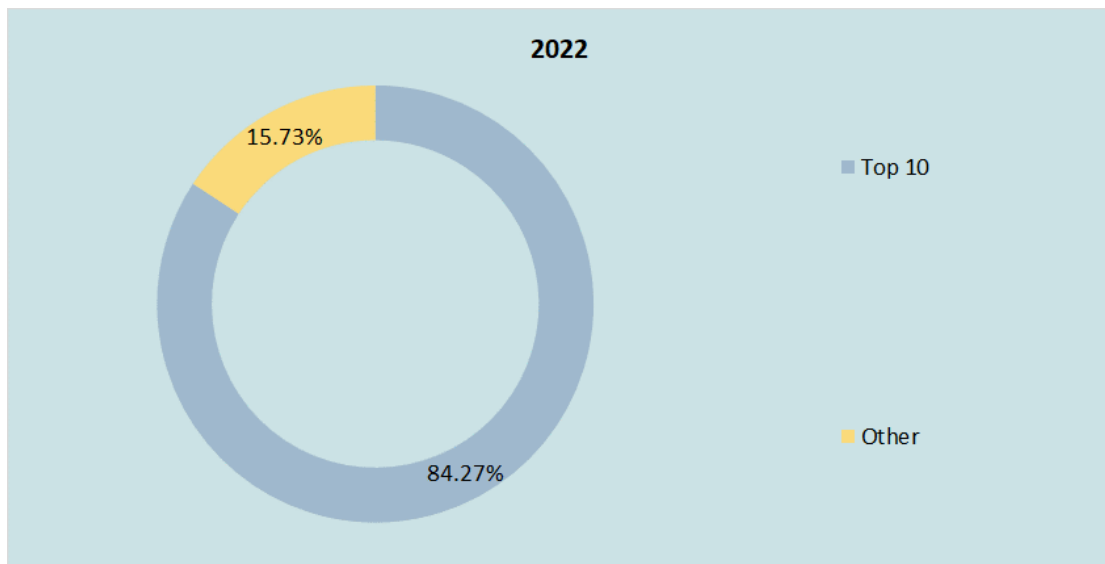


Hyde sails	16.62%	16.35%	16.35%	15.70%	15.53%	15.31%
Elvstrom Sails	4.62%	4.68%	4.74%	4.80%	4.77%	4.65%
UK-Halsey International	3.61%	3.67%	3.72%	3.75%	3.71%	3.87%
Ullman Sails	2.92%	2.81%	2.74%	2.72%	2.68%	2.65%
Neilpryde Sails	1.25%	1.24%	1.19%	1.22%	1.24%	1.25%
Jeckells	1.49%	1.52%	1.51%	1.52%	1.57%	1.64%
Lidgard Sailmakers	1.03%	1.01%	1.02%	0.99%	0.99%	0.97%
The Sail Service	1.29%	1.26%	1.24%	1.20%	1.28%	1.39%
Loong Sails	0.90%	0.92%	0.91%	0.92%	0.93%	0.94%
Horizon Sails	0.76%	0.74%	0.75%	0.73%	0.73%	0.72%
Precision Sails	0.91%	0.88%	0.87%	0.85%	0.85%	0.85%
Olimpic Sails	0.35%	0.34%	0.35%	0.34%	0.33%	0.33%
SAILONET	0.44%	0.43%	0.44%	0.42%	0.41%	0.41%
South East Asia Sails	0.47%	0.48%	0.49%	0.48%	0.50%	0.51%
Others	10.79%	10.49%	10.63%	10.94%	10.69%	10.62%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Maia Research Analysis

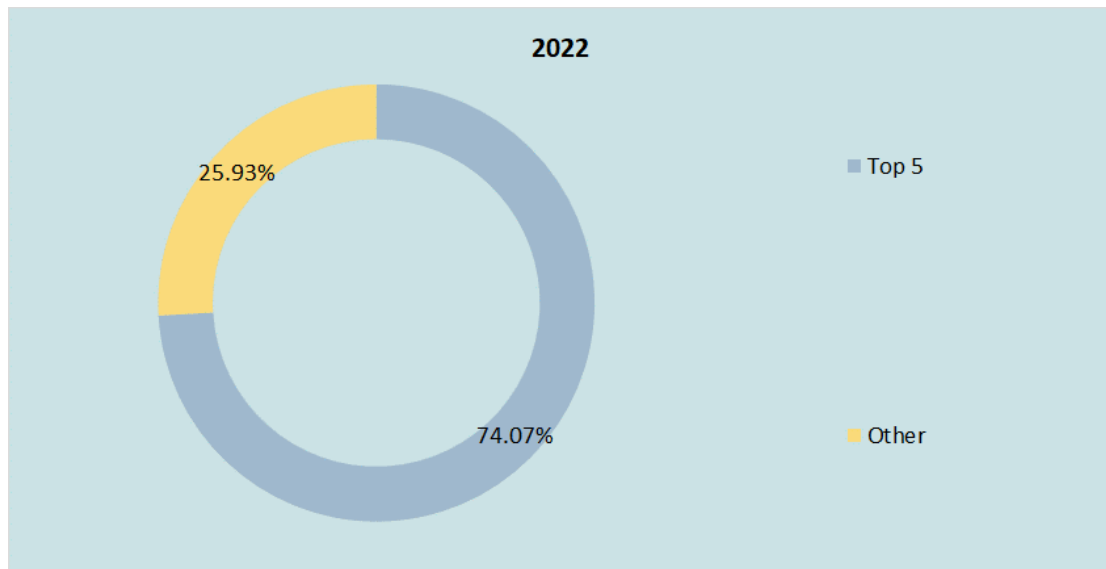
### 4.2.3 Global Top 10 and Top 5 Companies by Main Sail Sales Market Share in 2022

Table Global Top 10 Companies by Main Sail Sales Market Share in 2022



Source: Maia Research Analysis

**Table Global Top 5 Companies by Main Sail Sales Market Share in 2022**



Source: Maia Research Analysis

## 4.2 Global Main Sail Revenue by Manufacturers

### 4.2.1 Global Top Main Sail Manufacturers by Revenue (2018-2023)

**Table Global Top Main Sail Manufacturers by Revenue (M USD) (2018-2023)**

	2018	2019	2020	2021	2022	2023
North Sails Sailmaking	115.40	120.82	115.53	125.48	131.87	134.66
Quantum Sails	36.22	36.97	34.36	36.79	39.64	41.26
Doyle	23.68	25.12	23.44	25.29	28.27	29.95
Hyde sails	27.07	27.48	25.85	26.58	27.81	28.25
Elvstrom Sails	12.61	13.23	12.78	13.82	14.47	14.49
UK-Halsey International	7.79	8.17	7.76	8.36	8.73	9.35
Ullman Sails	5.71	5.62	5.11	5.39	5.61	5.72
Neilpryde Sails	3.22	3.32	2.97	3.28	3.56	3.68
Jeckells	2.86	3.04	2.89	3.11	3.41	3.67
Lidgard Sailmakers	2.97	2.95	2.80	2.96	3.13	3.16
The Sail Service	2.56	2.55	2.41	2.47	2.84	3.21
Loong Sails	2.30	2.46	2.33	2.55	2.73	2.84
Horizon Sails	1.64	1.67	1.61	1.66	1.76	1.81
Precision Sails	1.38	1.37	1.28	1.33	1.42	1.45
Olimpic Sails	0.99	0.97	0.92	0.97	1.01	1.04
SAILONET	0.92	0.94	0.91	0.92	0.94	0.98
South East Asia Sails	0.55	0.58	0.56	0.60	0.67	0.72

Others	23.75	23.96	22.89	25.44	26.32	26.85
<b>Total</b>	<b>271.64</b>	<b>281.23</b>	<b>266.41</b>	<b>287.01</b>	<b>304.19</b>	<b>313.09</b>

Source: Maia Research Analysis

## 4.2.2 Global Top Main Sail Manufacturers Market Share by Revenue (2018-2023)

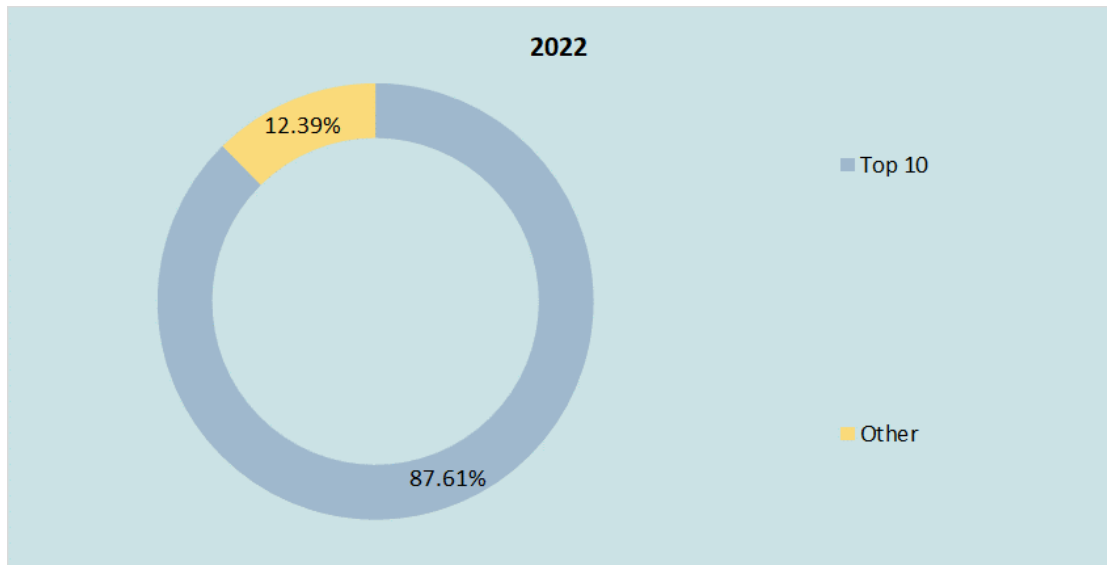
**Table Global Top Main Sail Manufacturers Market Share by Revenue (M USD) (2018-2023)**

	2018	2019	2020	2021	2022	2023
North Sails Sailmaking	42.48%	42.96%	43.36%	43.72%	43.35%	43.01%
Quantum Sails	13.34%	13.15%	12.90%	12.82%	13.03%	13.18%
Doyle	8.72%	8.93%	8.80%	8.81%	9.29%	9.57%
Hyde sails	9.97%	9.77%	9.70%	9.26%	9.14%	9.02%
Elvstrom Sails	4.64%	4.71%	4.80%	4.82%	4.76%	4.63%
UK-Halsey International	2.87%	2.91%	2.91%	2.91%	2.87%	2.99%
Ullman Sails	2.10%	2.00%	1.92%	1.88%	1.84%	1.83%
Neilpryde Sails	1.19%	1.18%	1.12%	1.14%	1.17%	1.17%
Jeckells	1.05%	1.08%	1.09%	1.09%	1.12%	1.17%
Lidgard Sailmakers	1.09%	1.05%	1.05%	1.03%	1.03%	1.01%
The Sail Service	0.94%	0.91%	0.91%	0.86%	0.93%	1.02%
Loong Sails	0.85%	0.87%	0.87%	0.89%	0.90%	0.91%
Horizon Sails	0.60%	0.59%	0.60%	0.58%	0.58%	0.58%
Precision Sails	0.51%	0.49%	0.48%	0.46%	0.47%	0.46%
Olimpic Sails	0.37%	0.34%	0.35%	0.34%	0.33%	0.33%
SAILONET	0.34%	0.33%	0.34%	0.32%	0.31%	0.31%
South East Asia Sails	0.20%	0.21%	0.21%	0.21%	0.22%	0.23%
Others	8.74%	8.52%	8.59%	8.87%	8.65%	8.58%
<b>Total</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>

Source: Maia Research Analysis

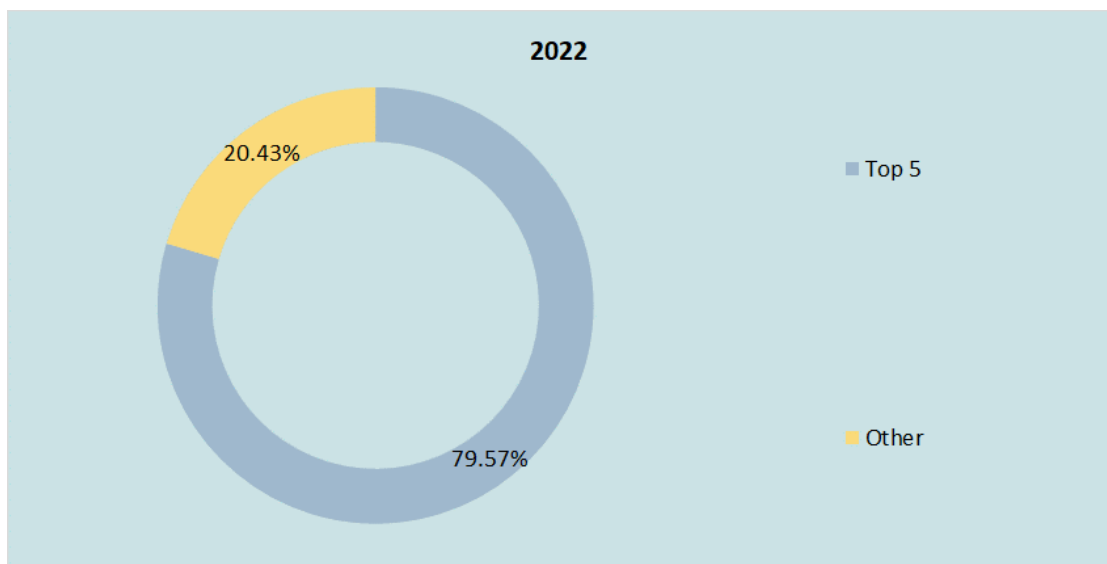
### 4.2.3 Global Top 10 and Top 5 Companies by Main Sail Revenue Market Share in 2022

Figure Table Global Top 10 Companies by Main Sail Revenue Market Share in 2022



Source: Maia Research Analysis

Figure Table Global Top 5 Companies by Main Sail Revenue Market Share in 2022



Source: Maia Research Analysis

### 4.3 Global Main Sail Sales Price by Manufacturers

Table Global Main Sail Sales Price (USD/Unit) by Manufacturers

	2018	2019	2020	2021	2022	2023
--	------	------	------	------	------	------

North Sails Sailmaking	4851	4720	4629	4544	4453	4335
Quantum Sails	4823	4671	4528	4452	4381	4272
Doyle	4092	4017	3884	3794	3732	3638
Hyde sails	2308	2248	2176	2126	2083	2032
Elvstrom Sails	3870	3783	3710	3618	3532	3432
UK-Halsey International	3056	2974	2873	2800	2735	2657
Ullman Sails	2768	2674	2569	2488	2432	2373
Neilpryde Sails	3650	3581	3430	3385	3344	3246
Jeckells	2722	2675	2636	2571	2530	2467
Lidgard Sailmakers	4075	3894	3761	3754	3667	3587
The Sail Service	2803	2710	2669	2591	2573	2533
Loong Sails	3627	3592	3528	3474	3409	3322
Horizon Sails	3057	3014	2940	2868	2813	2773
Precision Sails	2149	2086	2017	1966	1934	1880
Olimpic Sails	3996	3796	3666	3618	3531	3469
SAILONET	2963	2896	2855	2767	2673	2644
South East Asia Sails	1628	1617	1579	1563	1557	1539
Others	3118	3056	2961	2920	2863	2783
Total	3848	3761	3664	3604	3538	3446

Source: Maia Research Analysis

## 4.4 Analysis of Competitive Landscape

### 4.4.1 Global Main Sail Manufacturers Geographical Distribution

Table Global Main Sail Manufacturers Geographical Distribution

Players	Headquarters	Market Distribution
North Sails Sailmaking	USA	Worldwide
Quantum Sails	USA	Europe, America, Australia, China, Japan, Malaysia
Doyle	USA	Europe, America, Oceania, East Asia
Hyde sails	UK	Europe, North America, East Asia, South Asia, Oceania
Elvstrom Sails	Denmark	Mainly in America, Australia, Europe and the Caribbean
UK-Halsey International	USA	North America, East Asia, Europe
Ullman Sails	USA	Worldwide
Neilpryde Sails	USA	Worldwide
Jeckells	UK	Mainly in Europe
Lidgard Sailmakers	New Zealand	Mainly in New Zealand
Sailservice Germany	Germany	Mainly in Europe
Loong Sails	UK	Mainly in Europe, North America and Asia Pacific
Horizon Sails	France	Mainly in Europe

<b>Precision Sails</b>	Canada	Mainly in North America
<b>Olimpic Sails</b>	Italy	Mainly in America, Europe and Asia Pacific
<b>SAILONET</b>	France	Mainly in Europe
<b>South East Asia Sails</b>	Thailand	Mainly in Asia Pacific

Source: Maia Research Analysis

## 5 Estimates and Forecasts by Type

### 5.1 Global Main Sail Sales by Type

#### 5.1.1 Global Main Sail Historical Sales by Type (2018-2023)

**Table Global Main Sail Sales (K Units) by Type (2018-2023)**

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	43.6	46.1	44.7	48.8	52.6	55.4
Woven polyester	30.4	31.9	30.7	33.3	35.6	37.3
Laminated polyester	13.2	14.2	14.0	15.5	17.0	18.1
Carbon Main Sail	3.2	3.4	3.3	3.7	4.1	4.4
Aramid Main Sail	8.4	8.8	8.6	9.3	10.0	10.6
Nylon Main Sail	6.9	7.3	7.1	7.7	8.3	9.0
Cotton Main Sail	2.3	2.4	2.3	2.5	2.8	2.9
Others	6.2	6.7	6.7	7.6	8.2	8.5
Total	70.6	74.8	72.7	79.6	86.0	90.8

Source: Maia Research Analysis

#### 5.1.2 Global Main Sail Forecasted Sales by Type (2024-2029)

**Table Global Main Sail Sales (K Units) Forecast by Type (2024-2029)**

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	57.6	59.9	62.1	64.2	66.3	68.3
Woven polyester	38.5	39.7	40.9	42.0	43.1	44.0
Laminated polyester	19.1	20.2	21.2	22.3	23.2	24.3
Carbon Main Sail	4.7	4.9	5.2	5.5	5.8	6.1
Aramid Main Sail	11.0	11.4	11.8	12.2	12.6	13.0
Nylon Main Sail	9.3	9.7	10.0	10.4	11.0	11.3
Cotton Main Sail	3.0	3.1	3.2	3.4	3.5	3.6
Others	9.1	9.7	10.3	10.8	11.0	11.6
Total	94.7	98.7	102.6	106.4	110.1	113.8

Source: Maia Research Analysis

#### 5.1.3 Global Main Sail Sales Market Share by Type (2018-2029)

**Table Global Main Sail Sales Market Share by Type (2018-2029)**

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	61.76%	61.59%	61.42%	61.27%	61.12%	60.99%

Woven polyester	69.76%	69.21%	68.74%	68.22%	67.70%	67.32%
Laminated polyester	30.24%	30.79%	31.26%	31.78%	32.30%	32.68%
Carbon Main Sail	4.50%	4.59%	4.60%	4.68%	4.77%	4.85%
Aramid Main Sail	11.86%	11.81%	11.77%	11.72%	11.64%	11.65%
Nylon Main Sail	9.83%	9.78%	9.75%	9.66%	9.67%	9.89%
Cotton Main Sail	3.27%	3.22%	3.20%	3.18%	3.22%	3.22%
Others	8.79%	9.00%	9.26%	9.48%	9.58%	9.41%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	60.83%	60.65%	60.51%	60.36%	60.24%	60.07%
Woven polyester	66.79%	66.34%	65.83%	65.33%	64.96%	64.45%
Laminated polyester	33.21%	33.66%	34.17%	34.67%	35.04%	35.55%
Carbon Main Sail	4.96%	4.96%	5.05%	5.15%	5.24%	5.35%
Aramid Main Sail	11.59%	11.56%	11.51%	11.43%	11.44%	11.39%
Nylon Main Sail	9.84%	9.81%	9.72%	9.73%	9.95%	9.90%
Cotton Main Sail	3.17%	3.15%	3.14%	3.17%	3.17%	3.12%
Others	9.61%	9.86%	10.08%	10.16%	9.98%	10.17%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Maia Research Analysis

## 5.2 Global Main Sail Revenue by Type

### 5.2.1 Global Main Sail Historical Revenue by Type (2018-2023)

Table Global Main Sail Historical Revenue (M USD) by Type (2018-2023)

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	125.86	129.29	122.02	130.60	137.29	140.15
Woven polyester	78.45	79.95	74.95	79.60	83.04	84.30
Laminated polyester	47.41	49.34	47.07	51.00	54.25	55.85
Carbon Main Sail	39.59	41.88	39.70	43.51	47.05	49.25
Aramid Main Sail	35.51	36.60	34.59	37.10	39.05	40.22
Nylon Main Sail	34.18	35.22	33.26	35.52	37.69	39.66
Cotton Main Sail	12.25	12.51	11.77	12.60	13.50	13.87
Others	24.26	25.73	25.08	27.67	29.61	29.94
Total	271.64	281.23	266.41	287.01	304.19	313.09

Source: Maia Research Analysis

### 5.2.2 Global Main Sail Forecasted Revenue by Type (2024-2029)

Table Global Main Sail Forecasted Revenue (M USD) by Type (2024-2029)

	2024	2025	2026	2027	2028	2029
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Polyester Main Sail	142.72	144.45	146.07	148.65	153.31	158.72
Woven polyester	85.17	85.61	85.92	86.77	88.98	91.40
Laminated polyester	57.55	58.83	60.16	61.89	64.33	67.32
Carbon Main Sail	51.68	52.56	54.45	57.04	60.37	64.45
Aramid Main Sail	41.12	41.68	42.27	43.10	44.87	46.68
Nylon Main Sail	40.54	41.05	41.45	42.60	45.31	47.12
Cotton Main Sail	14.05	14.18	14.36	14.90	15.48	15.96
Others	31.42	32.78	34.10	35.30	36.09	38.44
Total	321.54	326.69	332.71	341.61	355.42	371.37

Source: Maia Research Analysis

### 5.2.3 Global Main Sail Revenue Market Share by Type (2018-2029)

**Table Global Main Sail Revenue Market Share by Type (2018-2029)**

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	46.33%	45.97%	45.80%	45.50%	45.13%	44.76%
Woven polyester	62.33%	61.84%	61.42%	60.95%	60.49%	60.15%
Laminated polyester	37.67%	38.16%	38.58%	39.05%	39.51%	39.85%
Carbon Main Sail	14.57%	14.89%	14.90%	15.16%	15.47%	15.73%
Aramid Main Sail	13.07%	13.01%	12.98%	12.93%	12.84%	12.84%
Nylon Main Sail	12.58%	12.52%	12.48%	12.38%	12.39%	12.67%
Cotton Main Sail	4.51%	4.45%	4.42%	4.39%	4.44%	4.43%
Others	8.93%	9.15%	9.41%	9.64%	9.73%	9.56%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	44.39%	44.21%	43.90%	43.52%	43.13%	42.74%
Woven polyester	59.67%	59.27%	58.82%	58.37%	58.04%	57.58%
Laminated polyester	40.33%	40.73%	41.18%	41.63%	41.96%	42.42%
Carbon Main Sail	16.07%	16.09%	16.37%	16.70%	16.98%	17.35%
Aramid Main Sail	12.79%	12.76%	12.70%	12.62%	12.62%	12.57%
Nylon Main Sail	12.61%	12.57%	12.46%	12.47%	12.75%	12.69%
Cotton Main Sail	4.37%	4.34%	4.32%	4.36%	4.36%	4.30%
Others	9.77%	10.03%	10.25%	10.33%	10.15%	10.35%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Maia Research Analysis

## 6 Market Size by Application

### 6.1 Global Main Sail Sales by Application

#### 6.1.1 Global Main Sail Historical Sales by Application (2018-2023)

Table Global Main Sail Sales (K Units) by Application (2018-2023)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	23.8	25.4	24.9	27.5	30.0	32.0
Professional Sports	46.8	49.3	47.8	52.1	56.0	58.9
Total	70.6	74.8	72.7	79.6	86.0	90.8

Source: Maia Research Analysis

#### 6.1.2 Global Main Sail Forecasted Sales by Application (2024-2029)

Table Global Main Sail Sales (K Units) Forecast by Application (2024-2029)

	2024	2025	2026	2027	2028	2029
Amateur Leisure	33.6	35.3	37.0	38.8	40.4	42.1
Professional Sports	61.1	63.4	65.6	67.7	69.7	71.6
Total	94.7	98.7	102.6	106.4	110.1	113.8

Source: Maia Research Analysis

#### 6.1.3 Global Main Sail Sales Market Share by Application (2018-2029)

Table Global Main Sail Sales Market Share by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	33.74%	34.01%	34.27%	34.56%	34.90%	35.19%
Professional Sports	66.26%	65.99%	65.73%	65.44%	65.10%	64.81%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

	2024	2025	2026	2027	2028	2029
Amateur Leisure	35.47%	35.76%	36.07%	36.43%	36.73%	37.04%
Professional Sports	64.53%	64.24%	63.93%	63.57%	63.27%	62.96%

Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
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Source: Maia Research Analysis

## 6.2 Global Main Sail Revenue by Application

### 6.2.1 Global Main Sail Historical Revenue by Application (2018-2023)

Table Global Main Sail Revenue (M USD) by Application (2018-2023)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	85.52	89.24	85.21	92.56	99.06	102.79
Professional Sports	186.12	191.99	181.20	194.45	205.14	210.30
Total	271.64	281.23	266.41	287.01	304.19	313.09

Source: Maia Research Analysis

### 6.2.2 Global Main Sail Forecasted Revenue by Application (2024-2029)

Table Global Main Sail Revenue (M USD) Forecast by Application (2024-2029)

	2024	2025	2026	2027	2028	2029
Amateur Leisure	106.43	109.01	111.98	116.11	121.82	128.35
Professional Sports	215.10	217.68	220.73	225.50	233.61	243.01
Total	321.54	326.69	332.71	341.61	355.42	371.37

Source: Maia Research Analysis

### 6.2.3 Global Main Sail Revenue Market Share by Application (2018-2029)

Table Global Main Sail Revenue Market Share by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	31.48%	31.73%	31.98%	32.25%	32.56%	32.83%
Professional Sports	68.52%	68.27%	68.02%	67.75%	67.44%	67.17%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

	2024	2025	2026	2027	2028	2029
Amateur Leisure	33.10%	33.37%	33.66%	33.99%	34.27%	34.56%
Professional Sports	66.90%	66.63%	66.34%	66.01%	65.73%	65.44%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Maia Research Analysis

## 6.3 Global Main Sail Price by Application

### 6.3.1 Global Main Sail Price by Application (2018-2023)

**Table Global Main Sail Price (USD/Unit) by Application (2018-2023)**

	2018	2019	2020	2021	2022	2023
Amateur Leisure	3591	3510	3419	3363	3302	3216
Professional Sports	3979	3891	3792	3731	3665	3572
<b>Total</b>	<b>3848</b>	<b>3761</b>	<b>3664</b>	<b>3604</b>	<b>3538</b>	<b>3446</b>

Source: Maia Research Analysis

### 6.3.2 Global Main Sail Price Forecast by Application (2024-2029)

**Table Global Main Sail Price (USD/Unit) Forecast by Application (2024-2029)**

	2024	2025	2026	2027	2028	2029
Amateur Leisure	3168	3087	3027	2995	3012	3046
Professional Sports	3520	3432	3367	3333	3354	3393
<b>Total</b>	<b>3396</b>	<b>3309</b>	<b>3244</b>	<b>3210</b>	<b>3228</b>	<b>3265</b>

Source: Maia Research Analysis

## 7 North America

### 7.1 North America Main Sail Market Size by Company

#### 7.1.1 North America Main Sail Revenue by Company (2018-2023)

Table North America Main Sail Revenue (M USD) by Company (2018-2023)

	2018	2019	2020	2021	2022	2023
North Sails Sailmaking	42.70	44.87	42.80	46.40	48.79	50.14
Quantum Sails	18.56	19.22	17.85	18.60	20.74	21.96
Doyle	11.21	11.89	11.09	11.97	13.38	14.17
Hyde sails	7.47	7.60	6.91	7.33	7.55	7.63
Elvstrom Sails	4.33	4.56	4.42	4.84	5.04	5.06
Others	18.29	17.64	16.71	18.02	17.85	17.28
<b>Total</b>	<b>102.55</b>	<b>105.78</b>	<b>99.79</b>	<b>107.16</b>	<b>113.35</b>	<b>116.24</b>

Source: Maia Research Analysis

### 7.2 North America Main Sail Market Size by Type

#### 7.2.1 North America Main Sail Sales by Type (2018-2029)

Table North America Main Sail Sales (K Units) by Type (2018-2029)

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	15.8	16.6	16.1	17.5	18.8	19.8
Woven polyester	10.9	11.4	10.9	11.8	12.6	13.2
Laminated polyester	4.9	5.2	5.1	5.7	6.2	6.6
Carbon Main Sail	1.3	1.4	1.3	1.5	1.6	1.7
Aramid Main Sail	3.3	3.5	3.3	3.6	3.9	4.1
Nylon Main Sail	2.5	2.7	2.6	2.8	3.0	3.2
Cotton Main Sail	0.9	0.9	0.9	1.0	1.0	1.1
Others	2.5	2.7	2.7	3.0	3.2	3.4
<b>Total</b>	<b>26.2</b>	<b>27.7</b>	<b>26.8</b>	<b>29.3</b>	<b>31.6</b>	<b>33.3</b>

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	20.5	21.3	22.0	22.8	23.5	24.1
Woven polyester	13.6	14.0	14.3	14.7	15.1	15.3
Laminated polyester	7.0	7.3	7.7	8.1	8.4	8.8

Carbon Main Sail	1.8	1.9	2.0	2.1	2.2	2.4
Aramid Main Sail	4.3	4.4	4.6	4.7	4.8	5.0
Nylon Main Sail	3.3	3.5	3.6	3.7	3.9	4.0
Cotton Main Sail	1.1	1.2	1.2	1.3	1.3	1.3
Others	3.6	3.8	4.0	4.2	4.2	4.4
Total	34.7	36.0	37.3	38.7	40.0	41.2

Source: Maia Research Analysis

## 7.2.2 North America Main Sail Revenue by Type (2018-2029)

Table North America Main Sail Revenue (M USD) by Type (2018-2029)

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	46.63	47.72	44.85	47.84	50.18	51.04
Woven polyester	28.80	29.23	27.29	28.88	30.06	30.41
Laminated polyester	17.84	18.49	17.56	18.96	20.11	20.63
Carbon Main Sail	15.58	16.43	15.51	16.95	18.30	19.09
Aramid Main Sail	14.01	14.39	13.54	14.48	15.21	15.61
Nylon Main Sail	11.72	12.03	11.31	12.05	12.75	13.37
Cotton Main Sail	5.10	5.19	4.86	5.19	5.55	5.69
Others	9.51	10.02	9.70	10.65	11.36	11.45
Total	102.55	105.78	99.79	107.16	113.35	116.24

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	51.85	52.35	52.82	53.70	55.28	57.07
Woven polyester	30.64	30.73	30.77	31.04	31.77	32.55
Laminated polyester	21.20	21.62	22.05	22.66	23.50	24.53
Carbon Main Sail	19.99	20.28	20.98	21.96	23.20	24.72
Aramid Main Sail	15.93	16.10	16.30	16.60	17.26	17.91
Nylon Main Sail	13.64	13.77	13.88	14.25	15.13	15.70
Cotton Main Sail	5.75	5.79	5.85	6.07	6.30	6.48
Others	11.96	12.42	12.87	13.29	13.57	14.39
Total	119.11	120.72	122.69	125.88	130.74	136.26

Source: Maia Research Analysis

## 7.3 North America Main Sail Market Size by Application

### 7.3.1 North America Main Sail Sales by Application (2018-2029)

Table North America Main Sail Sales (K Units) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	8.8	9.5	9.3	10.3	11.3	12.0
Professional Sports	17.4	18.2	17.5	19.0	20.3	21.3

Total	26.2	27.7	26.8	29.3	31.6	33.3
	2024	2025	2026	2027	2028	2029
Amateur Leisure	12.7	13.4	14.1	14.8	15.4	16.1
Professional Sports	22.0	22.7	23.3	23.9	24.6	25.1
Total	34.7	36.0	37.3	38.7	40.0	41.2

Source: Maia Research Analysis

## 7.3.2 North America Main Sail Revenue by Application (2018-2029)

Table North America Main Sail Revenue (M USD) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	32.15	33.68	32.18	35.06	37.61	38.96
Professional Sports	70.40	72.10	67.60	72.09	75.74	77.28
Total	102.55	105.78	99.79	107.16	113.35	116.24

	2024	2025	2026	2027	2028	2029
Amateur Leisure	40.54	41.63	42.92	44.66	46.85	49.59
Professional Sports	78.57	79.09	79.77	81.23	83.89	86.67
Total	119.11	120.72	122.69	125.88	130.74	136.26

Source: Maia Research Analysis

## 7.4 North America Main Sail Market Size by Country

### 7.4.1 North America Main Sail Revenue by Country (2018-2029)

Table North America Main Sail Revenue (M USD) by Country (2018-2029)

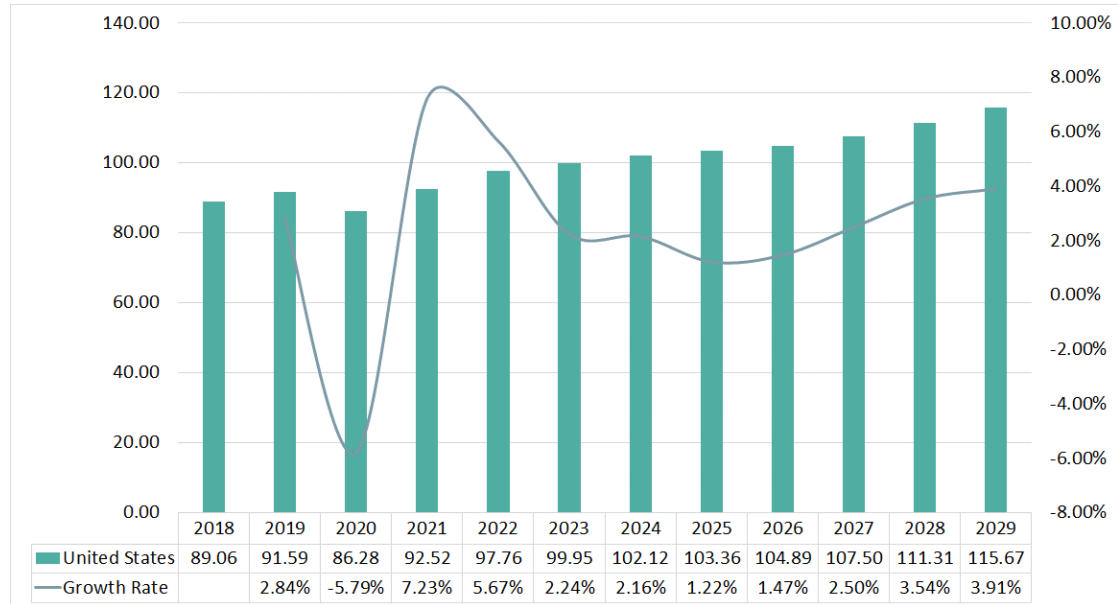
	2018	2019	2020	2021	2022	2023
United States	89.06	91.59	86.28	92.52	97.76	99.95
Canada	13.49	14.19	13.50	14.64	15.59	16.28
Total	102.55	105.78	99.79	107.16	113.35	116.24

	2023	2024	2025	2026	2027	2028	2029
United States	99.95	102.12	103.36	104.89	107.50	111.31	115.67
Canada	16.28	16.99	17.36	17.80	18.38	19.42	20.60
Total	116.24	119.11	120.72	122.69	125.88	130.74	136.26

Source: Maia Research Analysis

## 7.4.2 United States

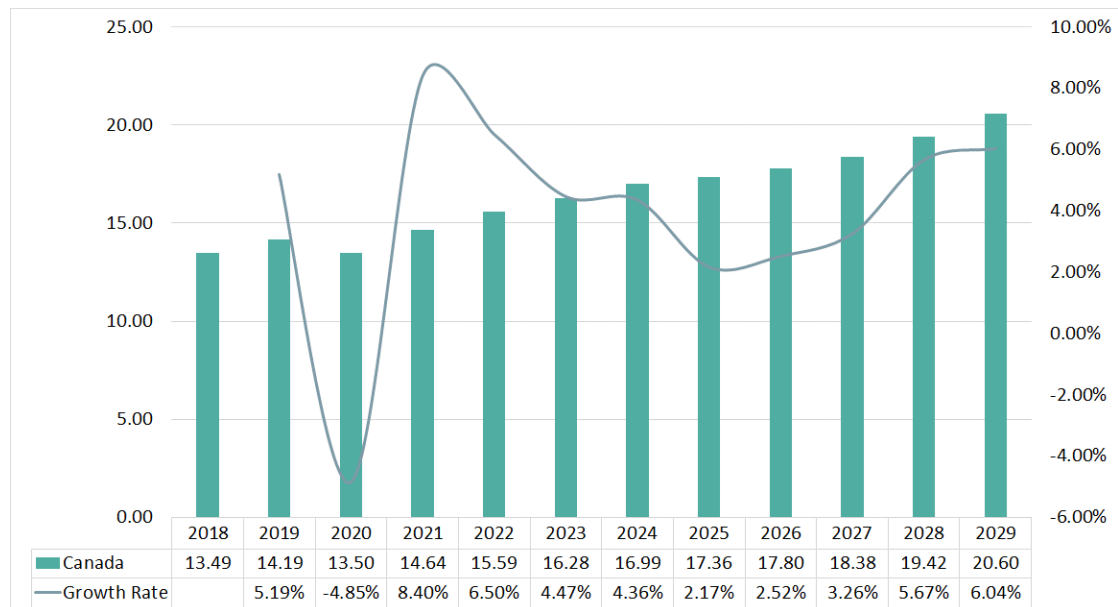
Figure United States Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

## 7.4.3 Canada

Figure Canada Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis



## 8 Europe

### 8.1 Europe Main Sail Market Size by Company

#### 8.1.1 Europe Main Sail Revenue by Company (2018-2023)

Table Europe Main Sail Revenue (M USD) by Company (2018-2023)

	2018	2019	2020	2021	2022	2023
North Sails Sailmaking	35.20	37.73	35.76	38.63	40.91	41.44
Hyde sails	14.71	14.80	13.79	14.34	15.08	15.36
Quantum Sails	10.40	10.72	9.62	10.42	11.50	11.97
Elvstrom Sails	6.05	6.22	5.89	6.47	6.81	6.83
Jeckells	2.33	2.50	2.37	2.56	2.79	3.04
Others	26.60	26.20	24.98	26.39	26.89	28.17
Total	95.28	98.16	92.40	98.81	103.98	106.81

Source: Maia Research Analysis

### 8.2 Europe Main Sail Market Size by Type

#### 8.2.1 Europe Main Sail Sales by Type (2018-2029)

Table Europe Main Sail Sales (K Units) by Type (2018-2029)

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	15.2	16.0	15.4	16.7	17.9	18.8
Woven polyester	10.6	11.1	10.6	11.4	12.1	12.7
Laminated polyester	4.6	4.9	4.8	5.3	5.8	6.1
Carbon Main Sail	1.1	1.2	1.2	1.3	1.4	1.5
Aramid Main Sail	2.9	3.0	2.9	3.2	3.4	3.6
Nylon Main Sail	2.5	2.6	2.5	2.7	2.9	3.1
Cotton Main Sail	0.8	0.8	0.8	0.8	0.9	1.0
Others	2.1	2.2	2.2	2.5	2.7	2.8
Total	24.6	25.9	25.0	27.2	29.1	30.7

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	19.5	20.1	20.7	21.3	21.9	22.4
Woven polyester	13.0	13.3	13.6	13.9	14.2	14.4
Laminated polyester	6.5	6.8	7.1	7.4	7.7	8.0
Carbon Main Sail	1.6	1.6	1.7	1.8	1.9	2.0
Aramid Main Sail	3.7	3.8	3.9	4.0	4.1	4.2

Nylon Main Sail	3.2	3.3	3.4	3.5	3.7	3.8
Cotton Main Sail	1.0	1.0	1.0	1.1	1.1	1.1
Others	2.9	3.1	3.3	3.4	3.5	3.6
Total	31.9	33.0	34.1	35.1	36.2	37.2

Source: Maia Research Analysis

## 8.2.2 Europe Main Sail Revenue by Type (2018-2029)

**Table Europe Main Sail Revenue (M USD) by Type (2018-2029)**

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	44.27	45.25	42.43	45.07	47.04	47.91
Woven polyester	27.58	27.97	26.05	27.46	28.44	28.80
Laminated polyester	16.68	17.28	16.38	17.61	18.60	19.11
Carbon Main Sail	13.83	14.56	13.72	14.93	16.03	16.75
Aramid Main Sail	12.02	12.33	11.57	12.32	12.88	13.24
Nylon Main Sail	12.81	13.13	12.32	13.06	13.76	14.44
Cotton Main Sail	4.19	4.26	3.98	4.24	4.51	4.63
Others	8.18	8.64	8.38	9.18	9.76	9.84
Total	95.28	98.16	92.40	98.81	103.98	106.81

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	48.55	48.82	49.01	49.51	50.95	52.40
Woven polyester	28.96	28.92	28.80	28.88	29.55	30.15
Laminated polyester	19.59	19.90	20.20	20.63	21.40	22.25
Carbon Main Sail	17.49	17.68	18.19	18.92	19.99	21.20
Aramid Main Sail	13.47	13.57	13.66	13.83	14.37	14.85
Nylon Main Sail	14.69	14.78	14.82	15.12	16.05	16.58
Cotton Main Sail	4.66	4.68	4.70	4.85	5.03	5.15
Others	10.28	10.67	11.03	11.34	11.55	12.23
Total	109.15	110.20	111.40	113.57	117.93	122.42

Source: Maia Research Analysis

## 8.3 Europe Main Sail Market Size by Application

### 8.3.1 Europe Main Sail Sales by Application (2018-2029)

**Table Europe Main Sail Sales (K Units) by Application (2018-2029)**

	2018	2019	2020	2021	2022	2023
Amateur Leisure	8.6	9.1	8.9	9.6	10.4	11.0
Professional Sports	15.9	16.8	16.1	17.5	18.7	19.7
Total	24.6	25.9	25.0	27.2	29.1	30.7

	2024	2025	2026	2027	2028	2029
Amateur Leisure	11.5	12.0	12.3	12.8	13.3	13.7
Professional Sports	20.4	21.1	21.7	22.3	22.9	23.5
Total	31.9	33.0	34.1	35.1	36.2	37.2

Source: Maia Research Analysis

### 8.3.2 Europe Main Sail Revenue by Application (2018-2029)

Table Europe Main Sail Revenue (M USD) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	31.11	32.11	30.37	32.51	34.48	35.60
Professional Sports	64.17	66.05	62.03	66.29	69.50	71.21
Total	95.28	98.16	92.40	98.81	103.98	106.81

	2024	2025	2026	2027	2028	2029
Amateur Leisure	36.45	36.98	37.42	38.44	40.12	41.73
Professional Sports	72.71	73.22	73.97	75.12	77.80	80.69
Total	109.15	110.20	111.40	113.57	117.93	122.42

Source: Maia Research Analysis

## 8.4 Europe Main Sail Market Size by Country

### 8.4.1 Europe Main Sail Revenue by Country (2018-2029)

Table Europe Main Sail Revenue (M USD) by Country (2018-2029)

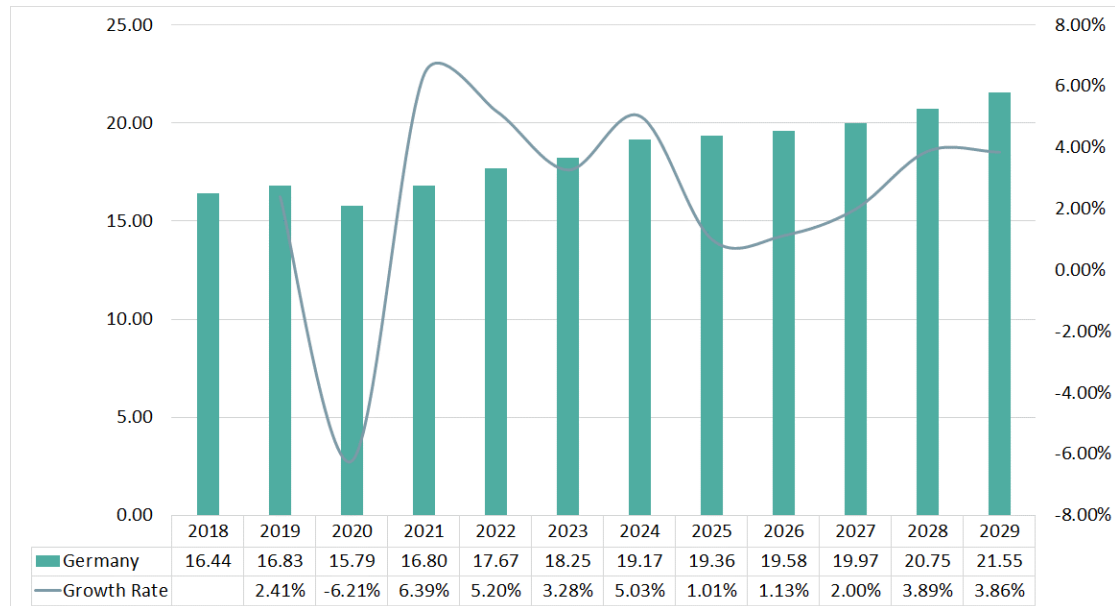
	2018	2019	2020	2021	2022	2023
Germany	16.44	16.83	15.79	16.80	17.67	18.25
UK	20.15	20.80	19.54	21.02	22.12	22.75
France	18.02	18.52	17.40	18.55	19.44	19.97
Italy	13.98	14.41	13.57	14.54	15.35	15.77
Russia	6.54	6.77	6.41	6.89	6.39	6.70
Others	20.16	20.83	19.69	21.00	23.01	23.37
Total	95.28	98.16	92.40	98.81	103.98	106.81

	2023	2024	2025	2026	2027	2028	2029
Germany	18.25	19.17	19.36	19.58	19.97	20.75	21.55
UK	22.75	23.62	23.76	23.90	24.35	25.43	26.30
France	19.97	20.65	20.81	21.16	21.57	22.42	23.23
Italy	15.77	16.36	16.49	16.62	16.86	17.52	18.15
Russia	6.70	7.11	7.21	7.33	7.51	7.96	8.30
Others	23.37	22.25	22.58	22.81	23.30	23.86	24.88
Total	106.81	109.15	110.20	111.40	113.57	117.93	122.42

Source: Maia Research Analysis

## 8.4.2 Germany

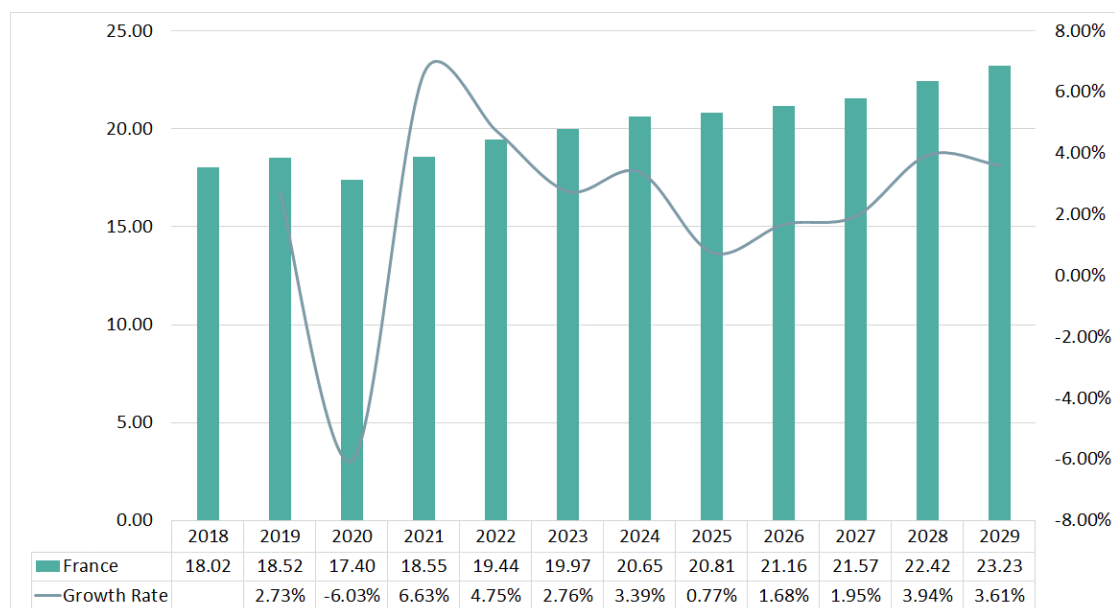
Figure Germany Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

## 8.4.3 France

Figure France Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 8.4.4 U.K.

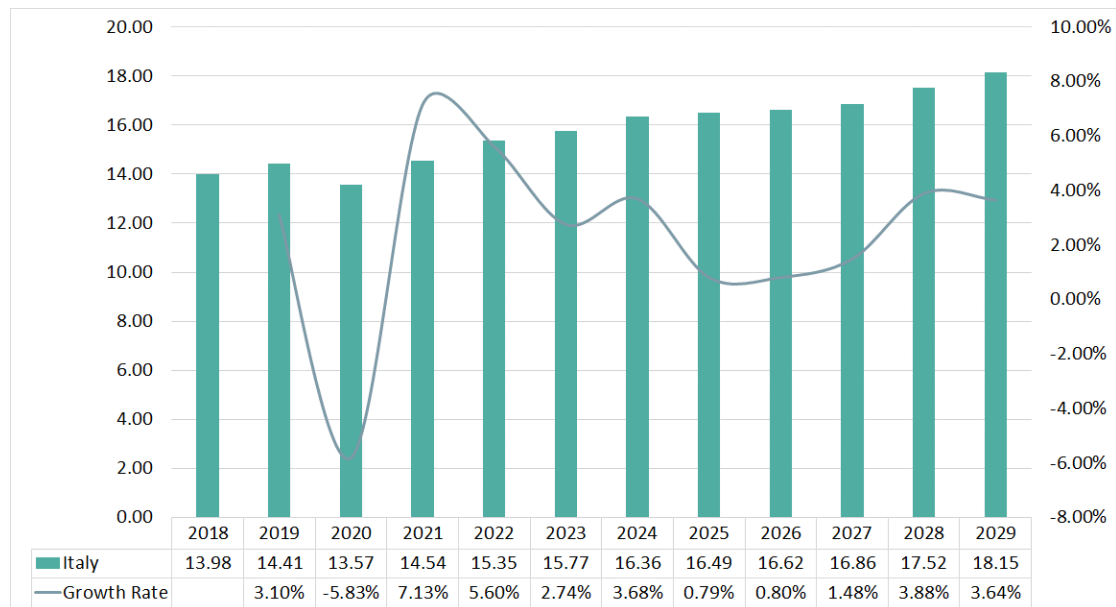
Figure U.K. Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 8.4.5 Italy

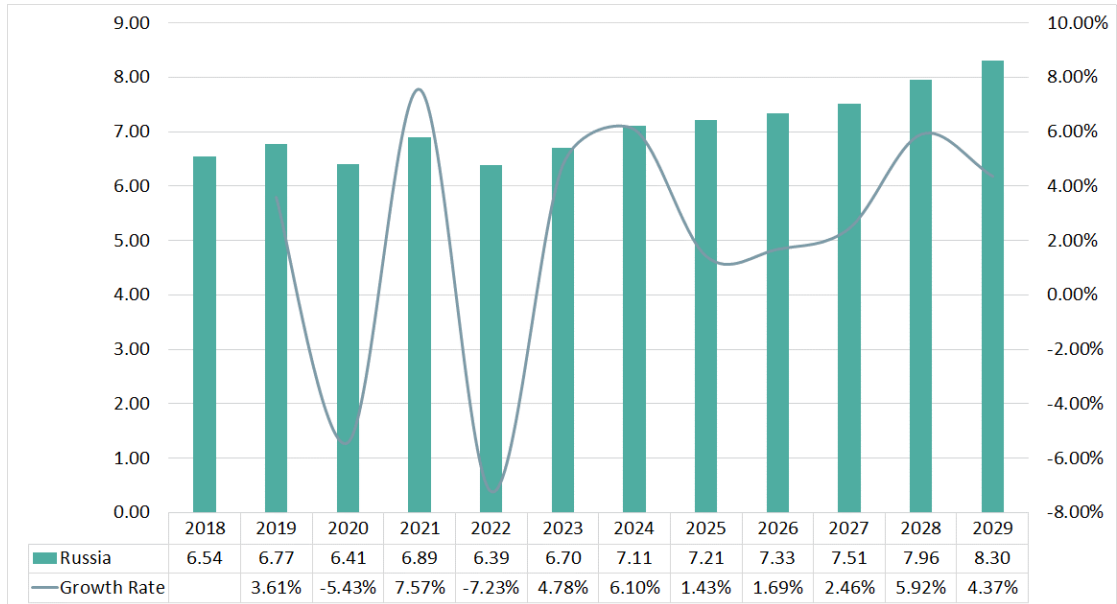
Figure Italy Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

## 8.4.6 Russia

Figure Russia Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

## 9 Asia Pacific

### 9.1 Asia Pacific Main Sail Market Size by Type

#### 9.1.1 Asia Pacific Main Sail Sales by Type (2018-2029)

**Table Asia Pacific Main Sail Sales (K Units) by Type (2018-2029)**

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	9.7	10.3	10.1	11.1	12.1	12.8
Woven polyester	6.9	7.3	7.1	7.7	8.3	8.7
Laminated polyester	2.8	3.1	3.1	3.4	3.8	4.0
Carbon Main Sail	0.6	0.7	0.7	0.8	0.8	0.9
Aramid Main Sail	1.7	1.8	1.7	1.9	2.1	2.2
Nylon Main Sail	1.5	1.6	1.5	1.7	1.8	2.0
Cotton Main Sail	0.5	0.5	0.5	0.6	0.6	0.6
Others	1.2	1.4	1.4	1.6	1.7	1.8
<b>Total</b>	<b>15.2</b>	<b>16.2</b>	<b>15.9</b>	<b>17.6</b>	<b>19.1</b>	<b>20.2</b>

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	13.3	14.0	14.6	15.2	15.7	16.3
Woven polyester	9.0	9.4	9.8	10.1	10.4	10.7
Laminated polyester	4.3	4.6	4.8	5.1	5.4	5.6
Carbon Main Sail	1.0	1.0	1.1	1.2	1.2	1.3
Aramid Main Sail	2.3	2.4	2.5	2.6	2.7	2.8
Nylon Main Sail	2.0	2.1	2.2	2.3	2.5	2.5
Cotton Main Sail	0.7	0.7	0.7	0.8	0.8	0.8
Others	1.9	2.1	2.2	2.3	2.4	2.5
<b>Total</b>	<b>21.2</b>	<b>22.3</b>	<b>23.4</b>	<b>24.3</b>	<b>25.2</b>	<b>26.3</b>

Source: Maia Research Analysis

#### 9.1.2 Asia Pacific Main Sail Revenue by Type (2018-2029)

**Table Asia Pacific Main Sail Revenue (M USD) by Type (2018-2029)**

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	27.00	27.98	26.70	28.90	30.62	31.41
Woven polyester	17.11	17.59	16.67	17.91	18.83	19.21
Laminated polyester	9.89	10.39	10.03	10.99	11.79	12.21
Carbon Main Sail	7.95	8.48	8.14	9.02	9.83	10.35
Aramid Main Sail	7.40	7.70	7.36	7.99	8.47	8.77
Nylon Main Sail	7.48	7.78	7.43	8.02	8.58	9.07

Cotton Main Sail	2.27	2.34	2.23	2.41	2.61	2.69
Others	5.02	5.39	5.32	5.95	6.43	6.54
<b>Total</b>	<b>57.12</b>	<b>59.67</b>	<b>57.19</b>	<b>62.30</b>	<b>66.54</b>	<b>68.83</b>

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	32.17	32.79	33.44	34.19	35.33	36.85
Woven polyester	19.51	19.76	19.99	20.28	20.84	21.56
Laminated polyester	12.66	13.04	13.45	13.91	14.49	15.28
Carbon Main Sail	10.92	11.20	11.70	12.32	13.06	14.05
Aramid Main Sail	9.02	9.21	9.42	9.65	10.06	10.55
Nylon Main Sail	9.32	9.52	9.69	10.00	10.66	11.17
Cotton Main Sail	2.75	2.79	2.85	2.98	3.10	3.22
Others	6.91	7.28	7.65	7.97	8.17	8.78
<b>Total</b>	<b>71.09</b>	<b>72.79</b>	<b>74.75</b>	<b>77.11</b>	<b>80.37</b>	<b>84.61</b>

Source: Maia Research Analysis

## 9.2 Asia Pacific Main Sail Market Size by Application

### 9.2.1 Asia Pacific Main Sail Sales by Application (2018-2029)

Table Asia Pacific Main Sail Sales (K Units) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	4.9	5.2	5.1	5.7	6.3	6.7
Professional Sports	10.3	11.0	10.8	11.9	12.8	13.5
<b>Total</b>	<b>15.2</b>	<b>16.2</b>	<b>15.9</b>	<b>17.6</b>	<b>19.1</b>	<b>20.2</b>

	2024	2025	2026	2027	2028	2029
Amateur Leisure	7.0	7.4	7.8	8.2	8.6	9.0
Professional Sports	14.2	14.9	15.5	16.1	16.6	17.3
<b>Total</b>	<b>21.2</b>	<b>22.3</b>	<b>23.4</b>	<b>24.3</b>	<b>25.2</b>	<b>26.3</b>

Source: Maia Research Analysis

### 9.2.2 Asia Pacific Main Sail Revenue by Application (2018-2029)

Table Asia Pacific Main Sail Revenue (M USD) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	17.49	18.34	17.62	19.35	20.78	21.70
Professional Sports	39.63	41.34	39.56	42.95	45.76	47.13
<b>Total</b>	<b>57.12</b>	<b>59.67</b>	<b>57.19</b>	<b>62.30</b>	<b>66.54</b>	<b>68.83</b>

	2024	2025	2026	2027	2028	2029
Amateur Leisure	22.50	23.10	23.91	24.79	26.09	27.57



Professional Sports	48.60	49.70	50.84	52.31	54.28	57.05
<b>Total</b>	<b>71.09</b>	<b>72.79</b>	<b>74.75</b>	<b>77.11</b>	<b>80.37</b>	<b>84.61</b>

Source: Maia Research Analysis

## 9.3 Asia Pacific Main Sail Market Size by Country

### 9.3.1 Asia Pacific Main Sail Revenue by Country (2018-2029)

**Table Asia Pacific Main Sail Revenue (M USD) by Country (2018-2029)**

	2018	2019	2020	2021	2022	2023
China	27.50	28.58	27.22	29.59	31.49	32.43
Japan	6.49	6.70	6.42	6.94	7.43	7.68
South Korea	4.83	5.02	4.79	5.21	5.59	5.78
India	3.74	3.97	3.87	4.33	4.56	4.70
Southeast Asia	3.37	3.53	3.39	3.70	3.95	4.09
Australia	6.32	6.58	6.29	6.83	7.26	7.46
Others	4.87	5.28	5.20	5.71	6.25	6.70
<b>Total</b>	<b>57.12</b>	<b>59.67</b>	<b>57.19</b>	<b>62.30</b>	<b>66.54</b>	<b>68.83</b>

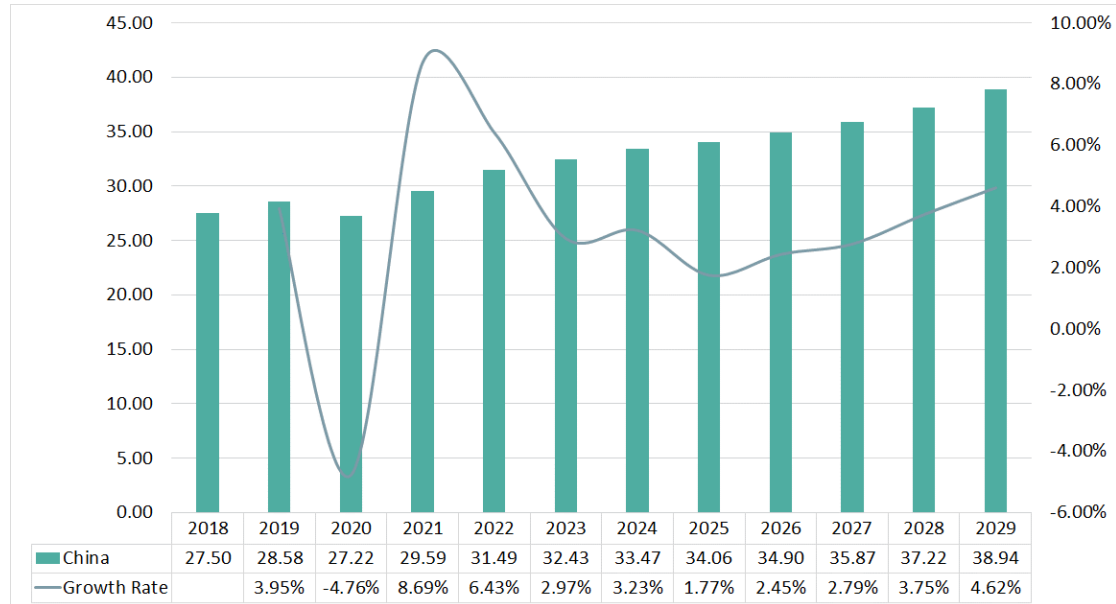
  

	2024	2025	2026	2027	2028	2029
China	33.47	34.06	34.90	35.87	37.22	38.94
Japan	7.84	8.02	8.17	8.45	8.79	9.25
South Korea	5.94	6.06	6.21	6.44	6.71	7.04
India	4.93	5.13	5.41	5.51	5.72	6.12
Southeast Asia	4.48	4.59	4.72	4.87	5.08	5.35
Australia	7.68	7.84	8.02	8.24	8.53	8.94
Others	6.75	7.09	7.32	7.73	8.33	8.98
<b>Total</b>	<b>71.09</b>	<b>72.79</b>	<b>74.75</b>	<b>77.11</b>	<b>80.37</b>	<b>84.61</b>

Source: Maia Research Analysis

### 9.3.2 China

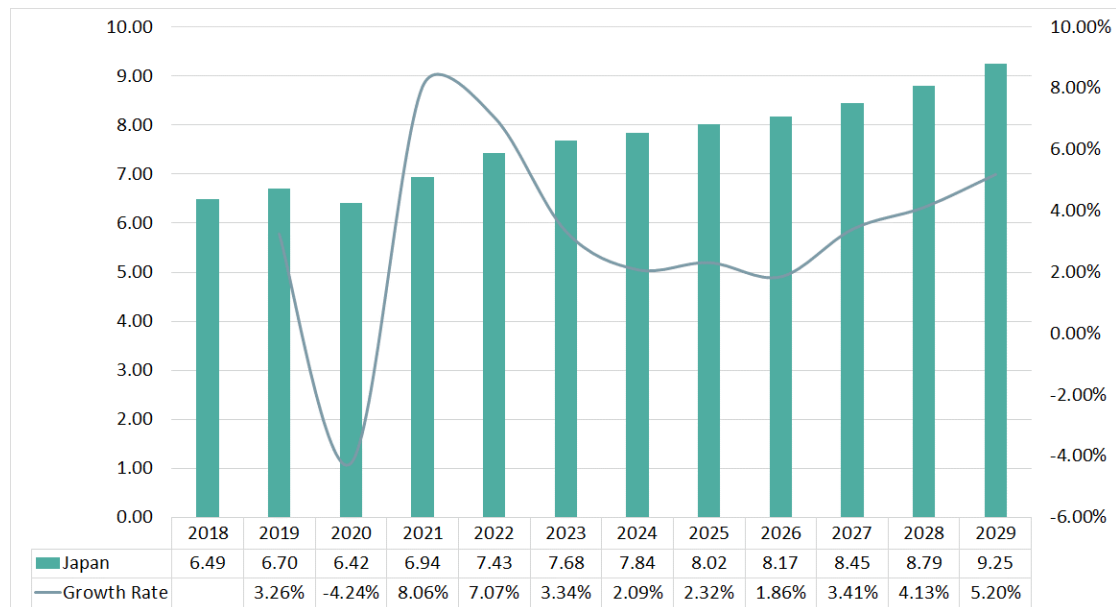
Figure China Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 9.3.3 Japan

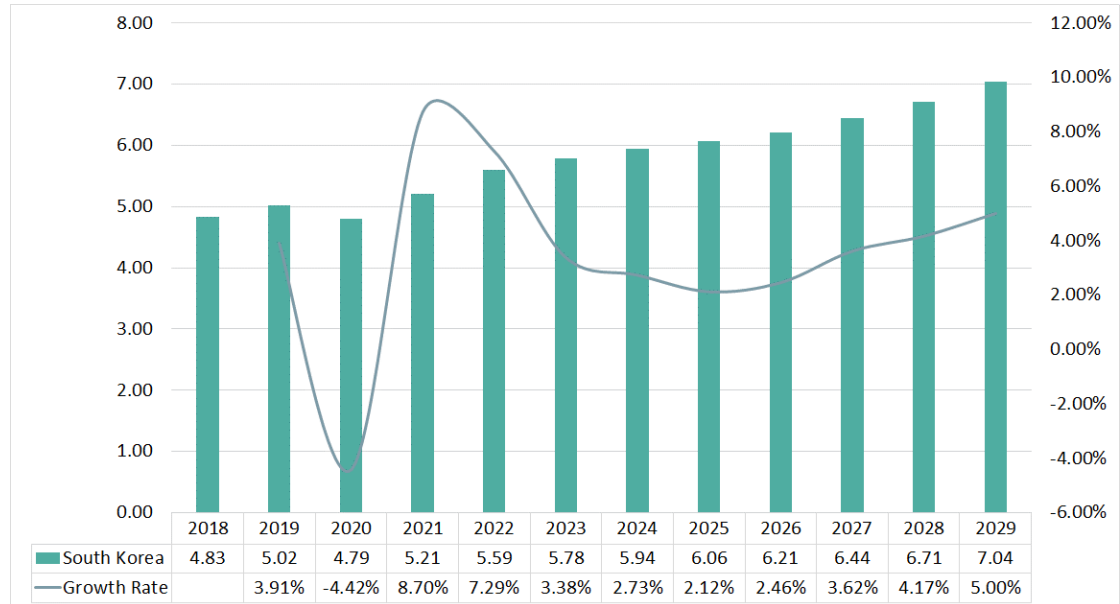
Figure Japan Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 9.3.4 South Korea

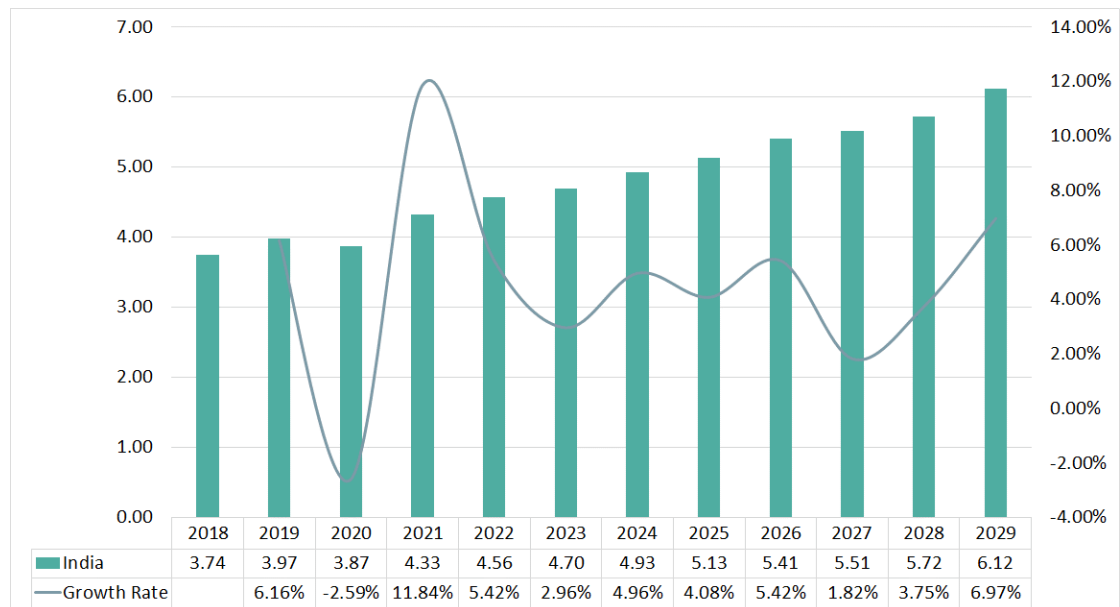
Figure South Korea Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 9.3.5 India

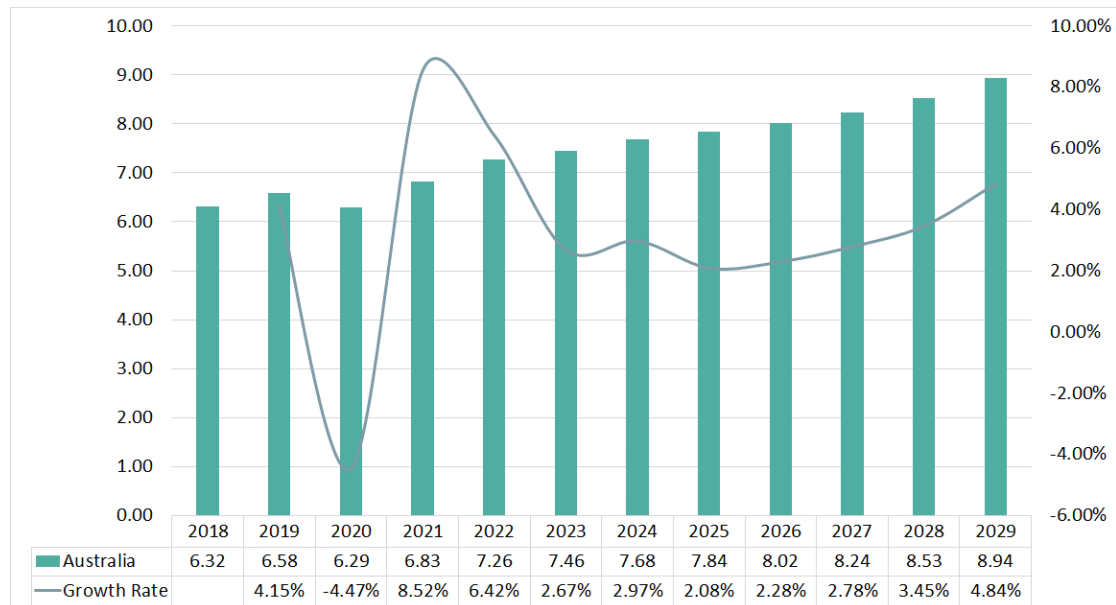
Figure India Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 9.3.6 Australia

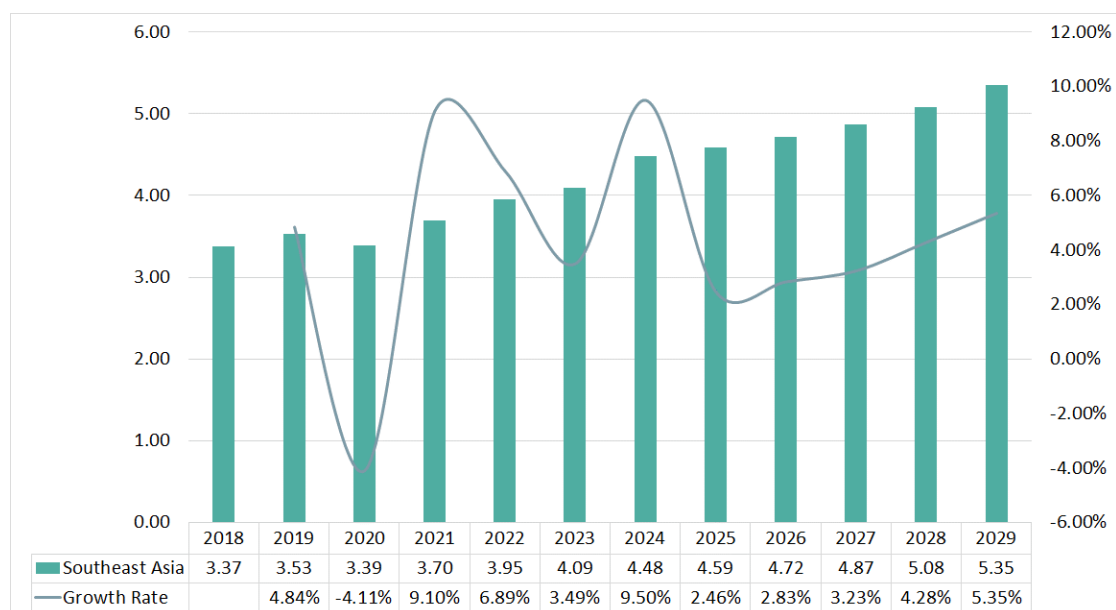
Figure Australia Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 9.3.7 Southeast Asia

Figure Southeast Asia Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

# 10 Latin America

## 10.1 Latin America Main Sail Market Size by Type

### 10.1.1 Latin America Main Sail Sales by Type (2018-2029)

**Table Latin America Main Sail Sales (K Units) by Type (2018-2029)**

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	1.7	1.8	1.8	2.0	2.1	2.3
Woven polyester	1.2	1.3	1.2	1.4	1.5	1.6
Laminated polyester	0.5	0.5	0.5	0.6	0.7	0.7
Carbon Main Sail	0.1	0.1	0.1	0.1	0.1	0.2
Aramid Main Sail	0.3	0.3	0.3	0.4	0.4	0.4
Nylon Main Sail	0.3	0.3	0.3	0.3	0.3	0.4
Cotton Main Sail	0.1	0.1	0.1	0.1	0.1	0.1
Others	0.3	0.3	0.3	0.3	0.4	0.4
<b>Total</b>	<b>2.7</b>	<b>2.9</b>	<b>2.9</b>	<b>3.2</b>	<b>3.5</b>	<b>3.7</b>

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	2.4	2.5	2.7	2.8	2.9	3.1
Woven polyester	1.6	1.7	1.8	1.9	1.9	2.0
Laminated polyester	0.8	0.8	0.9	0.9	1.0	1.1
Carbon Main Sail	0.2	0.2	0.2	0.2	0.2	0.2
Aramid Main Sail	0.4	0.5	0.5	0.5	0.5	0.5
Nylon Main Sail	0.4	0.4	0.4	0.5	0.5	0.5
Cotton Main Sail	0.1	0.1	0.1	0.2	0.2	0.2
Others	0.4	0.5	0.5	0.5	0.5	0.6
<b>Total</b>	<b>3.9</b>	<b>4.2</b>	<b>4.4</b>	<b>4.6</b>	<b>4.8</b>	<b>5.1</b>

Source: Maia Research Analysis

### 10.1.2 Latin America Main Sail Revenue by Type (2018-2029)

**Table Latin America Main Sail Revenue (M USD) by Type (2018-2029)**

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	4.66	4.87	4.68	5.11	5.47	5.65
Woven polyester	2.89	3.00	2.87	3.10	3.29	3.39
Laminated polyester	1.76	1.87	1.82	2.01	2.17	2.26
Carbon Main Sail	1.31	1.41	1.37	1.53	1.68	1.78
Aramid Main Sail	1.21	1.27	1.22	1.34	1.43	1.49
Nylon Main Sail	1.28	1.34	1.29	1.40	1.51	1.61

Cotton Main Sail	0.41	0.43	0.41	0.45	0.49	0.51
Others	0.95	1.03	1.02	1.14	1.24	1.28
Total	9.82	10.35	9.98	10.97	11.82	12.32

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	5.85	6.01	6.19	6.40	6.66	7.00
Woven polyester	3.48	3.55	3.63	3.72	3.85	4.02
Laminated polyester	2.37	2.46	2.56	2.68	2.81	2.98
Carbon Main Sail	1.90	1.96	2.07	2.20	2.35	2.55
Aramid Main Sail	1.55	1.60	1.65	1.71	1.79	1.89
Nylon Main Sail	1.67	1.72	1.77	1.85	1.98	2.09
Cotton Main Sail	0.52	0.53	0.55	0.58	0.61	0.64
Others	1.36	1.44	1.52	1.60	1.66	1.79
Total	12.85	13.26	13.74	14.32	15.05	15.96

Source: Maia Research Analysis

## 10.2 Latin America Main Sail Market Size by Application

### 10.2.1 Latin America Main Sail Sales by Application (2018-2029)

Table Latin America Main Sail Sales (K Units) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	0.8	0.9	0.9	1.0	1.2	1.3
Professional Sports	1.9	2.0	1.9	2.1	2.3	2.5
Total	2.7	2.9	2.9	3.2	3.5	3.7

	2024	2025	2026	2027	2028	2029
Amateur Leisure	1.4	1.5	1.6	1.7	1.8	1.9
Professional Sports	2.6	2.7	2.8	2.9	3.1	3.2
Total	3.9	4.2	4.4	4.6	4.8	5.1

Source: Maia Research Analysis

### 10.2.2 Latin America Main Sail Revenue by Application (2018-2029)

Table Latin America Main Sail Revenue (M USD) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	2.77	2.99	2.93	3.29	3.61	3.81
Professional Sports	7.05	7.36	7.05	7.68	8.21	8.51
Total	9.82	10.35	9.98	10.97	11.82	12.32

	2024	2025	2026	2027	2028	2029
Amateur Leisure	4.06	4.26	4.51	4.78	5.09	5.51
Professional Sports	8.79	9.00	9.24	9.54	9.96	10.44
Total	12.85	13.26	13.74	14.32	15.05	15.96

Source: Maia Research Analysis

## 10.3 Latin America Main Sail Market Size by Country

### 10.3.1 Latin America Main Sail Revenue by Country (2018-2029)

Table Latin America Main Sail Revenue (M USD) by Country (2018-2029)

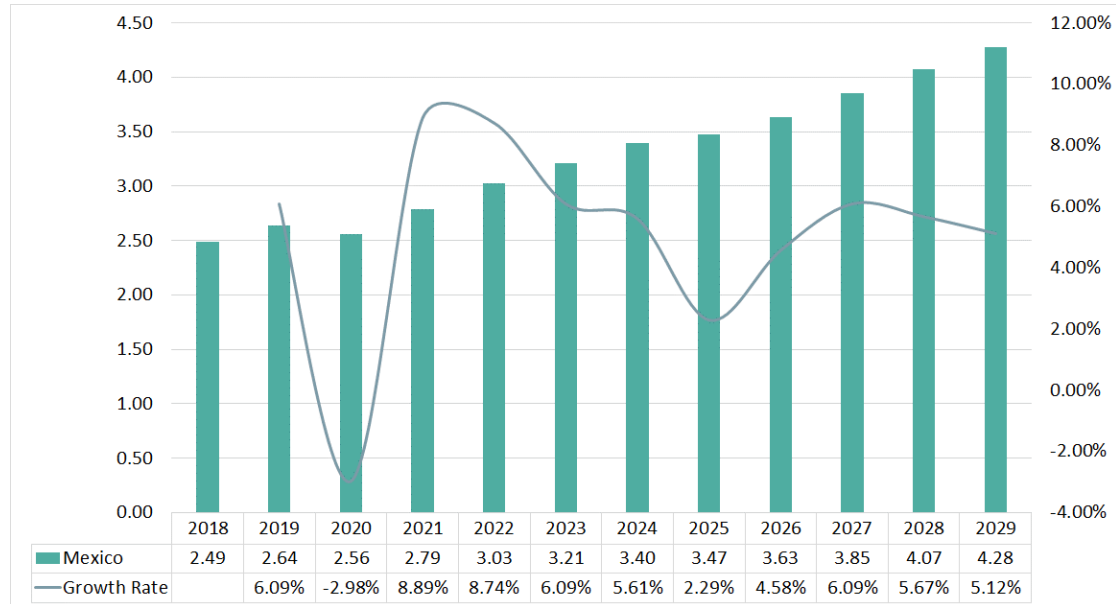
	2018	2019	2020	2021	2022	2023
Brazil	3.56	3.78	3.67	4.04	4.37	4.55
Argentina	0.97	1.01	0.97	1.06	1.14	1.22
Mexico	2.49	2.64	2.56	2.79	3.03	3.21
Others	2.81	2.92	2.79	3.08	3.28	3.34
Total	9.82	10.35	9.98	10.97	11.82	12.32

	2024	2025	2026	2027	2028	2029
Brazil	4.81	4.97	5.17	5.39	5.70	6.05
Argentina	1.26	1.29	1.34	1.42	1.49	1.57
Mexico	3.40	3.47	3.63	3.85	4.07	4.28
Others	3.39	3.53	3.61	3.66	3.79	4.05
Total	12.85	13.26	13.74	14.32	15.05	15.96

Source: Maia Research Analysis

### 10.3.2 Mexico

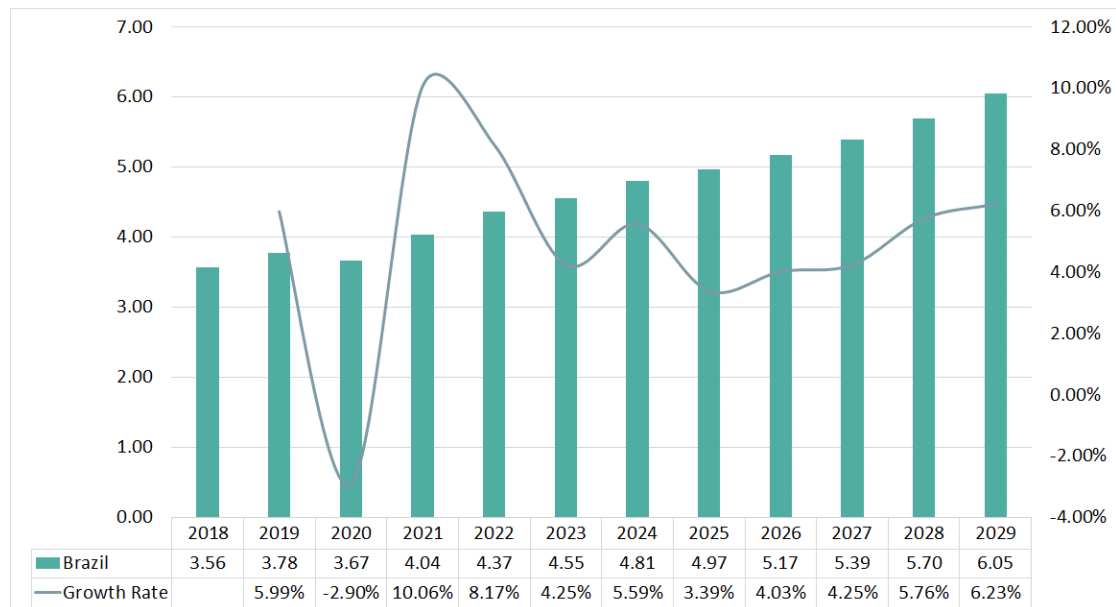
Figure Mexico Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 10.3.3 Brazil

Figure Brazil Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)

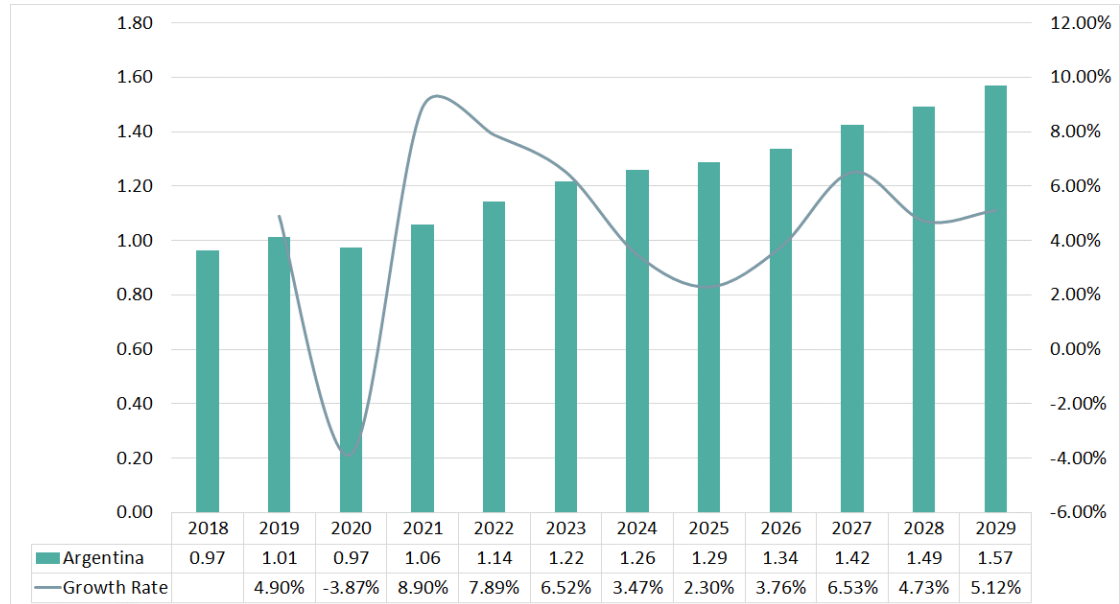


Source: Maia Research Analysis



### 10.3.4 Argentina

Figure Argentina Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

## 11 Middle East and Africa

### 11.1 Middle East and Africa Main Sail Market Size by Type

#### 11.1.1 Middle East and Africa Main Sail Sales by Type (2018-2029)

Table Middle East and Africa Main Sail Sales (K Units) by Type (2018-2029)

	2018	2019	2020	2021	2022	2023
Polyester Main Sail	1.2	1.3	1.3	1.5	1.6	1.7
Woven polyester	0.8	0.9	0.9	1.0	1.1	1.2
Laminated polyester	0.4	0.4	0.4	0.5	0.5	0.6
Carbon Main Sail	0.1	0.1	0.1	0.1	0.1	0.1
Aramid Main Sail	0.2	0.2	0.2	0.3	0.3	0.3
Nylon Main Sail	0.2	0.2	0.2	0.2	0.3	0.3
Cotton Main Sail	0.1	0.1	0.1	0.1	0.1	0.1
Others	0.2	0.2	0.2	0.2	0.2	0.2
Total	1.9	2.1	2.1	2.3	2.6	2.8

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	1.8	2.0	2.1	2.2	2.3	2.5
Woven polyester	1.2	1.3	1.4	1.4	1.5	1.6
Laminated polyester	0.6	0.7	0.7	0.8	0.8	0.9
Carbon Main Sail	0.1	0.1	0.2	0.2	0.2	0.2
Aramid Main Sail	0.3	0.4	0.4	0.4	0.4	0.4
Nylon Main Sail	0.3	0.3	0.3	0.4	0.4	0.4
Cotton Main Sail	0.1	0.1	0.1	0.1	0.1	0.1
Others	0.3	0.3	0.3	0.4	0.4	0.4
Total	3.0	3.2	3.4	3.6	3.8	4.0

Source: Maia Research Analysis

#### 11.1.2 Middle East and Africa Main Sail Revenue by Type (2018-2029)

Table Middle East and Africa Main Sail Revenue (M USD) by Type (2018-2029)

	2018	2019	2020	2021	2022	2023
--	------	------	------	------	------	------

Polyester Main Sail	3.30	3.47	3.35	3.68	3.99	4.14
Woven polyester	2.07	2.15	2.07	2.25	2.42	2.50
Laminated polyester	1.24	1.32	1.29	1.43	1.57	1.64
Carbon Main Sail	0.92	0.99	0.96	1.08	1.21	1.28
Aramid Main Sail	0.87	0.92	0.89	0.98	1.06	1.11
Nylon Main Sail	0.89	0.94	0.91	0.99	1.08	1.16
Cotton Main Sail	0.28	0.29	0.28	0.31	0.34	0.36
Others	0.60	0.65	0.65	0.74	0.82	0.84
Total	6.86	7.26	7.05	7.78	8.50	8.89

	2024	2025	2026	2027	2028	2029
Polyester Main Sail	4.31	4.47	4.63	4.86	5.09	5.40
Woven polyester	2.58	2.66	2.73	2.84	2.97	3.12
Laminated polyester	1.73	1.81	1.90	2.01	2.13	2.28
Carbon Main Sail	1.38	1.44	1.52	1.64	1.77	1.93
Aramid Main Sail	1.16	1.20	1.25	1.31	1.39	1.48
Nylon Main Sail	1.21	1.26	1.30	1.38	1.49	1.58
Cotton Main Sail	0.37	0.39	0.40	0.43	0.45	0.48
Others	0.90	0.97	1.03	1.10	1.15	1.25
Total	9.33	9.71	10.13	10.72	11.34	12.12

Source: Maia Research Analysis

## 11.2 Middle East and Africa Main Sail Market Size by Application

### 11.2.1 Middle East and Africa Main Sail Sales by Application (2018-2029)

Table Middle East and Africa Main Sail Sales (K Units) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	0.6	0.7	0.7	0.8	0.9	0.9
Professional Sports	1.3	1.4	1.4	1.6	1.7	1.9
Total	1.9	2.1	2.1	2.3	2.6	2.8

	2024	2025	2026	2027	2028	2029
Amateur Leisure	1.0	1.1	1.2	1.3	1.4	1.4
Professional Sports	2.0	2.1	2.2	2.4	2.5	2.6
Total	3.0	3.2	3.4	3.6	3.8	4.0

Source: Maia Research Analysis

## 11.2.2 Middle East and Africa Main Sail Revenue by Application (2018-2029)

Table Middle East and Africa Main Sail Revenue (M USD) by Application (2018-2029)

	2018	2019	2020	2021	2022	2023
Amateur Leisure	1.99	2.13	2.09	2.34	2.57	2.72
Professional Sports	4.87	5.13	4.96	5.44	5.92	6.17
<b>Total</b>	<b>6.86</b>	<b>7.26</b>	<b>7.05</b>	<b>7.78</b>	<b>8.50</b>	<b>8.89</b>

	2024	2025	2026	2027	2028	2029
Amateur Leisure	2.88	3.04	3.22	3.43	3.66	3.95
Professional Sports	6.45	6.67	6.92	7.30	7.68	8.17
<b>Total</b>	<b>9.33</b>	<b>9.71</b>	<b>10.13</b>	<b>10.72</b>	<b>11.34</b>	<b>12.12</b>

Source: Maia Research Analysis

## 11.3 Middle East and Africa Main Sail Market Size by Country

### 11.3.1 Middle East and Africa Main Sail Revenue by Country (2018-2029)

Table Middle East and Africa Main Sail Revenue (M USD) by Country (2018-2029)

	2018	2019	2020	2021	2022	2023
Turkey	1.76	1.87	1.80	1.99	2.18	2.28
Saudi Arabia	1.57	1.68	1.65	1.80	1.97	2.06
U.A.E	0.64	0.68	0.66	0.74	0.80	0.84
Others	2.89	3.04	2.94	3.24	3.54	3.72
<b>Total</b>	<b>6.86</b>	<b>7.26</b>	<b>7.05</b>	<b>7.78</b>	<b>8.50</b>	<b>8.89</b>

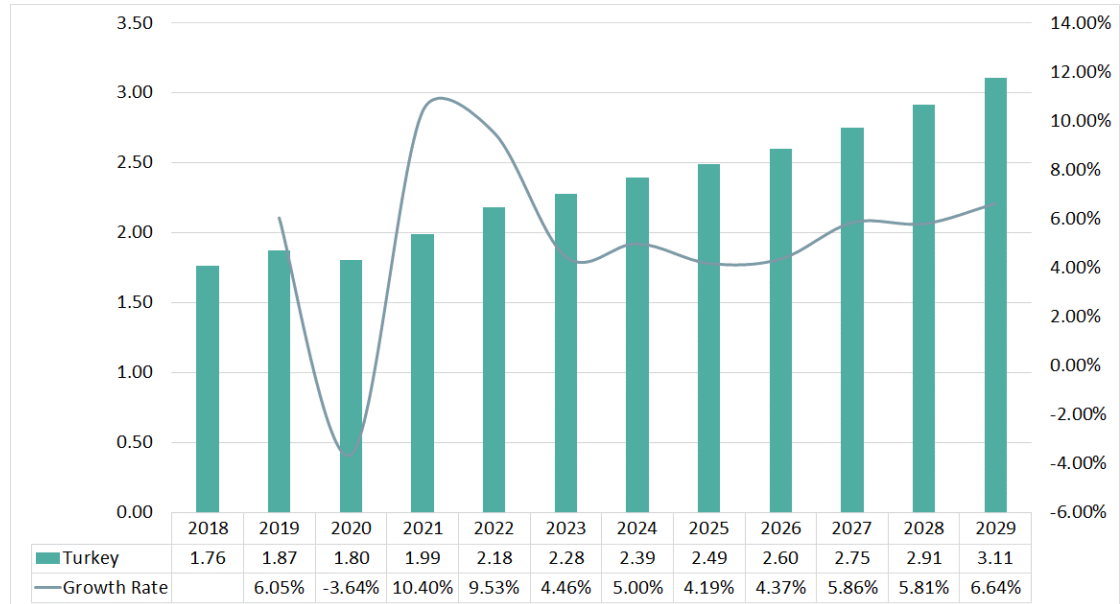
  

	2024	2025	2026	2027	2028	2029
Turkey	2.39	2.49	2.60	2.75	2.91	3.11
Saudi Arabia	2.16	2.24	2.33	2.48	2.62	2.80
U.A.E	0.89	0.93	0.97	1.03	1.08	1.16
Others	3.89	4.05	4.23	4.47	4.73	5.05
<b>Total</b>	<b>9.33</b>	<b>9.71</b>	<b>10.13</b>	<b>10.72</b>	<b>11.34</b>	<b>12.12</b>

Source: Maia Research Analysis

### 11.3.2 Turkey

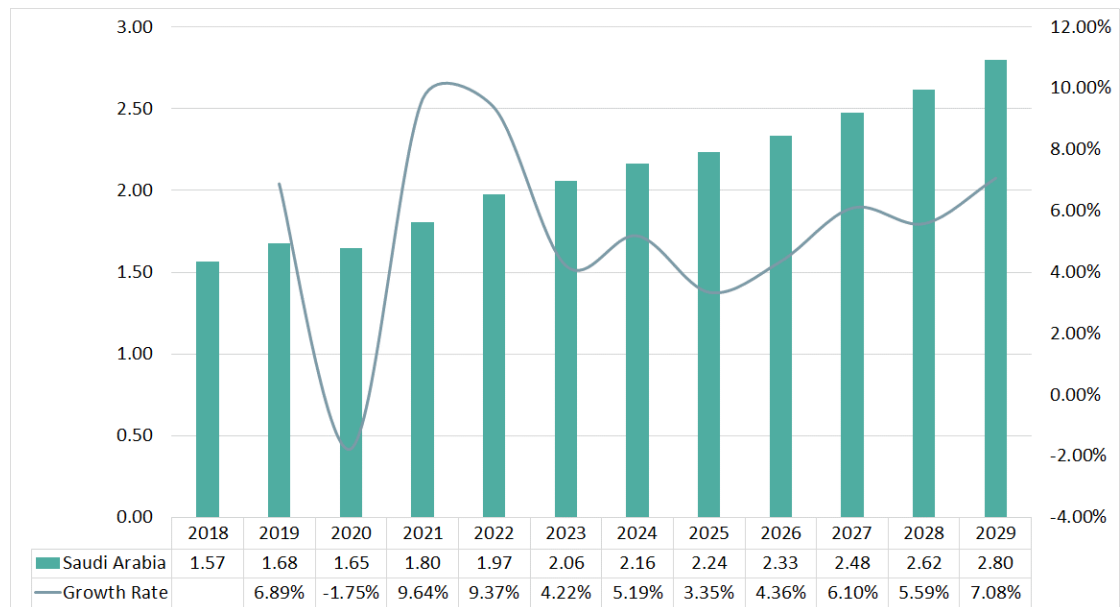
Figure Turkey Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 11.3.3 Saudi Arabia

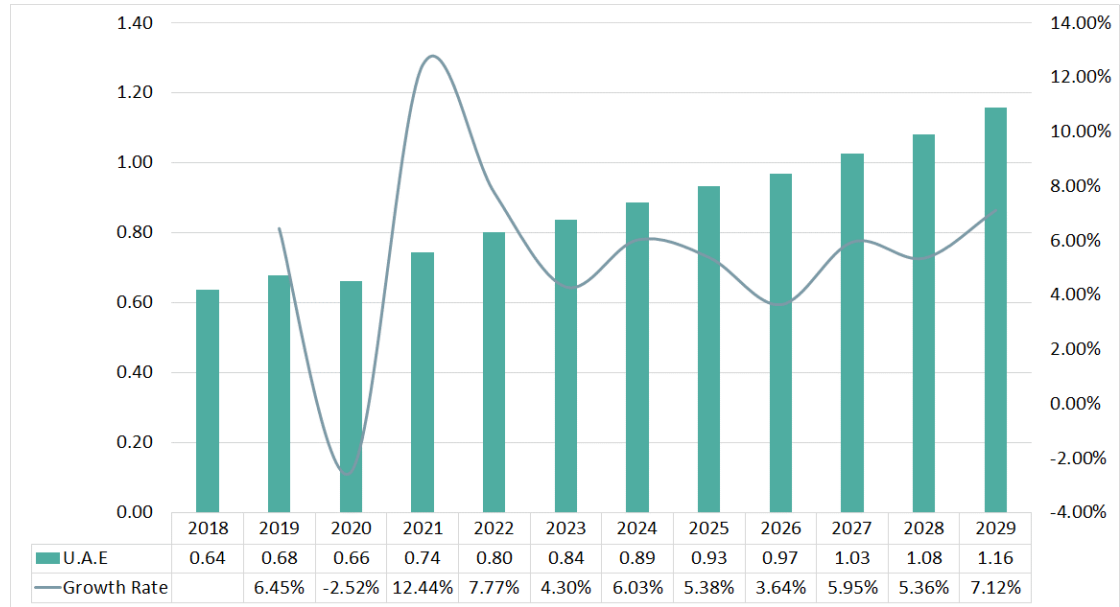
Figure Saudi Arabia Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

### 11.3.4 U.A.E

Figure U.A.E Main Sail Market Size YoY Growth (2018-2029) & (US\$ Million)



Source: Maia Research Analysis

## 12 Company Profiles

### 12.1 North Sails Sailmaking

#### 12.1.1 North Sails Sailmaking Corporation Information

Table North Sails Sailmaking Corporation Information

Item	Description
Company Name	North Sails Sailmaking
Website	<a href="http://www.northsails.com">www.northsails.com</a>
Establish Time	1957
Headquarter	USA
Area Served	Worldwide
Contact Information	Tel: +1 415-339-3000 Add: 440 Coloma St, Sausalito, CA 94965


Source: North Sails Sailmaking; Maia Research Analysis

#### 12.1.2 Business Overview

North Sails is the Worldwide leader in Sailmaking. Featuring over 150 lofts across the globe, innovative products and materials, and the North Sails Collection. Go North. Go Beyond.

## 12.1.3 Main Sail Products and Services

Table Main Sail Products and Services


<p>Racing Mainsail, Cruising Mainsails, Full-Batten Cruising Mainsails, High Roach Mainsail, Mast Furling Mainsail, Boom Furling Mainsail: North Sails offers a racing mainsail customized to your requirements.</p> <p>Standard Features:</p> <ul style="list-style-type: none"><li>• Rule Optimized Roach Profile</li><li>• 1 or 2 Full Length Top Battens</li><li>• RBS E-Glass Tapered Battens*</li><li>• Exclusive Tie-in Batten Adjusters</li><li>• Racing Headboard</li><li>• Hard Braid Luff Rope</li><li>• Cunningham</li><li>• Adjustable Leech and Foot Cords</li><li>• Loose Foot with Integral Foot Shelf</li><li>• Exclusive Teardrop Corner Reinforcements</li><li>• Stainless Steel Rings</li><li>• Racing Trim Stripes</li><li>• Nylon Twist (Leech) Telltales</li><li>• Yarn Flow (Horizontal) Telltales</li><li>• Class Insignia</li><li>• Sail Numbers and Country Code</li><li>• Certified Measurement</li><li>• Drawstring Sail Bag</li></ul> <p>Optional Features:</p>



- Reef Points
- Carbon Battens
- Simple Luff Slides
- Custom Luff & Batten Car Systems
- Overhead Leech Cord
- Spreader Tip Patches
- Custom Graphics

Source: North Sails Sailmaking; Maia Research Analysis

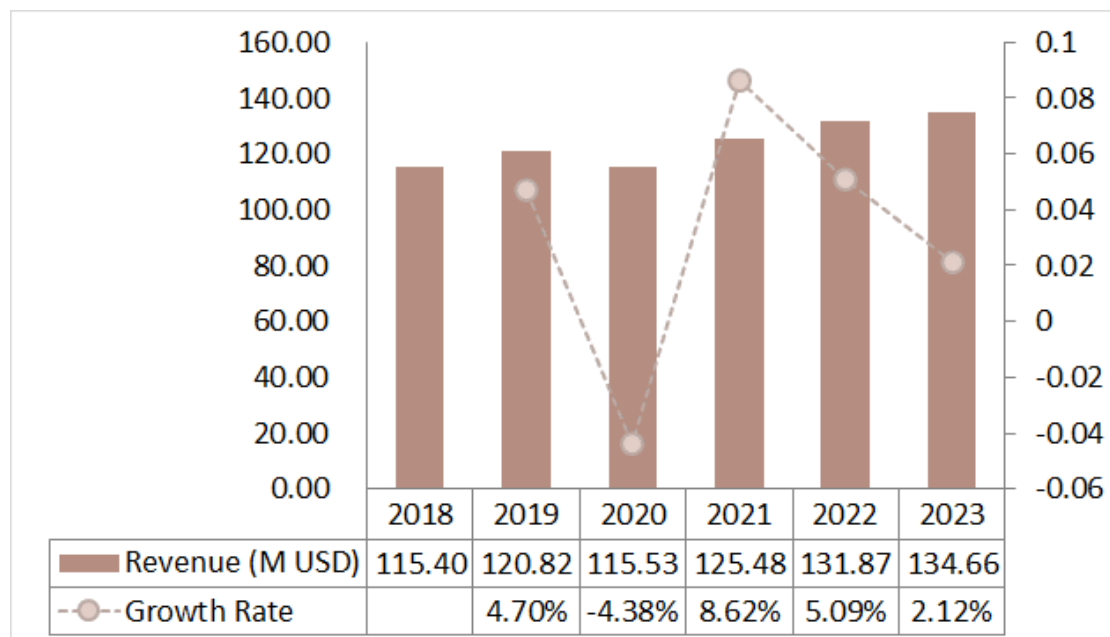
### 12.1.4 North Sails Sailmaking Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Table North Sails Sailmaking Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

North Sails Sailmaking	2018	2019	2020	2021	2022	2023
Sales (K Units)	23.8	25.6	25.0	27.6	29.6	31.1
Price (USD/Unit)	4851	4720	4629	4544	4453	4335
Revenue (M USD)	115.40	120.82	115.53	125.48	131.87	134.66
Gross (M USD)	28.25	29.85	27.50	29.30	31.44	32.36
Gross Margin	24.48%	24.71%	23.80%	23.35%	23.85%	24.03%

Source: Maia Research Analysis

Figure North Sails Sailmaking Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

## 12.1.5 North Sails Sailmaking Recent Development

Table North Sails Sailmaking Recent Development

Item	Description
NORTH SAILS PARTNERS WITH NAJAD YACHTS 2023/3/16	North Sails Sweden are proud to announce a partnership with the true bluewater cruising yacht builder, Najad Yachts. This collaboration is an investment in sailors as Najad Yachts further refine and improve the sailing experience in all new boats that leave the yard in Henån.

Source: North Sails Sailmaking; Expert Interviews; Maia Research Analysis

## 12.1.6 North Sails Sailmaking Main Sail SWOT Analysis

Table North Sails Sailmaking SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>Design and manufacture mainsail shape leading position</li> <li>3D manufacturing technology is mature</li> <li>Strong research and development capability</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>High price</li> <li>High raw material cost</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>The use of digital, automatic customization mature</li> <li>Score well in multiple competitions</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>The pandemic has stalled testing and evaluation on water</li> <li>Mainstream events have been cancelled and postponed</li> </ul>

Source: Maia Research Analysis

## 12.2 Quantum Sails

### 12.2.1 Quantum Sails Corporation Information

Table Quantum Sails Corporation Information

Item	Description
<b>Company Name</b>	Quantum Sails
<b>Website</b>	www.quantumsail.com
<b>Establish Time</b>	1996
<b>Headquarter</b>	USA
<b>Area Served</b>	Europe, America, Australia, China, Japan, Malaysia
<b>Contact Information</b>	Tel: 231-941-1222 Add: 1576 International Dr. Traverse City, MI 49686


Source: Quantum Sails; Maia Research Analysis

## 12.2.2 Business Overview

Since 1996, the group have focused on providing the best-performing products in sailing. Quantum has taken the art and science of sailmaking to the highest level to produce the most efficient and fastest sail shapes possible. Quantum’s proprietary iQ Technology® system was created by experts with over 20 years of knowledge and expertise in both sailing and the complexities of engineered structures.

## 12.2.3 Main Sail Products and Services

**Table Main Sail Products and Services**


<p>2.4 MR: Woven polyester D/P 160 OD bi-radial main for the Charger mast. Designed as an all purpose sail, it provides the perfect amount of power, durability and control that the 2.4 MR demands from a mainsail. The woven Woven polyester gives you the longest ultimate life particularly combined with the bi radial construction. It is the ideal sail for a simple setup that’s very competitive.</p>

Source: Quantum Sails; Maia Research Analysis

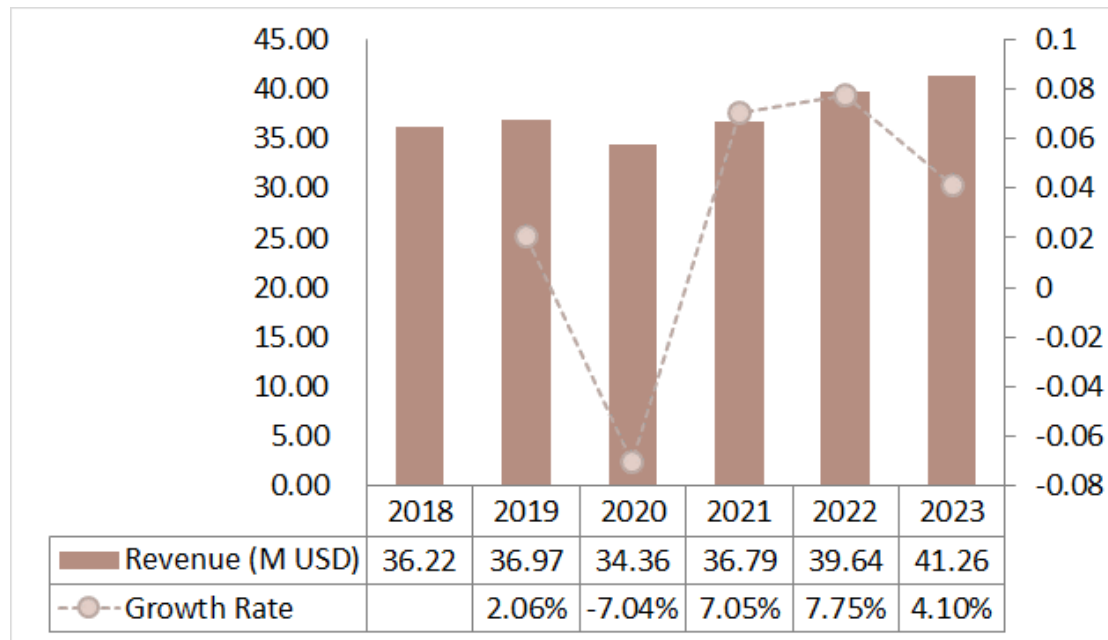
## 12.2.4 Quantum Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

**Table Quantum Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

Quantum Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	7.5	7.9	7.6	8.3	9.0	9.7
Price (USD/Unit)	4823	4671	4528	4452	4381	4272
Revenue (M USD)	36.22	36.97	34.36	36.79	39.64	41.26
Gross (M USD)	9.99	10.46	9.48	9.97	11.10	11.24
Gross Margin	27.58%	28.30%	27.58%	27.09%	28.00%	27.25%

Source: Maia Research Analysis

Figure Quantum Sails Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

## 12.2.5 Quantum Sails Recent Development

Table Quantum Sails Recent Development

Item	Description
<b>QUANTUM SAILS ANNOUNCES PARTNERSHIP WITH ADVANCED WING SYSTEMS 2021/3/11</b>	Quantum Sails is excited to announce its partnership with Advanced Wing Systems, the industry leader in soft-wing sails. In addition to sharing its technologies and knowledge, Quantum Sails will also provide Advanced Wing Systems with sail membranes for wing sails as well as headsails, codes sails, and spinnakers modified to work with the special spars needed for soft-wing sails. This partnership expands the support network for the Advanced Wing Systems wing sail to include Quantum Sails lofts worldwide.

Source: Quantum Sails; Expert Interviews; Maia Research Analysis

## 12.2.6 Quantum Sails Main Sail SWOT Analysis

Table Quantum Sails SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>Product performance is excellent and stable, consistent</li> <li>Build multiple dovecotes and build a global network.</li> <li>Customized customer service is professional and accurate</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>The competition experience of the product is less</li> <li>Compared with other old brands, the competitiveness is weak</li> </ul>

<b>Opportunity</b>	<ul style="list-style-type: none"> <li>• Technology development has driven the development of iQ Technology® systems</li> <li>• The addition of talents, so that professional pigeon loft service</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>• Fierce competition between brands</li> <li>• High manufacturing cost</li> </ul>

Source: Maia Research Analysis

## 12.3 Doyle

### 12.3.1 Doyle Corporation Information

Table Doyle Corporation Information

Item	Description
<b>Company Name</b>	Doyle
<b>Website</b>	www.doylesails.com
<b>Establish Time</b>	1982
<b>Headquarter</b>	USA
<b>Area Served</b>	Mainly in North America, Europe and Asia Pacific
<b>Contact Information</b>	Tel: 978 740 5950 Add: 96 Swampscott Rd Salem, MA 01970 United States


Source: Doyle; Maia Research Analysis

### 12.3.2 Business Overview

Founded by Robbie Doyle in 1982, Doyle Sailmakers' headquarters is located in Salem, central to all New England ports. Today, with over 70 lofts in 20 countries, Doyle is a full service, global sailmaker, highly experienced in catering to the professionally crewed yacht market. Doyle's 30 years of sailmaking experience combined with Computational Fluid Dynamics (CFD) and Finite Element Analysis (FEA), enables Doyle Sailmakers to engineer the most innovative and fully optimized sails for yachts of all sizes.

### 12.3.3 Main Sail Products and Services

Table Main Sail Products and Services


<p><b>DACRON</b></p> <p>Polyester’s desirable properties include excellent resiliency, high abrasion resistance, high UV resistance, high flex strength and low cost. Low absorbency allows the fiber to dry quickly. Although polyester has been replaced by higher modulus fibers such as those used in the Doyle Stratis products, its proven durability and price point has seen it remain a popular cruising sailcloth fibre.</p>

Source: Doyle; Maia Research Analysis

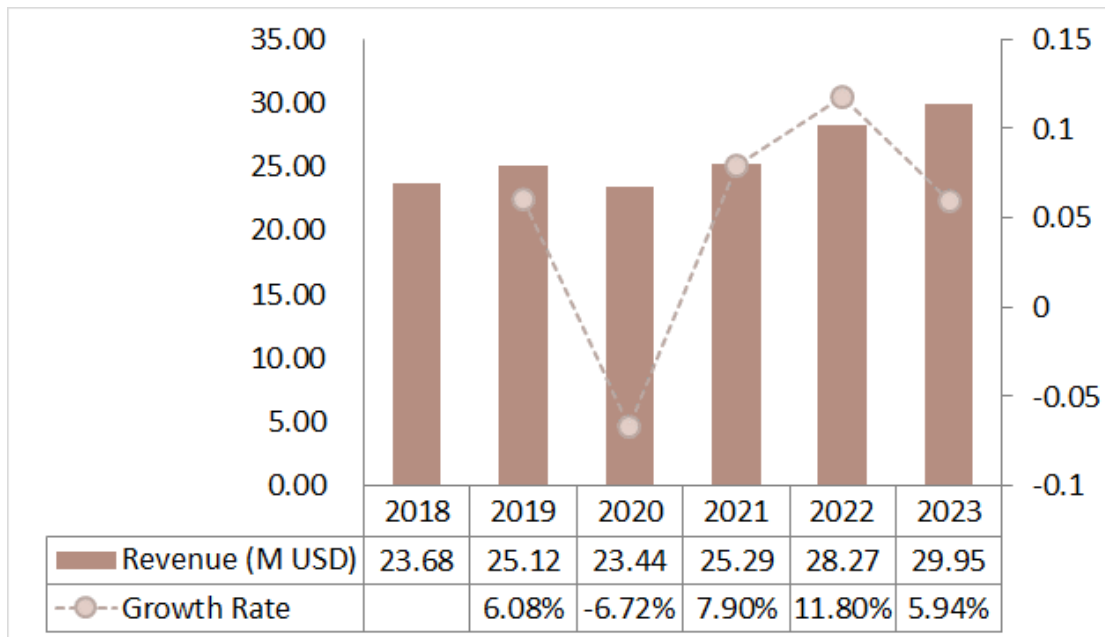
### 12.3.4 Doyle Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Table Doyle Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Doyle	2018	2019	2020	2021	2022	2023
Sales (K Units)	5.8	6.3	6.0	6.7	7.6	8.2
Price (USD/Unit)	4092	4017	3884	3794	3732	3638
Revenue (M USD)	23.68	25.12	23.44	25.29	28.27	29.95
Gross (M USD)	5.35	5.67	5.35	6.04	6.57	6.94
Gross Margin	22.58%	22.56%	22.82%	23.87%	23.25%	23.18%

Source: Maia Research Analysis

Figure Doyle Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

### 12.3.5 Doyle Recent Development

Table Doyle Recent Development

Item	Description
<b>DOYLE SAILS BECOMES A TECHNICAL PARTNER TO CLUBSWAN RACING</b> 2023/4/26	Doyle Sails is proud to officially become a Technical Partner to the Nautor Swan racing world. The fleets corral some of the most high-performance sailors to highlight the spirit of Swan, delivering top-level, friendly and fair racing to the crews and owners. Ultimately, both seek to deliver high-performance, high-quality, custom solutions alongside unforgettable experiences and adventures while striving to connect like-minded sailors.
<b>DENMARK SAILGP TEAM GIVES SAILS A SECOND LIFE WITH PIONEERING ON-WATER WASTE BAG</b> 2023/3/30	Denmark SailGP Team presented by ROCKWOOL athletes have developed a new on-water waste management solution made from recycled SailGP sails, which could set a new standard for recycling and waste reduction at the world's best sailing events and regattas. The solution – which features used materials including Denmark's SailGP jib – is a collaboration between the Danish athletes, One Ocean Foundation and SailGP's official sailmaker, Doyle Sails.

Source: Doyle; Expert Interviews; Maia Research Analysis

## 12.3.6 Doyle Main Sail SWOT Analysis

Table Doyle SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>In the market for a long time, with a high brand awareness</li> <li>Customized services mature</li> <li>Established a global service and sales network</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>High raw material cost</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>Core innovations like stratis dedicated sail film and wireless technology</li> <li>Products in a number of grand Prix achieved excellent results</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>Competition among brands is fierce</li> </ul>

Source: Maia Research Analysis

## 12.4 Hyde sails

### 12.4.1 Hyde sails Corporation Information

Table Hyde sails Corporation Information

Item	Description
<b>Company Name</b>	Hyde sails
<b>Website</b>	<a href="http://www.hydesails.co.uk">www.hydesails.co.uk</a>
<b>Establish Time</b>	1968
<b>Headquarter</b>	UK
<b>Area Served</b>	Europe, North America, East Asia, South Asia, Oceania
<b>Contact Information</b>	Tel: +44 (0) 2380 457779 Add: The Slipway, Hamble Point Marina, Hamble, Hampshire SO31 4JD

Source: Hyde sails; Maia Research Analysis

### 12.4.2 Business Overview

Hyde Sails is one of the largest volume sailmakers worldwide, delivering high quality sails with a service to match. Backed up by 50 years of expertise, Hyde Sails has always placed itself at the forefront of sail technology, design and production for everything from Optimists to cruisers and ocean racing yachts.



## 12.4.3 Main Sail Products and Services

Table Main Sail Products and Services



**HYDE SAILS TOURING RANGE:** The fore and aft sails will be in a cross cut construction made from a durable Woven polyester, which will give the sail a long useful life. The material is the best in the class of basic cruising sailcloth's. Hardware will also be nearer the top of the specification range. These sails are priced as their entry level specification.

**HYDE SAILS VOYAGER RANGE:** for serious passage making. You can choose from the highest quality woven or laminate sail cloths in either X – cut or Tri Radial construction, finished with ultra high specification components to ensure your yacht has the best custom sails onboard.

**Hyde Heritage Sails:** Hyde Heritage Sails is a new range of sails dedicated to the Classic and Traditional classes of boats. Cloth choices are available in a range of cream and tan cloths, with particular attention paid to finishing the sails with traditional features such as leather clew patches and brass piston hanks. The fore and aft sails are cross cut design and made from a durable Woven polyester. These sails can be either for a Gaff or Bermuda rigged Sloop, Schooner or Ketch and are made to the world's highest standards, each sail is then finished by a craftsman sailmaker, whose training and experience allows for the creation of traditional finished sails.

**The Hyde Sails Grand Prix range:** designed for serious, no compromise racing either round the cans or offshore. Grand Prix fore and aft sails are available either as panelled sails with a tri-radial seam layout or a membrane sail. The main material of canvas is polyethylene.

Source: Hyde sails; Maia Research Analysis

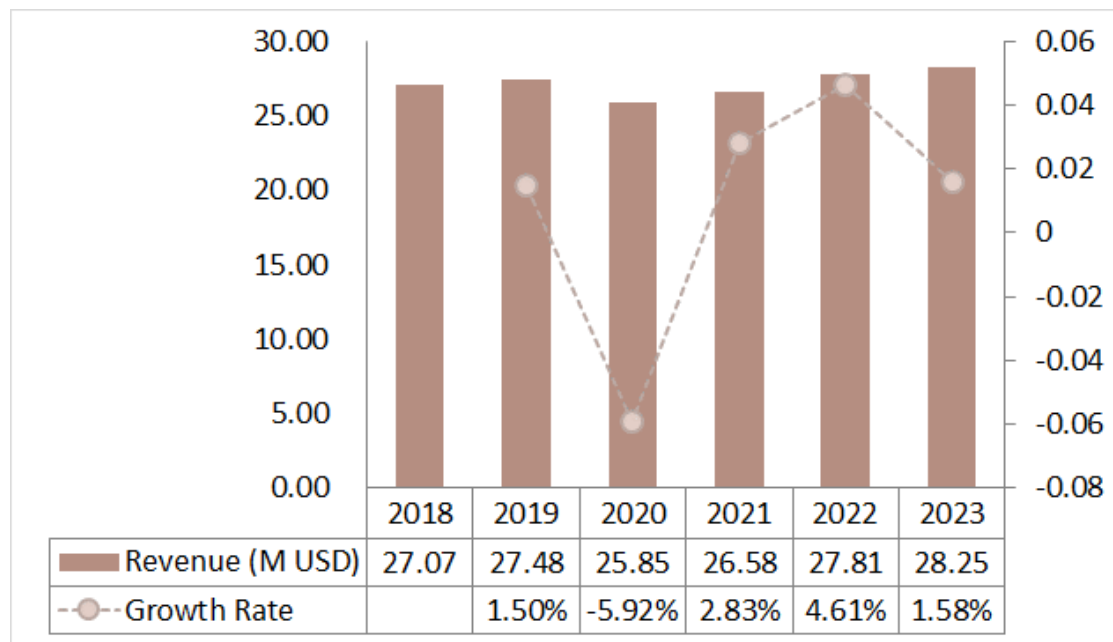
## 12.4.4 Hyde sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Table Hyde sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Hyde sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	11.7	12.2	11.9	12.5	13.4	13.9
Price (USD/Unit)	2308	2248	2176	2126	2083	2032
Revenue (M USD)	27.07	27.48	25.85	26.58	27.81	28.25
Gross (M USD)	7.03	7.26	6.79	6.98	7.46	7.34
Gross Margin	25.95%	26.40%	26.24%	26.27%	26.81%	25.97%

Source: Maia Research Analysis

Figure Hyde sails Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

## 12.4.5 Hyde sails Main Sail SWOT Analysis

Table Hyde sails SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>Build a wide global dealer network</li> <li>OEM for a third party company</li> <li>Preferential price, cost-effective</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>Compared with other established services, products and brands are weak</li> <li>Some dovetailed services were neglected</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>The development of electronic commerce</li> </ul>

	<ul style="list-style-type: none"> <li>• New countries have increased demand for water sports</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>• Strong competition from other established sail builders.</li> <li>• Rising raw material and production costs.</li> </ul>

Source: Maia Research Analysis

## 12.5 Elvstrom Sails

### 12.5.1 Elvstrom Sails Corporation Information

Table Elvstrom Sails Corporation Information

Item	Description
<b>Company Name</b>	Elvstrom Sails
<b>Website</b>	elvstromsails.com
<b>Establish Time</b>	1954
<b>Headquarter</b>	Denmark
<b>Area Served</b>	Mainly in Europe
<b>Contact Information</b>	Tel: +45 73 62 48 00 Add: Paul Elvstrøms Vej 4 6200 Aabenraa

Source: Elvstrom Sails; Maia Research Analysis

### 12.5.2 Business Overview

For over 65 years the group have developed a unique sail making expertise driven by the experience of high performing sailors and sail designers, and legendary founder, Paul Elvstrøm.

### 12.5.3 Main Sail Products and Services

Table Main Sail Products and Services



Alisio Conventional Main Sail: This mainsail is made from a tightly Woven polyester cloth,

providing a long-lasting sail which provides many years of good service. The classic cross-cut construction is a widely used design producing sails at competitive prices. The horizontal full battens help keep the shape, and when lowering the sail, it practically packs itself in to the lazy jack or zippack. The sail is delivered in a sail bag thus easy to store and transport. The Woven polyester used for their ALISIO segment is a durable and economical fabric ideal for recreational cruising.

Marin EMS Fatfurl Main: The FatFurl only available at Elvstrøm is specially designed with optimum shape and maximum sail area for all modern High-Performance Cruisers. The Fatfurl is larger than conventional horizontally battened mainsails. The continuous vertical battens with carbon top provide maximum support for the leech, whether the sail is fully deployed or reefed. The full battens are also to be used as reefing points, stretching the reefed luff and making the sail flat and efficient. The short intermediate battens have the same function. The EPEX layout ensures an optimum fiber distribution and a strong and stable sail. Optional integrated batten pockets are symmetric and ensures optimally airflow over the sail. Taffeta used as an outside layer on both sides adds strength and durability to the sail. It improves resistance against UV, tear, flex and chafe. Taffeta is available in light and heavy and in grey and white.

Maestro Racing Main Sail: EPEX nanno features a strong and light structure. On both sides of the flat spreaded carbon fibers and the regular Aramid Black fibers, an ultrathin film adds diagonal strength and a mono-and micro polyester surface in light grey adds protection against wear and tear. The integrated Absorption Power Strips™ made from a strong carbon filament add additional power distribution to typical overstressed areas of the sail.

Source: Elvstrom Sails; Maia Research Analysis

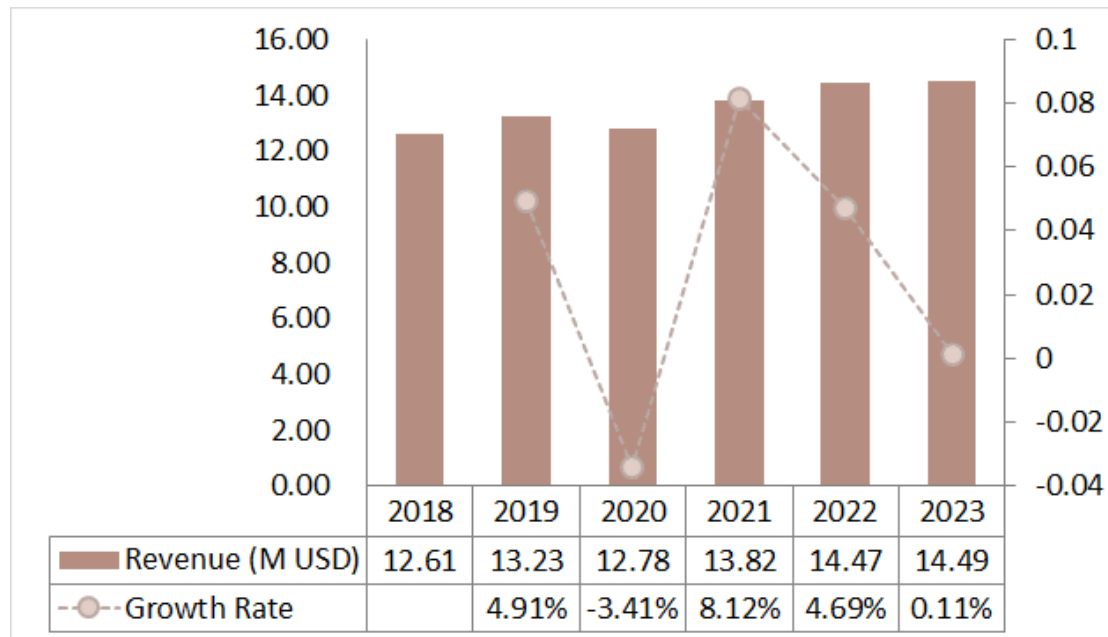
## 12.5.4 Elvstrom Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Table Elvstrom Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Elvstrom Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	3.3	3.5	3.4	3.8	4.1	4.2
Price (USD/Unit)	3870	3783	3710	3618	3532	3432
Revenue (M USD)	12.61	13.23	12.78	13.82	14.47	14.49
Gross (M USD)	3.34	3.66	3.42	3.57	3.82	3.81
Gross Margin	26.51%	27.68%	26.75%	25.86%	26.43%	26.33%

Source: Maia Research Analysis

Figure Elvstrom Sails Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

## 12.5.5 Elvstrom Sails Recent Development

Table Elvstrom Sails Recent Development

Item	Description
Expansion in Bruinisse 2020/7/6	The loft in Bruinisse driven by Maxim Van Pelt has doubled up the capacity with 100 m2 and with machines integrated in the working floor. The Elvstrøm Sails Benelux loft in Bruinisse is now able to service much bigger sails and deliver a better and more professional service.

Source: Elvstrom Sails; Expert Interviews; Maia Research Analysis

## 12.5.6 Elvstrom Sails Main Sail SWOT Analysis

Table Elvstrom Sails SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>With local advantages and strong market share of service points</li> <li>Has a stable, high quality of a number of downstream customer companies</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>Compared with other old brands, the global influence is weak</li> <li>The price is higher among the old brands</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>3D technology enables customization of services</li> <li>The development of e-commerce promotes the improvement and</li> </ul>

	expansion of services
<b>Threat</b>	<ul style="list-style-type: none"> <li>• Mainstream events have been cancelled and postponed</li> <li>• There's a lot of competition between brands</li> </ul>

Source: Maia Research Analysis

## 12.6 UK-Halsey International

### 12.6.1 UK-Halsey International Corporation Information

Table UK-Halsey International Corporation Information

Item	Description
<b>Company Name</b>	UK-Halsey International
<b>Website</b>	www.uksailmakers.com
<b>Establish Time</b>	1946
<b>Headquarter</b>	USA
<b>Area Served</b>	Mainly in North America, Europe and Asia Pacific
<b>Contact Information</b>	Tel: +1 914-312-2520 Add: 10 Midland Ave Suite M-01A Port Chester, NY 10573

Source: UK-Halsey International; Maia Research Analysis

### 12.6.2 Business Overview

UK-Halsey united two very successful sailmakers, each known for quality and performance in different segments and territories within the sailing community. UK Sailmakers, founded in City Island, New York, was known as a leader in loadpath laminate construction, having pioneered Tape-Drive sails.

### 12.6.3 Main Sail Products and Services

Table Main Sail Products and Services



**Cruising Mainsails:**

**TITANIUM DOUBLE**, Lightest weight performance cruising sail. Molded membrane containing carbon load-path fibers running continuously from corner to corner over a Technora scrim. Lite Skin, White or grey taffeta on both sides of the sail.

**TAFFETA**, Load-path reinforced performance cruising laminate sail. Extra lightweight cross-cut laminate panels reinforced with corner-to-corner carbon or S-Glass reinforcing yarns bonded to the sail. Taffeta or Lite Skin on one or both sides of the sail.

**X-DRIVE TAFFETA**, Tri-Radial panel layout for increased shape holding. Long narrow panels radiating from the three corners of the sail that follow load paths connecting the three corners. The narrower the panels the better the shape-holding. Taffeta on both sides.

**RADIAL TAFFETA**, Tri-Radial panel layout for increased shape holding. Long narrow panels radiating from the three corners of the sail that follow load paths connecting the three corners. The narrower the panels the better the shape-holding. Taffeta on both sides.

**VOYAGER**, A woven hybrid of polyester and inserted high-strength UHMWPE. Efficient, nearly wasteless use of sailcloth. Cross-cut panels are orientated so that the strong UHMWPE fill yarns run parallel to the straight-line leech – the part of the sail that sees the highest loads.

**DACRON**, Most economical sails for cruising and daysailing. Cross-cut panels make for the most efficient use of the sailcloth, which helps control costs. Woven polyester is better known by the name Dacron, which is a trademark of Dupont.

**Racing Mainsails:** Performance cruising sails are made with UK Sailmakers' Titanium membranes, X-Drive® load-path reinforced laminates, and premium dacrons. Molded membrane containing carbon load-path fibers running continuously from corner to corner over an aramid scrim. Lite Skin® or taffeta on the exterior gives the sail extra durability.

Source: UK-Halsey International; Maia Research Analysis

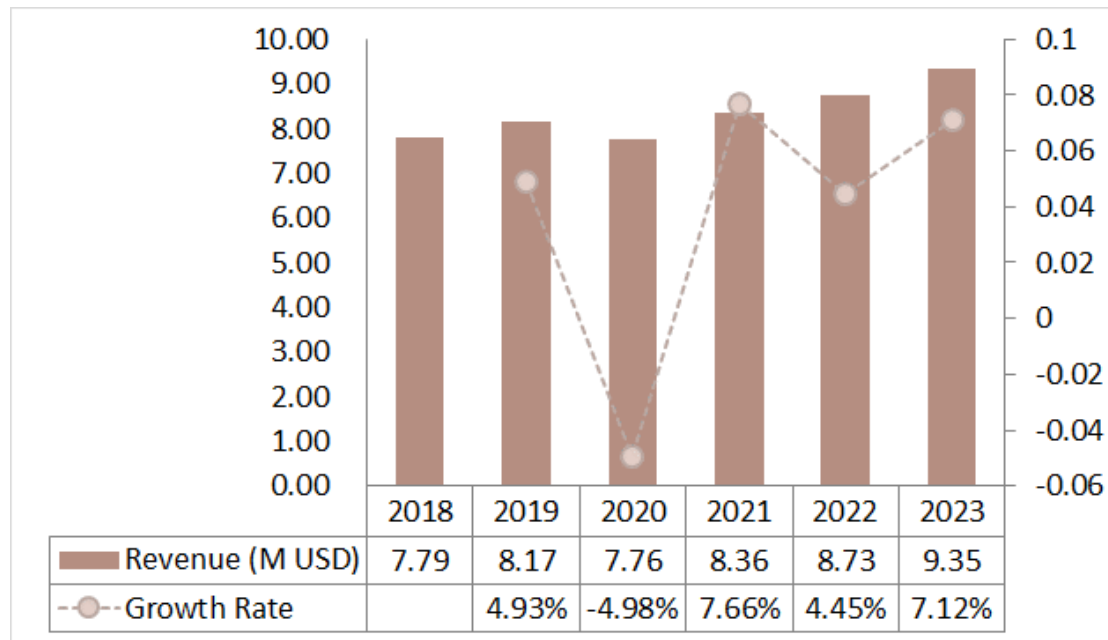
## 12.6.4 UK-Halsey International Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

**Table UK-Halsey International Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

UK-Halsey International	2018	2019	2020	2021	2022	2023
Sales (K Units)	2.55	2.75	2.70	2.98	3.19	3.52
Price (USD/Unit)	3056	2974	2873	2800	2735	2657
Revenue (M USD)	7.79	8.17	7.76	8.36	8.73	9.35
Gross (M USD)	1.96	2.06	1.97	1.94	2.06	2.37
Gross Margin	25.13%	25.20%	25.34%	23.16%	23.58%	25.37%

Source: Maia Research Analysis

Figure UK-Halsey International Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

## 12.6.5 UK-Halsey International Main Sail SWOT Analysis

Table UK-Halsey International SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>A global service network has been established through a number of dovecotes</li> <li>There are a wide variety of mainsails for cruising</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>The race mainsail has few varieties</li> <li>The trend of sustainability is weak</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>The addition of talents promotes the establishment of a wider global network</li> <li>About brand series broadcast to expand publicity</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>Competition from other high-end sail manufacturers such as North Sails Sailmaking or Quantum Sails</li> </ul>

Source: Maia Research Analysis

## 12.7 Ullman Sails

### 12.7.1 Ullman Sails Corporation Information

Table Ullman Sails Corporation Information

Item	Description
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<b>Company Name</b>	Ullman Sails
<b>Website</b>	ullmansails.com
<b>Establish Time</b>	1967
<b>Headquarter</b>	USA
<b>Area Served</b>	Worldwide
<b>Contact Information</b>	Tel: +27 21 007 3826 Email: info@ullmansails.com


Source: Ullman Sails; Maia Research Analysis

## 12.7.2 Business Overview

Ullman Sails has a rich and diverse legacy in custom sail design and sail manufacturing dating back over 50 years. Ullman Sails is an international company, located in 25 countries with 75 locations worldwide that benefit from the collaboration of skilled sail designers, experienced sailmakers and decorated sailors.

## 12.7.3 Main Sail Products and Services

**Table Main Sail Products and Services**


<p><b>2.4 Meter Mainsail:</b> Ullman Sails uses premium Dacron to offer sailors top performance, low-stretch sails that are built to handle off-threadline loads. Further, the sails feature a rip-stop weave and an HTP finish giving you added performance. A cross-cut construction is used, offering greater longevity and ease of use through the wind range.</p> <p><b>Snipe Mainsail:</b> The Ullman Sails Snipe mainsail utilizes a radial panel layout for maximum load-handling and performance. The sail, which features Dimension Polyant premium Dacron with an HTP finish, offers minimum stretch and a rip-stop weave.</p> <p><b>F18 Mainsails:</b> The Ullman Sails F18 AP mainsail design offers competitors a design that will carry them through the wind range. The mainsail is built in a tri-radial design using Pen fibers. The cloth Ullman Sails utilizes for their F18 sails features a ZigZag fiber layout that ensures efficient support and distribution of the loads over the sail. The result is a reduced load on the Mylar film, helping with shape retention.</p>

Source: Ullman Sails; Maia Research Analysis

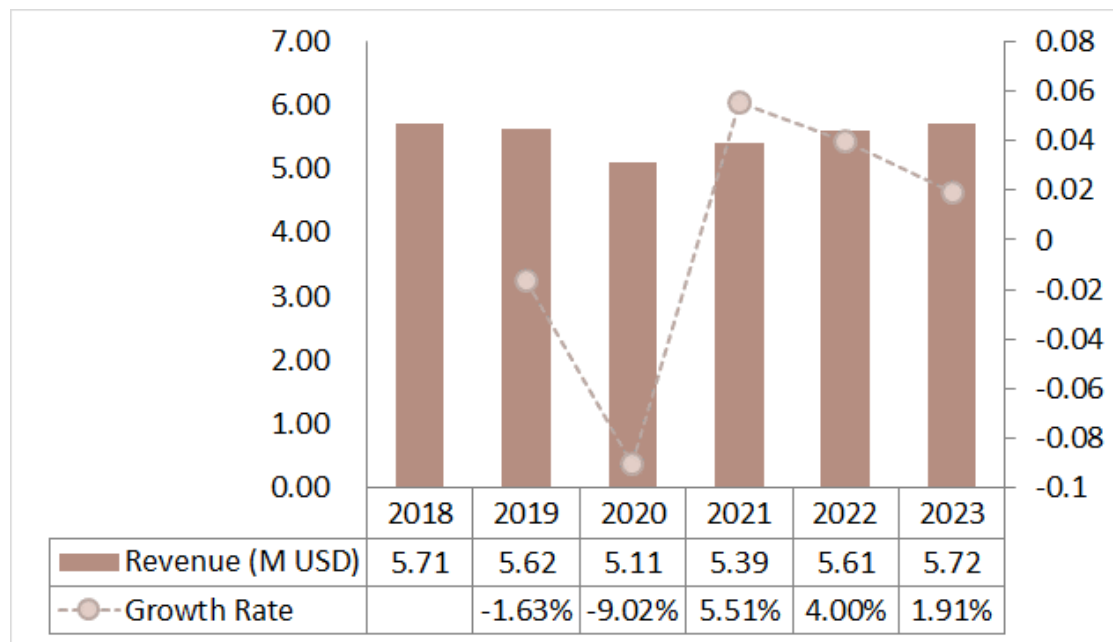
## 12.7.4 Ullman Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

**Table Ullman Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

Ullman Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	2.06	2.10	1.99	2.17	2.31	2.41
Price (USD/Unit)	2768	2674	2569	2488	2432	2373
Revenue (M USD)	5.71	5.62	5.11	5.39	5.61	5.72
Gross (M USD)	1.26	1.25	1.18	1.21	1.19	1.21
Gross Margin	21.99%	22.29%	23.17%	22.35%	21.18%	21.20%

Source: Maia Research Analysis

**Figure Ullman Sails Revenue in Main Sail Business (2018-2023)**



Source: Maia Research Analysis

## 12.7.5 Ullman Sails Main Sail SWOT Analysis

**Table Ullman Sails SWOT Analysis**

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>A global dealer network has been established, covering Africa, Europe, Antarctica, Australia, America, etc.</li> <li>Service is comprehensive and mature</li> <li>Racing mainsail products have a long reputation</li> </ul>

<b>Weakness</b>	<ul style="list-style-type: none"> <li>• Manufacturing costs are high and time consuming</li> <li>• The price is high, ordinary customer government burden</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>• The contest in Long Beach, California, expands its popularity</li> <li>• The development of e-commerce improves global services</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>• There is fierce competition among the older brands</li> </ul>

Source: Maia Research Analysis

## 12.8 Neilpryde Sails

### 12.8.1 Neilpryde Sails Corporation Information

Table Neilpryde Sails Corporation Information

Item	Description
<b>Company Name</b>	Neilpryde Sails
<b>Website</b>	www.neilprydesails.com
<b>Establish Time</b>	1970
<b>Headquarter</b>	USA
<b>Area Served</b>	Worldwide
<b>Contact Information</b>	Tel: (203) 375-2626 Add: 1681 Barnum Avenue, Stratford, CT 06614 USA

Source: Neilpryde Sails; Maia Research Analysis

### 12.8.2 Business Overview

Neilpryde Sails is a renowned sailmaker that provides a wide range of high-performance sails for various applications, including racing, cruising, and more. They offer customized sails and also specialize in sail repair and maintenance.

### 12.8.3 Main Sail Products and Services

Table Main Sail Products and Services

<p><b>Mainsails and Genoas</b> Their entire product line of mainsails, headsails and storm sails.</p> <p>Premier Their top of the line competition sails in laminated fabrics.</p> <p>Vectrix Membrane Their custom 'string' membrane sails in Carbon, Aramid and Aramid/Carbon blends, race ready with all the bells and whistles.</p>
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<p><b>Race</b> Their top of the line competition sails in conventional woven fabrics.</p> <p><b>Performance Cruising</b> Their best cruising sail built in a Cruising Laminates of different types of yarn with finishing found in their Cruise Plus line.</p> <p><b>Cruise Plus</b> A true Blue Water sail; rugged, uncompromising, tried and tested. Often used in Charter work and other heavy use applications.</p> <p><b>Cruise</b> Sails for the cruising yachtsperson... representing the best dollar for feature/construction in sails today. Check out the New PBF and Radially cut mainsails and headsails.</p> <p><b>Inshore</b> Designed for dinghies, day sailors and small keel boats.</p> <p><b>Storm Sails</b> Rugged, overly built storm sails; the right sail for the worst of times. They cut no corners in making sure this sail performs when you need it.</p> <p><b>Classic Sails</b> Sails built for traditional yachts and incorporating such features as cream and tanbark fabrics, narrow width panels, external bolt ropes and 'classic' finger style patches and finishing.</p>
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Source: Neilpryde Sails; Maia Research Analysis

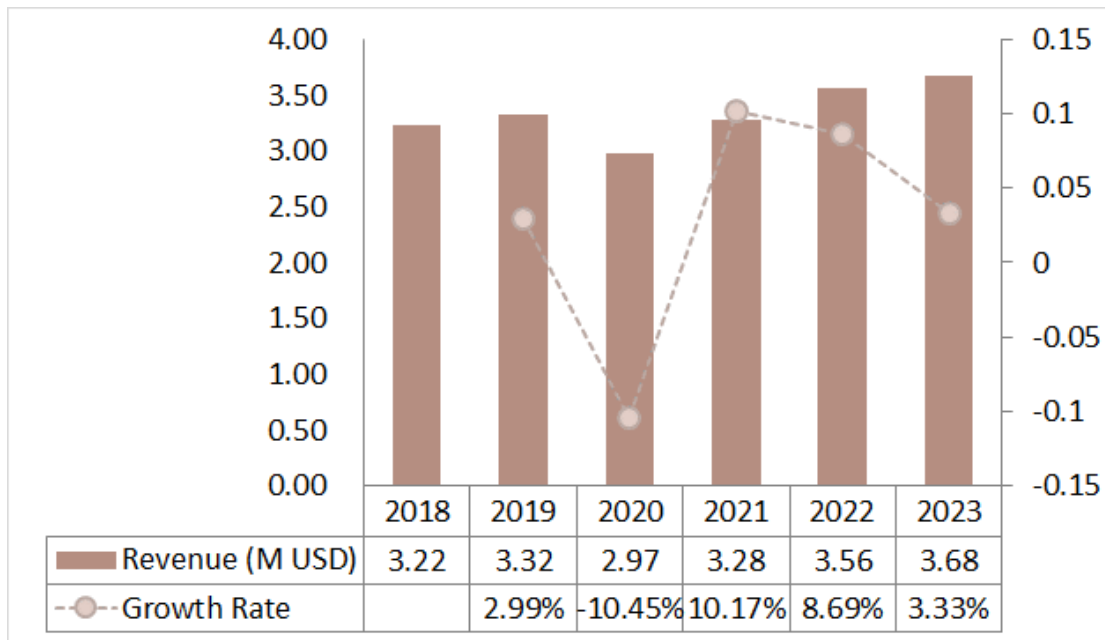
## 12.8.4 Neilpryde Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Table Neilpryde Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Neilpryde Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.88	0.93	0.87	0.97	1.06	1.13
Price (USD/Unit)	3650	3581	3430	3385	3344	3246
Revenue (M USD)	3.22	3.32	2.97	3.28	3.56	3.68
Gross (M USD)	0.62	0.62	0.57	0.63	0.65	0.66
Gross Margin	19.12%	18.78%	19.25%	19.28%	18.22%	17.97%

Source: Maia Research Analysis

**Figure Neilpryde Sails Revenue in Main Sail Business (2018-2023)**



Source: Maia Research Analysis

## 12.8.5 Neilpryde Sails Main Sail SWOT Analysis

**Table Neilpryde Sails SWOT Analysis**

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>Neilpryde Sails has a long history of innovation and research leading the development of cutting-edge sailing technology</li> <li>They have a great reputation in the industry for producing high performance and efficient sails</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>This sail is relatively expensive compared to other sails on the market, which may limit its appeal to budget-conscious sailors.</li> <li>Neilpryde Sails may not be available in all sailing shops, which may limit access to certain sailors.</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>As sailors become more discerning, the demand for high-quality sails with better performance and durability continues to increase.</li> <li>Improve their online presence and e-commerce capabilities to attract more customers and enhance the buying experience</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>Neilpryde Sails faces competition from other sail manufacturers, which could limit its market share.</li> <li>Environmental regulations may restrict the use of certain materials in sail production, which may affect the quality and performance of Neilpryde Sails.</li> </ul>

Source: Maia Research Analysis

## 12.9 Jeckells

### 12.9.1 Jeckells Corporation Information

Table Jeckells Corporation Information

Item	Description
Company Name	Jeckells
Website	www.jeckells.co.uk
Establish Time	1832
Headquarter	UK
Area Served	Mainly in Europe
Contact Information	Tel: 01603 782223 Add: Jeckells of Wroxham Ltd., Station Road, Wroxham, Norfolk, England, NR12 8UT

Source: Jeckells; Maia Research Analysis

### 12.9.2 Business Overview

Jeckells the Sailmakers have been making sails for nearly 200 years. They are designed, cut and built in the UK using the latest technology and laser cutting methods. This gives them (rather than subcontractors) full control over the sail from design to completion. They offer expertise in mainsail and jib furling systems and their product range includes Sailtainer, Profurl, Rotostay, Furlex, Bamar and Harken.

### 12.9.3 Main Sail Products and Services

Table Main Sail Products and Services


<b>Mainsails</b>

EVERY ECO SAIL COMES COMPLETE WITH:

- Designed & manufactured in their factory (Wroxham, UK)
- One set of reef points
- Bolt rope or slides to suit your mast
- Loose foot
- Pressed rings at head, tack & clew
- Fibreglass battens
- Three step stitching with UV resistant polyester thread
- Sail bag
- One-year warranty on materials and workmanship

Source: Jeckells; Maia Research Analysis

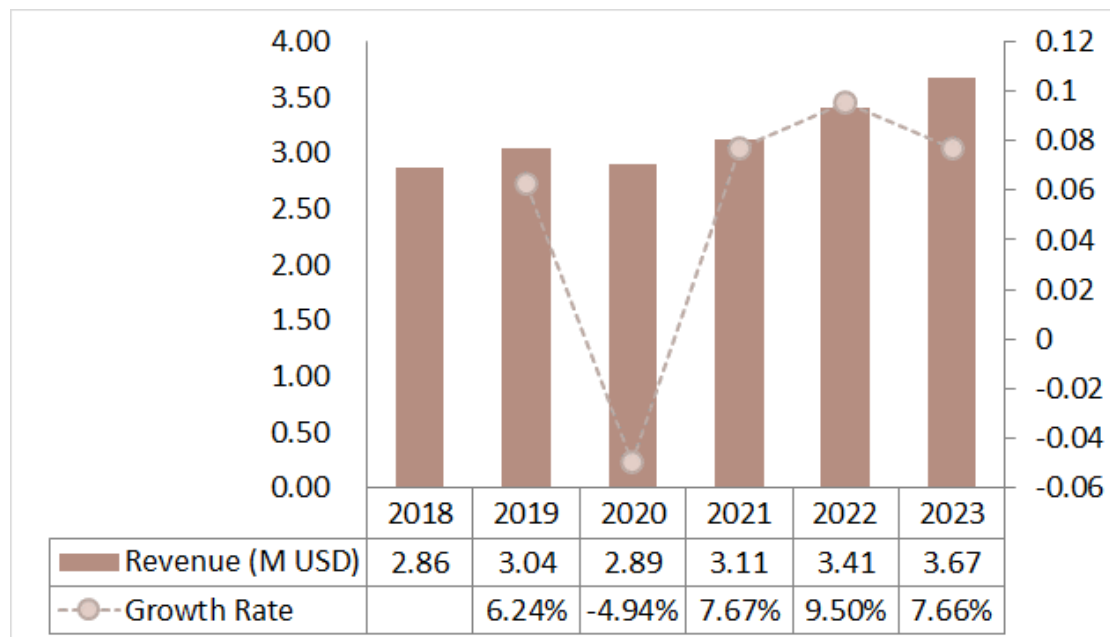
### 12.9.4 Jeckells Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Table Jeckells Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Jeckells	2018	2019	2020	2021	2022	2023
Sales (K Units)	1.05	1.14	1.10	1.21	1.35	1.49
Price (USD/Unit)	2722	2675	2636	2571	2530	2467
Revenue (M USD)	2.86	3.04	2.89	3.11	3.41	3.67
Gross (M USD)	0.54	0.56	0.54	0.59	0.63	0.68
Gross Margin	18.74%	18.29%	18.69%	18.99%	18.51%	18.43%

Source: Maia Research Analysis

Figure Jeckells Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

## 12.9.5 Jeckells Main Sail SWOT Analysis

Table Jeckells SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>Available in a variety of sizes and styles, making Jeckells sails suitable for a variety of boats and sailing conditions</li> <li>Strong brand recognition and reputation in the nautical community, especially in the UK</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>Limited availability in some regions outside of Europe which may make it difficult for sailors in other markets to obtain them</li> <li>Limited marketing and advertising outside of traditional nautical media, which may limit product exposure</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>Open up new international markets by increasing distribution channels and building relationships with local retailers</li> <li>Develop innovative new sail technologies, such as environmentally friendly materials or designs that improve performance under specific conditions</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>Competition from other high-end sail manufacturers such as North Sails Sailmaking or Quantum Sails</li> <li>Changing consumer preferences and trends, such as shifting to lower cost and more convenient sailing options</li> </ul>

Source: Maia Research Analysis

## 12.10 Lidgard Sailmakers

### 12.10.1 Lidgard Sailmakers Corporation Information

Table Lidgard Sailmakers Corporation Information

Item	Description
<b>Company Name</b>	Lidgard Sailmakers
<b>Website</b>	<a href="http://www.lidgardsails.com">www.lidgardsails.com</a>
<b>Establish Time</b>	1973
<b>Headquarter</b>	New Zealand
<b>Area Served</b>	Mainly in North America and Asia Pacific
<b>Contact Information</b>	Tel: 09 489 1111 Add: 81 Hillside Road, Wairau Valley, North Shore, AKL

Source: Lidgard Sailmakers; Maia Research Analysis



## 12.10.2 Business Overview

Lidgard Sails have a pedigree for top of the line sailmaking for everything from weekend racers, to ocean cruisers, through to classic super yachts. Based in Auckland NZ.

## 12.10.3 Main Sail Products and Services

**Table Main Sail Products and Services**



**Tri-Radial Mainsail:** Lidgard Sails Tri-Radial Mainsails have superior performance and longevity. This is through superior design using Sailmaker 3D software.

**Cross Cut Mainsail:** Lidgard Sails Cross Cut Mainsails are constructed from the highest quality Dacron materials. Sails are designed for performance and longevity.

**Square Top Mainsail:** Lidgard Sails have been at the forefront of Square Top Mainsail development for over 10 years. The group has made large Roach Mainsails for all types of yachts from Maxi Cats, GP Keel Boats, Multihulls, Americas Cup yachts and Skiffs to custom built IRC racers.

**Xcel Membrane Mainsail:** XCEL Sail laminates are individually designed and manufactured for your boat and conditions. XCEL sail laminates are lighter, stronger, and hold their shape longer and are available in the following fibres: XCEL's advanced fiber aligned sails make load path technology available for all sized yachts. In combination with Sailmaker 3D software and innovative engineering XCEL sail laminates.

Source: Lidgard Sailmakers; Maia Research Analysis

## 12.10.4 Lidgard Sailmakers Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

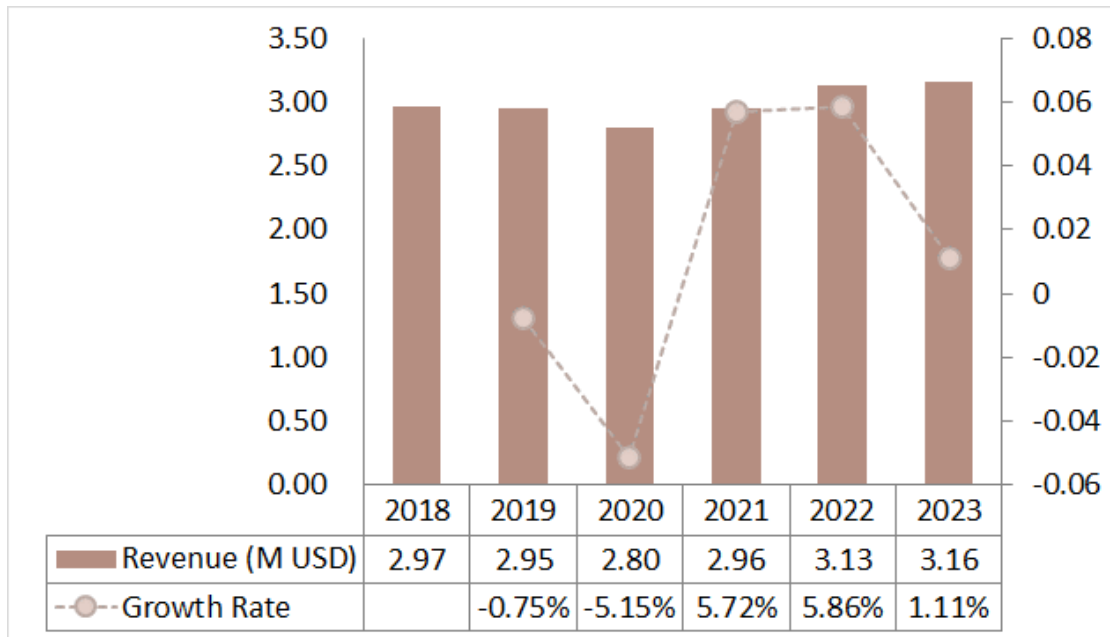
**Table Lidgard Sailmakers Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

Lidgard Sailmakers	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.73	0.76	0.74	0.79	0.85	0.88

Price (USD/Unit)	4075	3894	3761	3754	3667	3587
Revenue (M USD)	2.97	2.95	2.80	2.96	3.13	3.16
Gross (M USD)	0.71	0.72	0.66	0.69	0.71	0.73
Gross Margin	23.81%	24.39%	23.52%	23.28%	22.79%	23.08%

Source: Maia Research Analysis

**Figure Lidgard Sailmakers Revenue in Main Sail Business (2018-2023)**



Source: Maia Research Analysis

### 12.10.5 Lidgard Sailmakers Main Sail SWOT Analysis

**Table Lidgard Sailmakers SWOT Analysis**

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>Strong brand recognition and reputation in the nautical community, especially in the New Zealand.</li> <li>Can provide a variety of materials, sizes of products</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>The near absence of established dovecotes in some areas outside New Zealand may make them difficult for sailors in other markets to access</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>Facebook and other social media spread awareness</li> <li>Open up new international markets by increasing distribution channels and building relationships with local retailers</li> <li>Develop innovative new sail technologies, such as environmentally friendly materials or designs that improve performance under specific conditions</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>Competition from other high-end sail manufacturers such as North Sails Sailmaking or Quantum Sails</li> </ul>

	<ul style="list-style-type: none"> <li>• Changing consumer preferences and trends, such as shifting to lower cost and more convenient sailing options</li> </ul>
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Source: Maia Research Analysis

## 12.11 The Sail Service

### 12.11.1 The Sail Service Corporation Information

Table The Sail Service Corporation Information

Item	Description
Company Name	The Sail Service
Website	<a href="http://www.sailservice-germany.de">www.sailservice-germany.de</a>
Establish Time	1951
Headquarter	Germany
Area Served	Mainly in Europe
Contact Information	Tel: + 49 5033 390 7371 Email: <a href="mailto:info@sailservice-germany.de">info@sailservice-germany.de</a>


Source: The Sail Service; Maia Research Analysis

### 12.11.2 Business Overview

The Sail Service is a traditional sailboat builder founded in 1951 as a division of the Gdansk yacht builder J. Conrad. Sail Service Poland has been producing sails under its own name since 1987. Currently, 67 tall vessels from 23 countries sail under Sail Service's sails. Only the highest quality fabrics are used for horizontal, radial and membrane sails. You'll find sails on the world's largest sailing, expedition and regatta yachts. Many of the employees are sailors who personally test their products on regattas and long voyages. In addition to making sails for boats, Sail Service also specializes in the manufacture of sails such as beanbags/mainfall systems, tree sails and furling sails.

### 12.11.3 Main Sail Products and Services

**Table Main Sail Products and Services**


<p><b>Individual sails made to measure</b></p> <p>The most common form of the mainsail is the cross cut (horizontal cut) made of Dacron cloth. A mainsail made of Dacron in cross-cut is characterized by its durability, robustness, and easy handling. Their sails are specially reinforced, especially at critical points such as the leeches, reef thimbles, or at sail corners. They may manufacture your mainsail with short battens, partially battened or fully battened according to your wishes. A full batten mainsail not only has better performance but there is also significantly less noise and beating when hoisting and hauling in the sail.</p>

Source: The Sail Service; Maia Research Analysis

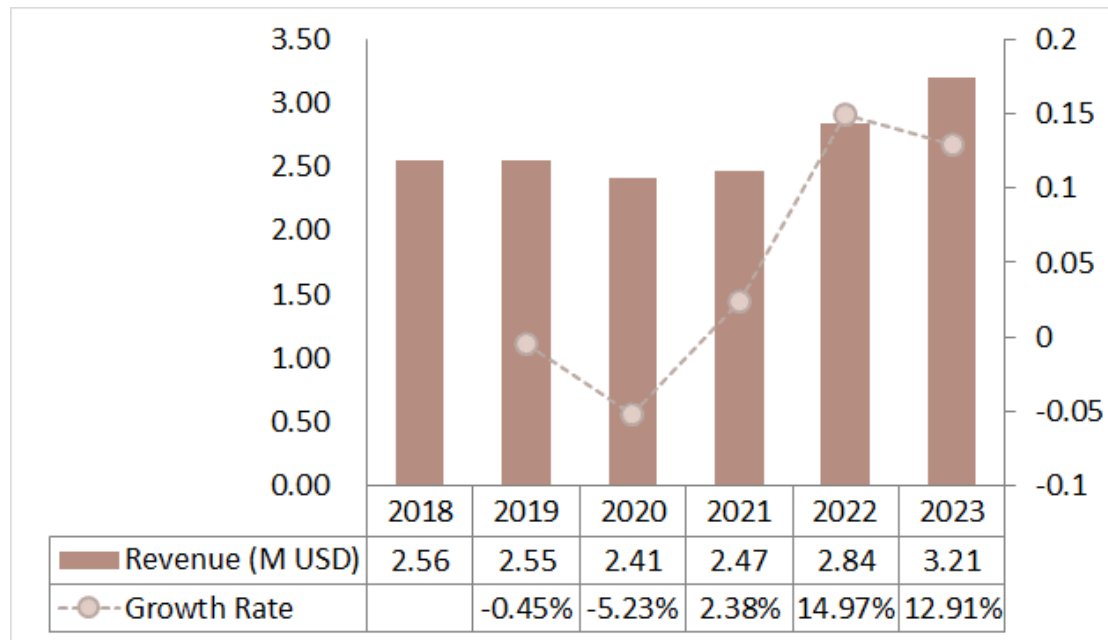
### 12.11.4 The Sail Service Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

**Table The Sail Service Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

The Sail Service	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.91	0.94	0.90	0.95	1.10	1.27
Price (USD/Unit)	2803	2710	2669	2591	2573	2533
Revenue (M USD)	2.56	2.55	2.41	2.47	2.84	3.21
Gross (M USD)	0.47	0.49	0.46	0.48	0.55	0.64
Gross Margin	18.55%	19.25%	18.90%	19.63%	19.48%	19.94%

Source: Maia Research Analysis

Figure The Sail Service Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

### 12.11.5 The Sail Service Main Sail SWOT Analysis

Table The Sail Service SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>• Customize the sail according to the individual needs of customers</li> <li>• High quality materials are used to ensure longevity and performance</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>• Products lack market competitiveness</li> <li>• Lack of brand recognition outside the local market</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>• Growing Demand for Sailing and Marine Activities Worldwide</li> <li>• Expand the company's product range to cater to a wider range of customers and vessels</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>• Competition from larger shipbuilding companies with stronger brand recognition and global reach</li> <li>• Global economic fluctuations and their impact on the marine industry</li> </ul>

Source: Maia Research Analysis

## 12.12 Loong Sails

### 12.12.1 Loong Sails Corporation Information

Table Loong Sails Corporation Information

Item	Description
Company Name	Loong Sails
Website	www.loongsails.com
Establish Time	1991
Headquarter	UK
Area Served	Mainly in Europe, North America and Asia Pacific
Contact Information	Tel: www.loongsails.com Add: RM101, MAPLE HOUSE, 118, HIGH STREET, PURLEY, LONDON, UNITED KINGDOM

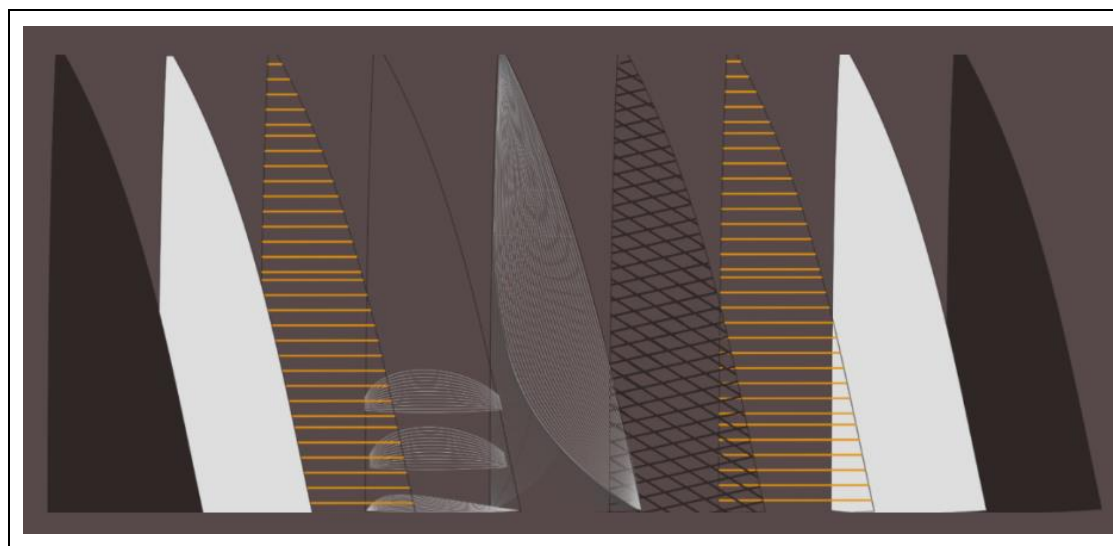
Source: Loong Sails; Maia Research Analysis

### 12.12.2 Business Overview

Loong Sails is a world-class sail maker that uses state-of-the-art design and production equipment to build yacht sails of the highest quality. Depending on your application, you can choose from a variety of construction types and materials. Loong Sails offers Dacron, Nylon, Mylar, Aramid, Technora, and Carbon Laminates as well as stringed membrane load path sails. They make their crosscut, bi-radial, tri-radial, and molded sails by using materials from the finest European and American makers of sailcloth and hardware.

### 12.12.3 Main Sail Products and Services

Table Main Sail Products and Services



Membrane 4D sails deliver the ultimate in sail performance, reliability and style through custom construction, allowing for stronger, lighter and smoother sails.

Loong Sails offer fashion Black Liteskin for membrane 4D from L to M. Fiber can be Technora /Twaron or Kevlar mixed with Carbon which gives all 4D Sails excellent resistance to flex fatigue.

Source: Loong Sails; Maia Research Analysis

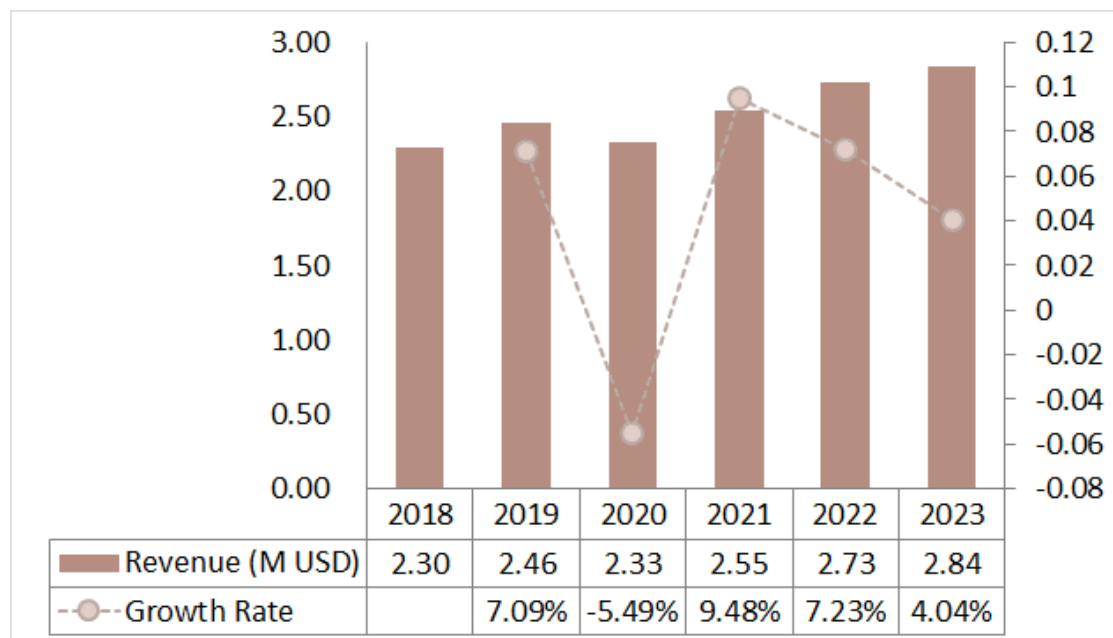
## 12.12.4 Loong Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

**Table Loong Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

Loong Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.63	0.68	0.66	0.73	0.80	0.86
Price (USD/Unit)	3627	3592	3528	3474	3409	3322
Revenue (M USD)	2.30	2.46	2.33	2.55	2.73	2.84
Gross (M USD)	0.43	0.47	0.43	0.46	0.48	0.50
Gross Margin	18.54%	19.25%	18.56%	18.00%	17.66%	17.47%

Source: Maia Research Analysis

**Figure Loong Sails Revenue in Main Sail Business (2018-2023)**



Source: Maia Research Analysis

## 12.12.5 Loong Sails Main Sail SWOT Analysis

Table Loong Sails SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>Affordable prices, making Loong Sails a more accessible option for sailors on a budget</li> <li>Available in a variety of sizes and styles, allowing customization to suit different sailing needs</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>May not be as high quality as some other high-end sail manufacturers, may result in shorter lifespan or less durability</li> <li>Brand awareness and reputation in the sailing world is low compared to well-known brands</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>Capitalize on the growing trend of online buying by continuing to expand and market their eCommerce platforms</li> <li>Use positive customer reviews and word of mouth to build a reputation in the sailing community and attract new clients</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>Fluctuating material costs, such as the cost of synthetic materials used to manufacture sails, which could affect Loong Sails' pricing and profitability</li> <li>Environmental concerns leading to a shift in consumer preference away from synthetic materials used in sailing products may reduce demand for Loong Sails products.</li> </ul>

Source: Maia Research Analysis

## 12.13 Horizon Sails

### 12.13.1 Horizon Sails Corporation Information

Table Horizon Sails Corporation Information

Item	Description
<b>Company Name</b>	Horizon Sails
<b>Website</b>	h-sails.com
<b>Establish Time</b>	1996
<b>Headquarter</b>	France
<b>Area Served</b>	Mainly in Europe
<b>Contact Information</b>	Tel: +33 (0)768-437-205 Email: info@h-sails.com

Source: Horizon Sails; Maia Research Analysis

### 12.13.2 Business Overview

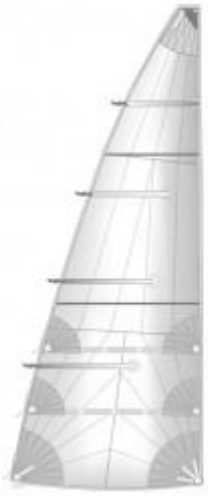
Horizon Sails are sailmakers with years of experience, a wealth of knowledge and excellent



technical skills. They've been in business since 1996 with a passion for helping sailors choose the right sail for their boat. All of their sails are manufactured in their European lofts and are individually designed and built for the highest level of performance and durability. Each sail is designed to the client's specifications.

### 12.13.3 Main Sail Products and Services

**Table Main Sail Products and Services**


<p><b>Semi Full Batten Tri-Radial Mainsail</b>  <b>TRIRADIAL SEMI FULL BATTEN MAINSAIL</b></p> <ul style="list-style-type: none"> <li>• DCX® / CDX® Laminate or Woven Pro Radial®</li> <li>• 6 stroke triple zig-zag seam</li> <li>• DaBond® UV resistant thread and seams</li> <li>• Tri-Radial cut panels design</li> <li>• Luff-rope</li> <li>• 4 fiberglass battens</li> <li>• Velcro-closed battens tension device</li> <li>• Reinforced batten pockets</li> <li>• Head, tack, clew stainless steel eyelet</li> <li>• Large radial reinforcements</li> <li>• Leech line</li> <li>• Custom headsail</li> <li>• Two rows reefing points</li> <li>• Loose foot with clew velcro strap</li> <li>• Cunningham</li> <li>• Low friction slides</li> <li>• Telltails</li> <li>• Sail bag</li> <li>• Two-year warranty</li> <li>• Free shipping in Europe &amp; UK</li> </ul>

Source: Horizon Sails; Maia Research Analysis

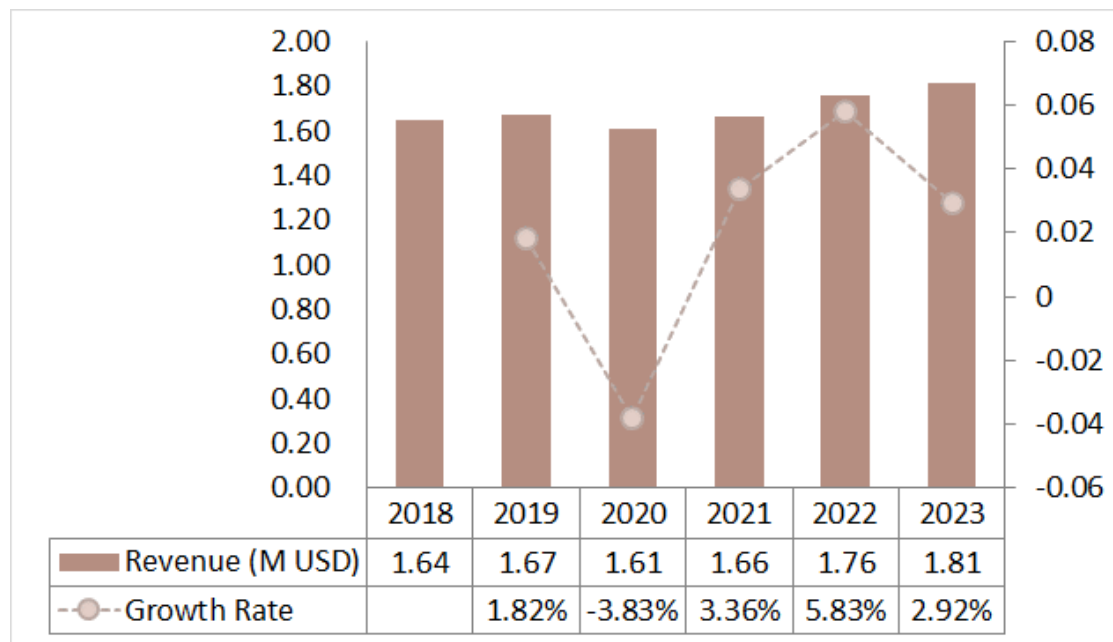
### 12.13.4 Horizon Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Table Horizon Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Horizon Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.54	0.56	0.55	0.58	0.63	0.65
Price (USD/Unit)	3057	3014	2940	2868	2813	2773
Revenue (M USD)	1.64	1.67	1.61	1.66	1.76	1.81
Gross (M USD)	0.39	0.41	0.38	0.39	0.40	0.42
Gross Margin	24.04%	24.54%	23.70%	23.17%	22.91%	22.96%

Source: Maia Research Analysis

Figure Horizon Sails Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

### 12.13.5 Horizon Sails Recent Development

Table Horizon Sails Recent Development

Item	Description
Horizon and Delver Agents Partner to Serve Arctic, Alaskan, and Antarctic	August 12, 2022 For 15 years, Delver Agents has been the premier Ushuaia-based port agency and supplier supporting Antarctic expeditions from Argentina, Chile, and Uruguay. Antarctic operators from cruise lines and fishing fleets including NASA and Metallica trust Delver for ship services, freight forwarding, and import and export services. From parkas and pistons to mobile labs and

<b>Expeditions</b>	<p>submarines, they've always found a way to get you whatever you need, wherever you need it, from ports throughout the Southern Cone.</p> <p>Now joining forces, Horizon and Delver Agents have the global reach to serve all your Arctic, Alaskan, and Antarctic expeditions. With their combined logistics supply chains, they provide consolidated door-to-deck delivery of marine spares, hotel supplies, and food and beverages from vendors anywhere in the world.</p>
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Source: Horizon Sails; Expert Interviews; Maia Research Analysis

## 12.13.6 Horizon Sails Main Sail SWOT Analysis

Table Horizon Sails SWOT Analysis

Item	Description
<b>Strength</b>	<p>Strong reputation for high-quality products and customer service</p> <p>Use advanced design software and manufacturing techniques to create innovative custom sails</p>
<b>Weakness</b>	<p>Higher price compared to some competitors in the market</p> <p>Reliance on external suppliers to source materials, which may affect lead times and prices</p>
<b>Opportunity</b>	<p>Growing interest in sailing and marine activities across the globe has resulted in increased demand for high quality sails</p> <p>Invest in digital marketing and online sales channels to expand global reach</p>
<b>Threat</b>	<p>Competition from larger shipbuilding companies with stronger brand recognition and global reach</p> <p>Potential for global economic fluctuations, changes in relevant regulations and tariffs</p>

Source: Maia Research Analysis

## 12.14 Precision Sails

### 12.14.1 Precision Sails Corporation Information

Table Precision Sails Corporation Information

Item	Description
<b>Company Name</b>	Precision Sails
<b>Website</b>	<a href="http://www.precisionsailloft.com">www.precisionsailloft.com</a>
<b>Establish Time</b>	2009
<b>Headquarter</b>	Canada
<b>Area Served</b>	Mainly in North America
<b>Contact Information</b>	Tel: 1-888-958-5638

Email: [info@precisionsailloft.com](mailto:info@precisionsailloft.com)

Source: Precision Sails; Maia Research Analysis

## 12.14.2 Business Overview

Precision Sails is a sailmaking company based in Vancouver, British Columbia, Canada. The company specializes in designing and producing high-quality sails for racing and cruising yachts. Precision Sails offers a wide range of sails, including mainsails, genoas, spinnakers, and more.

## 12.14.3 Main Sail Products and Services

### Table Main Sail Products and Services



#### **Mainsails**

##### **Sail Cloth**

All of their sailcloth comes from the following top brands in the industry: Contender, Dimension-Polyant, Bainbridge International, Mazu, and Challenge. Their sail consultants help narrow down your options by choosing the appropriate cloth weight based on your specific requirements, the type of sailing you do, and the specifications as set out by the appropriate cloth manufacturer.

##### **Stitching**

UV protected waxed white thread is used on all their sails. Thread weights come in V30, V46, V69, V92, V138, V207. Tenara, Gore-Tex thread, and different color upgrades are available. Triple step zigzag stitching on all seams adds strength and stops broken threads from unraveling like a row of standard zig zag stitching. Where a small sail may have one row of stitching, a large sail could have four or more. Need more security? The offshore package adds wider seams for extra rows of stitching.

##### **Luff Attachment**

Whether your sail has a bolt rope luff, a UHMW Nylon slider, or you would like webbing loops to supply your own custom sliders, they can find the correct attachment for your luff. Reinforcement patches, chafe protection, and heavy-duty press rings secure the mainsail slider attachment points. Sliders are hand-stitched to the sail with several loops of webbing and special heavy-duty waxed thread.

**Headboards**

Aluminum head boards of different sizes and styles come from Bainbridge, Challenge, and Antal. Custom headboards are also available. Webbing is added for extra reinforcement and stronger metal sliders are used to secure the sail at the head.

**Foot & Clew**

Their standard mainsails come loose footed to give you a modern design that emphasizes performance and ease of use. Large diameter heavy duty press rings are used on the clew of your mainsail. These rings come in 14mm, 20mm, 25mm, 30mm, 35mm, 40mm, 50mm, and 60mm sizes. A sail designer will select an appropriate size to be used for your sail. Depending on your configuration a clew slug may also be added. A heavy-duty metal clew slug is attached to the clew corner if your rig does not have an out-haul car. This slug holds your sail down to your boom in the vertical direction just like a clew car would. The slug is webbed on with multiple layers of webbing strap and slides easily along the boom.

**Lines & Cleats**

Strong leech and foot lines prevent fluttering and cloth fatigue. Their lines come in Kevlar, Polyester, and Vectran. Proper tension is maintained with quality alloy cleats to ensure your leech and foot lines are always secured. Velcro style cleats are also available to prevent your lines and cleats from catching.

Source: Precision Sails; Maia Research Analysis

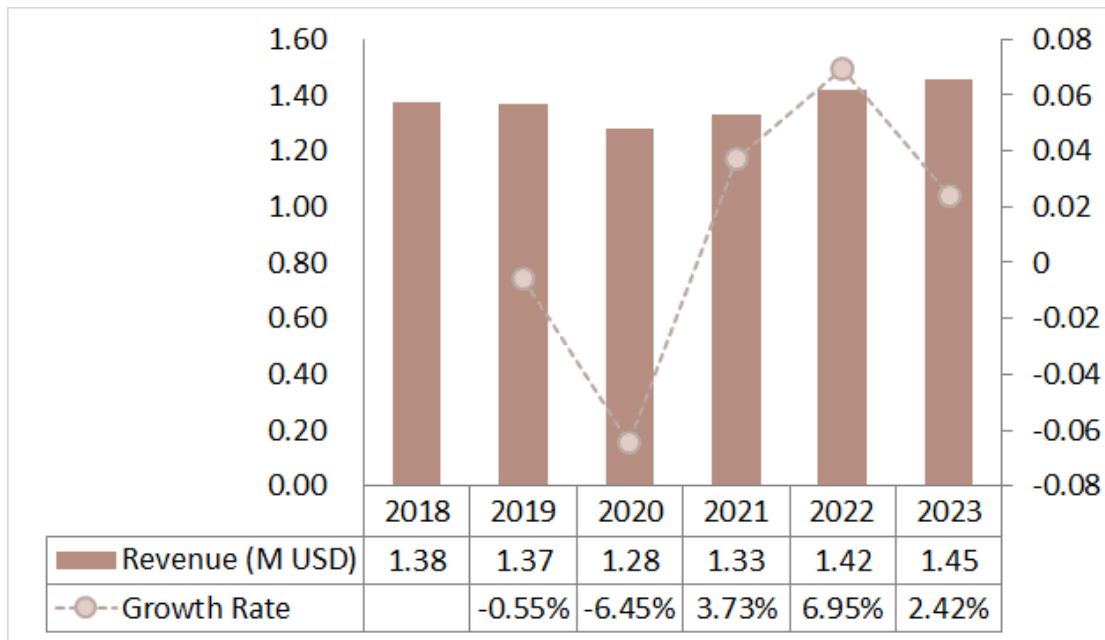
**12.14.4 Precision Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

**Table Precision Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

Precision Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.64	0.66	0.63	0.68	0.73	0.77
Price (USD/Unit)	2149	2086	2017	1966	1934	1880
Revenue (M USD)	1.38	1.37	1.28	1.33	1.42	1.45
Gross (M USD)	0.27	0.28	0.25	0.26	0.27	0.27
Gross Margin	19.40%	20.28%	19.75%	19.87%	18.81%	18.87%

Source: Maia Research Analysis

Figure Precision Sails Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

### 12.14.5 Precision Sails Main Sail SWOT Analysis

Table Precision Sails SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>Precision Sails use high quality materials in the manufacture of their mainsails to ensure durability and longevity.</li> <li>Precision Sails offers competitive pricing for its mainsails, making them available to a wide range of clients.</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>Precision Sails may not be as well-known as some of its competitors, which could make it difficult to attract new customers.</li> <li>The company's limited product range may limit its appeal to customers who are looking for a wider range of sail products.</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>Companies may consider diversifying their product range to include other types of sails or sailing accessories.</li> <li>Precision Sails could increase its online presence and sales by improving its website and online marketing efforts.</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>The sailmaking industry is highly competitive with many established players and new entrants vying for market share.</li> <li>Rising environmental concerns may lead to stricter regulations on the production and use of sails, which may affect the company's operations</li> </ul>

Source: Maia Research Analysis

## 12.15 Olympic Sails

### 12.15.1 Olympic Sails Corporation Information

Table Olympic Sails Corporation Information

Item	Description
Company Name	Olympic Sails
Website	www.olisails.it
Establish Time	1980
Headquarter	Italy
Area Served	Mainly in America, Europe and Asia Pacific
Contact Information	Tel: +39 040 232363 Email: info@olisails.it

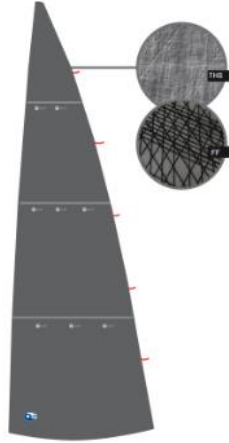
Source: Olympic Sails; Maia Research Analysis

### 12.15.2 Business Overview

Olympic Sails is an Italy-based sailmaker that provides customized sails for various applications, including racing, cruising, and more. They use high-quality materials and provide sail repair and maintenance services as well.

### 12.15.3 Main Sail Products and Services

Table Main Sail Products and Services


<p>Olympic Sails builds its mainsails using the most advanced design, lamination and CFD (fluid dynamic calculation) tools to optimize them for the bending characteristics of the mast and the expected sailing conditions.</p> <p>All the elements, membranes, rigidity and position of the battens and reinforcements are</p>

designed and built to work together in order to guarantee the best fluid dynamic performance, strength and durability of the sail.

To obtain the best fluid dynamic performance and longer life, all of their sails are made with corner reinforcements, accessories and batten pockets, inside the membrane.

- Optimized square top head batten angle
- 1 or more full length battens
- Reefs
- E-Glass Tapered Battens
- Exclusive Batten Adjusters
- Cunningham
- Adjustable Leech and Foot Cords
- Loose Foot with Integral Foot Shelf
- Exclusive Corner Reinforcements
- Stainless Steel Rings
- Racing Trim Stripes
- Nylon Twist (Leech) Telltales
- Telltales
- Class insignia
- Letters and numbers
- IRC/ORC rules optimized profile
- Measurement
- Internal batten pockets
- Internal reinforcements and accessories
- Sail bag

**OPTIONAL RACING ACCESSORIES**

- Carbon battens
- Titanium rings
- Soft clew
- Low friction ball bearing cars
- Custom Luff & Batten Car Systems
- Custom graphics

Source: Olympic Sails; Maia Research Analysis

### 12.15.4 Olympic Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

**Table Olympic Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)**

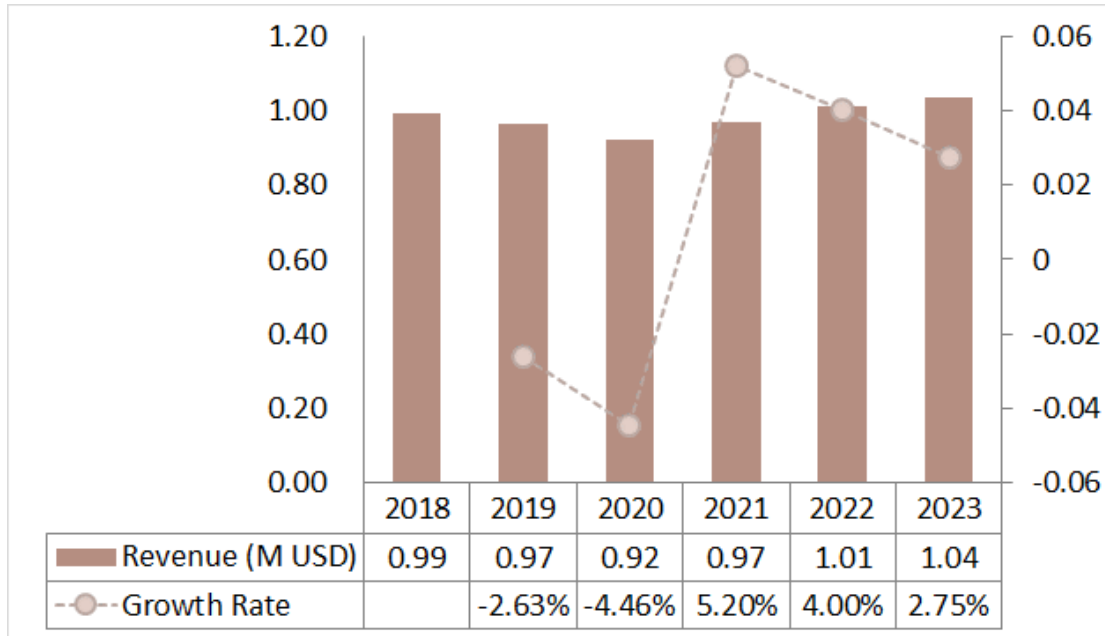
Olympic Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.25	0.25	0.25	0.27	0.29	0.30
Price (USD/Unit)	3996	3796	3666	3618	3531	3469
Revenue (M USD)	0.99	0.97	0.92	0.97	1.01	1.04



Gross (M USD)	0.19	0.19	0.17	0.19	0.19	0.20
Gross Margin	19.33%	19.86%	18.89%	19.14%	19.14%	19.17%

Source: Maia Research Analysis

**Figure Olympic Sails Revenue in Main Sail Business (2018-2023)**



Source: Maia Research Analysis

### 12.15.5 Olympic Sails Main Sail SWOT Analysis

**Table Olympic Sails SWOT Analysis**

Item	Description
<b>Strength</b>	Olympic Sails maintains control over the entire production cycle of each sail, guaranteeing high quality standards. Olympic Sails is able to engineer the volume, structure and positioning of every fiber of the sail, offering customization options for its mainsails.
<b>Weakness</b>	Olympic Sails has limited brand recognition and may not be as well-known as some of its competitors. The company's focus on mainsails may limit its appeal to customers who are looking for a wider range of sail products.
<b>Opportunity</b>	Olympic Sails could expand its reach by targeting new markets Companies may consider diversifying their product range to include other types of sails or sailing accessories.
<b>Threat</b>	The sail-making industry is highly competitive with many established players and new entrants vying for market share. A sluggish economy could lead to lower demand for luxury items such as sailing products.

Source: Maia Research Analysis

## 12.16 SAILONET

### 12.16.1 SAILONET Corporation Information

Table SAILONET Corporation Information

Item	Description
Company Name	SAILONET
Website	sailonet.com
Establish Time	2006
Headquarter	France
Area Served	Mainly in Europe
Contact Information	Tel: +33 (0)5 46 30 78 71 Add: Sailonet, Port des Minimes - 4 Place du Petit Hunier - 17000 La Rochelle - France

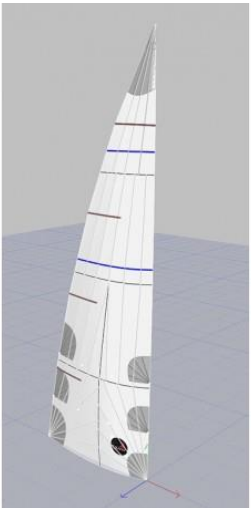
Source: SAILONET; Maia Research Analysis

### 12.16.2 Business Overview

Sailonet is a company specializing in the manufacture and sale of sailing accessories. Currently the European leader in online sales of sails and accessories. Sailonet products are renowned for their quality and price, ISO 9001 certification guarantees quality control at every stage of production.

### 12.16.3 Main Sail Products and Services

Table Main Sail Products and Services


<p><b>Radial cut classic mainsail</b></p> <p>The range is made of Mylar laminated with Taffeta on each side. The radial cut allows using different types of cloth and weights to optimize performance. The mainsails are equipped as</p>

standard with 2 reefs and 4 long battens.

Source: SAILONET; Maia Research Analysis

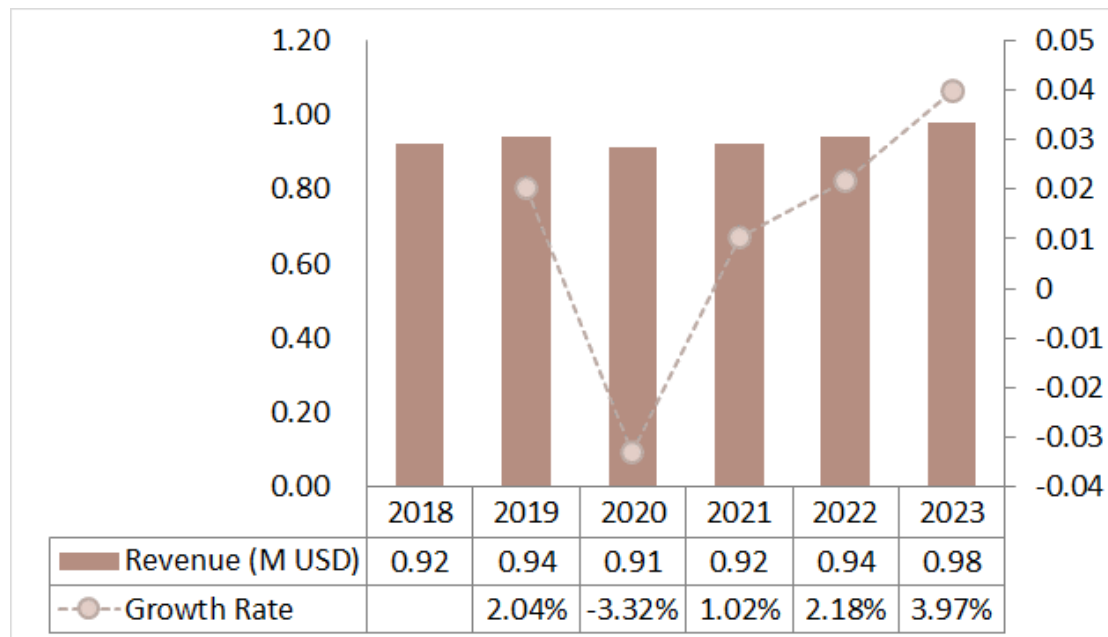
### 12.16.4 SAILONET Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

Table SAILONET Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

SAILONET	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.31	0.33	0.32	0.33	0.35	0.37
Price (USD/Unit)	2963	2896	2855	2767	2673	2644
Revenue (M USD)	0.92	0.94	0.91	0.92	0.94	0.98
Gross (M USD)	0.21	0.23	0.21	0.22	0.22	0.23
Gross Margin	22.93%	24.20%	23.59%	24.34%	23.76%	23.13%

Source: Maia Research Analysis

Figure SAILONET Revenue in Main Sail Business (2018-2023)



Source: Maia Research Analysis

### 12.16.5 SAILONET Main Sail SWOT Analysis

Table SAILONET SWOT Analysis

Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>The company has a team of experienced sailmakers with extensive knowledge and expertise in sail design and fabrication.</li> <li>SAILONET has excellent customer service which helps to retain existing</li> </ul>

	customers and attract new ones.
<b>Weakness</b>	<ul style="list-style-type: none"> <li>SAILONET may not be as well-known as some of its competitors, which may make it difficult to attract new customers.</li> <li>The company's products are single and lack competitiveness.</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>Companies may consider diversifying their product range to include other types of sails or sailing accessories.</li> <li>SAILONET can increase its online presence and sales by improving its website and online marketing efforts.</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>The sailmaking industry is highly competitive with many established players and new entrants vying for market share.</li> <li>Economic downturns or disruptions in the nautical industry may result in reduced nautical activity and reduced demand for nautical products.</li> </ul>

Source: Maia Research Analysis

## 12.17 South East Asia Sails

### 12.17.1 South East Asia Sails Corporation Information

Table South East Asia Sails Corporation Information

Item	Description
<b>Company Name</b>	South East Asia Sails
<b>Website</b>	southeastasiasails.com
<b>Establish Time</b>	2017
<b>Headquarter</b>	Thailand
<b>Area Served</b>	Mainly in Asia Pacific
<b>Contact Information</b>	Tel: +66 (0)76 604 598 Add: 50/7 Moo 4, Ban Phara, Tambon Pa Klok, A. Thalang, Chang Wat Phuket 83110

Source: South East Asia Sails; Maia Research Analysis

### 12.17.2 Business Overview

South East Asia Sails is Southeast Asia's leading sailboat manufacturer and supplier of marine hardware and equipment. They offer a wide range of sails combining durability, quality and performance at the most competitive prices. Whether it is a small boat or a large yacht.

### 12.17.3 Main Sail Products and Services

Table Main Sail Products and Services



**Rip-Stop Nylon Main Sail**

Strong & Flexible

SEAS Spinnaker are made from tightly woven Rip-Stop construction nylon, combined with Melamine impregnation and PU2 (polyurethane) coatings. This all-round fabric offers unprecedented performance, tear resistance, low porosity and high water repellency.

**Highlights**

- Light weight.
- Very stable
- Exceptionally strong fiber for its weight
- Will stretch substantially under load before breaking

Source: South East Asia Sails; Maia Research Analysis

### 12.17.4 South East Asia Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

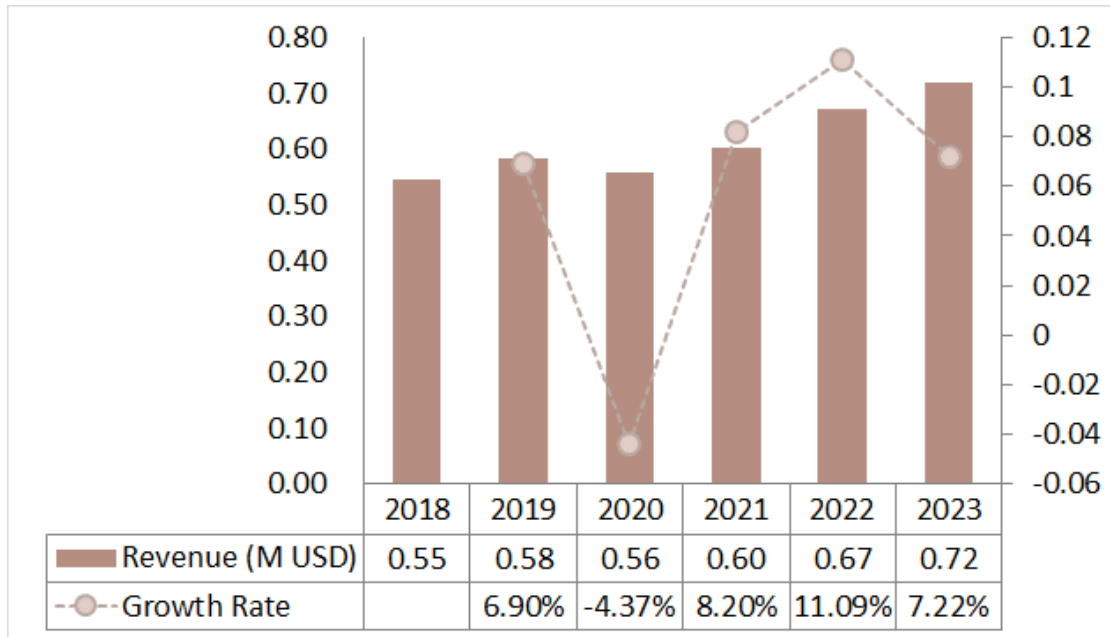
Table South East Asia Sails Main Sail Sales, Revenue, Price, and Gross Margin (2018-2023)

South East Asia Sails	2018	2019	2020	2021	2022	2023
Sales (K Units)	0.33	0.36	0.35	0.39	0.43	0.47
Price (USD/Unit)	1628	1617	1579	1563	1557	1539

Revenue (M USD)	0.55	0.58	0.56	0.60	0.67	0.72
Gross (M USD)	0.09	0.09	0.09	0.10	0.11	0.12
Gross Margin	15.92%	15.75%	15.95%	15.76%	16.55%	16.70%

Source: Maia Research Analysis

**Figure South East Asia Sails Revenue in Main Sail Business (2018-2023)**



Source: Maia Research Analysis

## 12.17.5 South East Asia Sails Main Sail SWOT Analysis

**Table South East Asia Sails SWOT Analysis**

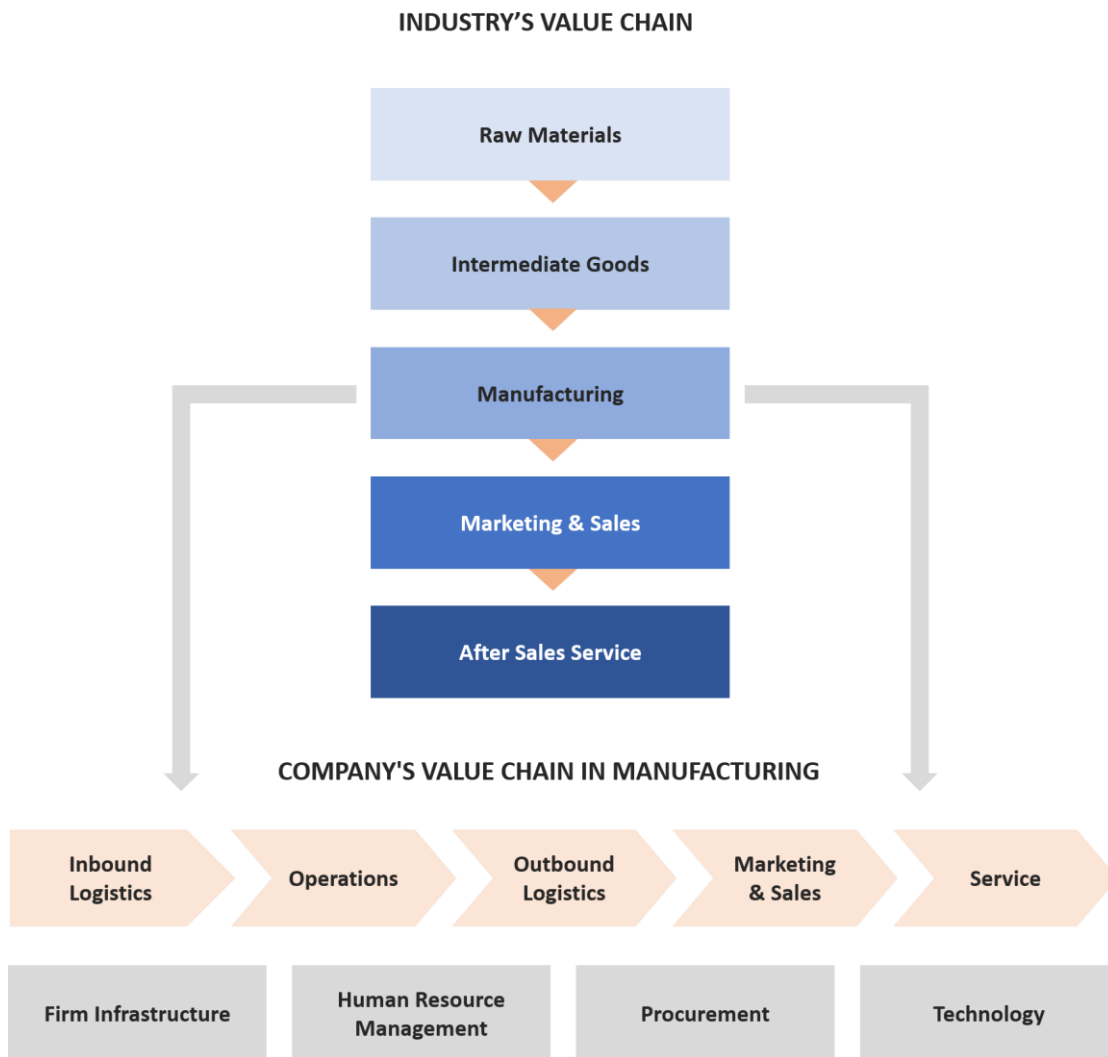
Item	Description
<b>Strength</b>	<ul style="list-style-type: none"> <li>• South East Asia Sails has an experienced team</li> <li>• Great Customer Service and Support</li> </ul>
<b>Weakness</b>	<ul style="list-style-type: none"> <li>• Limited online presence and e-commerce capabilities</li> <li>• Reliance on the Southeast Asian market, limited expansion to other regions, and lack of brand awareness outside Southeast Asia</li> </ul>
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>• Growing demand for sailing and marine activities in Southeast Asia</li> <li>• Invest in digital marketing and online sales channels to enter new markets</li> </ul>
<b>Threat</b>	<ul style="list-style-type: none"> <li>• Increasing competition from other sailmakers and marine equipment suppliers</li> <li>• Global economic fluctuations and their impact on the marine industry and international shipping and logistics</li> </ul>

Source: Maia Research Analysis

# 13 Value Chain and Sales Channels Analysis

## 13.1 Main Sail Value Chain Analysis

Figure Industry Chain Analysis of Main Sail



Source: Maia Research Analysis

The value chain analysis of the main sail industry can be broken down into the following components:

**Raw Materials:** The main sail is typically made from materials such as polyester, carbon, nylon, or aramid. The raw materials are sourced from suppliers and manufacturers who specialize in producing high-quality sailcloth.

**Manufacturing:** The manufacturing process involves cutting and sewing the sailcloth into the desired shape and size. This process requires skilled labor and specialized equipment such as

sewing machines and cutting tables.

**Distribution:** Once the main sail is manufactured, it is distributed to retailers and wholesalers who sell the sails to end-users. This process involves logistics and transportation, which can be a significant cost for manufacturers and distributors.

**Marketing and Sales:** The main sail industry relies heavily on marketing and sales to promote their products and reach potential customers. This includes advertising, trade shows, and other promotional activities.

**After-Sales Service:** The main sail industry also provides after-sales service to customers, including repairs and maintenance. This service is essential to ensure customer satisfaction and maintain the quality of the product.

Overall, the main sail industry is highly dependent on the quality of raw materials, skilled labor, and efficient manufacturing processes. Effective marketing and sales strategies, as well as excellent after-sales service, are also critical to the success of the industry.

## 13.2 Main Sail Key Raw Materials

### 13.2.1 Key Raw Materials

Mainsails are usually made of polyester, carbon fiber, aramid, nylon, cotton, UV protective coating, or film, and some other hardware components such as hooks, rings, and buckles are used to secure the sail to the mast and spar.

### 13.2.2 Raw Materials Key Suppliers

**Table Upstream Raw Material Suppliers of Main Sail with Contact Information**

Raw Material	Suppliers	Contact Information
<b>Polyester</b>	Sinopec Yizheng Chemical Fibre Limited Liability Company	Web: <a href="http://ycfc.sinopec.com">ycfc.sinopec.com</a> Tel: 0514—83232235 Add: Xupu Yizheng, Jiangsu Province, China
	Bosal Foam& Fiber	Web: <a href="http://www.bosalonline.com">www.bosalonline.com</a> Tel: (207)793-2245 Add: 171 Washington Street, Limerick, Maine 04048, United States
<b>Carbon</b>	Toray Industries	Web: <a href="http://www.toray.com">www.toray.com</a> Tel: 03-3245-5111 Add: Nihonbashi Mitsui Tower, 1-1, Nihonbashi-Muromachi 2-chome, Chuo-ku, Tokyo 103-8666, Japan

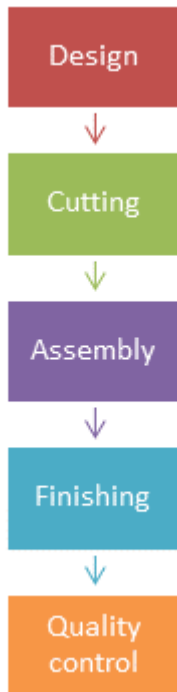


	Teijin Limited	<p>Web: <a href="http://www.teijin.com">www.teijin.com</a>          Tel: +81-3-3506-4529          Add: Kasumigaseki Common Gate West Tower, 2-1, Kasumigaseki 3-chome, Chiyoda-ku, Tokyo 100-8585, Japan</p>
<b>Aramid</b>	DuPont	<p>Web: <a href="http://www.dupont.com">www.dupont.com</a>          Phone: 1-302-774-1000          Add: 974 Centre Road Building 730 Wilmington, DE 19805 United States</p>
	Aramid HPM	<p>Web: <a href="http://www.aramid.com">www.aramid.com</a>          Tel: (843) 686-2132          Add: 301 Central Ave. No. 128 Hilton Head, SC 29926 USA</p>
<b>Nylon</b>	Meryl	<p>Web: <a href="http://www.merylusa.com">www.merylusa.com</a>          Tel: 1-650-690-2440          Add: 13 Portsmouth Cove, San Rafael, CA, 94901 United States</p>
	William J. Dixon Co.	<p>Web: <a href="http://www.wjdixon.com">www.wjdixon.com</a>          Tel: (610) 524-1131          Add: Whiteland Business Park, 756 Springdale Drive, Exton, PA 19341</p>
<b>Cotton</b>	Arvind Ltd.	<p>Web: <a href="http://www.arvind.com">www.arvind.com</a>          Add: Naroda Road, Near Chamunda Bridge, Ahmedabad – 380 025, Gujarat, India.          Tel: +91-79-68268000</p>
	Testfabrics, Inc.	<p>Web: <a href="http://www.testfabrics.com">www.testfabrics.com</a>          Add: 415 Delaware Ave, West Pittston PA 18643 USA          Tel: 1 (570) 603 0432</p>

Source: Maia Research Analysis

## 13.3 Main Sail Production Mode & Process

Figure Production Process of Main Sail



Source: Maia Research Analysis

The main sail production process typically involves the following steps:

**Design:** The sail design is created using computer-aided design (CAD) software or by hand.

**Cutting:** The sailcloth is cut into the desired shape using a computer-controlled cutting machine or by hand.

**Assembly:** The sail panels are sewn together using a sewing machine or by hand. The sailmaker may also add reinforcements, such as webbing or patches, to areas of high stress.

**Finishing:** The sail edges are finished with binding tape or a zigzag stitch to prevent fraying. The sailmaker may also add hardware, such as grommets or slides, to attach the sail to the mast and boom.

**Quality control:** The finished sail is inspected for defects and tested for performance.

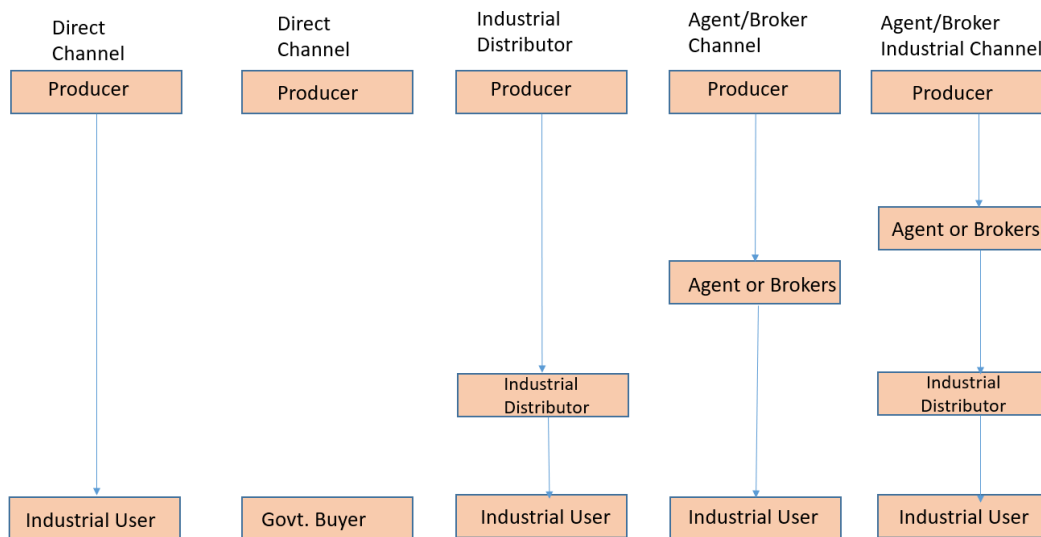
The production mode can vary depending on the sailmaker's preferences and the type of sail being produced. Some sailmakers may use traditional hand-sewing techniques, while others may rely heavily on computer-controlled machines. The production process may also be customized to meet the specific needs of the customer, such as adding custom graphics or logos to the sail.

## 13.4 Main Sail Sales and Marketing

### 13.4.1 Main Sail Sales Channels

There are two types of distribution channels: direct and indirect. As the names would imply, direct distribution is a direct sale between the manufacturer and the consumer, and indirect distribution is when a manufacturer utilizes a wholesaler or retailer to sell their products. There are pros and cons associated with either method and deciding the right choice for a business heavily depends on the trends and preferences of the consumers.

**Figure Sales Channel: Direct Channel vs Indirect Channel**

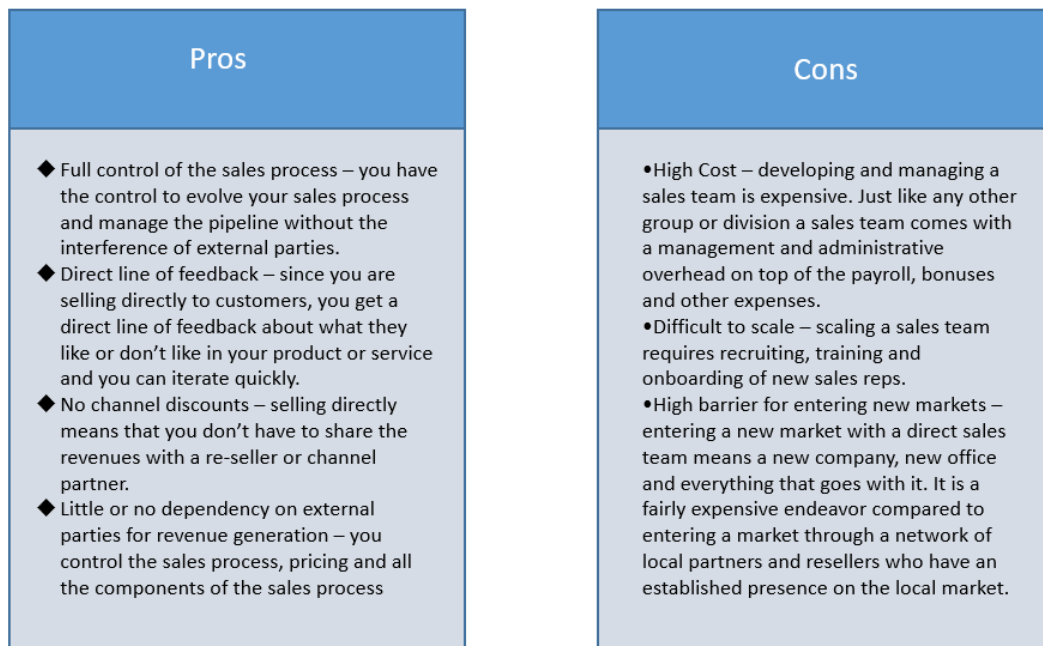


Source: Maia Research Analysis

#### 13.4.1.1 Direct Channel

Direct channel is a marketing channel that does not use intermediaries to distribute the product. Direct-sale is selling directly to consumers away from a static commercial or physical location. In today's modern world of direct sales, deals can be reached through personal arrangements, in-person demonstrations, and of course online direct sales. A direct sales channel requires building and managing a sales team. The sales team needs to be close to your target markets so if you plan to sell in multiple markets you will likely need local sales teams which may add an additional cost and management overhead.

Figure Direct Channel Pros & Cons

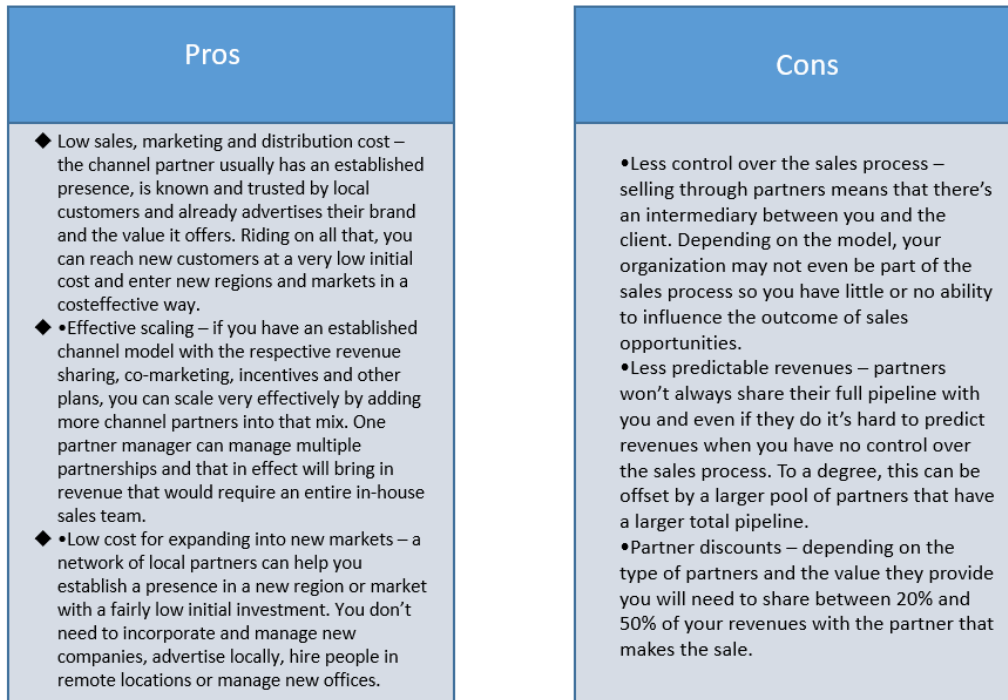


Source: Maia Research Analysis

### 13.4.1.2 Indirect Channel

Indirect channel is a marketing channel where intermediaries are used to help distribute the product. Re-sellers, distributors, value added providers and other types of channel partners can provide a wide reach for your business and get your product or service in front of many prospective buyers. It is also a very cost-effective way to enter new markets as it spares you the costs of maintaining a local operation.

### Figure Indirect Channel Pros & Cons



Source: Maia Research Analysis

## 13.4.2 Main Sail Distributors

Table Main Sail Distributors

Distributors	Contact Information
<b>Nautic Expo</b>	Web: <a href="http://www.nauticexpo.com">www.nauticexpo.com</a> Tel: +33491038090 Add: 17 Avenue André Roussin, 13016 Marseille
<b>Masthead</b>	Web: <a href="http://mastheadsailinggear.com">mastheadsailinggear.com</a> Tel: 1-800-783-6953 Add: 4500 28th Street North Saint Petersburg, FL, 33714 USA
<b>Hooper's Yachts</b>	Web: <a href="http://hoopersyachts.com">hoopersyachts.com</a> Tel: 651-436-8795 Add: 599 Manning AVE S Afton, MN 55001
<b>Patio Products USA</b>	Web: <a href="http://www.patioproductsusa.com">www.patioproductsusa.com</a> Tel: (855) 298-4922 Add: 3321 Power Inn Rd. #310 Sacramento, CA 95826
<b>Atlantic Sail Traders</b>	Web: <a href="http://www.usedsails.com">www.usedsails.com</a> Email: <a href="mailto:traders@usedsails.com">traders@usedsails.com</a> Add: 959 N. Lime Ave. Sarasota, FL. 34237
<b>UBI MAIOR ITALIA</b>	Web: <a href="http://ubimaioritalia.com">ubimaioritalia.com</a> Tel: 055 8364421

Email: [info@ubimaioritalia.com](mailto:info@ubimaioritalia.com)

Source: Maia Research Analysis

## 13.5 Main Sail Customers

The main sail customers are typically sailors who own sailboats or yachts. These customers can range from recreational sailors who enjoy weekend sailing to professional sailors who compete in races or use their boats for commercial purposes, such as chartering. Sailors may purchase a new main sail to replace an old or damaged one, or to upgrade their boat's performance. They may also purchase a main sail as part of a larger sail package, which includes other sails such as jibs or spinnakers. In addition to individual sailors, sailmakers may also work with boat manufacturers to provide sails for new boats or as part of a boat refit.

**Table Main Sail Customers**

Customers	Contact Information
<b>Boston Whaler</b>	Web: <a href="http://www.bostonwhaler.com">www.bostonwhaler.com</a> Tel: 1-877-294-5645 Add: Boston Whaler 100 Whaler Way Edgewater, FL 32141
<b>Beneteau</b>	Web: <a href="http://www.beneteau.com">www.beneteau.com</a> Email: <a href="mailto:info@beneteau.fr">info@beneteau.fr</a> Add: 3141 Victoria Ave. 93035 Oxnard, US.
<b>Bertram</b>	Web: <a href="http://www.bertram.com">www.bertram.com</a> Tel: +1.813.527.9899 Add: 5250 West Tyson Avenue Tampa, FL 33611, United States
<b>Viking</b>	Web: <a href="http://www.vikingyachts.com">www.vikingyachts.com</a> Tel: +1 609-296-6000 Add: 190 Viking Avenue, New Gretna, NJ 08224, United States
<b>Chris-Craft</b>	Web: <a href="http://www.chriscraft.com">www.chriscraft.com</a> Tel: 941-351-4900 Add: 8161 15th St E, Sarasota, FL 34243, United States
<b>Lund</b>	Web: <a href="http://www.lundboats.com">www.lundboats.com</a> Tel: 1-800-222-7539 Add: 318 West Gilman Street, New York Mills, MN 56567, United States
<b>Bayliner</b>	Web: <a href="http://www.bayliner.com">www.bayliner.com</a> Tel: (847) 735-4002 Add: 800 S Gay St, Plaza Suite 380. Knoxville, TN 37934

Source: Maia Research Analysis

# 14 Appendix

## 14.1 Methodology

### Qualitative Analysis

- Industry Status and Trends
- Manufacturer/Company profiles, manufacturing base distribution, sales areas, product introduction, main business, market position and their competitors.
- Product Development, Technology, Price, Cost, Manufacturing Process and Trends
- Market segment by Region, Type, Application and forecast
- Market opportunities, potential, government policies and influence factors

### Quantitative Analysis

- Market size (value, sales/output, historical data and forecast (2018-2029))
- Sales/output/capacity, revenue, price, gross margin, market share, for top players, from 2018 to 2023. Interviews with manufacturers, distributors, traders, dealers and buyers, etc.
- Cost structure, proportion, price trend, gross margin and trend, the status quo and trend, 2018 to 2029
- Market size by Type, Region, Application, from 2018 to 2029.
- Market forecast based on potential demand from downstream clients/buyers, government, influence factors and the total economic indication that may occur in the following years.

## 14.2 Research Data Source

### 14.2.1 Secondary Data

Secondary sources include annual reports, press releases, and investor presentations of companies; Journal of Science, official statistical yearbook, National Customs, Industry Association;

Secondary research has mainly been applied to obtain key information about the industry's supply chain, the market downstream buyers, technical dynamics development trends, major vendors of this market, and market classification & segmentation according to the industry

trends, regional markets, and key developments from a market and business-oriented perspective.

### Key Data from Secondary

Market Size (Value & Volume)	Revenue of Companies	Qualitative Analysis
<ul style="list-style-type: none"> <li>Industry Association</li> <li>Magazines</li> <li>Journals</li> <li>Press Releases</li> <li>Statistical Yearbook</li> <li>National Customs</li> </ul>	<ul style="list-style-type: none"> <li>Annual Reports</li> <li>Statista</li> <li>D&amp;B Hoovers</li> <li>Bloomberg</li> <li>Factiva</li> <li>Maia Data Center</li> </ul>	<ul style="list-style-type: none"> <li>Annual Reports</li> <li>Press Releases</li> <li>Industry Associations</li> <li>Journals</li> <li>Magazines</li> </ul>

### 14.2.2 Primary Data

In the primary research process, various sources from both the production and consumption sides were interviewed to obtain qualitative and quantitative information for this report. The primary sources from the production side include major product manufacturers (and their competitors), industry specialist, industry association, research institutions, distributors, dealers and traders, as well as the raw materials suppliers and producers, etc. The primary sources from the consumption side include industry experts such as business leaders, marketing and sales directors, technology and innovation directors, supply chain executive, end users (product buyers), and related key executives from various major companies and organizations operating in the global market. Primary research was conducted to identify segmentation types, product price range, product Applications, key players, raw material supplies and the downstream consumption, industry status and outlook, and key market dynamics such as risks, influence factors, opportunities, market barriers, industry trends, and key player strategies.



### Key Data from Primary

 <p><b>Market Segmented by Regions</b></p>	 <p><b>Submarket by Types</b></p>	 <p><b>Submarket by Applications</b></p>
<p><b>Total and Regional Market Status Growth Rate Forecast from 2023-2029</b></p>	<p><b>Historical (2018-2022) and Forecast (2023-2029) Data</b></p>	<p><b>Historical (2018-2022) and Forecast (2023-2029) Data</b></p>
<ul style="list-style-type: none"> <li>• North America,</li> <li>• Europe</li> <li>• Asia-Pacific</li> <li>• South America</li> <li>• Middle East and Africa, etc.</li> <li>• Market Status and Forecast</li> </ul>	<ul style="list-style-type: none"> <li>• Consumption</li> <li>• Value and Growth Rate of Different</li> <li>• Downstream</li> <li>• Applications</li> </ul>	<ul style="list-style-type: none"> <li>• Company Annual Reports</li> <li>• Press Releases</li> <li>• Industry Associations</li> </ul>

### Figure Industry Insight from Professional Leaders

<p>Sales Manager, Fortune 500 companies:</p> <p><b>'China is the promising market in the next few years.'</b></p> 	<p>Association Experts:</p> <p><b>'Europe accounts for the biggest market share in 2018.'</b></p> 
<p>Market Development Directors, Fortune 500 companies:</p> <p><b>'Future market will be explosive growth.'</b></p> 	<p>Project Manager, Top 5 Downstream companies</p> <p><b>'Multi-functional products will be more popular among customers.'</b></p> 

### 14.2.3 Market Size Estimation

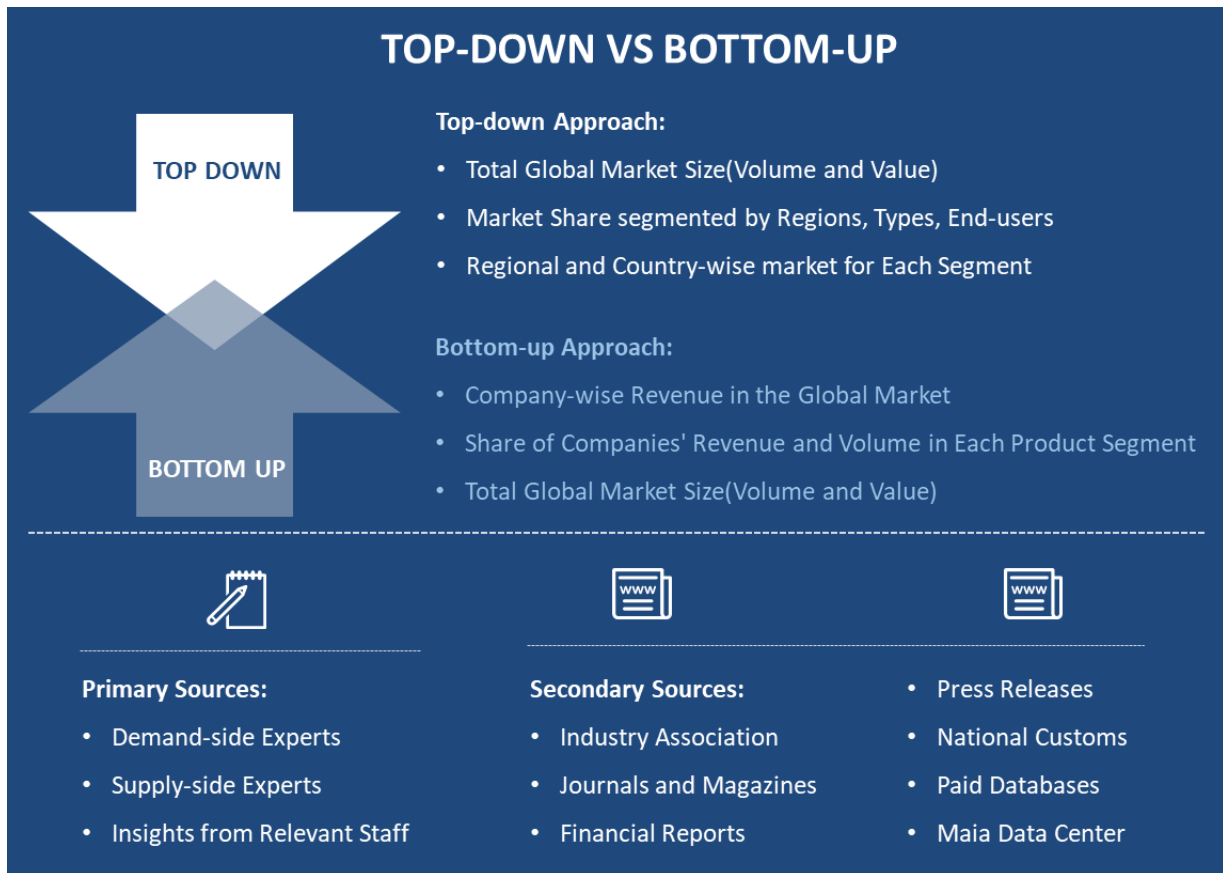
The top-down and bottom-up methods have been applied to estimate and forecast the market

size in different regions, types, and Applications. The major vendors in the market were identified through secondary research and their market shares in different regions were determined by primary and secondary researches.

Major players in the market were identified through secondary research and their market revenues were determined by primary and secondary researches. Secondary research generally involves the analysis of top manufacturers' annual and financial reports, and paid third-party databases including Statista, D&B Hoovers, Bloomberg, Factiva, etc., while primary research contains extensive interviews with key opinion leaders and industry experts such as experienced front-line staff, directors, CEOs and marketing executives. The percentage splits, market shares, growth rate and breakdowns of product markets were determined by secondary sources and verified by primary sources.

All percentage shares, splits, and breakdowns were determined by secondary sources and verified by primary sources. All parameters potentially affecting the market in this research study have been accounted for, viewed in detail, validated by primary research, and analyzed to get the final quantitative and qualitative data.

Figure Market Size Estimation: Top-down and Bottom-up Approach



### 14.2.4 Legal Disclaimer

Quantitative market information is based primarily on interviews and therefore is subject to fluctuation. Maia is not responsible for incorrect information supplied to us by manufacturers or users. Our research services are limited publications containing valuable market information provided to a select group of customers. Our customers acknowledge, when ordering, subscribing or downloading, that Maia Research services are for customers’ internal use and not for general publication or disclosure to third parties. No part of this research service may be given, lent, resold, or disclosed to noncustomers without written permission. Furthermore, no part may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the permission of the publisher.