



SAMPLE

RETAIL MARKET SIZE REPORT

HUNTING & SHOOTING EQUIPMENT



TABLE OF CONTENTS

INTRODUCTION AND METHODS	3
2023 VERSUS 2022	4
HUNTING AND SHOOTING PURCHASES.....	5
Firearm Purchases	6
Ammunition Purchases.....	10
Handloading/Reloading Purchases.....	13
Optics Purchases	14
Hunting Apparel Purchases.....	15
Hunting Gear and Supplies Purchases.....	16
Shooting Gear and Supplies Purchases.....	18
Firearm Storage and Cleaning Purchases	19
Firearm Parts & Accessories Purchases	20

INTRODUCTION AND METHODS

This report estimates U.S. national retail expenditures for new products purchased for hunting, recreational shooting and self-defense. Law enforcement, military, and used product sales are not included. Estimates of the used market are available separately.

Southwick Associates estimates retail sales (dollars and units) using multiple approaches, with the specific approach dependent on the product under study:

- For firearms and ammunition, the annual federal excise tax collected from manufacturers and importers are the base source of data. These data are then augmented with current tax rates, common wholesale and retail margins, plus information from Southwick Associates' proprietary trade surveys and market monitoring efforts.
- Annual adjustments of retail sales (in units and dollars) for hunting and shooting products not subject to excise taxes are derived through market monitoring that includes ongoing consumer studies utilizing both a balanced general population panel and Southwick Associates' proprietary HunterSurvey® / ShooterSurvey® consumer panels.

Throughout the report, a standard table notation is applied which is as follows:

** indicates the sample size too small to report.*

ⁿ indicates the sample size is less than 30 and results should be viewed with caution.

CAUTION: We advise caution when comparing the 2023 Market Size report to the 2019 versions or earlier. Southwick Associates employed additional data gathering efforts beginning in 2020 and adapted the models to reflect the best available data and knowledge about current market conditions. Additionally, differences between the recording periods used by Federal excise tax reports and those employed by HunterSurvey® / ShooterSurvey® and normal natural survey modifications will also drive variation. We strive to ensure each report best represents the year being reported and will make adjustments and improvements whenever possible.

Additional Insights Available:

Southwick Associates implements quarterly surveys to track participation and purchasing trends for major hunting and shooting product categories. Information provided includes brand purchased, average prices, sales by price category, sales channel, and more. Quarterly topline reports are available by subscription, and year-end results can be obtained individually. Results are based on Southwick Associates' HunterSurvey and ShooterSurvey consumer panels of hunters and recreational shooters in conjunction with an outside U.S. general population sample, which reaches a broader and representative audience of the hunters and shooters. Custom reports can be developed for specific niches or to track trends over recent years. For more information, contact Nancy@SouthwickAssociates.com.

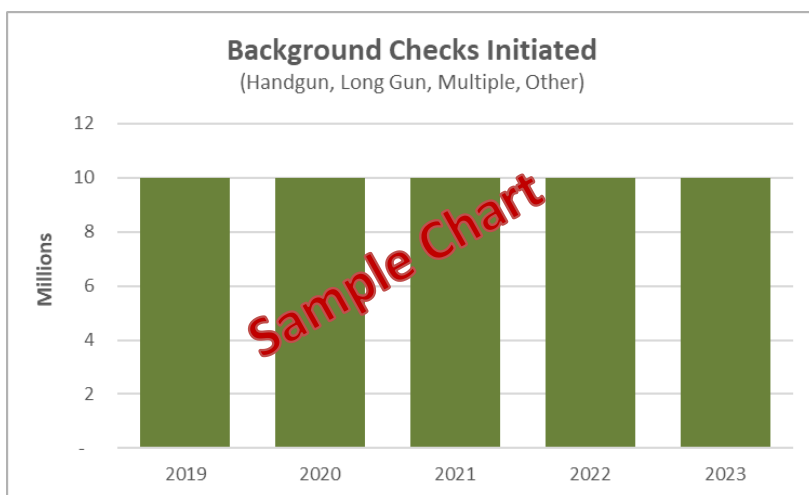
2023 VERSUS 2022

To help readers understand the trend from 2022 to 2023, we offer the following insights:

NICS

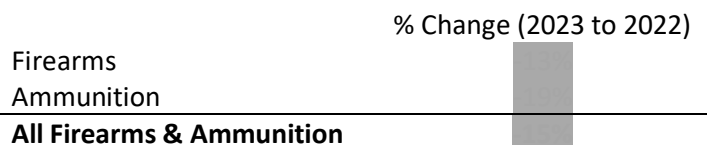
Before a firearm purchase can be transacted, the buyer's background must be checked and approved through the National Instant Criminal Background Check System (NICS). Not all background checks equal a firearm sale.

The figure below only includes background checks initiated on purchases of what are more likely to be new firearms. Background checks initiated for permit checks, pawn, private sale, and rentals are not included.



Excise Tax

Firearms and ammunition are taxed at their first sale within the US. Typically paid by manufacturers and importers, these taxes are dedicated to state wildlife agencies for use in wildlife restoration and shooting range development.



Participation

Hunting accessories sales are typically driven by participation. In 2023,

HUNTING AND SHOOTING PURCHASES

Retail market size by category

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Firearms		
Ammunition ^a		
Archery		
Optics		
Handloading equipment		
Hunting apparel		
Hunting accessories		
Shooting accessories		
Firearm accessories		
Firearm storage ^b		
Total		

^aAmmunition units are reported as total rounds purchased.

^bFirearm storage for 2023 does not include gun safes due to a small sample size for that item.

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Firearm Purchases

FIREARM ITEMS survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Traditional Rifles		
MSR Rifles		
Shotguns		
Muzzleloaders		
Handguns		
Air rifles/air guns		
Total		

Action of TRADITIONAL RIFLES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Bolt action		
Lever action		
Semi-automatic		
Other ⁿ		
Total		

Type of TRADITIONAL RIFLES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Centerfire		
Rimfire		
Total		

Caliber of TRADITIONAL RIFLES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
22 cal		
308 cal ⁿ		
6.5 Creedmoor ⁿ		
30-06 Springfield ⁿ	*	*
223 cal ⁿ	*	*
243 cal ⁿ	*	*
Other ^{**}		
Total		

^{**}Includes 223, 243, 204, 22-250, 300 WSM, 30-30, 300 Rem, 300 Win, 44 Rem, 7.62x39, 7mm and others.

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6

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Primary purpose of TRADITIONAL RIFLES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Casual shooting		
Competitive shooting	*	*
Hunting		
Other (including for gifts, collecting, and self-defense)	*	*
Total		

Type of MSR RIFLES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
AR		
Other (including AK & SKS)		
Total		

Caliber of MSR RIFLES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
223 cal/5.56x45		
308 cal	*	*
300 Blackout	*	*
22 cal ⁿ		
Other ^{**}		
Total		

^{**}Includes 17 cal, 204, 243, 270, 270 WSM, 30, 30-06, 300, 40 S&W, 44 Rem, 45 ACP, 450, 458, 5.45x39m, 5.7x28m, 6.5, 6.8 SPC II, 7mm, 9mm

Primary purpose of MSR RIFLES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Casual shooting		
Competitive shooting	*	*
Hunting		
Self-defense		
Other (including for gifts and collecting)		
Total		

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Type of SHOTGUNS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Pump action		
Semi-automatic		
Over/under ⁿ		
Other (including side-by-side and single shot)		
Total		

Gauge of SHOTGUNS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
12 gauge		
20 gauge		
Other (includes 16 ga, 28 ga, 410)		
Total		

Primary purpose of SHOTGUNS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Casual shooting		
Competitive shooting ⁿ	*	*
Hunting		
Self-defense		
Other ⁿ (including for gifts and collecting)		
Total		

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Action type of HANDGUNS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Semi-automatic		
Revolver		
Other (including break action)		
Total		

Type of HANDGUNS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Centerfire		
Rimfire		
Total		

Caliber of HANDGUNS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
9mm		
22 cal		
357 Magnum		
32 ACP ⁿ		
32 S&W ⁿ		
38 Special ⁿ		
380 ACP		
40 S&W ⁿ		
Other (including 45 cal)		
Total		

Primary purpose of HANDGUNS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Casual shooting		
Collecting		
Competitive shooting ⁿ		
Hunting		
Self-defense		
Other ⁿ (including for gifts)		
Total		

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Ammunition Purchases

AMMUNITION PRODUCTS survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
Rifle ammunition		
Shotgun ammunition		
Handgun ammunition		
Total		

Type of RIFLE AMMUNITION purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds in thousands)
Rimfire		
Centerfire		
Total		

Caliber of RIFLE AMMUNITION purchase

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
22 Long Rifle		
223 Remington		
30-06 Springfield		
308 Winchester		
5.56x45 NATO		
22 Magnum		
270 Winchester		
30-30 Winchester		
6.5 Creedmoor		
243 Winchester		
Other**		
Total		

**Includes 7mm Remington Magnum, 350 Legend, .300 Winchester Mag, 7mm-08, .30 Carbine, 8mm Mauser, .22 Hornet, 6.5 Grendel, .375 H&H Magnum, .450 Bushmaster, and others.

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Primary purpose of RIFLE AMMUNITION purchase

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

Type of SHOTGUN AMMUNITION purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
Lead		
Non-lead/Non-toxic		
Other		
Total		

Gauge of SHOTGUN AMMUNITION purchase

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
12 gauge		
16 gauge		
20 gauge		
28 gauge		
410 gauge		
Other		
Total		

Primary purpose of SHOTGUN AMMUNITION purchase

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

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Type of HANDGUN AMMUNITION purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
Rimfire		
Centerfire		
Total		

Caliber of HANDGUN AMMUNITION purchase

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
9mm		
22 Magnum/22 Long Rifle		
380 ACP		
40 S&W		
357 Magnum		
45 ACP		
38 Special		
10mm		
45 Colt		
32 ACP		
Other**		
Total		

**Includes 357 Sig, 32 S&W, 32 ACP, 17 HMR, 5.7X28.

Primary purpose of HANDGUN AMMUNITION purchase

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Rounds (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

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Handloading/Reloading Purchases

HANDLOADING/RELOADING ITEMS survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Dies		
Reloading component (brass shell cases, bullets, primers, shotshell hulls or wads, shot)		
Press		
Bullet mold		
Total ^a		

^a Items within the reloading component sub-category, like reloading powder, underwent data collection adjustments and are not included in 2023. Their absence accounts for the difference between the reported 'Total' and sum across reported items.

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Optics Purchases

OPTICS ITEMS survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Binoculars		
Handheld laser rangefinders		
Laser sights		
Night vision/thermal imaging		
Non-powered sight		
Reflex/red dot sights		
Scope/Accessory mounts (rings and bases)		
Scopes		
Spotting scopes	*	*
Total		

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Hunting Apparel Purchases

HUNTING APPAREL ITEMS survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Jackets/coats		
Shirts/pants/bibs/overalls		
Boots		
Head Gear/gloves		
Backpack/waist pack/duffle		
Total		

Type of BACKPACKS/WAIST PACKS/DUFFLES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Backpack		
Waist pack		
Other (including Duffle bags)	*	*
Total		

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Hunting Gear and Supplies Purchases

HUNTING GEAR AND SUPPLIES survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Blinds		
Scent	*	*
Decoys	*	*
Food plot seed	*	*
Game calls		
Game cleaning supplies		
Game feed		
Game feeder		
Hunting knives/multi-tools	*	*
Trail cameras/Game cameras		
Tree stands, ladders, towers		
Total		

^aHunting knives and multi-tools underwent data collection adjustments and are not included in 2023.

Type of GAME CALLS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Big game		
Predator	*	*
Turkey		
Waterfowl		
Other ⁿ (including small game, upland game, and game call accessories)		
Total		

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Type of GAME FEED purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Mass (Corn, Soybean, etc)		
Blocks/Mineral licks		
Other (including liquid, pellets, and powder)		
Total		

Type of TREE STANDS, LADDERS, or TOWERS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Ladder stands		
Other (including hang-on, climbing, tower/box stand, tripod stands, ladder and steps, harnesses and accessories)		
Total		

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Shooting Gear and Supplies Purchases

SHOOTING GEAR AND SUPPLIES survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Benches and rests		
Clays/clay pigeons		
Ear protection		
Shooting glasses		
Holsters/ammunition belts ^a	*	*
Air rifle pellets		
Shooting stick	*	*
Total		

^aHolsters and ammunition belts underwent data collection adjustments and are not included in 2023.

Type of EAR PROTECTION purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Ear plugs		
Muffs		
Total		

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18

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Firearm Storage and Cleaning Purchases

FIREARM STORAGE AND CLEANING ITEMS survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Gun case or sleeve		
Gun cleaning		
Total ^a		

^aTotal does not include gun safes due to small sample size.

Type of GUN CASES/SLEEVES purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Hard sided case		
Soft sided case		
Other ⁿ		
Total		

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Firearm Parts & Accessories Purchases

FIREARM PARTS & ACCESSORIES survey respondents reported buying

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Barrels		
Bipod		
Bolts/carriers/bolt parts		
Choke tubes		
Grips (pistol and forward) and buttstocks		
Hand guard		
Lower/upper receiver		
Magazines		
Muzzle devices (flash hidere, muzzle brakes, suppressors)		
Recoil reduction		
Slings		
Trigger assemblies/trigger guards		
Total		

Type of RECOIL REDUCTION purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Recoil pads ⁿ		
Recoil reduction		
Other ⁿ (including Spacers)	*	*
Total		

Type of BOLTS/CARRIERS/BOLT PARTS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Assembly		
Bolts ⁿ		
Parts ⁿ		
Other ⁿ (including Carriers)		
Total		

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Type of GRIPS and BUTTSTOCKS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Pistol grip only		
Buttstock only ⁿ		
Other (including pistol and forward grip set)		
Total		

Type of RECEIVERS purchased

	2023 Estimated Retail Dollars (in millions)	2023 Estimated Units (in thousands)
Lower receiver kit		
Complete lower receiver ⁿ		
Upper receiver kit	*	*
Complete upper receiver ⁿ		
Other ⁿ		
Total		

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