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# 2021 Retail Market Size Report

## Hunting & Shooting Equipment

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Annual Sales in Dollars and Units for Major Product Categories and Sub-Categories

# SAMPLE



**SOUTHWICK**  
ASSOCIATES

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# 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.
- For hunting and shooting products not subject to excise taxes, retail sales (in units and dollars) are benchmarked to a balanced general population study of U.S. residents age 18 and older conducted by Southwick Associates to quantify purchases made for hunting and shooting purposes. Annual adjustments are also derived through data from Southwick Associates' HunterSurvey® and ShooterSurvey® proprietary consumer panels.

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

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

*<sup>n</sup> indicates the sample size is less than 30 and results should be viewed with caution.*

**CAUTION:** We advise caution when comparing the 2021 Market Size report to the 2019 versions or earlier. Southwick Associates employed additional data gathering efforts for 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.

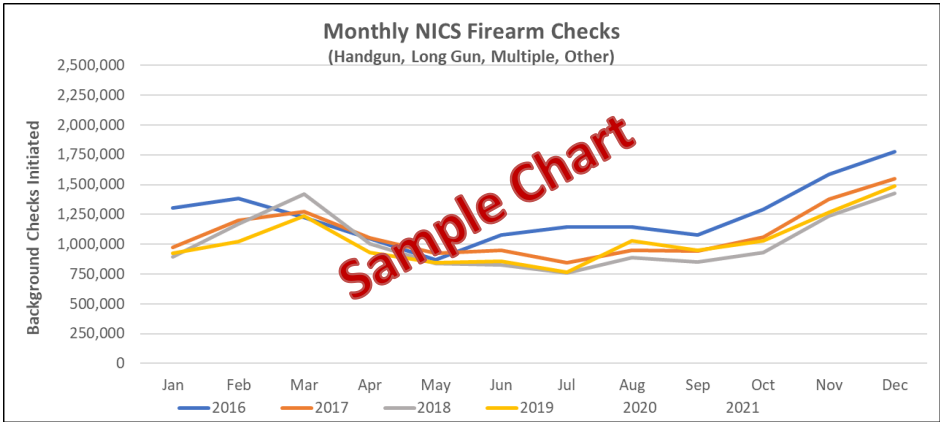
## **About HunterSurvey® and ShooterSurvey®:**

HunterSurvey and ShooterSurvey are Southwick Associates' proprietary consumer panels of hunters and recreational shooters. The panels are surveyed each quarter, tracking participation as well as 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. Custom reports can be developed for specific niches or to track trends over recent years. For more information, contact [Nancy@SouthwickAssociates.com](mailto:Nancy@SouthwickAssociates.com).

# 2020 VERSUS 2021

To help readers understand the trend from 2020 to 2021, 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; however, in 2020, these checks were XX% greater than 2019, and in 2021 were XX% less than 2020. This figure only includes background checks initiated on purchases of what are most likely new firearms. Background checks initiated for permit checks, pawn, private sale, and rentals are not included.



As shown above, major increases began in March 2020 as COVID-induced shutdowns began. Social unrest and the Presidential election drove and sustained the increased levels. Checks remained high in the first quarter of 2021, then decreased and flattened through the remainder of the year.

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

	% Increase (2020 to 2021)
Pistols and revolvers	XX%
Firearms (other)	XX%
Ammunition	XX%
All Firearms & Ammunition	XX%

These excise tax data reflect trends at the wholesale level in dollars, which was up XX% from 2020 levels, and include firearms held as inventory. Inventory slowly began to grow in 2021 but did not return to 2019 levels. Because inventoried items are subject to excise tax collection, the model was adapted to adjust for the growth of inventory and reflect 2021 market size estimates for retail sales only.

\* **Participation** – Hunting accessories sales are typically driven by participation. In 2021, according to state license data, hunting license sales decreased by XX%. Despite the decline, sales are still higher than pre-pandemic 2019 levels. Nonresident license sales increased by XX% between 2020 and 2021. Hunters also shifted their license purchases earlier in the year, a potential indication of more days spent afield over the course of the whole year resulting in greater consumption of ammunition and accessories.

Altogether, 2021 sales remained strong, relative to 2020. Southwick Associates will continue to report trends and market size using the best practical data and methods.

# HUNTING AND SHOOTING PURCHASES

## Retail market size by category

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Firearms		
Ammunition <sup>a</sup>		
Archery		
Optics		
Handloading equipment		
Hunting apparel		
Hunting accessories <sup>b</sup>		
Shooting accessories <sup>c</sup>		
Firearm accessories		
Firearm storage <sup>d</sup>		
<b>Total</b>		na

<sup>a</sup>Ammunition units is reported as total rounds purchased

<sup>b</sup>Hunting accessories for 2021 do not include knives and multi-tools due to a small sample size for that item.

<sup>c</sup>Shooting accessories for 2021 do not include holsters due to a small sample size for that item.

<sup>d</sup>Firearm storage for 2021 do 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:*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Traditional Rifles		
MSR Rifles		
Shotguns		
Muzzleloaders		
Handguns		
Air rifles/air guns		
Total		

*Action of TRADITIONAL RIFLES purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Bolt action		
Lever action		
Semi-automatic		
Other <sup>n</sup>		
Total		

*Type of TRADITIONAL RIFLES purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Centerfire		
Rimfire		
Total		

*Caliber of TRADITIONAL RIFLES purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
22 cal		
223 cal <sup>n</sup>	*	*
243 cal <sup>n</sup>	*	*
30-06 Springfield		
308 cal <sup>n</sup>		
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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*Primary purpose of TRADITIONAL RIFLES purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Casual shooting		
Competitive shooting <sup>n</sup>		
Hunting		
Other (including for gifts, collecting, and self-defense)		
Total		

*Type of MSR RIFLES purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
AR		
Other (including AK & SKS)		
Total		

*Caliber of MSR RIFLES purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
22 cal <sup>n</sup>		
223 cal/5.56x45		
308 cal <sup>n</sup>		
7.62x39 Soviet	*	*
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*

	2021 Estimated Retail Dollars (in millions)	2021 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*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Pump action		
Semi-automatic		
Over/under		
Other (including side-by-side and single shot)		
Total		

*Gauge of SHOTGUNS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
12 gauge		
20 gauge		
Other (includes 16 ga, 28 ga, .410)		
Total		

*Primary purpose of SHOTGUNS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Casual shooting		
Competitive shooting <sup>n</sup>		
Hunting		
Self-defense		
Other (including for gifts and collecting)		
Total		

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*Action type of HANDGUNS purchased*

	2020 Estimated Retail Dollars (in millions)	2020 Estimated Units (in thousands)
Semi-automatic		
Revolver		
Other <sup>n</sup> (including break action)		
Total		

*Type of HANDGUNS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Centerfire		
Rimfire		
Total		

*Caliber of HANDGUNS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
22 cal		
357 cal		
38 special <sup>n</sup>		
380 auto/ 380 ACP		
40 S&W	*	*
44 cal	*	*
45 auto		
9mm		
Other (including 32 cal)		
Total		

*Primary purpose of HANDGUNS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Casual shooting		
Collecting		
Competitive shooting		
Hunting		
Self-defense		
Other (including for gifts)		
Total		

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## Ammunition Purchases

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*AMMUNITION PRODUCTS survey respondents reported buying:*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
Rifle ammunition		
Shotgun ammunition		
Handgun ammunition		
Total		

*Type of RIFLE AMMUNITION purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
Rimfire		
Centerfire		
Total		

*Caliber of RIFLE AMMUNITION purchase*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
223 Remington/5.56		
22 Long Rifle		
308 Winchester/7.62		
30-06 Springfield		
6.5 Creedmoor		
243 Winchester		
270 Winchester		
22 Magnum		
9mm Parabellum		
30-30 Winchester		
Other**		
Total		

\*\*Includes 7mm Remington Magnum, 350 Legend, .17 cal, .300 Winchester Mag, 7mm-08, .30 Carbine, 8mm Mauser, .22 Hornet, 6.5 Grendel, .375 H&H Magnum, .270 WSM, .450 Bushmaster, and others.

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*<sup>n</sup> indicates the sample size is less than 30 and results should be viewed with caution*

*Primary purpose of RIFLE AMMUNITION purchase*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

*Type of SHOTGUN AMMUNITION purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
Lead		
Non-lead/Non-toxic		
Other		
Total		

*Gauge of SHOTGUN AMMUNITION purchase*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
12 gauge		
16 gauge		
20 gauge		
28 gauge		
410 gauge		
Other		
Total		

*Primary purpose of SHOTGUN AMMUNITION purchase*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

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

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*Type of HANDGUN AMMUNITION purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
Rimfire		
Centerfire		
Total		

*Caliber of HANDGUN AMMUNITION purchase*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
9mm		
357 Magnum		
22 Magnum/22 Long Rifle		
45 ACP		
40 S&W		
38 Special		
380 ACP		
44 Remington Magnum		
10mm		
Other**		
Total		

\*\*Includes 45 Colt, 357 Sig, 32 S&W, 32 ACP, 17 HMR, 5.7X28.

*Primary purpose of HANDGUN AMMUNITION purchase*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Rounds (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

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## Handloading/Reloading Purchases

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*HANDLOADING/RELOADING ITEMS survey respondents reported buying:*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Dies		
Reloading component (brass shell cases, bullets, primers, powder, shotshell hulls or wads, shot)		
Press		
Bullet mold		
Total		

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## Optics Purchases

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*OPTICS ITEMS survey respondents reported buying:*

	2021 Estimated Retail Dollars (in millions)	2021 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

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*HUNTING APPAREL ITEMS survey respondents reported buying:*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Jackets/coats		
Shirts/pants/bibs/overalls		
Boots		
Head Gear/gloves		
Backpack/waist pack/duffle		
Total		

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*Type of BACKPACKS/WAIST PACKS/DUFFLES purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Backpack		
Waist pack <sup>n</sup>		
Other (including Duffle bags)		
Total		

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# Hunting Gear and Supplies Purchases

*HUNTING GEAR AND SUPPLIES survey respondents reported buying:*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Blinds		
Scent		
Decoys		
Food plot seed		
Game calls		
Game cleaning supplies		
Game feed		
Game feeder		
Trail cameras/Game cameras		
Tree stands, ladders, towers		
Total <sup>a</sup>		

<sup>a</sup>Total does not include hunting knives and multi-tools due to small sample size.

## *Type of DECOYS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Turkey		
Waterfowl		
Other <sup>n</sup> (including big game, predator, small game, and upland game bird)		
Total		

## *Type of GAME CALLS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Big game		
Predator <sup>n</sup>		
Turkey		
Waterfowl <sup>n</sup>		
Other <sup>n</sup> (including small game, upland game, and game call accessories)		
Total		

<sup>\*</sup> indicates the sample size too small to report.

<sup>n</sup> indicates the sample size is less than 30 and results should be viewed with caution



*Type of GAME FEED purchased*

	2021 Estimated Retail Dollars (in millions)	2021 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*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Ladder stands <sup>n</sup>		
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

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*SHOOTING GEAR AND SUPPLIES survey respondents reported buying:*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Benches and rests		
Clays/clay pigeons		
Ear protection		
Shooting glasses		
Air rifle pellets		
Shooting stick		
Total <sup>a</sup>		

<sup>a</sup>Total does not include holsters due to small sample size.

*Type of EAR PROTECTION purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Ear plugs		
Muffs		
Total		

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

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## Firearm Storage and Cleaning Purchases

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*FIREARM STORAGE AND CLEANING ITEMS survey respondents reported buying:*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Gun case or sleeve		
Gun cleaning		
Total		

<sup>a</sup>Total does not include hunting knives and multi-tools due to small sample size.

*Type of GUN CASES/SLEEVES purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Hard sided case		
Soft sided case		
Other <sup>n</sup>		
Total		

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## Firearm Parts & Accessories Purchases

*FIREARM PARTS & ACCESSORIES survey respondents reported buying:*

	2021 Estimated Retail Dollars (in millions)	2021 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*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Recoil pads		
Recoil reduction		
Other <sup>n</sup> (including Spacers)	*	*
Total		

*Type of BOLTS/CARRIERS/BOLT PARTS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Assembly		
Bolts <sup>n</sup>		
Parts <sup>n</sup>		
Other <sup>n</sup> (including Carriers)		
Total		

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*Type of GRIPS and BUTTSTOCKS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Pistol grip only		
Buttstock only		
Other (including pistol and forward grip set)		
Total		

*Type of RECEIVERS purchased*

	2021 Estimated Retail Dollars (in millions)	2021 Estimated Units (in thousands)
Lower receiver kit		
Complete lower receiver <sup>n</sup>		
Upper receiver kit		
Complete upper receiver		
Other		
Total		

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