
2017 Retail Market Size Report

Fishing Equipment



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

SAMPLE

Produced by:



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INTRODUCTION AND METHODS

Southwick Associates estimates retail sales (dollars and units) using multiple approaches, with the specific approach dependent on the product under study. This report specifically estimates the U.S. national retail expenditures for products purchased and used while sportfishing. Only new sales are included. Sales of used products are not considered. Estimates of the used market are available separately.

For many fishing items including fishing rods, reels, and line, total retail sales are based on the annual federal excise tax collected from manufacturers and importers in these categories. Using the current tax rates in conjunction with information from trade surveys and experts, manufacturers' payments are adjusted to reflect retail sales by accounting for typical wholesale and retail mark-ups using proprietary Southwick Associates' market data.

For sportfishing products not subject to excise taxes, retail sales (in units and dollars) are estimated primarily using the following:

- Southwick Associates' random-based consumer surveys that examine purchases of non-taxed sportfishing products.
- The consumer survey only examined expenditure estimates for broad categories of products. Expenditure estimates for more detailed products (such as "spinner baits" versus "lures") are derived by matching the survey results with data from Southwick Associates' AnglerSurvey® consumer panel (see below) that explains the percentage of sales assigned to specific types of products within a larger product category.

Estimates of units sold are developed using the average price information. In some cases, additional data sources are used to provide greater reliability, including imports data. In general, most market size estimates are produced using the process described above.

NOTE: Benchmarking measures of angler spending reported through the National Survey of Fishing, Hunting, and Wildlife-Associated Recreation (U.S. Fish and Wildlife Service) are used in the calculations to estimate retail sales. These measures are updated this year with the most current data from 2016. The adjustment of benchmarks impacts trending between values reported here and earlier estimates, based on the 2012 benchmarks. On the following page, we do provide modified 2016 market size estimates which incorporate the most current benchmarks from 2016. These values differ from the 2016 estimates released in 2017 but enable more accurate trending with these 2017 retail sales estimates.

About AnglerSurvey®:

The AnglerSurvey® consumer panel survey is conducted every two months, covering consumer purchasing trends for major product categories and participation trends. Information provided includes average prices, sales by price category and sales channel, and more. Bi-monthly reports are available by subscription, and year-end results can be obtained individually. For more information, contact Nancy@SouthwickAssociates.com.

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2017 FISHING PURCHASES

FISHING EQUIPMENT (Summary) respondents reported buying:

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Reel - Not fly fishing		
Rod - Not fly fishing		
Combo (Rod/Reel)		
Lures & baits – (hard, soft, spinner, dough, jig, live baits - Not fly fishing)		
Fishing line - Not fly fishing		
Terminal tackle (hook, sinker, swivel, rig, bobber, leader)		
Fly fishing tackle and accessories		
Fishing electronics (GPS, sonar, fish finders)		
Fishing apparel		
Other fishing equipment (tackle box, landing nets, bait buckets, aerators, cast nets, knives, scales, grips, measuring devices, hook sharpeners, removers, pliers, stringers, trolling motor)		
Total		

MODIFIED 2016 FISHING EQUIPMENT (Summary) respondents reported buying:

	Modified 2016 Estimated Retail Dollars (in millions)	Modified 2016 Estimated Units (in thousands)
Reel - Not fly fishing		
Rod - Not fly fishing		
Combo (Rod/Reel)		
Lures & baits – (hard, soft, spinner, dough, jig, live baits - Not fly fishing)		
Fishing line - Not fly fishing		
Terminal tackle (hook, sinker, swivel, rig, bobber, leader)		
Fly fishing tackle and accessories		
Fishing electronics (GPS, sonar, fish finders)		
Fishing apparel		
Other fishing equipment (tackle box, landing nets, bait buckets, aerators, cast nets, knives, scales, grips, measuring devices, hook sharpeners, removers, pliers, stringers, trolling motor)		
Total		

NOTE: These are modified 2016 market size estimates of retail sales and units based on updated benchmarking data from the National Survey of Fishing, Hunting, and Wildlife-Associated Recreation (U.S. Fish and Wildlife Service).

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Fishing Rods

Type of fishing RODS respondents reported buying:

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Bait cast		
Spin cast		
Spinning		
Other		
Total		

Primary type of fishing intended for the RODS purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Inshore saltwater fishing		
Offshore saltwater fishing		
Other / Multiple types		
Total		

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Fishing Reels

Type of fishing REELS purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Bait cast		
Spin cast		
Spinning		
Other		
Total		

Primary type of fishing intended for the REELS purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Inshore saltwater fishing		
Offshore saltwater fishing		
Other / Multiple types		
Total		

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Fishing Combos

Type of fishing COMBOS purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Bait cast		
Spin cast		
Spinning		
Other		
Total		

Primary type of fishing intended for COMBOS purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Inshore saltwater fishing		
Offshore saltwater fishing		
Other / Multiple types		
Total		

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Fishing Line

Type of FISHING LINE purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Monofilament		
Superline or Braid		
Fluorocarbon		
Total		

Primary type of fishing intended for MONOFILAMENT LINES purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Inshore saltwater fishing		
Offshore saltwater fishing		
Other		
Total		

Primary type of fishing intended for BRAID LINES purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Inshore saltwater fishing		
Offshore saltwater fishing		
Other		
Total		

Primary type of fishing intended for FLUOROCARBON LINES purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Inshore saltwater fishing		
Offshore saltwater fishing		
Other		
Total		

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Bait & Terminal Tackle

Type of FISHING LURES purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Jigs		
Spinner bait		
Hard bait		
Soft bait		
Dough bait		
Live bait		
Total		

Primary type of fishing intended for JIG BAITs purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Inshore saltwater fishing		
Offshore saltwater fishing		
Other		
Total		

Primary type of fishing intended for SPINNER BAITs purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Other (saltwater, brackish water, and other)		
Total		

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Primary type of fishing intended for HARD BAITs purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Inshore saltwater fishing		
Offshore saltwater fishing		
Other		
Total		

Primary type of fishing intended for SOFT BAITs purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Saltwater fishing		
Other		
Total		

Primary type of fishing intended for DOUGH BAITs purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Other		
Total		

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Type of LIVE BAIT purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Live worms and night crawlers		
Live minnows, shiners or baitfish of any type		
Live crickets, grasshoppers or other non- water insects		
Freshwater shrimp		
Other live bait (hellgrammites, grubs, mealworms, frogs, etc.)		
Total		

**Sample size too small to report.*

Primary type of fishing intended for LIVE BAIT purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Freshwater fishing		
Saltwater fishing		
Other		
Total		

Type of TERMINAL TACKLE purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Bobber		
Hooks		
Sinkers/weights		
Other		
Total		

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Electronics

Type of FISHING ELECTRONICS purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Total*		

**Sample sizes were too small to report individual electronic products separately.*

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Apparel

Type of FISHING APPAREL purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Footwear		
Hats or headgear		
Raingear		
Shirts, pants, shorts, jackets, sweatshirts, etc		
Waders/Wade Boots/Chest Waders		
Glove		
Life jacket		
Other*		
Total		

**Sample sizes were too small to report life jackets separately. Included in the "Other" category along with fishing vests.*

Type of WADERS/WADE BOOTS/CHEST WADERS purchased:

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Chest Waders		
Other (includes hip and knee waders)		
Total		

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Other Fishing Equipment

Type of OTHER FISHING EQUIPMENT purchased

	2017 Estimated Retail Dollars (in millions)	2017 Estimated Units (in thousands)
Tackle box		
Landing net, gaff		
Bait bucket, aerator		
Cast net		
Scale, grip, measuring device		
Fishing knife		
Hook sharpener, remover, plier		
Trolling motor		
Rod & reel accessories		
Other*		
Total		

**Sample sizes were too small to report cast net separately. Included in the "Other" category along with coolers, and shallow water anchors.*

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