
2018 Retail Market Size Report

Hunting & Shooting Equipment



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

SAMPLE

Produced by:



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1

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TABLE OF CONTENTS

Introduction and Methods.....	3
Hunting and Shooting Purchases	4
Firearm Purchases	5
Ammunition Purchases	10
Black Powder Purchases.....	13
Archery and Bow Hunting Purchases.....	14
Hand Loading/Reloading Purchases	15
Optics Purchases	16
Hunting Apparel Purchases	17
Hunting Gear and Supplies Purchases	18
Shooting Gear and Supplies Purchases.....	20
Firearm Storage and Cleaning Purchases	21
Firearm Parts & Accessories Purchases	22

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 hunting and shooting. Only new sales are included. Sales of used products are not considered. Estimates of the used market are available separately. Law enforcement and military sales are also not included.

For firearms, ammunition and archery equipment, total retail sales are based on the annual federal excise tax collected from manufacturers and importers in these categories. Using the current tax rates, plus information from proprietary Southwick Associates' trade surveys and market monitoring efforts, and common wholesale and retail margins, results were then developed for specific product categories.

For hunting and shooting 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 hunting and shooting products.
- The consumer survey only examined expenditure estimates for broad categories of products. Expenditure estimates for more detailed products (such as "pump shotguns" versus "firearms") are derived by matching the survey results with data from Southwick Associates' HunterSurvey[®] and ShooterSurvey[®] consumer panels (see below) that explains the percentage of sales assigned to specific types of products within a larger product category plus average prices paid.

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

NOTE: Due to the differences between the excise tax data and the HunterSurvey recording cycles, some natural survey variation, along with regular improvements to the quantification methods, trend results derived from comparing reports across years will show larger than actual swings.

About HunterSurvey[®]:

HunterSurvey and ShooterSurvey panel surveys are 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.

HUNTING AND SHOOTING PURCHASES

Retail market size by category

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Firearms		
Ammunition		
Archery	*	*
Blackpowder		
Optics		
Hand loading equipment		
Hunting apparel		
Hunting accessories		
Shooting accessories		
Firearm accessories		
Firearm storage		
Total		

**Sample size too small to report.*

Firearm Purchases

FIREARM ITEMS survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Traditional Rifles		
MSR Rifles		
Shotguns		
Muzzleloaders		
Handguns		
Air rifles/air guns		
Total		

Type of TRADITIONAL RIFLES purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Bolt action		
Lever action		
Semi-automatic		
Break action	*	*
Other		
Total		

**Sample size too small to report*

Fire type of TRADITIONAL RIFLES purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Centerfire		
Rimfire		
Total		

Caliber of TRADITIONAL RIFLES purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
22 cal		
223 cal	*	*
243 cal	*	*
30-06 Springfield	*	*
308 cal		
Other**		
Total		

**Includes 223, 243, 30-06, 204, 22-250, 270, 270 WSM, 30, 30-30, 300 Rem, 300, 300 Win, 303, 35, 375 H&H, 44 Rem, 7.62x39, 7mm, 9mm

Primary purpose of TRADITIONAL RIFLES purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Casual shooting		
Competitive shooting	*	*
Hunting		
Other (including for gifts, collecting, and self-defense)		
Total		

Type of MSR RIFLES purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
AR		
AK & SKS	*	*
Other		
Total		

**Sample size too small to report.*

Caliber of MSR RIFLES purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
22 cal	*	*
223 cal/5 56x45		
308 cal/7 62x51mm	*	*
7 62x39 Soviet*	*	*
Other**		
Total		

**Sample size too small to report.*

***Includes 17 cal, 204, 243 cal, 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

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Casual shooting		
Competitive shooting	*	*
Hunting		
Self-defense		
Other (including for gifts and collecting)		
Total		

**Sample size too small to report.*

Type of SHOTGUNS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Pump action		
Semi-automatic		
Over/under		
Other (including side-by- side and single shot)		
Total		

Gauge of SHOTGUNS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
12 gauge		
20 gauge		
Other (includes 16 ga, 28 ga, .410)		
Total		

Primary purpose of SHOTGUNS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Casual shooting		
Competitive shooting	*	*
Hunting		
Self-defense		
Other (including for gifts and collecting)		
Total		

*Sample size too small to report.

Type of MUZZLELOADERS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Inline		
Standard	*	*
Flint lock	*	*
Other		
Total		

Primary purpose of MUZZLELOADERS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Casual shooting	*	*
Hunting		
Other (including for gifts, collecting, competitive shooting, and self-defense)		
Total		

Type of HANDGUNS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Semi-automatic		
Revolver		
Other (including break action)		
Total		

Fire type of HANDGUNS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Centerfire		
Rimfire		
Total		

Caliber of HANDGUNS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
22 cal		
357 cal		
38 special	*	*
380 auto/ 380 ACP		
40 S&W	*	*
44 cal	*	*
45 auto		
9mm		
Other (including 32 cal)		
Total		

**Sample size too small to report.*

Primary purpose of HANDGUNS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Casual shooting		
Collecting		
Competitive shooting		
Hunting	*	*
Self-defense		
Other (including for gifts)		
Total		

Ammunition Purchases

AMMUNITION PRODUCTS survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
Rifle ammunition		
Shotgun ammunition		
Handgun ammunition		
Total		

Type of RIFLE AMMUNITION purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
Rimfire		
Centerfire		
Total		

Caliber of RIFLE AMMUNITION purchase

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
17 cal		
22 cal		
22-250 cal	*	*
243 cal		
270 Winchester		
30 Carbine	*	*
300 Win Mag		
30-06 Springfield		
30-30 cal		
5 56 mm/ 223 cal		
7 62X39 mm/ 308 cal		
7 mm Remington Mag		
7 mm-08		
Other**		
Total		

*Sample size too small to report.

**Includes 204, 270 WMS, 280 cal, 300 Rem, 300, 300 WSM, 303, 32 Win, 35, 375 H&H, 44 Rem, 7 mm, 8 mm, 9 mm

Primary purpose of RIFLE AMMUNITION purchase

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

Type of SHOTGUN AMMUNITION purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
Lead		
Non-lead/Non-toxic		
Other		
Total		

Caliber of SHOTGUN AMMUNITION purchase

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
12 gauge		
16 gauge	*	*
20 gauge		
28 gauge	*	*
410 gauge		
Other		
Total		

Primary purpose of SHOTGUN AMMUNITION purchase

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

Type of HANDGUN AMMUNITION purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
Rimfire		
Centerfire		
Total		

Caliber of HANDGUN AMMUNITION purchase

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
22 cal		
32 cal	*	*
357 cal		
38 cal		
380 cal		
40 S&W		
44 cal		
45 auto		
9mm		
Other (including 17 cal)		
Total		

Primary purpose of HANDGUN AMMUNITION purchase

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Boxes (in thousands)
Casual Shooting		
Competitive Shooting		
Hunting		
Self-Defense		
Other		
Total		

Black Powder Purchases

BLACK POWDER PRODUCTS survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Bullets, balls and/or shot		
Cleaning Supplies		
Propellant/powder		
Primers		
Patches		
Solvent		
Other		
Total		

Archery and Bow Hunting Purchases

Sample sizes were too small to report Archery & Bow Hunting Purchases

Hand Loading/Reloading Purchases

HAND LOADING/RELOADING ITEMS survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Dies		
Reloading component (brass shell cases, bullets, primers, powder, shotshell hulls or wads, shot)		
Reloading tools		
Press		
Bullet mold		
Total		

RELOADING COMPONENTS survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Brass shell cases		
Bullets		
Primers		
Powder		
Shotshell hulls	*	*
Shotshell wads		
Shot (lead and other)		
Total		

**Sample size too small to report.*

Optics Purchases

OPTICS ITEMS survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Binoculars		
Boresighter		
Handheld laser rangefinders		
Laser sights		
Lens Covers		
Night vision/thermal imaging		
Non-power sight		
Red dot/tactical magnifier		
Reflex/red dot sights		
Scope/Accessory mounts (rings and bases)		
Scopes		
Spotting scopes		
Total		

Type of REFLEX/RED DOT SIGHTS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Red Dot		
Reflex		
Other		
Total		

Hunting Apparel Purchases

HUNTING APPAREL ITEMS survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Jackets/coats		
Pants/Bibs/Overalls		
Shirts		
Vests		
Boots		
Head Gear		
Gloves		
Coveralls	*	*
Backpack/waist pack/duffle		
Total		

Type of BACKPACKS/WAIST PACKS/DUFFLES purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Backpack		
Waist pack	*	*
Other (including Duffel bags)	*	*
Total		

Hunting Gear and Supplies Purchases

HUNTING GEAR AND SUPPLIES survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Blinds		
Cover scent		
Decoys		
Food plot seed		
Game calls		
Game cleaning supplies		
Game coolers (specialized for meat/game)	*	*
Game feed		
Game feeder		
GPS device		
Hunting knives/multitools		
Lighting		
Lure scent		
Odor eliminator		
Trail cameras/Game cameras		
Tree stands, ladders, towers		
Two-way radio		
Total		

Type of DECOYS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Turkey		
Waterfowl		
Other (including big game, predator, small game, and upland game bird)		
Total		

Type of GAME CALLS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Big game		
Predator		
Turkey		
Waterfowl	*	*
Other (including small game, upland game, and game call accessories)		
Total		

Digital or manual GAME CALLS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Digital/Electronic	*	*
Manual		
Total		

Type of HUNTING KNIVES/MULTITOOL purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Fixed blade		
Folding		
Multi-tool		
Pocket knife	*	*
Total		

Type of LIGHTING purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Flashlight		
Headlamp		
Other lighting device (including lanterns)		
Total		

Type of GAME FEED purchased

	2018 Estimated Retail Dollars (in millions)	2018 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

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Hang-on Ladder stands	*	*
Other (including climbing, tower/box stand, tripod stands, ladder and steps, harnesses and accessories)		
Total		

Shooting Gear and Supplies Purchases

SHOOTING GEAR AND SUPPLIES survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Benches and rests		
Clays/clay pigeons		
Ear protection		
Holsters/ammo belts		
Shooting glasses		
Targets & target throwing devices		
Air rifle pellets		
Total		

Type of EAR PROTECTION purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Ear plugs		
Muffs		
Total		

Type of HOLSTER/AMMUNITION BELTS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Ammunition Belt		
Holster		
Total		

Firearm Storage and Cleaning Purchases

FIREARM STORAGE AND CLEANING ITEMS survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Gun case or sleeve		
Gun cleaning		
Gun safes		
Total		

Type of GUN CASES/SLEEVES purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Hard sided case		
Soft sided case		
Other		
Total		

Firearm Parts & Accessories Purchases

FIREARM PARTS & ACCESSORIES survey respondents reported buying:

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Barrels		
Bipod		
Bolts/carriers/bolt parts		
Caliber conversion kits	*	*
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

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Recoil pads		
Recoil reduction	*	*
Other (including Spacers)		
Total		

Type of BOLTS/CARRIERS/BOLT PARTS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Assembly		
Bolts	*	*
Parts	*	*
Other (including Carriers)		
Total		

Type of GRIPS and BUTTSTOCKS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Pistol grip only		
Forward grip only	*	*
Buttstock, pistol, forward grip set	*	*
Buttstock only		
Other (including pistol and forward grip set)		
Total		

Type of RECEIVERS purchased

	2018 Estimated Retail Dollars (in millions)	2018 Estimated Units (in thousands)
Lower receiver kit		
Complete lower receiver	*	*
Upper receiver kit	*	*
Complete upper receiver		
Other		
Total		