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PRESS RELEASE

February 1, 2019

Camera & Imaging Products Association (CIPA)

2019 Outlook on the Shipment by Product-Type Concerning Cameras and Related Goods

The Camera & Imaging Products Association (CIPA: President Kazuo Ushida) has announced the outlook on the shipment by product-type concerning cameras and related goods for the 2019 term.

1. Track record of shipments 2018

In 2018 total shipments decreased by 22.2% year on year in digital cameras with a significant decline in built-in lens digital cameras. In interchangeable lens digital cameras, having taken over the position of core product, failed to fill the gap.

Total shipments of digital cameras in 2018 (the cumulative total of shipments from January to December) fell by 22.2% year on year to 19,423,371 units (represented by units of one million in the attached table).

After continued growth of the market since 1999, the year our statistics started, shipments fell for the first time in 2009 due to the global recession. They fell again in 2011 because of the serious impact on production from the Great East Japan Earthquake and flooding in Thailand. Since then, shipments have continued to decline, and though an increase was observed in 2017, the year 2018 saw another decline.

Total shipments of digital cameras fell more than 20% from the level a year before with a significant decline of 34.9% in built-in lens digital cameras to 8.7 million units. They still account for more than 40% of the total shipments even after the position of key product was taken over by interchangeable lens digital cameras, which include single-lens reflex and mirrorless cameras, products with higher value added and unit prices.

Indeed, some high-value added models are found among built-in lens digital cameras. However, this category of products has less to offer consumers as a distinct advantage over smartphones than interchangeable lens digital cameras, which, with diverse types of lens available for them, allow users dramatically broad possibilities of expression. In consequence, built-in lens digital cameras were put on the defensive against smartphones.

Shipments of interchangeable lens digital cameras decreased only less than 10% year on year. So did those of interchangeable lenses.

Shipments of interchangeable lens digital cameras decreased 7.8% year on year to 10.8 million units. Those of interchangeable lenses also fell 6.2% to 18.0 million units.

The interchangeable lens digital camera is the one and only choice for photographers aspiring to master the art ultimately, as it allows them to choose the best from a variety of lenses for any specific scene or subject. With the explosively rapid spread of smartphones, virtually everyone in the world carries a smartphone. These devices provide many users with an opportunity to discover the joy of taking photos. Once fascinated with photography, they will become interested in realizing greater photographic expression by moving on to digital cameras to take pictures that they could not with a smartphone. Absorbing this “step-up demand”, as it is often called, the interchangeable lens digital camera managed to avoid a significant drop in shipments, though failing to secure the same level as the year before.

At the same time, many existing users of interchangeable lens digital cameras, aspiring to master the art of photography, hope to upgrade their camera systems. Their continued high motivation serves as the driving force for the camera industry. The number of interchangeable lenses shipped for every camera stayed at a high level, a factor of 1.6 to 1.7. This demonstrates that many users are tirelessly pursuing a mastery of photography.

Among interchangeable lens digital cameras, the mirrorless camera has made a remarkable leap forward. Its rapid growth may come from a stream of additional purchases, rather than replacement purchases.

Camera makers are working harder to develop products. This enables digital camera users owning more than one camera type, to include both single-lens reflex and mirrorless types, to dynamically expand their camera systems and pick out the best combination of cameras and lenses when taking photos in a specific scene. We expect to see some synergy generated between these two categories with distinctive features.

Broken down by region, total shipments of digital cameras to Japan and regions outside of Japan decreased 19.2% and 22.7%, respectively. As for shipments of digital cameras with built-in lenses, those to Japan and regions outside of Japan decreased by 22.5% and 37.5%, respectively. As for shipments of digital cameras with interchangeable lenses, those to Japan and regions outside of Japan decreased by 13.0% and 7.2%, respectively.

As for shipments of interchangeable lenses, those to Japan and regions outside of Japan decreased by 11.9% and 5.4%, respectively.

There is an increased trend in shipments to regions outside of Japan on a long-term basis. However,

differences appeared between the categories in 2018. As for year-on-year changes from the previous year in shipments of interchangeable lens digital cameras, those to regions outside stayed at a higher level than those to Japan. The same is found in shipments of interchangeable lenses.

2. Outlook on shipments in 2019

Total shipments (the cumulative total of shipments from January to December) of digital cameras in 2019 are projected to be 16.9 million units, a year-on-year decline of 12.9%. Of those, shipments to Japan and those to regions outside of Japan are projected to be 2.5 million units (a year-on-year decrease of 10.7%) and 14.4 million units (a year-on-year decline of 13.3%), respectively.

Broken down by product type, shipments of built-in lens digital cameras are projected to be 6.9 million units (a year-on-year fall of 20.7%). Of those, shipments to Japan and those to regions outside of Japan are projected to be 1.5 million units (a year-on-year decrease of 16.7%) and 5.4 million units (a year-on-year decline of 21.7%), respectively. Shipments of interchangeable lens digital cameras are projected to be 10.0 million units (a year-on-year fall of 7.4%). Of those, shipments to Japan and those to regions outside of Japan are projected to be 1.0 million units (a year-on-year fall of 9.1%) and 9.0 million units (a year-on-year decrease of 7.2%), respectively.

Shipments of interchangeable lenses are projected to fall 8.3% year on year to 16.5 million units. Of those, shipments to Japan and those to regions outside of Japan are projected to decline 14.3% year on year to 1.8 million units and 8.1% year on year to 14.7 million units, respectively.

As in 2018, decreased shipments of built-in lens digital cameras will significantly weigh on total shipments of digital cameras. In contrast, shipments of interchangeable lens digital cameras will stay above 90% of the level a year before. So will shipments of interchangeable lenses. Against shipments of interchangeable lens digital cameras (bodies), those of interchangeable lenses, the other main actor, are projected to be larger by a factor of 1.6 to 1.7.

Note: “Non-reflex”, a category used for our statistics till 2018, will be referred to as “mirrorless” from 2019.

The end

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Millions of units

Item	Total Shipments											
					Shipments to Japan				Shipments to countries other than Japan			
	Actual results for 2018	Year-on-year change	Forecast for 2019	Year-on-year change	Actual results for 2018	Year-on-year change	Forecast for 2019	Year-on-year change	Actual results for 2018	Year-on-year change	Forecast for 2019	Year-on-year change
Digital cameras (total)	19.4	77.8%	16.9	87.1%	2.8	80.8%	2.5	89.3%	16.6	77.3%	14.4	86.7%
Built-in lens cameras	8.7	65.1%	6.9	79.3%	1.8	77.5%	1.5	83.3%	6.9	62.5%	5.4	78.3%
Interchangeable lens cameras	10.8	92.2%	10.0	92.6%	1.1	87.0%	1.0	90.9%	9.7	92.8%	9.0	92.8%
Lenses for interchangeable lens cameras	18.0	93.8%	16.5	91.7%	2.1	88.1%	1.8	85.7%	16.0	94.6%	14.7	91.9%

Notes: Figures may not add up due to rounding.

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