

## **Pachinko Equipment Market in Japan: Key Research Findings 2017**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the domestic pachinko equipment market with the following conditions:**

1. Research period: From April to August, 2017
2. Research target items: Gaming machines including pachinko and pachi-slot, and peripheral equipment
3. Research target companies: Manufacturers of pachinko machines, pachi-slot machines, and peripheral equipment
4. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone/email, and literature research

#### **What is the Pachinko Equipment Market?**

The pachinko equipment market in this research indicates a collective term of the markets of pachinko machines, pachi-slot machines, and peripheral equipment. Note that the peripheral equipment market is a collective term of the markets of equipment and devices installed in parlors including hall computers, ball/token supply systems, and etc.

### ◆ **Key Findings**

#### ■ **Size of Pachinko Equipment Market in FY2016 Marked 1,001.4 Billion, 88.5% on Y-o-Y Basis**

The pachinko equipment market size (total market sizes of pachinko machines, pachi-slot machines, and peripheral equipment) in FY2016 ended up at 1,001.4 billion yen, 88.5% of that of the previous fiscal year, a decline by 129.9 billion yen, based on the sales of manufacturers.

#### ■ **Gaming Machine Market Size in FY2015 Marked 91% on Y-o-Y Basis, Being Less than 1 Trillion Yen for 2 Consecutive years**

The pachinko machine market, occupying 90% of the entire pachinko equipment market, have shrank for five fiscal years in a row since FY2012, based on the sales of manufacturers. The breakdown is as follows: The pachinko machine market size scaled down in FY2016 to 524.5 billion yen, 85.6% of the size of the previous fiscal year, whereas the pachi-slot machine market decreased to 357.6 billion yen, 96.7% of the size of the preceding fiscal year. Both of the machine markets have strongly affected by deteriorated sales performance at pachinko parlors which suppressed the eagerness to invest, and by decreasing number of newly opened parlors. Since the regulations stipulating the specification of gaming machines are planned to be revised in February 2018, predicament of the market environment in FY2017 is likely to worsen even further from that in FY2016.

■ **Peripheral Equipment Market in FY2016 Declined Significantly to 80.3% on Y-o-Y Basis**

The peripheral equipment market size in FY2016 has decreased substantially to 119.2 billion yen, based on the sales of manufacturers. Changes in the specification of gaming machines and other reasons have led to continuous deterioration of sale performance at pachinko parlors, preventing the number of new parlors from opening, which has led to decrease a chance of introducing peripheral equipment. According to the survey at Yano Research Institute, the number of new parlors opened in FY2016 was 171, largely declined from 221 parlors newly opened in FY2015. There seems to be no favorable factors to raise the number of new parlors in FY2017 and beyond.

◆ **Report format:**

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Price: 115,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ **Figure 1: Transition of Size of Pachinko Equipment Market**

Hundred Million Yen

	FY2012	FY2013	FY2014	FY2015	FY2016
<b>Pachinko Machines</b>	7,730	6,571	6,524	6,130	5,245
<b>Pachi-slot Machines</b>	4,300	4,774	4,274	3,697	3,576
<b>Peripheral Equipment</b>	1,743	1,752	1,535	1,485	1,192
<b>Entire Pachinko Equipment Market</b>	<b>13,772</b>	<b>13,097</b>	<b>12,333</b>	<b>11,313</b>	<b>10,014</b>

Estimated by Yano Research Institute

Notes:

1. The market size is based on the sales of manufacturers.