

Paddling has only recently become fashionable. No laws govern the use of canoes or kayaks because they have no engines. Canoes are used for picnic expeditions during the day; overnight camping is less popular since camp grounds are limited. At present, kayaks are mainly used for racing. However, industry experts believe sea kayaking will gain popularity.

Domestic kayak manufacturers have formed a "safety" association as a marketing ploy to neutralize foreign competition. For a fixed fee, the association inspects a kayak and, if approved, awards it a certification sticker. This sticker is mandatory for any kayak entered in a race. As racing results influence sales, such certification has been denied to some high-quality foreign boats to protect domestic boat sales.

### Who Paddles

Buyers of racing kayaks are mainly male, salaried office workers, 30 to 40 years old, with relatively little experience. They buy on the basis of price, image and fashion, rather than performance. Decisions are influenced most by experts, followed by product literature, then by trade magazines such as *Be Pal* and *Field and Stream*, by dealer advice, and finally by the opinion of friends. Buyers are concerned about sales outlet and repair services and most have taken courses at kayak schools.

Sea kayaks are bought by young, healthy, well-educated, high-income earners. Canoes, in contrast, appeal to families and sports fishermen.

**Canoes.** Traditional Canadian canoes are not very popular in Japan where rivers are short, fast and rocky and lakes are scarce. There is a large demand for folding canoes, especially polyurethane models which are convenient to store and transport. Approximately 80 per cent of all canoes sold are made of FRP. This represents a \$2 million market based on total retail sales of \$2.6 million in 1989.

**Kayaks.** In 1989, total kayak sales were estimated at \$5.8 million, of which \$3.5 million consisted of folding kayaks and of the remainder, \$1.5 million were polyurethane and \$800 000 were made of FRP. Polyurethane kayaks, 90 per cent of which are imported, sell well in the beginner and expert groups. In contrast, Japanese producers supply over 80 per cent of all FRP kayaks sold in Japan.

In 1989, total foreign kayak sales to Japan reached almost \$1.5 million, approximately one half the figure for all canoes sold in Japan during the same year. Foreign suppliers of polyurethane kayaks are expected to maintain a commanding market share as more gain experience and take up kayak racing.

### Who Sells What

Japanese manufacturers produce very popular, inexpensive, low-quality kayaks. Imported kayaks are more expensive, of better quality and offer superior performance, but do not sell as well.

Fujita Canoe, the oldest and best-known Japanese kayak manufacturer, makes FRP and folding kayaks. It controls 60 per cent of the market. The company advertises heavily and sponsors regattas, special events and promotional tours. In 1989, the folding kayak market had estimated sales of \$3.5 million. Of this amount, 2.1 million was attributed to Fujita, whose total sales were four times the amount of all foreign folding kayaks sold in Japan.

Table 1

Major Domestic Kayak Manufacturers

Company	Product	Price (C\$)
Fujita Canoe	Folding kayak	1 172
	FRP kayak	1 400
River Steel	Aluminum folding kayak	1 900
Soken	Kayak	1 255
Faltopia	Kayak	1 130
South Japan	Sea kayak	1 455

Most FRP kayaks and canoes are supplied by large international companies. Imported kayaks include Perception (U.S.), Chinook (U.S.), and Rettman (West Germany). FRP canoes are made by the large U.S. companies Coleman, Old Town and Mad River among others.