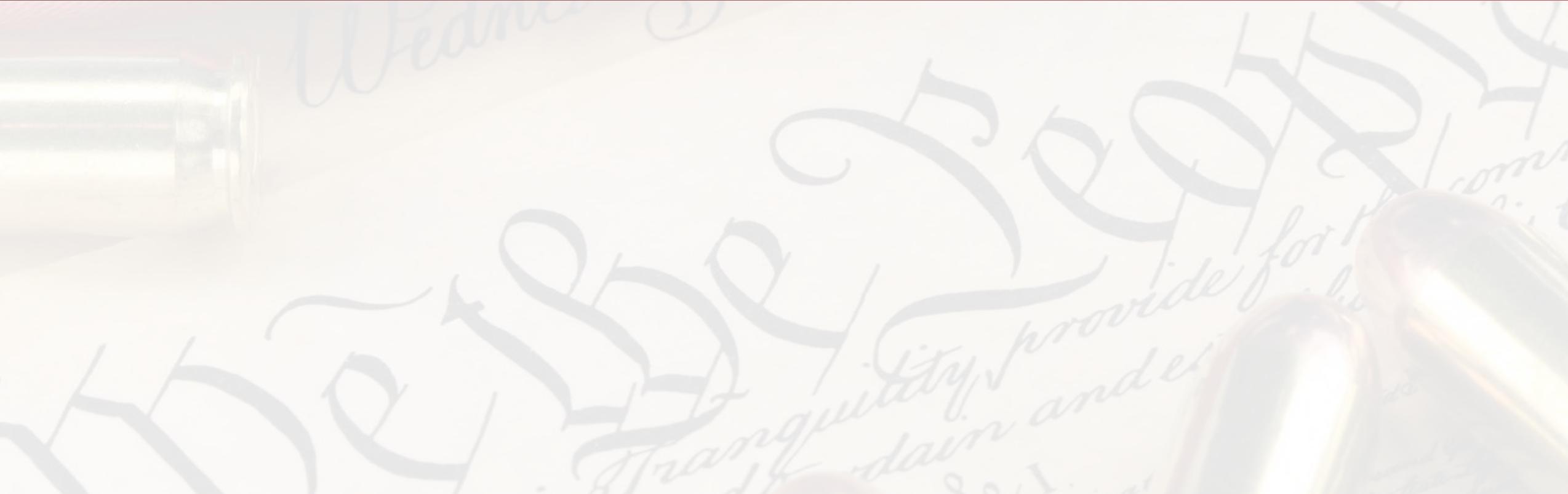


NASGW™

# SCOPE

2023 Q1  
QUARTERLY REPORT



### Analysis by Tom Hopper - NASGW Sr. Data Analyst

#### Which way is up? Understanding the Post-Pandemic Shooting Sports Market

As we look to 2023, data from NASGW distributors collected through SCOPE will help chart the path. The new year, 2023, has started a bit lower than the past several years. The market has changed, and everyone is trying to get a handle on it. We can use historical data to predict future performance. What early projections are available?

Before we dig in, note that I compared 2023 data to 2022. The last agreed upon "normal" pre-pandemic year was 2019, but that was 3 years ago. Time to look at more trended data. Keep in mind, the "surge" ended in 2022 but the early parts of the year were still influenced by the surge, so don't let Q1 2023 losses over 2022 rattle your cage.

The National Instant Criminal Background Checks System (NICS) supplies a baseline for Firearm sales performance and a key indicator for demand. Year to Date (YTD) NICS checks are -1% to LY but +22% to 2019. The new normal is approximately 20% over 2019 YTD and consistent to last year. Overall, demand is still strong.

#### Firearms:

Q1 Handgun shipments have declined year-over-year since 2021A. Currently, we are -28% to 2022 and -37% to 2021. Assortment breadth is improving but still limiting growth potential. Manufacturer inventories are recovering their full breadth of product offerings and caliber offerings. The market has grown with more shooters, broader gender dynamic, and concealed carry explosion. Retail outlets are coping with "pandemic hangover" assortments, created from availability rather than need.

Rifle shipments continue their positive shipment trajectory. The last several years have seen nominal YoY growth. Current WOS are at approximately 7.0 WOS across all SKUs. There are out-of-stock in key models. Bolt action rifles drive the largest percentage of rifle shipments. Hunters are getting back into the field. In addition, improved inventory availability has improved Lever Action gun shipments as well.

MSR shipments continue their decline. Shipments are off -53% to 2021 and -32% to 2022. Inventory WOS has been steadily declining Q4 2022 to date. Rolling 13 week (R13) average shipments have been slowly increasing through Q1 2023. Assortments are improving. Inventory flow is your friend.

Shotguns shipments were off Q1 2023 -20%. R13 average shipments have been flat through Q1 2023. Inventory WOS low moving into Q2 2023, currently under 10 weeks. Tactical pump guns are still volume drivers at a lesser degree (approx. 35% of mix). Do not tie up disproportionate amounts of inventory.

#### Ammunition:

Ammunition R13 average shipments have been declining all of 2022, but leveled off in Q1 2023. Inventory WOS are less than 10 weeks and positively affecting overall shipments. Top calibers, 9MM & .223 Rem/5.56 NATO, are readily available and the retail shelf is still recovering. It will take time to restore inventory to all calibers/pack sizes on the retail shelf. The customers are buying based on need vs. panic.

This is not a panic situation! Plan your needs and buy your plan. Stockpiling inventory in select calibers will limit sales opportunity to a broader customer base and limit assortment open to buy.

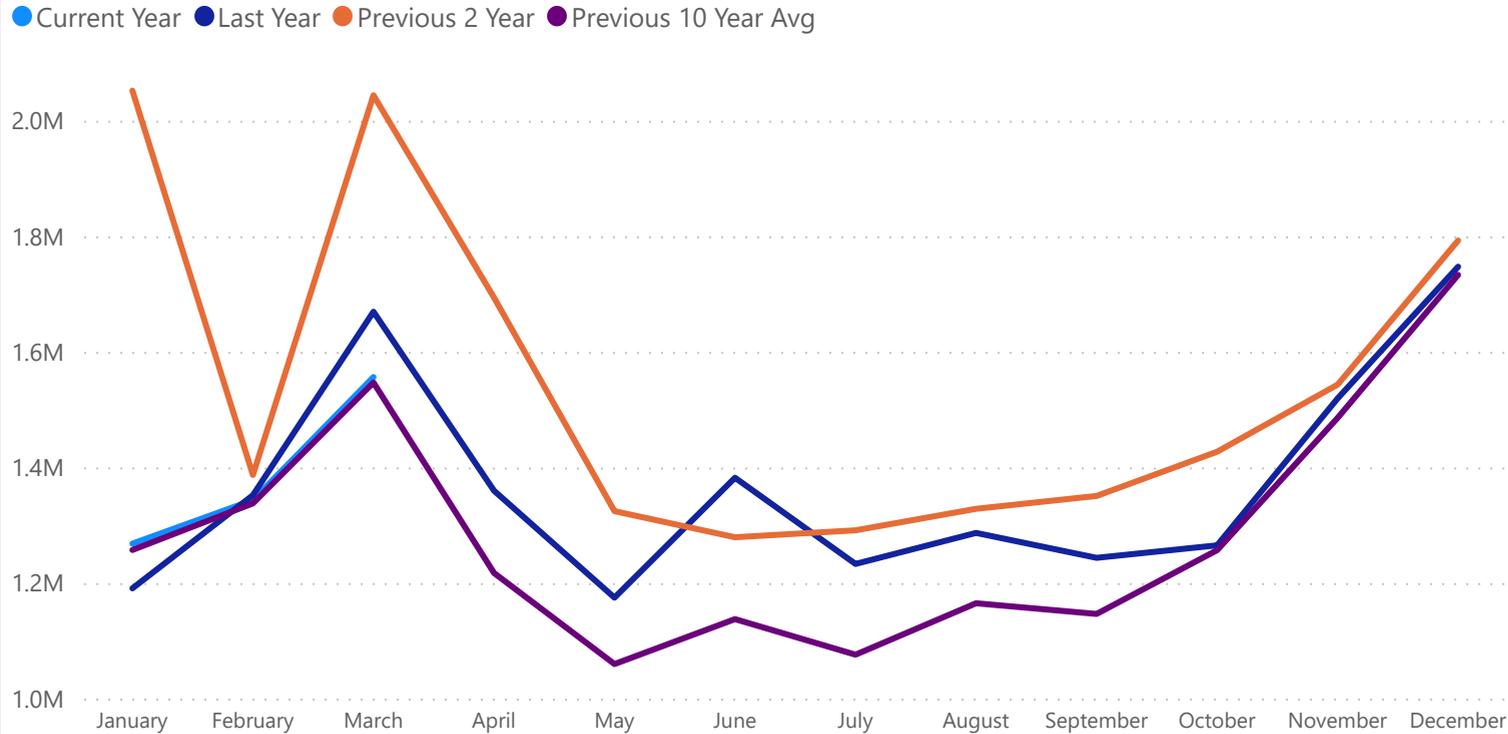
#### Optics:

Rifle scopes and reflex sights drive 70% of shipments. Rifle scopes R13 average shipments have been declining through Q1 2023 allowing Inventory WOS to increase to 16 weeks. Inventory WOS is at lowest point since Jan 2022. Plan conservatively, buy back often to stay productive. Reflex sights have found a consistent level of performance with R13 Average Shipments increasing through Q1 2023. In 2019, reflex sights were just gaining broader customer awareness. The "surge" brought them to a higher level of awareness. Reflex sights have settled at approximately 28% of Optics shipments. Inventory levels have been at a low point since January 2022. At just over 10 WOS, there are most likely outs in top sellers. Challenge pistol-rifle ratio and chase inventory.

Good luck out there and if there's anything I can do to be an extension of your team, please reach out at [thopper@nasgw.org](mailto:thopper@nasgw.org).

- Tom Hopper

## NICS CHECKS

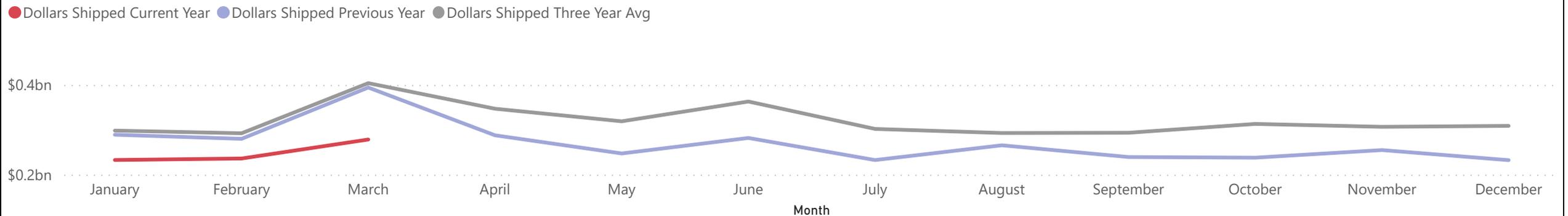


## TAKEAWAYS:

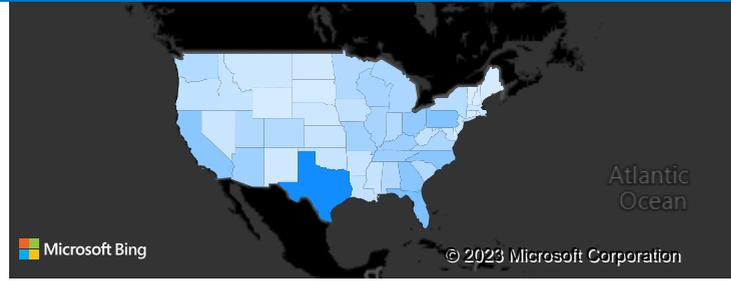
- NICS -1% to 2022 ; +22% to 2019
- YTD Shipments down -15.51% to 2022 and -19.65% to the 3 year average

YTD SALES	PREVIOUS YTD SALES	3 YEAR AVG YTD SALES
<b>756M</b>	<b>894M</b>	<b>940M</b>
% CHANGE FROM PREVIOUS YEAR	% CHANGE FROM 3 YEAR AVG	
<b>-15.51%</b>	<b>-19.65%</b>	

## FIREARMS SHIPMENT TREND



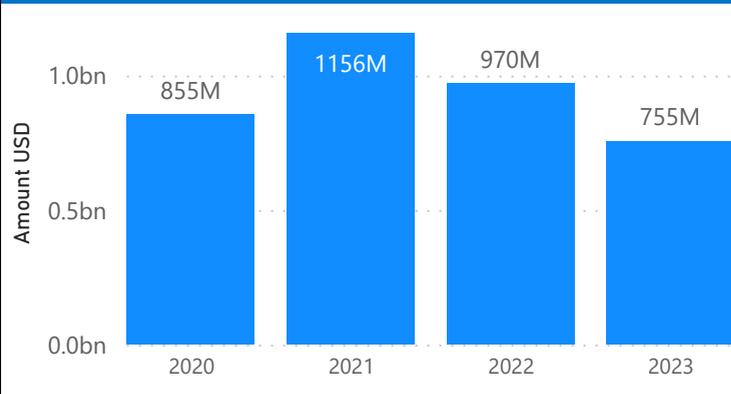
SHIPPED AMOUNT (USD) HEAT MAP



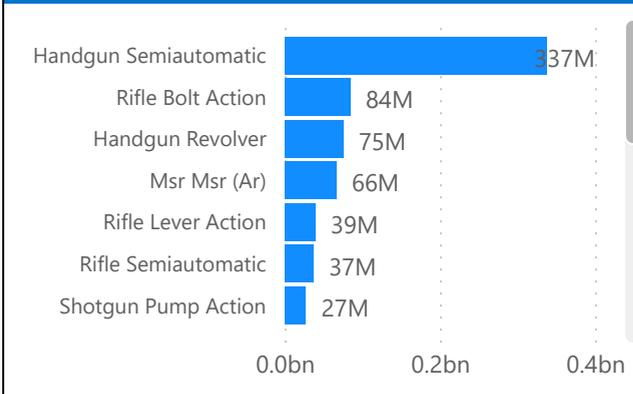
## TAKEAWAYS:

- - 22% to 2022
- Rifles continue to gain share of product mix
- 45% all firearms shipments are semi-automatic handguns
- 13-WK AVG Shipments leveling off Q1 2023
- Inventory WOS low at approximately 9 WOS
- Overall shipments spike at the end of Q1 2023

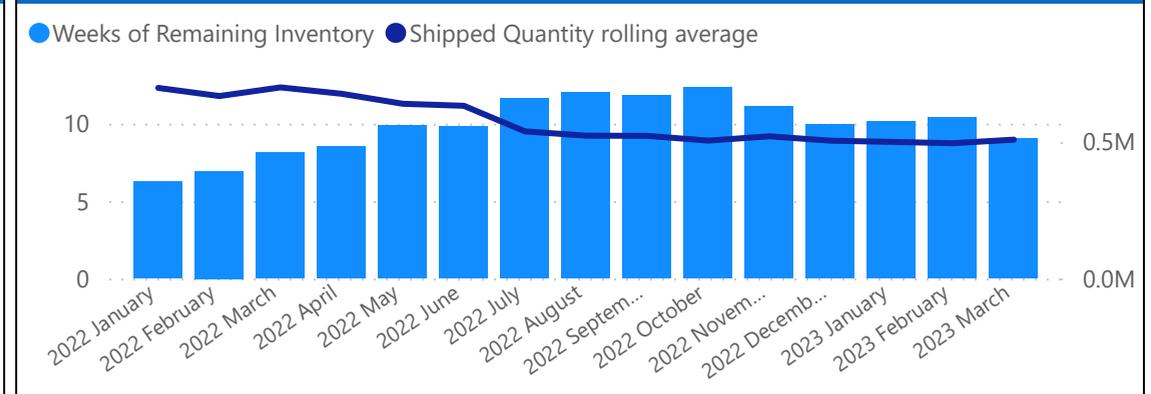
YOY ANALYSIS (USD)



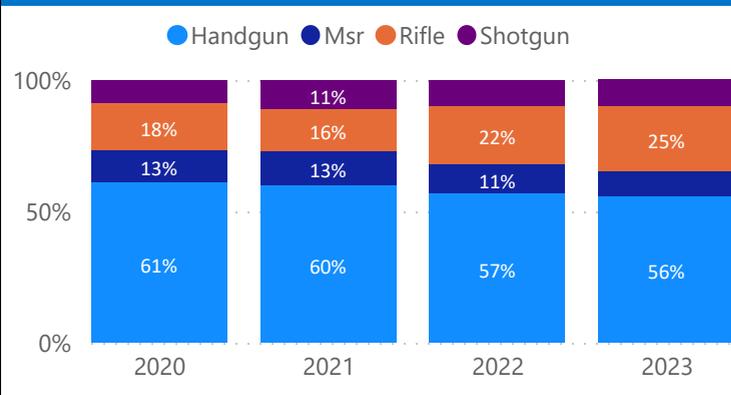
TOP 7 SUBCATEGORIES (USD)



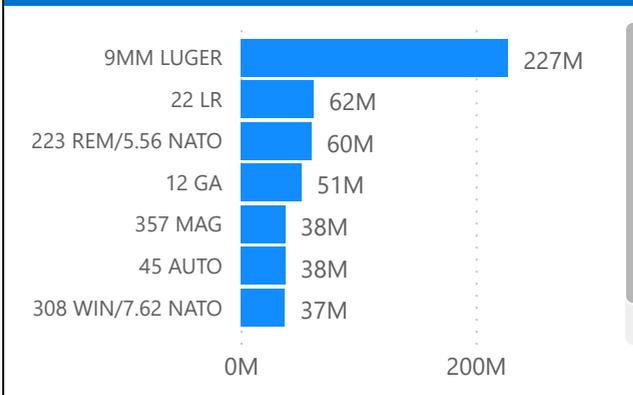
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



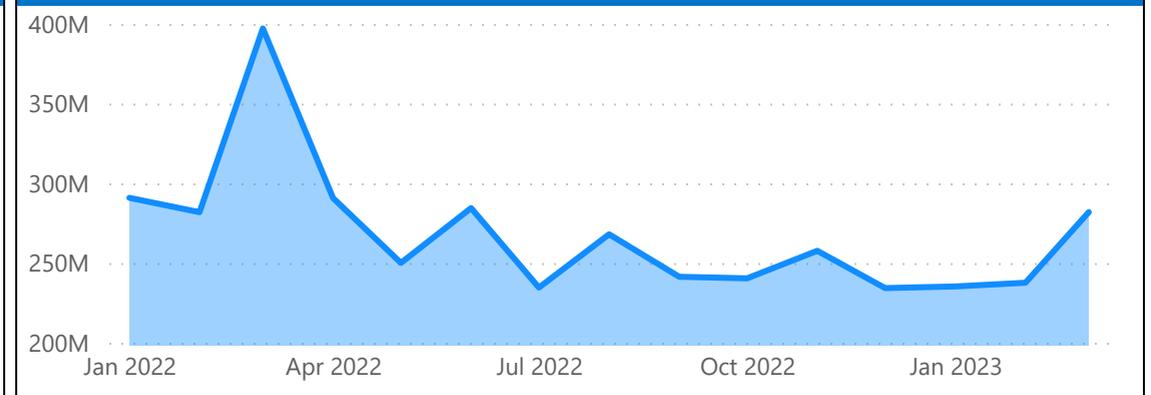
MARKET SHARE BY CATEGORY (USD)



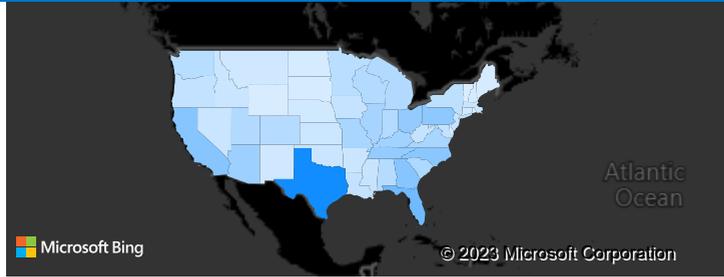
TOP 7 CALIBERS (USD)



SHIPMENTS OVER TIME (USD)



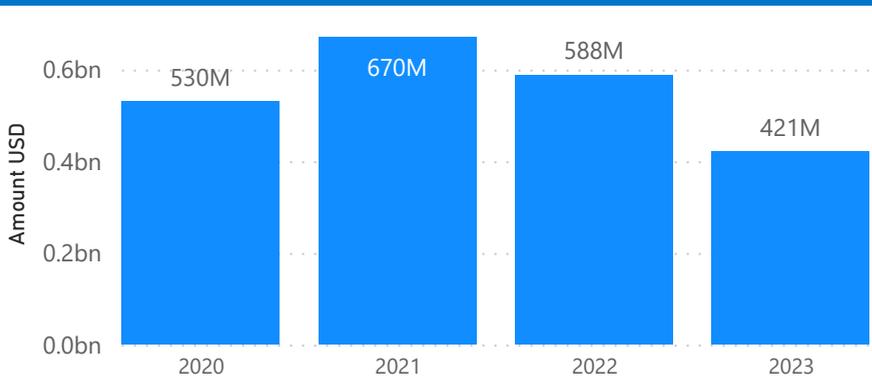
SHIPPED AMOUNT (USD) HEAT MAP



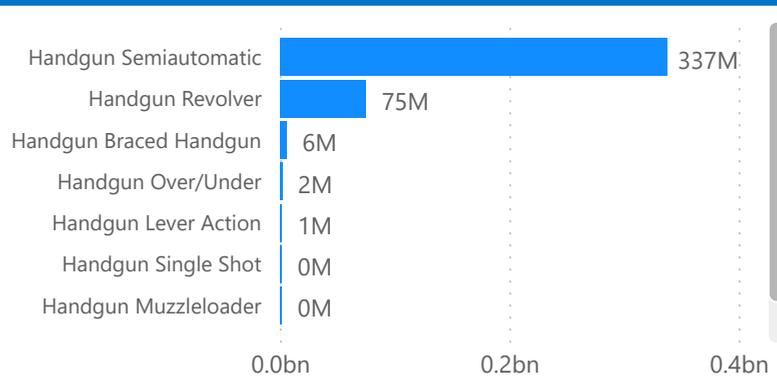
**TAKEAWAYS:**

- - 28% to 2022
- 80% all handgun shipments are semi-automatic
- 13-WK AVG Shipments shows slight lift Q1 2023
- Inventory WOS declining; low at approximately 9 WOS
- Overall shipments spike at the end of Q1 2023

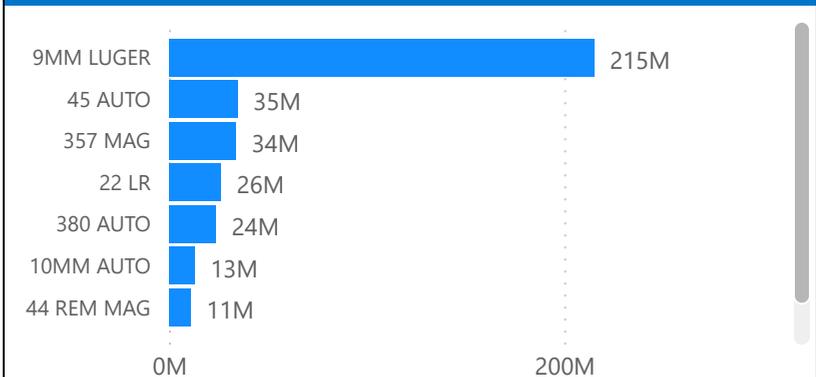
YOY ANALYSIS (USD)



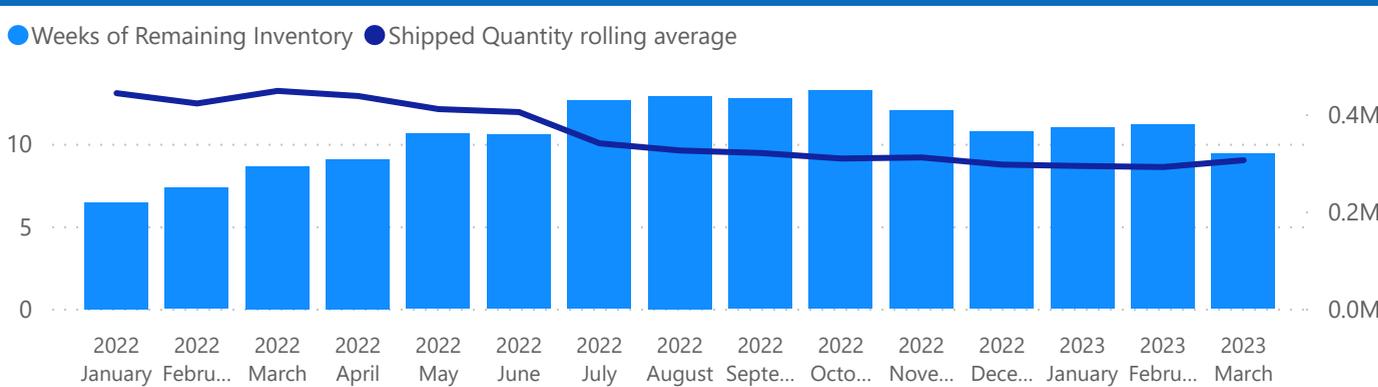
TOP 7 SUBCATEGORIES (USD)



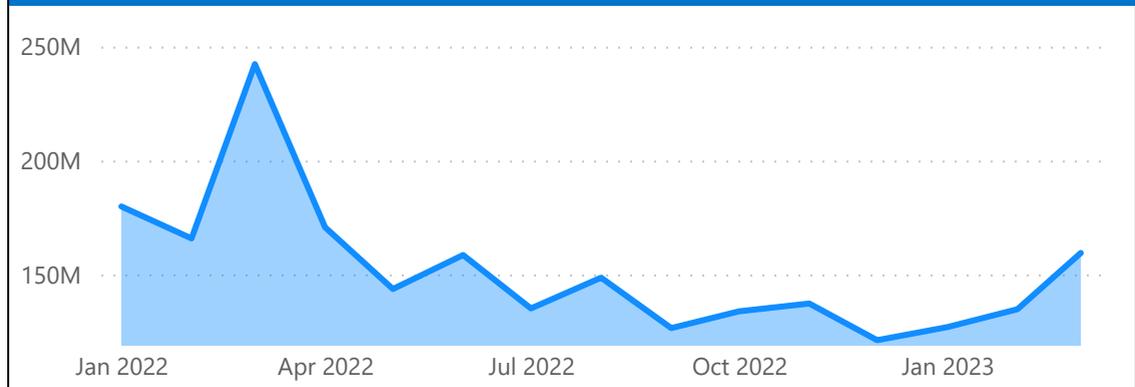
TOP 7 CALIBERS (USD)



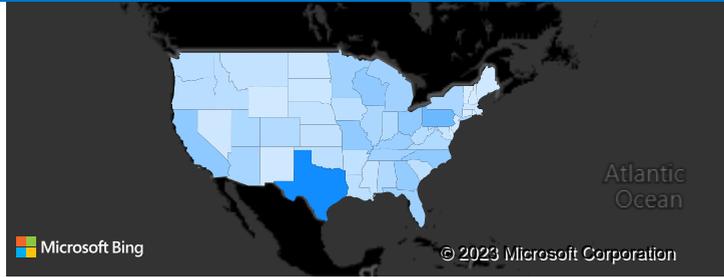
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



SHIPMENTS OVER TIME (USD)



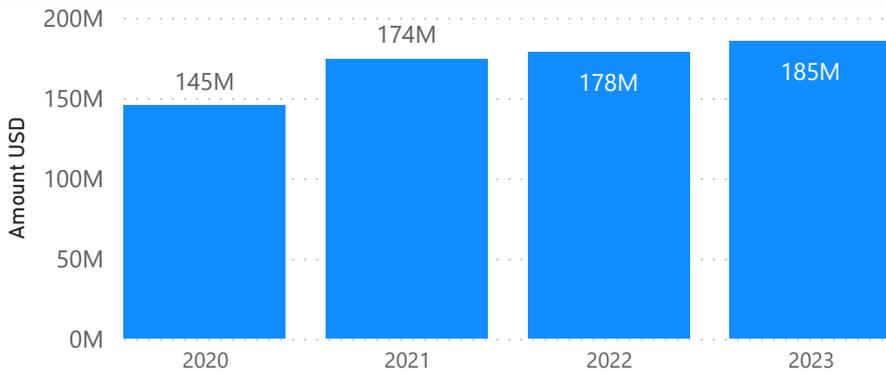
SHIPPED AMOUNT (USD) HEAT MAP



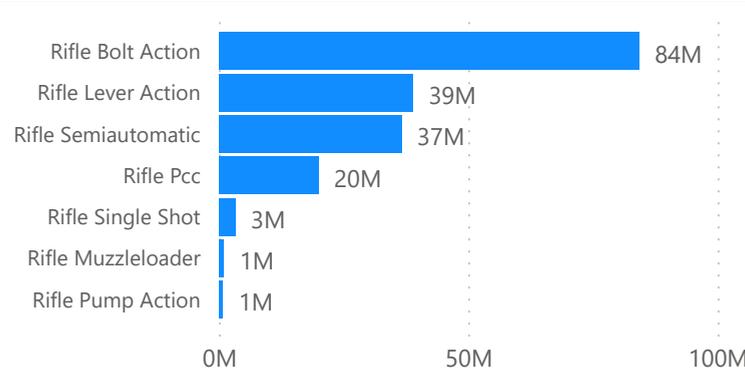
**TAKEAWAYS:**

- +4% to 2022
- Rifles were the strongest segment through the "Surge" and continue to grow
- 13-WK AVG Shipments declining late Q1 2023
- Inventory WOS low at approximately 7 WOS
- Overall shipments increasing through Q1 2023
- Bolt Action at 45% rifle mix, Lever Action at 21%, Semi-automatic at 20%

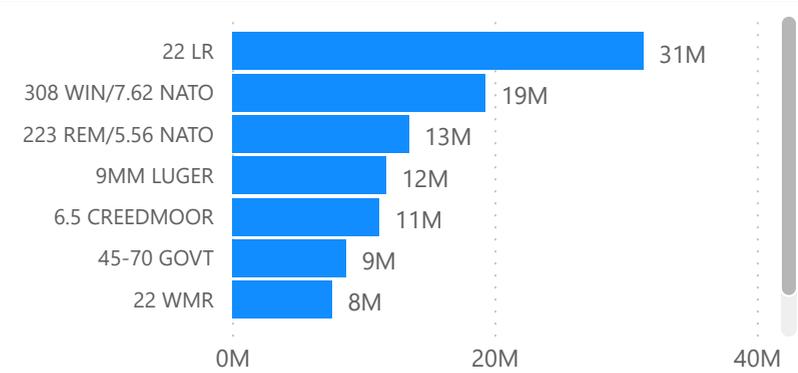
YOY ANALYSIS (USD)



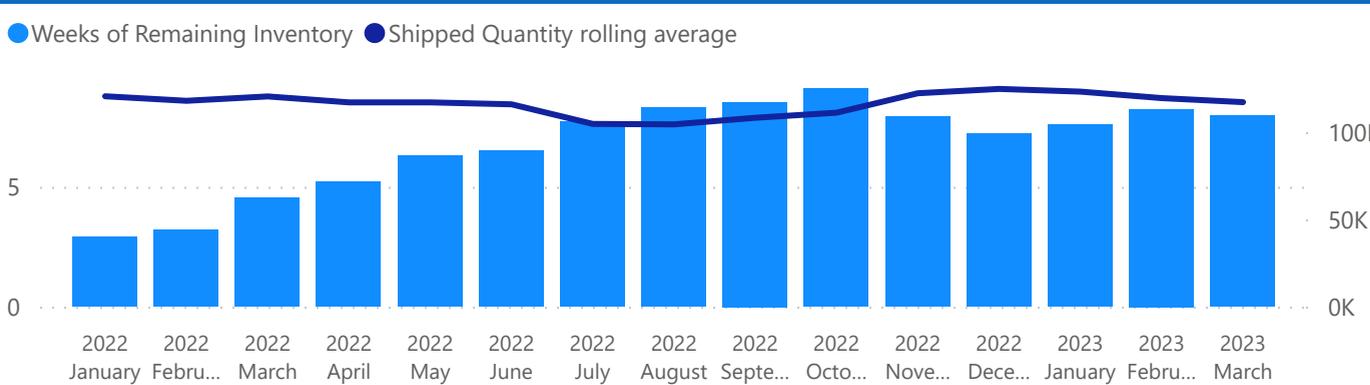
TOP 7 SUBCATEGORIES (USD)



TOP 7 CALIBERS (USD)



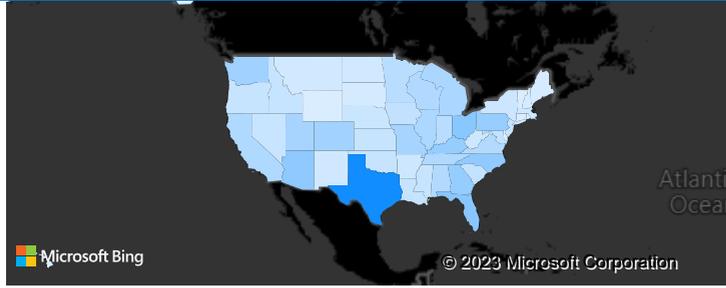
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



SHIPMENTS OVER TIME (USD)



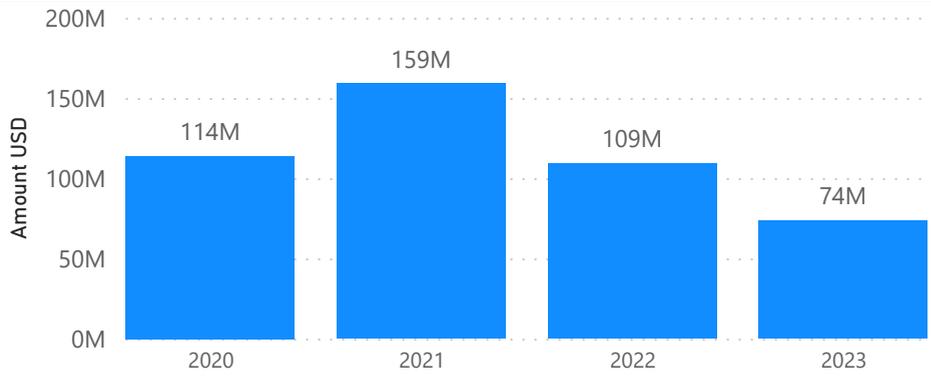
SHIPPED AMOUNT (USD) HEAT MAP



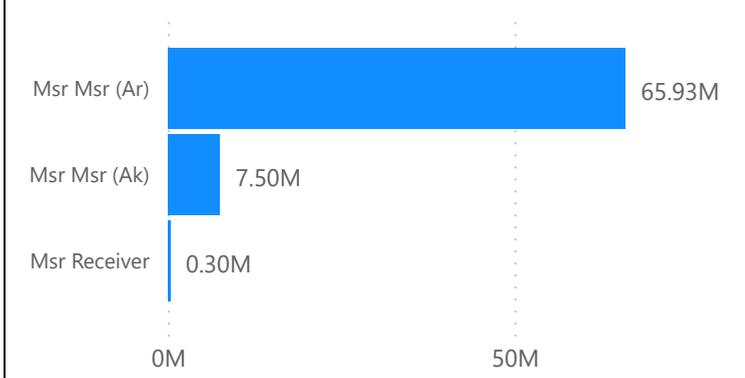
**TAKEAWAYS:**

- -32% to 2022
- 61% .223 REM/5.56 NATO
- 13-WK AVG Shipments show slight increase through Q1 2023
- Inventory WOS slowly declining through Q1 2023
  - Shipment increases forcing WOS down

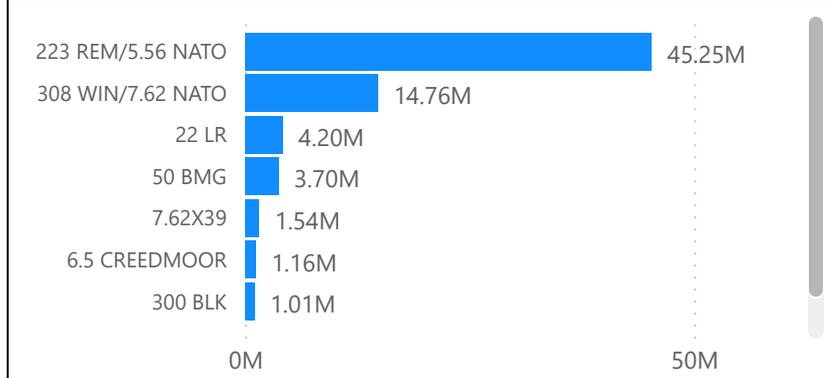
YOY ANALYSIS (USD)



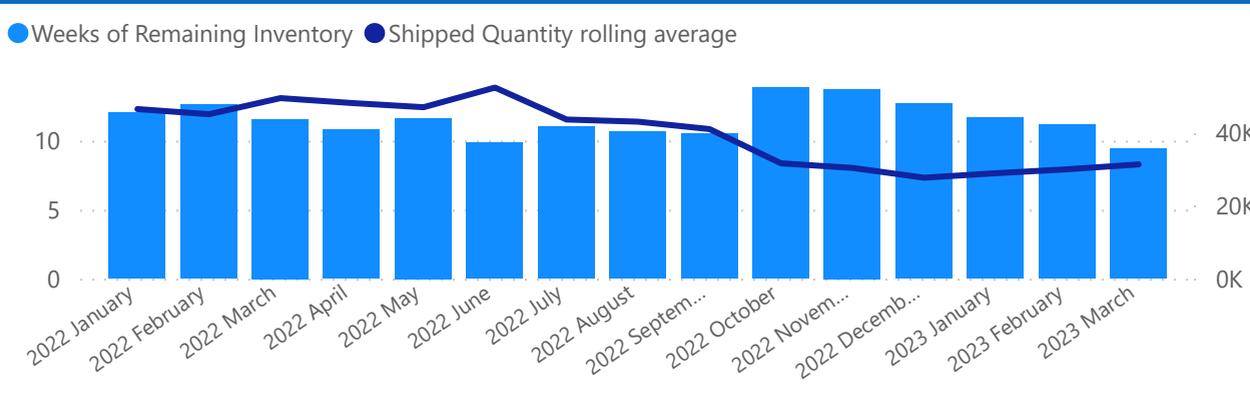
TOP SUBCATEGORIES (USD)



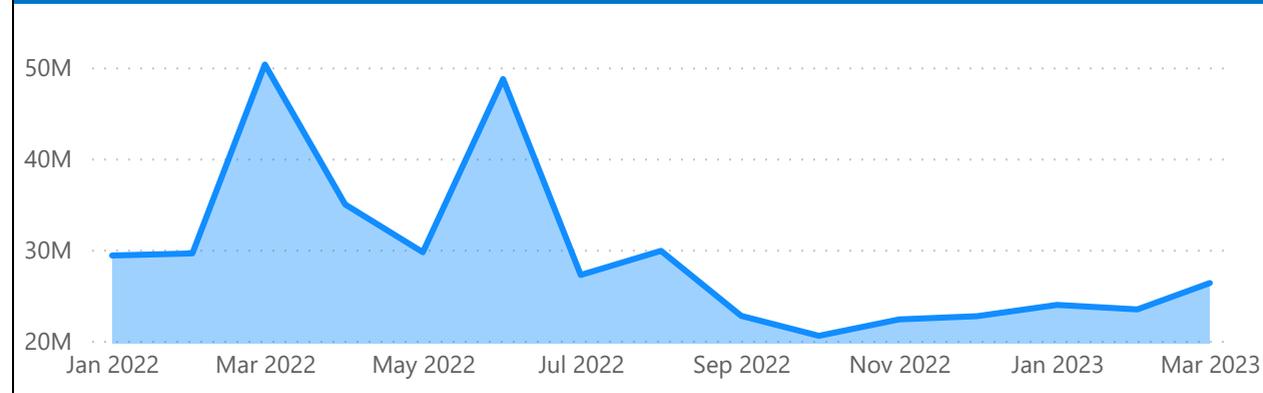
TOP 7 CALIBERS (USD)



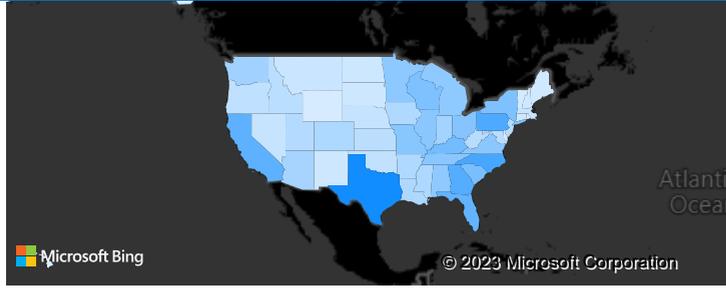
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



SHIPMENTS OVER TIME (USD)



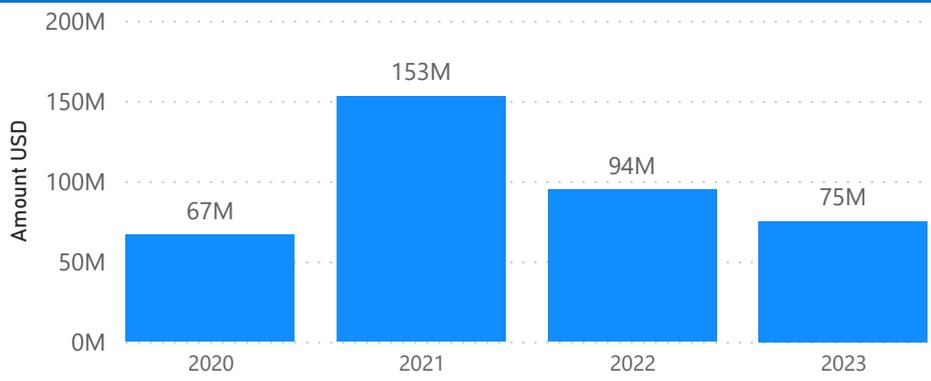
SHIPPED AMOUNT (USD) HEAT MAP



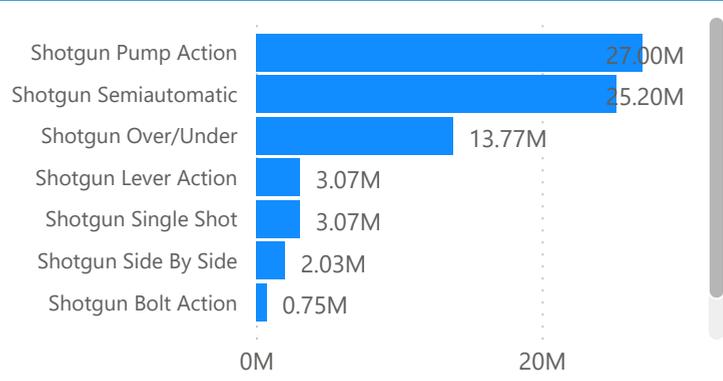
**TAKEAWAYS:**

- -20% to 2022
- 36% Pump Action, 33% Semi-automatic, 31% all other
- 68% 12 Ga., 18% 20 Ga
- 13-WK AVG Shipments flat Q1 2023
- Tactical shotgun shipments bottomed out and show nominal increase Q1 2023. Tactical shotguns 35% of shipments
- Inventory WOS low at 10 WOS

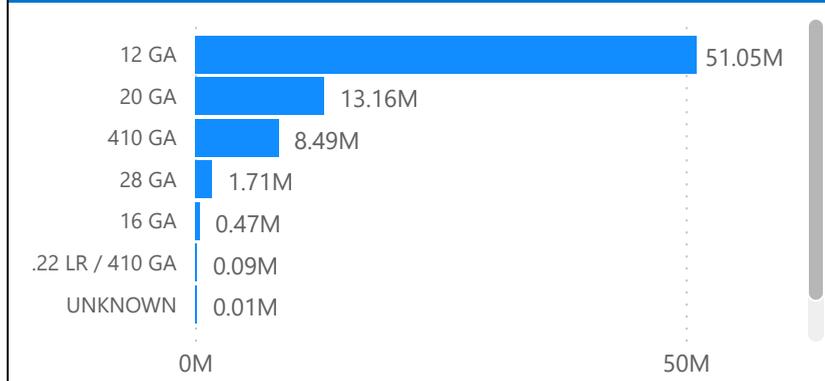
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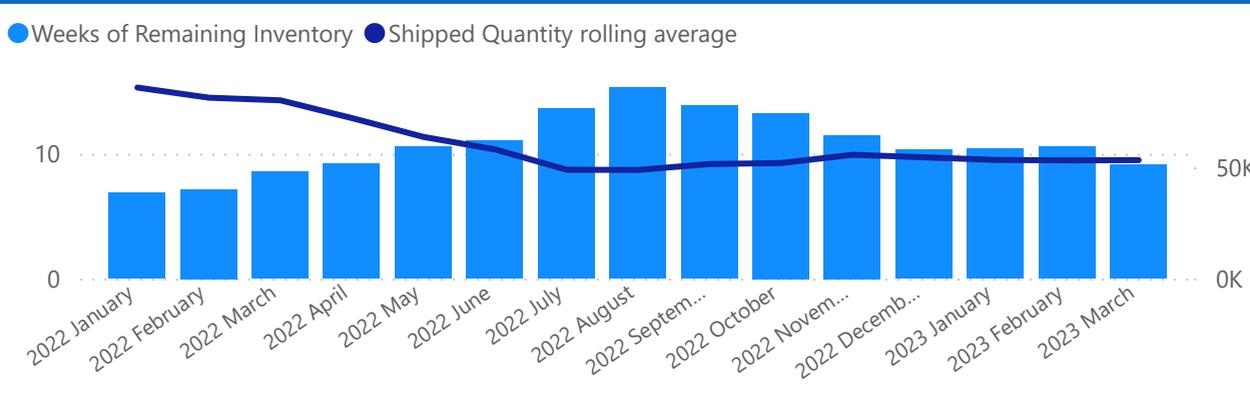
TOP SUBCATEGORIES (USD)



TOP 7 CALIBERS (USD)



WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



SHIPMENTS OVER TIME (USD)



2023 Q1 Handguns				
Rank	Brand	Subcategory	UPC	Description
1	Glock	SEMIAUTOMATIC	764503037894	PX4350201:GLOCK 43X 9MM FIXED 2-10RD BLACK PISTOL
2	Glock	SEMIAUTOMATIC	764503046629	PX4350201FRMOS:Glock G43X Semi Auto Pistol, 9MM, 3.41" BBL
3	Glock	SEMIAUTOMATIC	764503037252	PA195S203:Glock G19 Gen5 Semi Auto Pistol, 9MM, 4.02" BBL
4	Cz-Usa	REVOLVER	98289003270	PYTHON-SP6WTS:Python SP6WTS, 357Mag, 6" Bbl., SS
5	Glock	SEMIAUTOMATIC	764503030826	PA195S203MOS:Glock G19 Gen5 MOS Semi-Auto Pistol 9MM 4.02" BBL

Top 10 available in the Detailed SCOPE report.

2023 Q1 MSR				
Rank	Brand	Subcategory	UPC	Description
1	Radical Firearms Llc	MSR (AR)	816903022823	FR16-5.56SOC-15RPR:RAD AR15 556 16"/15" RPR 30RD BLK
2	Ruger	MSR (AR)	736676085149	Ruger AR-556 MPR 5.56 NATO AR-15 18" Barrel
3	Smith & Wesson	MSR (AR)	22188879643	12936:SWL M&P15SPTIIOR 12936 556 16 AS RED/GRN 30
4	Smith & Wesson	MSR (AR)	22188868104	10202:S&W M&P 15 Sport II 5.56 NATO 30+1Rd 16" BBL
5	Daniel Defense Inc	MSR (AR)	815604018456	02-128-02081-047:DDM4 V7 5.56 16"
6	Ruger	MSR (AR)	736676085002	Ruger AR-556 5.56 NATO AR-15 Rifle

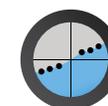
Top 10 available in the Detailed SCOPE report.

2023 Q1 Rifle				
Rank	Brand	Subcategory	UPC	Description
1	Henry Repeating Arms	LEVER ACTION	619835006004	Henry Golden Boy Lever Action Rifle .22 LR 20" Octagonal Barrel
2	Marlin Firearms Company	LEVER ACTION	736676704507	70450:MARLIN 1895 TRAPPER, 45-70 GOVT, 16.10" S/S,LAMINATE
3	Ruger	SEMIAUTOMATIC	736676011032	Ruger 10/22 22 LR Semi Auto Rifle 18.5" Barrel 10 Rounds
4	Ruger	PCC	736676193004	Ruger 19300 LC Semi-Auto Rifle, 5.7x28MM, 16.25" Bbl
5	Marlin Firearms Company	LEVER ACTION	736676704781	70478:MAR 1895SBL 45-70 18.5"SS LAM PISTOL GRIP

Top 10 available in the Detailed SCOPE report.

2023 Q1 Shotgun				
Rank	Brand	Subcategory	UPC	Description
1	Keltec	PUMP ACTION	640832003192	KSGBLK:*KELTEC 12GA PUMP BLACK
2	Keltec	PUMP ACTION	640832007787	KS7BLK:KEL-TEC KS7 12GA, 18.5" BLACK 6+1 RND W/ 3" SHELLS
3	Henry Repeating Arms	LEVER ACTION	619835500076	H018BAH-410:LEVER ACTION AXE 410/15 BRASS
4	Henry Repeating Arms	LEVER ACTION	619835500069	H018G-410R:HENRY SHOTGUN SIDE GATE .410 2.5" 19.75" CYL BORE
5	Henry Repeating Arms	LEVER ACTION	619835500045	H018X-410:HENRY LEVER ACTION 410GAX MODEL SHOTGUN

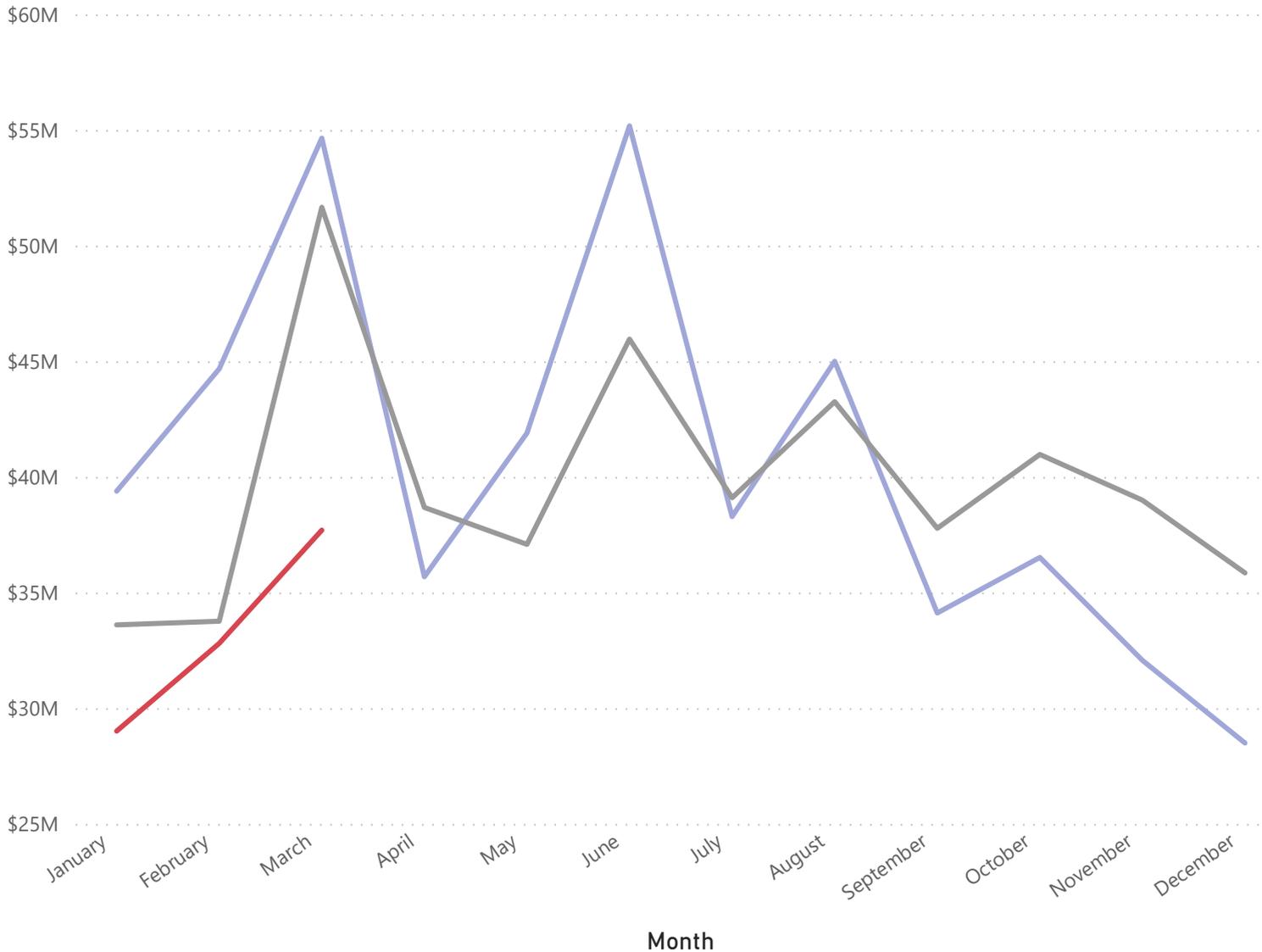
Top 10 available in the Detailed SCOPE report.



**Want the Top 10? Get it in the Detailed Version.**

**AMMUNITION SHIPMENT TREND**

● Dollars Shipped Current Year ● Dollars Shipped Previous Year ● Dollars Shipped Three Year Avg



**TAKEAWAYS:**

- Q1 2023 shipments show historic seasonal trend of Q1
- -20.9% to 2022 and -8.6% to 3 year average

YTD SALES

**104M**

PREVIOUS YTD SALES

**131M**

3 YEAR AVG YTD SALES

**113M**

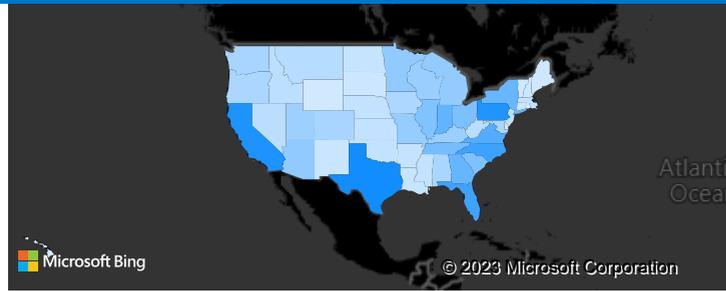
% CHANGE FROM PREVIOUS YEAR

**-20.90%**

% CHANGE FROM 3 YEAR AVG

**-8.62%**

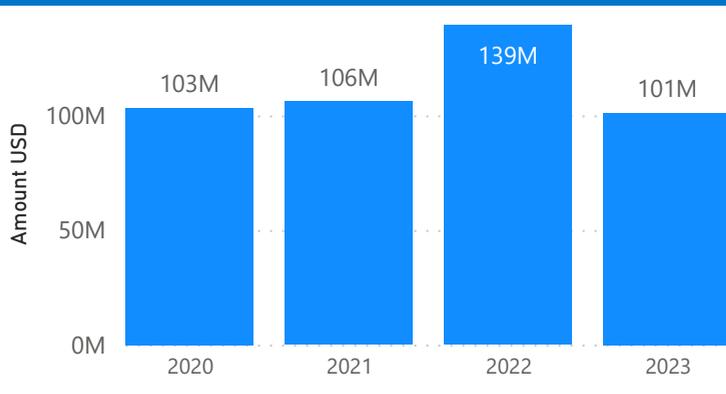
SHIPPED AMOUNT (USD) HEAT MAP



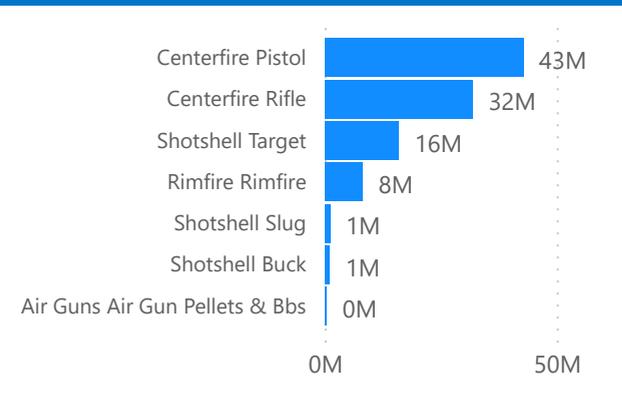
**TAKEAWAYS:**

- -27% to 2022
- Shot shell shows larger share of shipments
- 22% 9MM, 13% .223 Rem/5.56 NATO
- 13-WK AVG Shipments show steady nominal increase through Q1 2023
- Inventory weeks of supply declining but less than 10 WOS
- Inventory outs likely due to low WOS

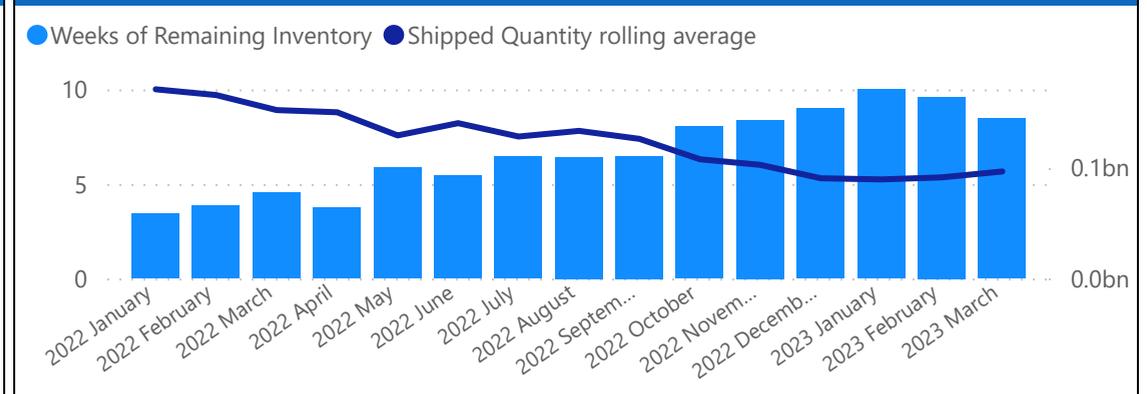
YOY ANALYSIS (USD)



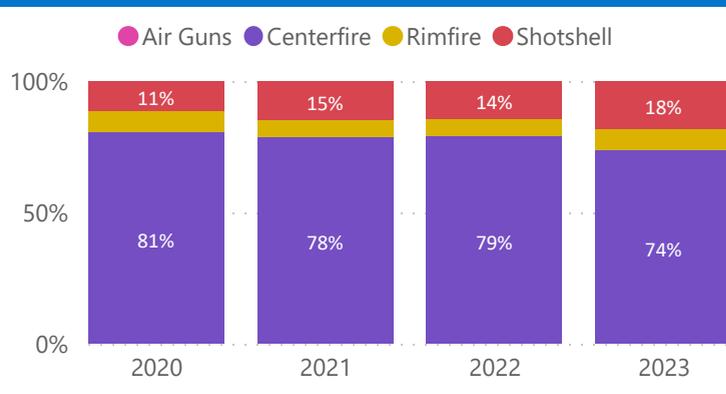
TOP 6 SUBCATEGORIES (USD)



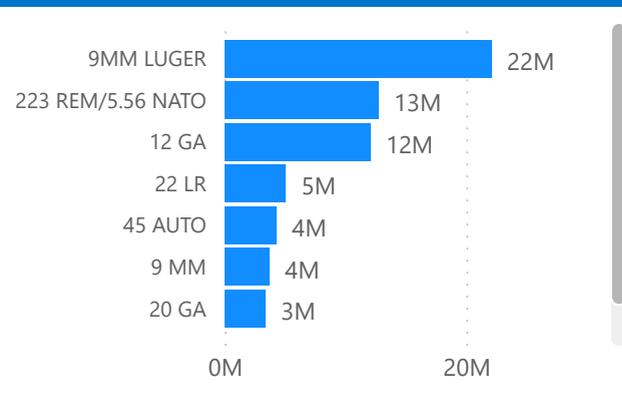
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



MARKET SHARE BY CATEGORY (USD)



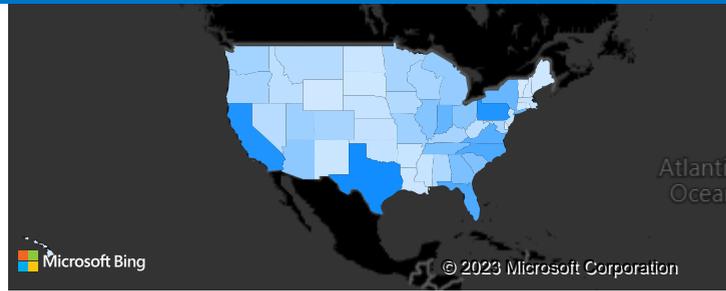
TOP 7 CALIBERS (USD)



SHIPMENTS OVER TIME (USD)



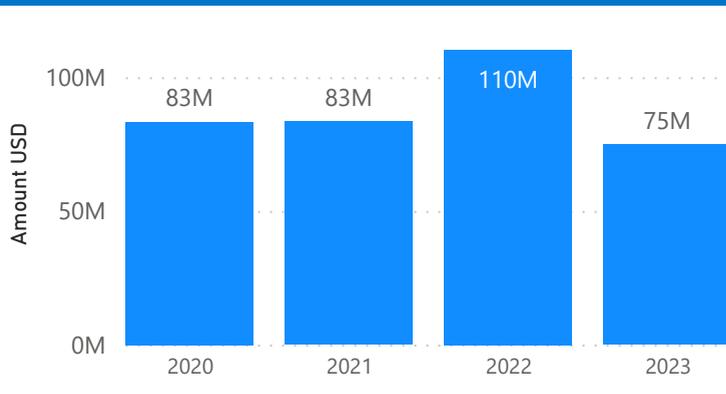
SHIPPED AMOUNT (USD) HEAT MAP



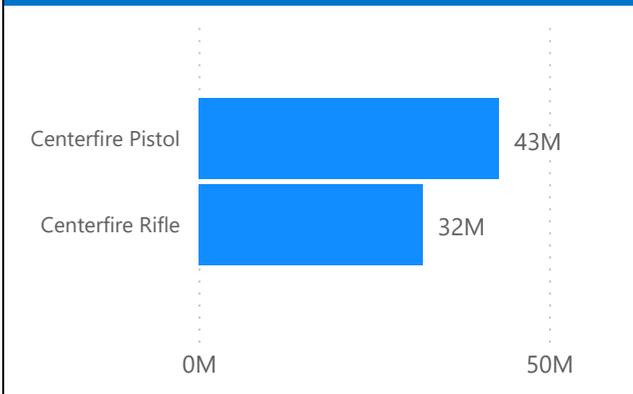
**TAKEAWAYS:**

- -32% to 2022
- Pistol share of centerfire ammunition high compared to history
- 29% 9MM, 17% .223 Rem/5.56 NATO
- 13-WK AVG Shipments flat through Q1 2023
- Overall shipments increasing into Q2 2023

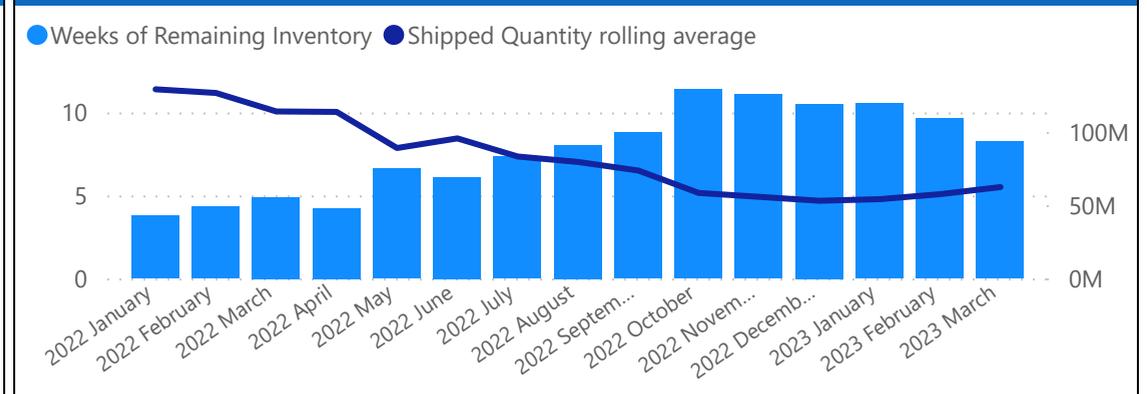
YOY ANALYSIS (USD)



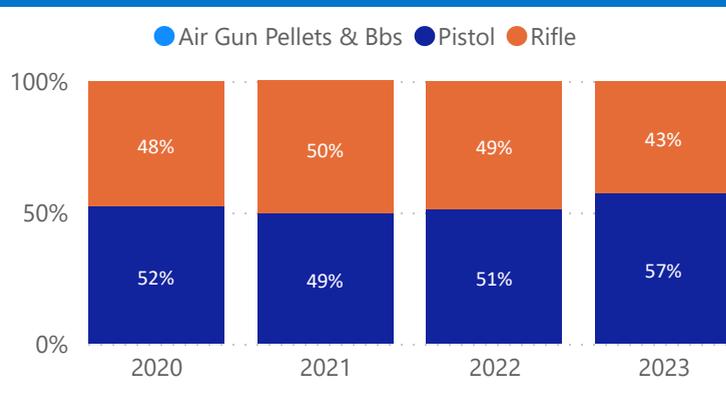
TOP 6 SUBCATEGORIES (USD)



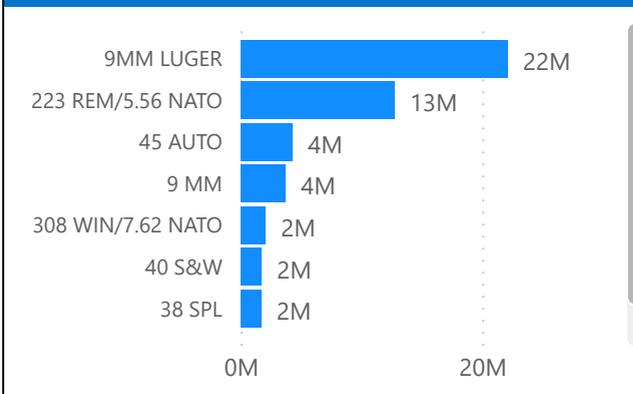
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



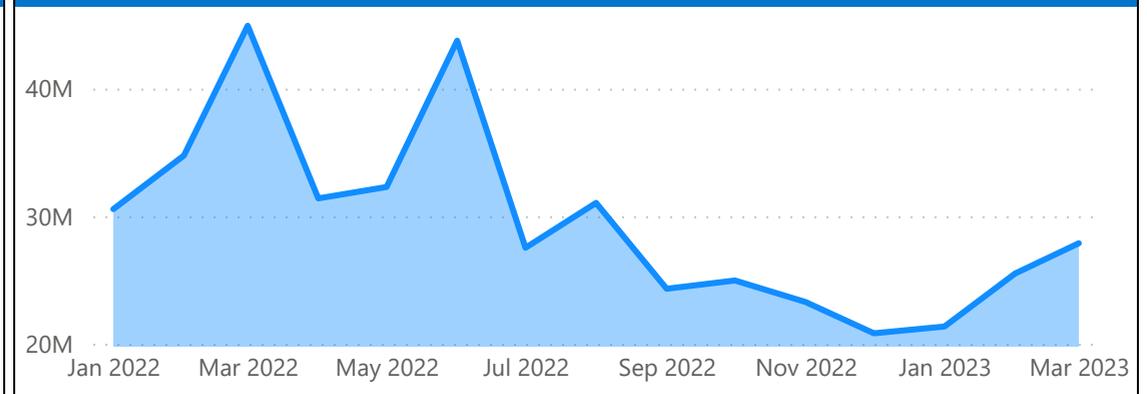
MARKET SHARE BY CATEGORY (USD)



TOP 7 CALIBERS (USD)



SHIPMENTS OVER TIME (USD)



<b>2023 Q1 Centerfire Pistol</b>				
<b>Rank</b>	<b>Manufacturer</b>	<b>Subcategory</b>	<b>UPC</b>	<b>Description</b>
1	Fiocchi Ammunition	PISTOL	762344001623	FIOCCHI AMMO 9MM LUGER 115GR FMJ
2	Vista Outdoors	PISTOL	76683052001	5200:9MM 115GR FMJ BLAZER BRASS
3	Vista Outdoors	PISTOL	76683052018	5201:9MM 124GR FMJ BLAZER - BRASS
4	Magtech Ammunition	PISTOL	754908114016	MAGTECH AMMO 9MM LUGER 115 GRAIN FMJ
5	Vista Outdoors	PISTOL	604544647167	5250BK1000:9MM LUGER 115GR FMJ BRASS INDEPENDENCE BULK

Top 10 available in the Detailed SCOPE report.

<b>2023 Q1 Centerfire Rifle</b>				
<b>Rank</b>	<b>Manufacturer</b>	<b>Subcategory</b>	<b>UPC</b>	<b>Description</b>
1	Pmc Ammunition Inc	RIFLE	741569060080	PMC AMMO .223 REM., 55 GR. FMJ-BT
2	Pmc Ammunition Inc	RIFLE	741569010122	PMC AMMO 5.56 NATO 62 GR. FMJ BT LAP
3	Pmc Ammunition Inc	RIFLE	741569010115	PMC AMMO 5.56 NATO 55 GR. FMJ BT
4	Winchester Ammunition	RIFLE	20892201880	Q3131K:WIN 5.56 55 GR FMJ 20/BX 50/CS
5	Vista Outdoors	RIFLE	50004544671882	FEDERAL .223 REM 55GR FMJ-BT AMMO 1000RD BULK

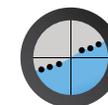
Top 10 available in the Detailed SCOPE report.

2023 Q1 Rimfire				
Rank	Manufacturer	Subcategory	UPC	Description
1	Eley Americas	RIMFIRE	650911011000	ELEY MATCH, FLAT NOSE, 40GR, 22LR,
2	Hornady Mfg Co	RIMFIRE	90255832020	83202:AMMO 22 WMR 30 GR V-MAX®
3	Vista Outdoors	RIMFIRE	47700415208	REM AMMO 22LR 36GR 1400 RDS
4	Vista Outdoors	RIMFIRE	76683000248	24:22 WMR HP MAXI MAG AMMO
5	Vista Outdoors	RIMFIRE	29465057350	AM22:22 LR 40GR SOLID AUTOMATCH

Top 10 available in the Detailed SCOPE report.

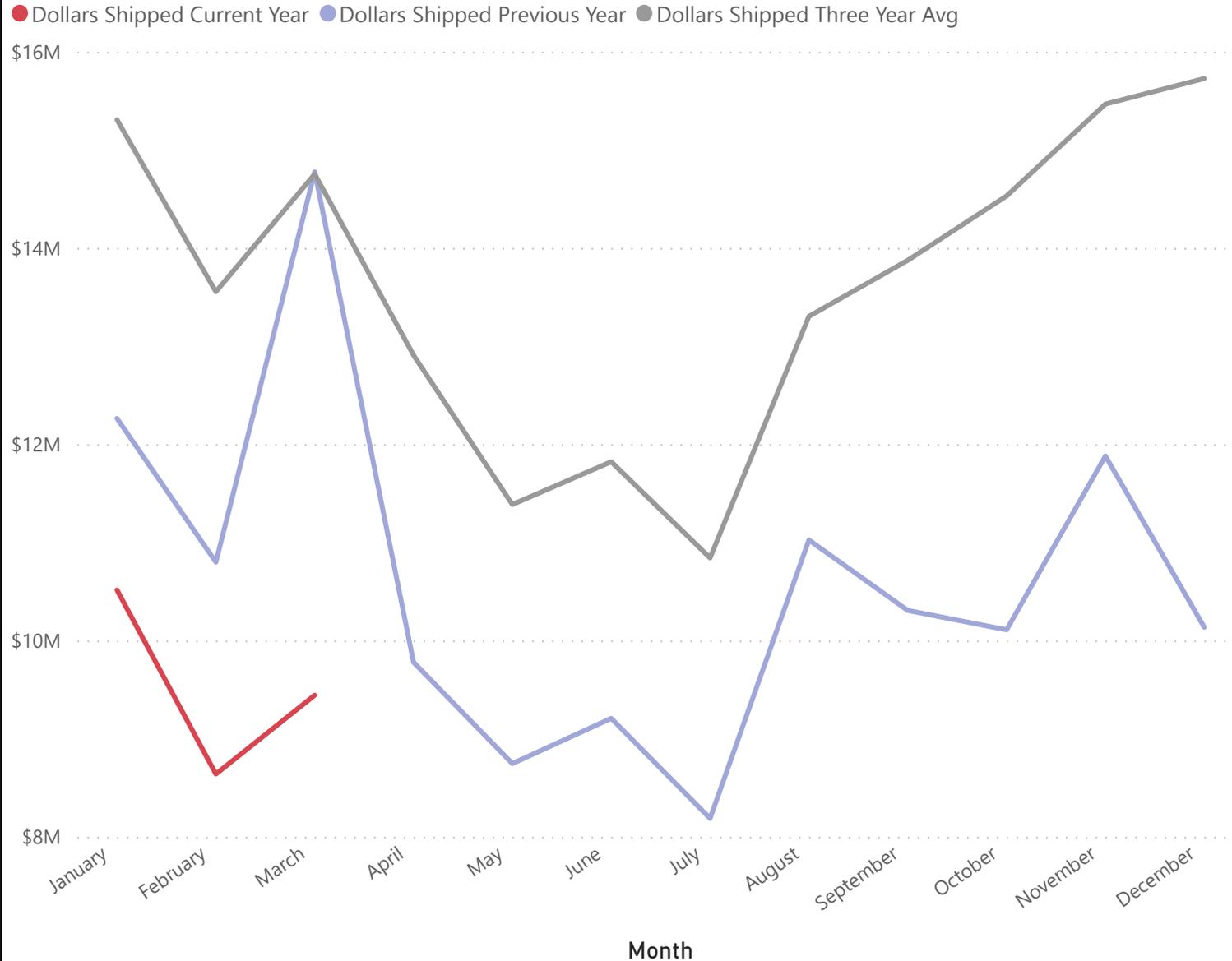
2023 Q1 Shotgun				
Rank	Manufacturer	Subcategory	UPC	Description
1	Vista Outdoors	TARGET	29465019365	TG12 7.5:12 GA TARGET LOAD
2	Vista Outdoors	TARGET	29465019372	TG12 8:12 GA TARGET LOAD
3	Winchester Ammunition	TARGET	20892013254	XU127:WIN 12GA 2.75" 1290fps 1oz 7
4	Vista Outdoors	TARGET	604544637953	PTSS419F 9:SS 410 3 INCH FEDERAL HWT TSS 13/16 OZ 9
5	Vista Outdoors	TARGET	604544256574	SS20 7.5:2 1/2 7/8 7 1/2

Top 10 available in the Detailed SCOPE report.



Want the Top 10? Get it in the Detailed Version.

**OPTICS SHIPMENT TREND**



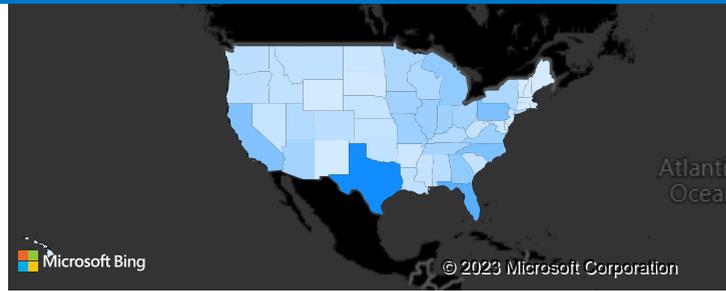
**TAKEAWAYS:**

- Trend following Q1 from 3 year average
- YTD shipments down -15.9% to last year and -30% to 3 year average
- Optics shipments continue their decline

YTD SALES	PREVIOUS YTD SALES	3 YEAR AVG YTD SALES
<b>29M</b>	<b>34M</b>	<b>41M</b>

% CHANGE FROM PREVIOUS YEAR	% CHANGE FROM 3 YEAR AVG
<b>-15.88%</b>	<b>-29.97%</b>

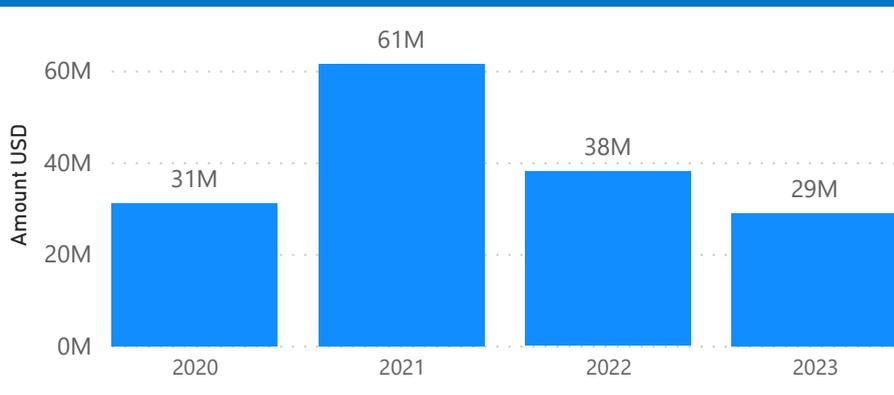
SHIPPED AMOUNT (USD) HEAT MAP



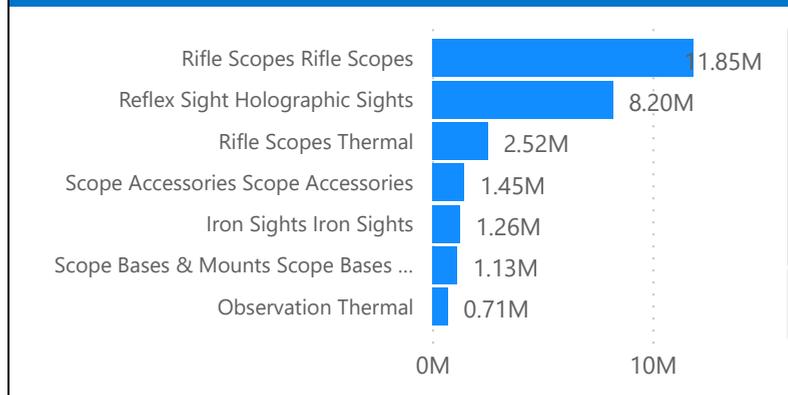
**TAKEAWAYS:**

- -24% to 2022
- 41% Rifle Scopes, 28% Reflex Sights
- 13-WK AVG Shipments steady decline through Q1 2023
- Approximately 16 Inventory WOS
- Overall shipments declining in Q1

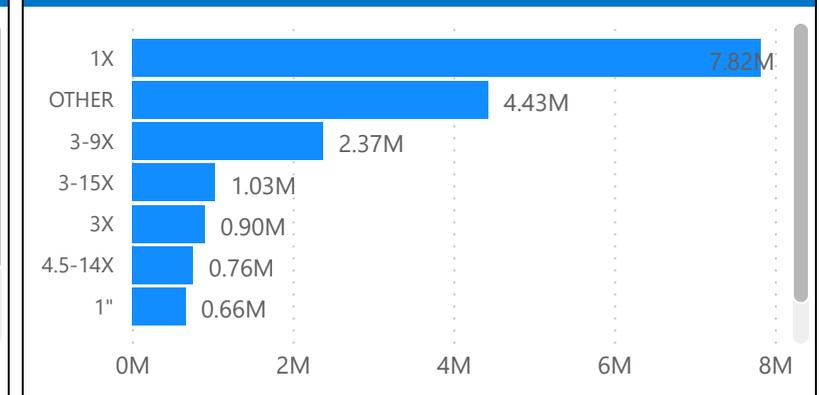
YOY ANALYSIS (USD)



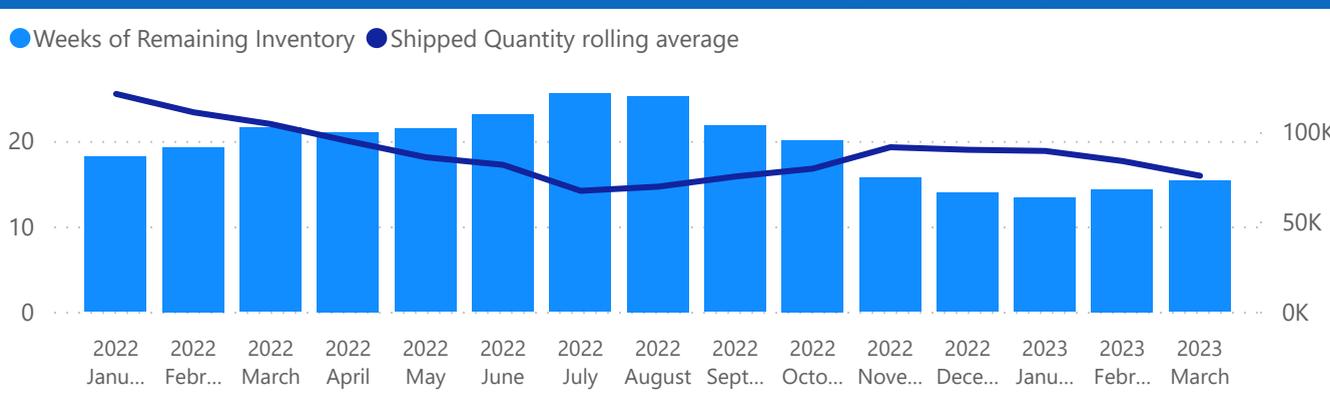
TOP 7 SUBCATEGORIES (USD)



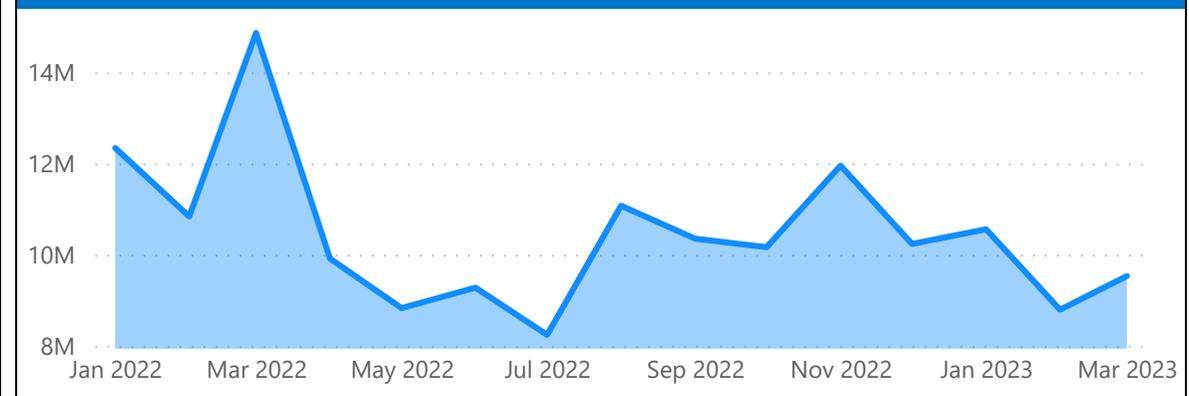
TOP 7 SIZINGS (USD)



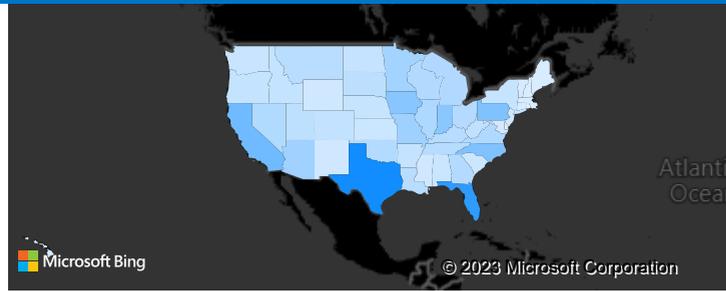
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



SHIPMENTS OVER TIME (USD)



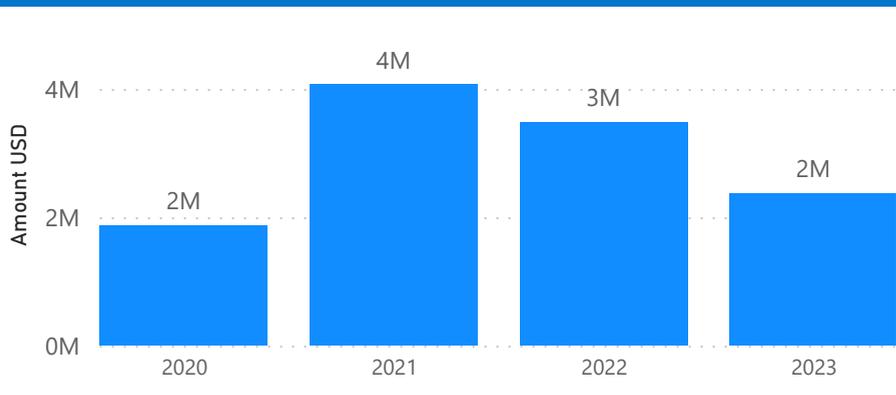
SHIPPED AMOUNT (USD) HEAT MAP



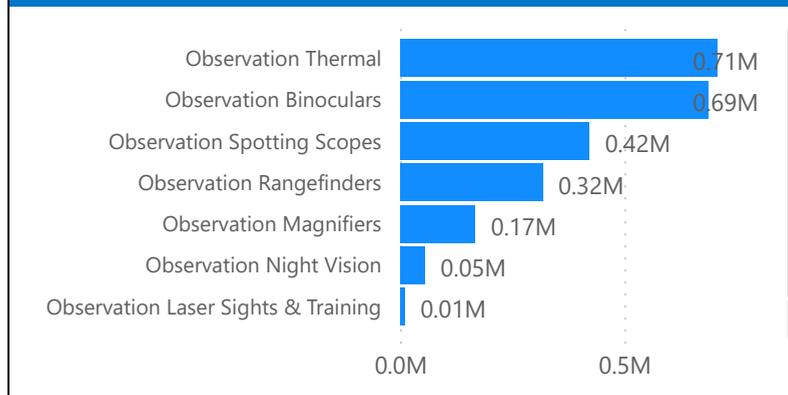
**TAKEAWAYS:**

- -33% to 2022
- 36% Thermal, 21% Binoculars
- 13-WK AVG Shipments slow decline through Q1
- Inventory Weeks of Supply building through Q1
- Overall shipments increasing into Q2 2023

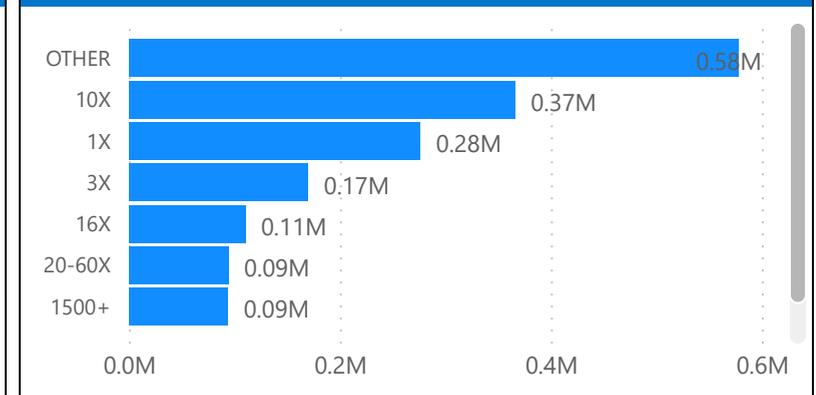
YOY ANALYSIS (USD)



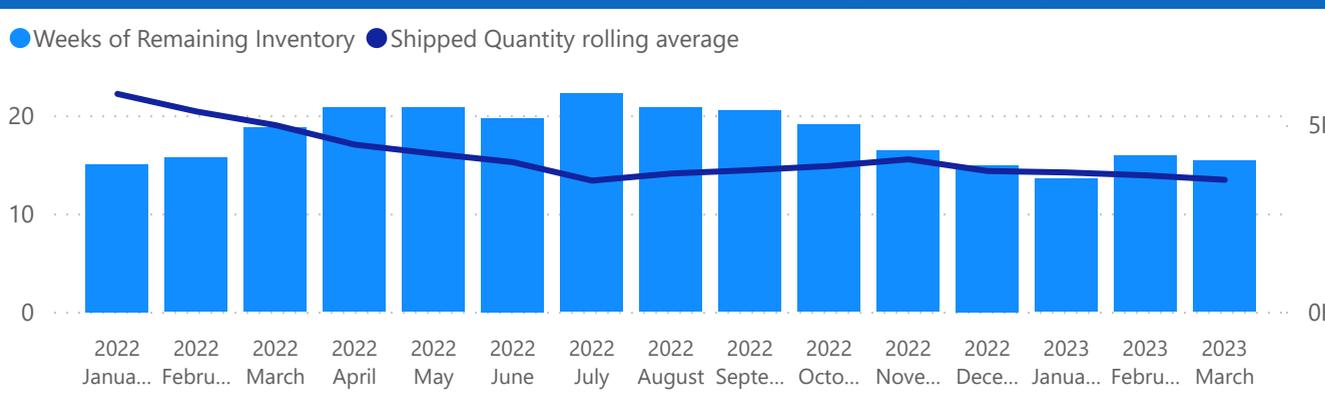
TOP 7 SUBCATEGORIES (USD)



TOP 7 SIZINGS (USD)



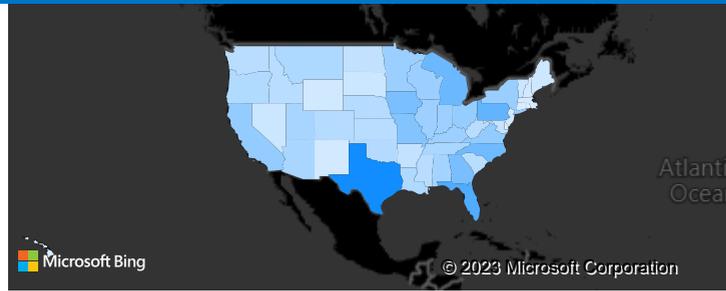
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



SHIPMENTS OVER TIME (USD)



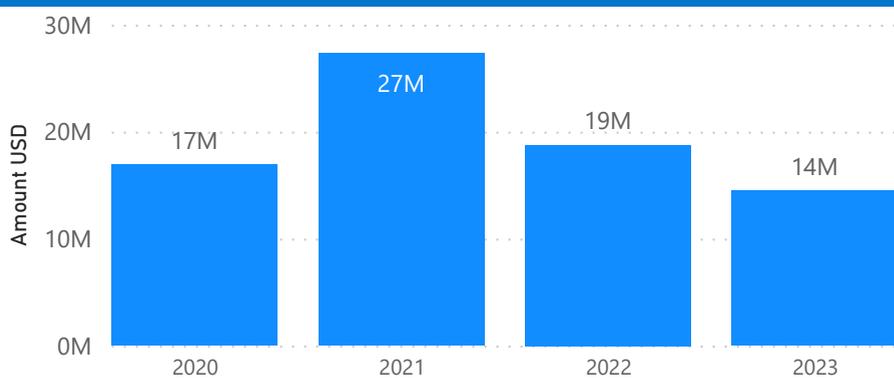
SHIPPED AMOUNT (USD) HEAT MAP



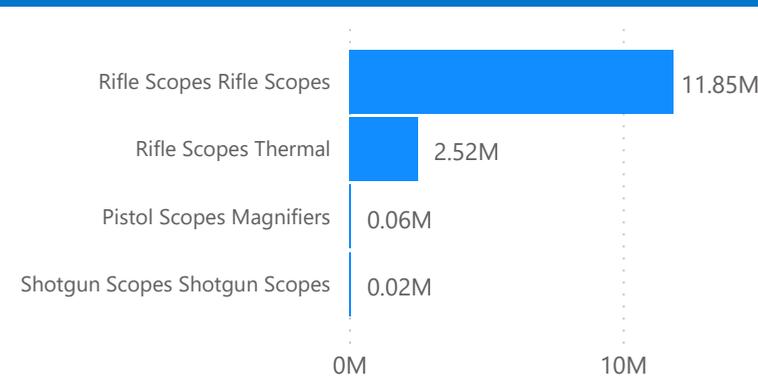
**TAKEAWAYS:**

- -26% to 2022
- 85% Rifle Scopes
- 13-WK AVG Shipments slow declining through Q1
- Inventory Weeks of Supply building. Approximately 15 WOS
- Overall shipments declining over Q1

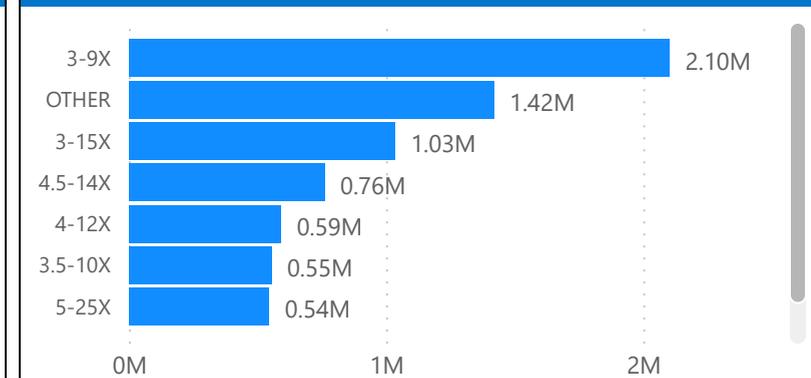
YOY ANALYSIS (USD)



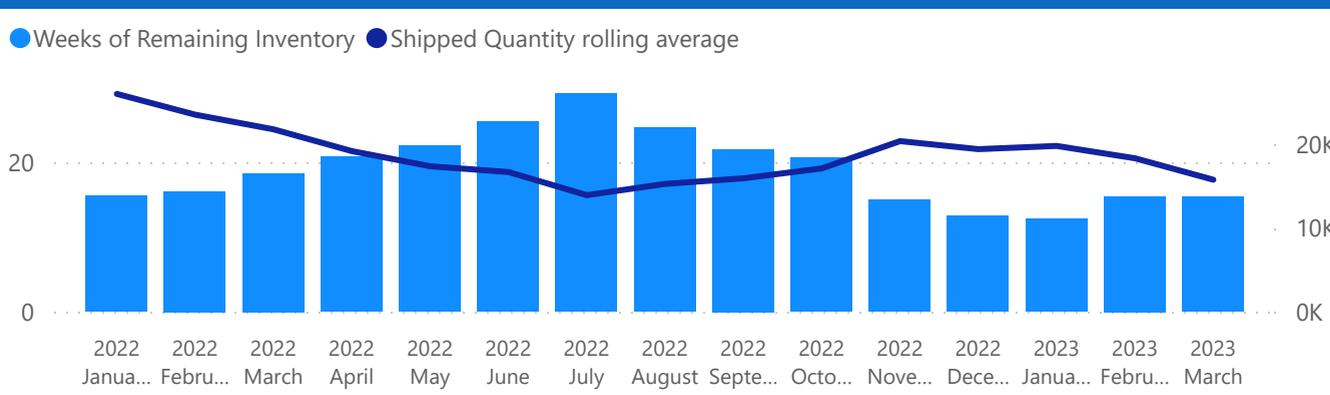
TOP 7 SUBCATEGORIES (USD)



TOP 7 SIZINGS (USD)



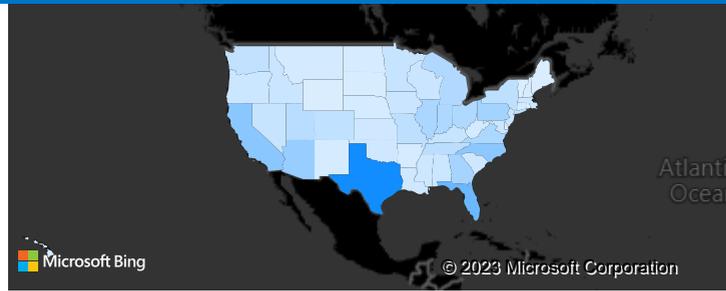
WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



SHIPMENTS OVER TIME (USD)



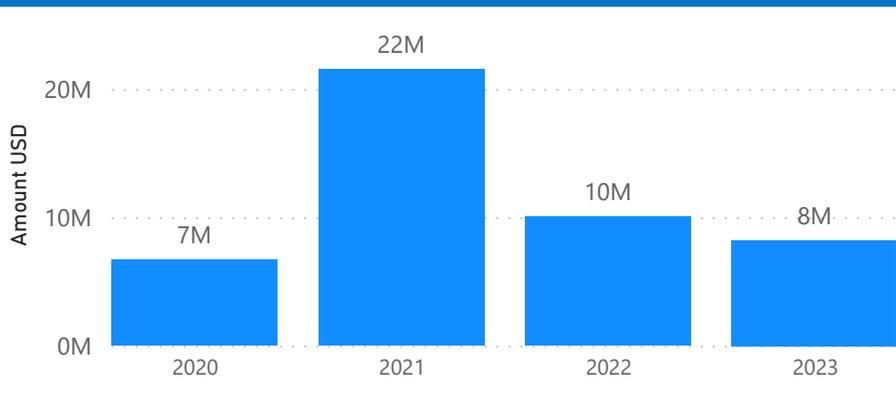
SHIPPED AMOUNT (USD) HEAT MAP



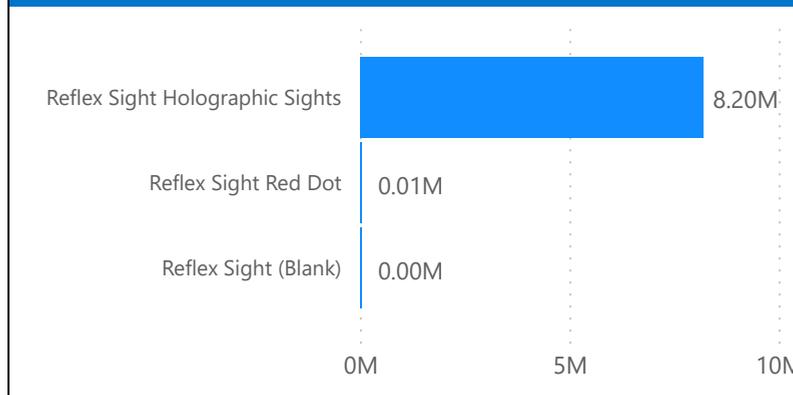
**TAKEAWAYS:**

- -20% to 2022
- 13-WK AVG Shipments flat/slight increase through Q1 2023
- Inventory Weeks of Supply declining
- Overall shipments increasing into Q2 2023

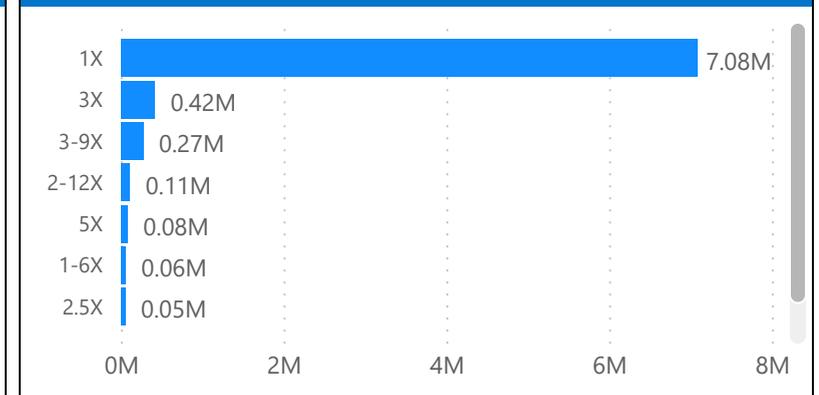
YOY ANALYSIS (USD)



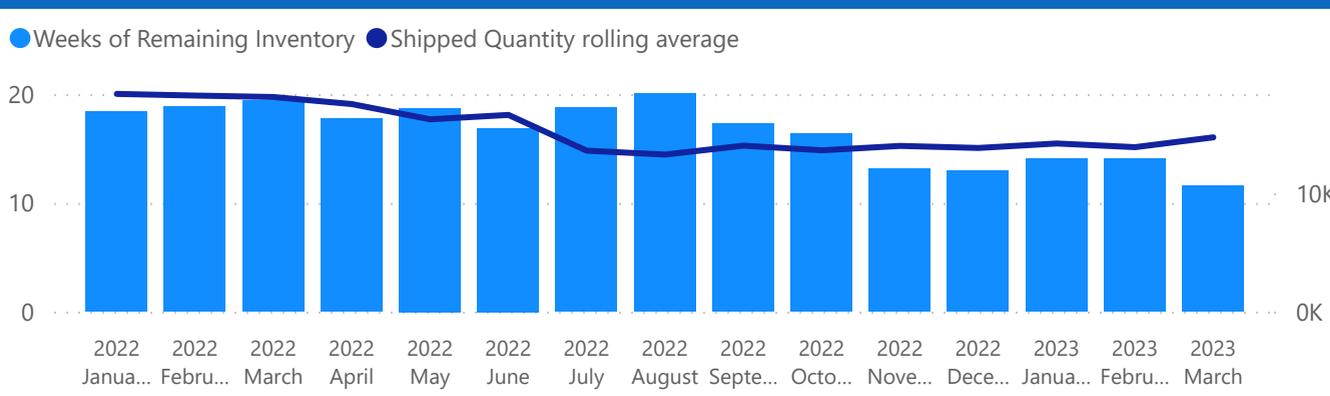
TOP SUBCATEGORIES (USD)



TOP 7 SIZINGS (USD)



WEEKS OF REMAINING INVENTORY AND SHIPPED QUANTITY (UNITS)



SHIPMENTS OVER TIME (USD)

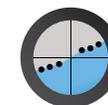


2023 Q1 Rifle Scopes				
Rank	Manufacturer	Subcategory	UPC	Description
1	Leupold & Stevens Inc	Rifle Scope	30317013851	172368:VX-5HD 3-15x44mm (30mm) CDS-ZL2 Side Focus Matte Illum. FireDot Duplex
2	Sig Sauer Inc	Rifle Scope	798681642502	SIG TANGO MSR 1-6X24300MM SFP BDC6
3	Leupold & Stevens Inc	Rifle Scope	30317028534	Leupold 180618 VX-3HD Rifle Scope 3.5-10x50mm (1 inch) CDS-ZL Duplex
4	AGM	Rifle Scope	810027778109	AGM RATTLER TS35-384MD RANGE THERMAL SCOPE
5	Leupold & Stevens Inc	Rifle Scope	30317029784	Leupold 181307 VX-Freedom Rifle Scope 3-9x40mm (1 inch) Hunt-Plex

Top 10 available in the Detailed SCOPE report.

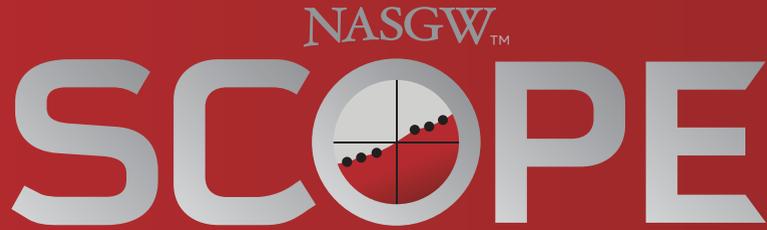
2023 Q1 Reflex Sights				
Rank	Manufacturer	Subcategory	UPC	Description
1	Leupold & Stevens Inc	Reflex Sight	30317005856	119688:DeltaPoint Pro Reflex Sight Matte 2.5 MOA Dot
2	Holosun	Reflex Sight	810047071211	HLS CLSC COMPACT CD RED DOT
3	Sig Sauer Inc	Reflex Sight	798681553396	SOR52001:ROME05 1X20 CMPT RD 2MOA BLK / 2MOA REDDOT
4	Holosun	Reflex Sight	810047071174	CIRCLE DOT/SOLAR FAILSAFE
5	Holosun	Reflex Sight	810047071389	HLS 507 CMPCT REFLX GRCD ALUM

Top 10 available in the Detailed SCOPE report.



**Want the Top 10? Get it in the Detailed Version.**

# Like what you see?



## OUR MISSION

NASGW SCOPE™ is an industry initiative to collect, standardize and analyze data that strengthens shooting sports businesses.

## Here's what you get in the detailed report:

### 2023 Q1 Market Summary and Key Takeaways

- Analysis by Tom Hopper

### 2023 Q1 - Sales Charts

#### Firearms

1. Total
2. Northeast Region
3. Midwest Region
4. South Region
5. West Region
6. Top 10

### 2023 Q1 - Sales Charts

#### Ammunition

- Total
1. Northeast Region
  2. Midwest Region
  3. South Region
  4. West Region
  5. Top 10

### 2023 Q1 - Sales Charts

#### Optics

- Total
1. Northeast Region
  2. Midwest Region
  3. South Region
  4. West Region
  5. Top 10



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# NASGW<sup>TM</sup> SCOPE

## About the Data

This report is derived from SCOPE DLX, NASGW's distribution data collection platform. Sales and inventory data are aggregated from 18 leading firearm distributors to analyze market trends, category mix and top products.

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