



Overview of Markets by Mainstay Products and Yamaha's Operations / Yamaha's Strengths / Main Competitors

Mainstay Products	Overview of Markets and Yamaha's Operations	Yamaha's Strengths	Main Competitors
Pianos	<ul style="list-style-type: none"> ■ Consistent, moderate growth in China, the world's largest piano market ■ Rising trend toward emphasizing more fundamental value of pianos in mature markets 	<ul style="list-style-type: none"> ■ Robust lineup that can accommodate customers of all skill levels developed through a dedication to the fundamental essence of acoustic pianos ■ Wide-ranging proposals for enjoying pianos that apply technologies pertaining to Disklavier™, TransAcoustic™, and other products 	Steinway & Sons (Germany and United States) Guangzhou Pearl River Piano Group Co., Ltd. (China) Kawai Musical Instruments Manufacturing Co., Ltd. (Japan)
Digital musical instruments	<ul style="list-style-type: none"> ■ Firm demand for digital musical instruments, despite shortages in product supplies resulting from global difficulties in procuring electronic components ■ Continued strong sales for digital pianos amid rising demand as people increasingly stay home in response to the COVID-19 pandemic ■ Growth in portable keyboard sales due to market exploration with mini keyboards and to launch of models designed specifically for Middle Eastern markets 	<ul style="list-style-type: none"> ■ Strong brand image and high market share backed by quality ■ Extensive product lineup matched to diverse user needs ■ Development capabilities, production bases, and wide-ranging sales channels allowing for supply of models with functions and content tailored to the local music traditions of Western markets as well as emerging markets 	Casio Computer Co., Ltd. (Japan) Roland Corporation (Japan) Kawai Musical Instruments Manufacturing (Japan) KORG Inc. (Japan)
Wind, string, and percussion instruments	<ul style="list-style-type: none"> ■ Lower, but gradually recovering, global demand as school and community brass band activities were restricted as a result of the COVID-19 pandemic ■ Growth in demand for digital drums, digital wind instruments, and digital violins, which can be played easily at home ■ Recovery in demand projected as restrictions on concerts are lifted around the world 	<ul style="list-style-type: none"> ■ Production and sale of almost all instruments used in brass bands and orchestras ■ Broad lineup of products for customers ranging from beginners to professional performers ■ Product development capabilities capitalizing on digital instrument and other expertise as a comprehensive musical instruments manufacturer ■ Expertise in stimulating demand for wind instruments through coordination with professional performers and music instructors 	Conn-Selmer, Inc. (United States) Buffet Crampon SAS (France) Jupiter (KHS Musical Instruments Co., Ltd.) (Taiwan)
Guitars	<ul style="list-style-type: none"> ■ Growth surpassing previous fiscal year as live event demand recovers from the impacts of the COVID-19 pandemic and demand associated with people increasingly staying home continues ■ Advancement in new concept guitars, diversification in ways people enjoy playing ■ Numerous competitors centered on U.S. brands 	<ul style="list-style-type: none"> ■ Global leader in number of acoustic guitars sold* ■ Comprehensive solutions encompassing peripheral equipment offered through Yamaha Guitar Group, Inc. (Line 6, Ampeg) ■ TransAcoustic™, wireless, and other new technologies a step ahead of competitors 	Fender Musical Instruments Corporation (United States) Gibson Brands, Inc. (United States) Taylor Guitars (United States) C.F. Martin & Co. (United States)

* Yamaha estimation, as of March 31, 2021

History and Mission of Yamaha's Design

Yamaha's design department was established in 1963. At the time, it was rare for a Japanese company to have dedicated design functions. Yamaha, however, was quick to realize the importance of design, prompting it to set up a dedicated organization for establishing a unique flair for the Company. Since then, this organization continued to support the Yamaha brand with a small team of diverse professionals of various nationalities. The mission of the Design Laboratory, the latest incarnation of our design department, is to propose and manage designs and methodologies for expressing the Yamaha Philosophy and to thereby contribute to the creation of products and services that surpass customer expectations. The Design Laboratory also strives to broadcast Yamaha's aspirations on a global scale to contribute to the development of a distinctly Yamaha culture. Embracing the five elements of our design principle laid out at the centennial anniversary of Yamaha's founding, this organization will continue to act as a proponent for the Group's product design activities.

The Five Elements of Our Design Principle (Formulated in 1987)

Integrity	Design that respects the essence of the object
Innovative	Creative design
Aesthetic	Beautiful design
Unobtrusive	Restrained design
Social Responsibility	Design that meets the needs of today's society

In music, the undertone series or subharmonic series is a sequence of notes that results from inverting the intervals of the overtone series. While overtones naturally occur with the physical production of music on instruments, undertones must be produced in unusual ways.



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You mean this thing ? Well, as crackpot ideas go, this one is near the top of the list. It is only effective at bedroom volumes. For that much money (\$250) you can get a real guitar amp so someone can hear you from 10 feet away.. All it is: just a tiny battery powered amp with reverb / echo type effects.



It sticks inconveniently to the back of the guitar and vibrates the wood back of the instrument a little. Very little. You can probably hum louder than this thing. I would just get an amp made for acoustic guitar, for less money, and have something you can actually use.