Freedonia Focus Reports
Global Collection

Power Lawn & Garden Equipment: Europe

September 2021

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About This Report

Scope

This report forecasts to 2025 power lawn and garden equipment demand and production in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by product in terms of:

- lawn mowers
- chainsaws
- trimmers and edgers
- turf and grounds mowers
- other equipment such as chipper/shredders, garden tractors, and power tillers
- parts and attachments

Total demand is also segmented by market as follows:

- consumer
- commercial

To illustrate historical trends, total demand is provided in annual series from 2010 to 2020; production and the various segments are reported at five-year intervals for 2010, 2015, and 2020.

Since the vast majority of engines for power lawn and garden equipment are used in original equipment manufacturer (OEM) capacities, engines are excluded from the scope of this report, except insofar as they contribute to the value of the equipment that they power. Also excluded are non-powered equipment, lawn and garden consumables, and agricultural equipment.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2020.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Table 6 | Countries in Western Europe

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium*	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden*
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City

*Major power lawn and garden equipment markets.

Source: The Freedonia Group

Table 7 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

*Major power lawn and garden equipment markets.

Source: The Freedonia Group

Sources

Power Lawn & Garden Equipment: Europe (FE90016) is based on *Global Power Lawn & Garden Equipment,* a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8	HS Codes Related to Power Lawn & Garden Equipment	
HS Code	**Definition**
8430.20	Snowplows and snowblowers
8433.11	Powered rotary mowers for lawns, parks, or sports grounds
8433.19	Other mowers for lawns, parks, or sports grounds
8467.81	Chainsaws with self-contained non-electric motors

Source: United Nations Statistics Division

Table 9	NACE Codes Related to Power Lawn & Garden Equipment	
NACE Code	**Definition**
28.24	Manufacture of power-driven hand tools
28.30	Manufacture of agricultural and forestry machinery

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2. The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Power Lawn & Garden Equipment

Freedonia Industry Studies

Global Agricultural Equipment

Global Batteries

Global Diesel Engines

Global Forestry Equipment

Global Housing

Global Power Tools

Hand Tools

Home & Garden Pesticides

Landscaping Products

Lawn & Garden Consumables

Lawn & Garden Watering Products

Live Goods: Plants, Trees, & Shrubbery

Outdoor Living Products

Power Lawn & Garden Equipment

Power Tools

Sheds & Other Residential Outdoor Storage

Tool Storage Products

Freedonia Focus Reports

Bearings: Europe

Commercial Building Construction: United States

Construction: United States

COVID-19 Market Impact Analysis

Diesel Engines: United States

Fabricated Metal Products: United States

Fertilizers: United States

Global Demographics

Global Macroeconomy

Landscaping Services: United States

Lawn Mowers: United States

Lubricants: Europe

Pesticides: Europe

Power Tools: Europe

Freedonia Custom Research

Trade Publications

Diesel Progress
Lawn & Landscape
Outdoor Power Equipment
Power Transmission Engineering
Turf

Agencies & Associations

Eurostat
Instituto Nacional de Estadística (Spain)
International Monetary Fund
Istituto Nazionale di Statistica (ISTAT) (Italy)
National Gardening Association
Organisation for Economic Co-operation and Development
Outdoor Power Equipment Institute
Statistisches Bundesamt (Germany)
The R&A
United Nations Comtrade
World Bank