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US Collection

Landscaping Products: United States

May 2019



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About This Report

Scope

This report forecasts to 2023 US landscaping product demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- decorative products
- hardscape products
- outdoor structures
- other products such as heating products, synthetic turf, and fabrics and accessories

Total demand is also segmented by market as follows:

- residential markets
- commercial markets
- parks, golf courses, and other markets

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Consumables, equipment, and furniture are excluded from the scope of this report, as are any related service revenues. The hardscaping used to produce site-built outdoor kitchens is included, but the similar materials that are incorporated at the manufacturer level into prefabricated versions are not. While outdoor structures that are prefabricated or built on site from a kit are included in this report, those that are built on site using customer-selected lumber or other materials (e.g., not part of a factory-compiled kit) are not included. Other exclusions include:

- sheds
- landscape lighting that is attached to a building
- synthetic turf in stadiums and sports fields other than golf courses

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.

Sources

Landscaping Products: United States (FF60057) is based on [Landscaping Products](#), 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:

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- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- licensed and proprietary national consumer survey data
- 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 and Packaged Facts

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

Industry Codes

Table 5 | NAICS & SIC Codes Related to Landscaping Products

| NAICS 2007 | | SIC | |
|-----------------------------------------------|---------------------------------------------------------------------------|------------------------------------|-------------------------------------------------|
| North American Industry Classification System | | Standard Industrial Classification | |
| 321920 | Wood container and pallet manufacturing | 2499 | Wood products, NEC |
| 326199 | All other plastic product manufacturing | 3999 | Manufacturing industries, NEC |
| 327112 | Vitreous China, fine earthenware, and other pottery product manufacturing | 3269 | Pottery products, NEC |
| 327331 | Concrete block and brick manufacturing | 3299 | Nonmetallic mineral products, NEC |
| 327390 | Other concrete product manufacturing | 3271 | Concrete block and brick |
| 332311 | Prefabricated metal building and component manufacturing | 3272 | Concrete products, except block and brick |
| 332323 | Ornamental and architectural metal work manufacturing | 3448 | Prefabricated metal buildings and components |
| 444220 | Nursery, garden center, and farm supply stores | 3446 | Architectural and ornamental metal work |
| 561730 | Landscaping services | 5261 | Retail nurseries, lawn and garden supply stores |
| | | 0782 | Lawn and garden services |

Source: US Census Bureau

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

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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

Landscaping Products

Freedonia Industry Studies

Decorative Tile

General Purpose LEDs & Other High-Efficiency Lighting in the US

General Purpose Lighting Fixtures in the US

Global Power Lawn & Garden Equipment

Green (Vegetative) Roofing

Home & Garden Pesticides

Lawn & Garden Consumables: Consumer Insights

Lawn & Garden Hand Tools & Wheeled Implements in the US

Lawn & Garden Robots

Lawn & Garden Watering Products in the US

Outdoor Furniture & Grills Market in the US

Outdoor Kitchen Equipment Market in the US

Outdoor Living Products

Power Lawn & Garden Equipment

Smart Lighting in the US

US Lawn & Garden Consumables

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Decorative Tile: United States

Global Power Lawn & Garden Equipment

Home & Garden Pesticides: United States

Landscaping Services: United States

Lawn & Garden Consumables: United States

Lawn & Garden Tools & Implements: United States

Lawn & Garden Watering Products: United States

Lighting Fixtures: United States

Outdoor Furniture & Grills: United States

Power Lawn & Garden Equipment: United States

Freedonia Custom Research

Trade Publications

Garden Center

Green Industry Pros

HardScape Magazine

Irrigation & Green Industry

About This Report

Landscape and Irrigation

Lawn & Landscape

Turf

Agencies & Associations

American Society of Landscape Architects

Association of Professional Landscape Designers

Hearth, Patio & Barbecue Association

National Association of Landscape Professionals

National Gardening Association

National Golf Course Owners Association

National Golf Foundation

United States Census Bureau

United States Department of Commerce

United States Department of Labor

United States Environmental Protection Agency

United States Geological Survey

United States International Trade Commission