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# Hardscaping Products: United States

May 2019



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# About This Report

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## Scope

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

- concrete
- stone pavers, tiles, and boulders
- wood
- clay brick
- aggregates
- porcelain and other edging, pavers, and tiles

Total demand is also segmented by market as follows:

- residential
- commercial
- 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.

For the purposes of this report, hardscape products include landscaping products made from concrete (e.g., pavers, poured, blocks); wood; stone and boulders (e.g., manufactured, granite, sandstone); clay brick; aggregates (e.g., sand, gravel); and other materials.

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.

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

*Hardscaping Products: United States* (FF60117) 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:

- firms participating in the industry, and their suppliers and customers

## About This Report

- 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 5 | NAICS & SIC Codes Related to Hardscaping Products

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

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 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

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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 Market in the US*

*Outdoor Furniture & Grills Market in the US*

*Outdoor Kitchen Equipment Market in the US*

*Outdoor Living Products 2019*

*Power Lawn & Garden Equipment*

*Smart Lighting in the US*

*US Lawn & Garden Consumables*

### Freedonia Focus Reports

*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