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US Collection



Lawn & Garden

# Watering Products: United States

October 2019



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# About This Report

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## Scope

This report forecasts to 2023 US lawn and garden watering product demand and retail sales in nominal US dollars. Total demand at the manufacturer level is segmented by product in terms of:

- hoses
- do-it-yourself (DIY) irrigation systems
- nozzles
- sprinklers
- hose reels
- accessories and other products such as tap timers, rain barrels, and watering cans

Total US lawn and garden watering product retail sales are segmented by channel as follows:

- home centers
- discount stores
- hardware stores
- lawn and garden specialty stores
- e-commerce and other channels such as direct sales through catalogues and retail outlets such as drug and grocery stores

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

This report presents an analysis of the US consumer market for residential DIY lawn and garden watering products. Sprinklers that are included with irrigation systems are counted as part of DIY irrigation systems, as are individual system components sold separately. Sprinklers used in irrigation systems are excluded from the scope of this report.

The report does not include products/services sold to the following markets:

- agricultural
- commercial
- horticultural
- institutional
- professional

## About This Report

- recreational

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

*Lawn & Garden Watering Products: United States (FF90052)* is based on *Lawn & Gardening Watering 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
- government/public agencies
- intergovernmental and non-governmental organizations
- 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

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 Lawn & Garden Watering Products

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
221310	Water Supply & Irrigation Systems	3052	Rubber and Plastics Hoses and Belting
326199	All Other Plastics Product Mfg	3089	Plastics Products, NEC
326220	Rubber & Plastics Hoses & Belting Mfg	3494	Valves and Pipe Fittings, NEC
332919	Other Metal Valve & Pipe Fitting Mfg	3499	Fabricated Metal Products, NEC
332999	All Other Miscellaneous Fabricated Metal Product Mfg	4971	Irrigation Systems

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

## About This Report

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

*Lawn & Gardening Watering Products*

### Freedonia Industry Studies

*Global Agricultural Equipment*

*Global Fertilizers*

*Global Housing*

*Global Power Lawn & Garden Equipment*

*Green (Vegetative) Roofing*

*Home & Garden Pesticides*

*Landscaping Products*

*Lawn & Garden Consumables*

*Lawn & Garden Hand Tools & Wheeled Implements in the US*

*Lawn & Garden Robots*

*Outdoor Furniture & Grills Market in the US*

*Outdoor Kitchen Equipment Market in the US*

*Outdoor Living Products*

*Power Lawn & Garden Equipment*

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*Hand Tools: United States*

*Hoses & Belts: United States*

*Landscaping Services: United States*

*Lawnmowers: United States*

*Power Tools: United States*

*Water: United States*

### Freedonia Custom Research

### Trade Publications

*Garden Center Magazine*

*Greenhouse Grower*

*Greenhouse Management Magazine*

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*Irrigation & Green Industry*

*Lawn and Landscape*

*Nursery Management Magazine*

### **Agencies & Associations**

American Society of Landscape Architects

National Association of Landscape Professionals

National Gardening Association

United States Census Bureau

United States Department of Labor

United States Environmental Protection Agency

United States International Trade Commission