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# Outdoor Living Products: United States

March 2020



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# About This Report

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## Scope

This report forecasts to 2024 US outdoor living products demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- outdoor cooking, entertaining, and recreation
- lawn and yard maintenance
- gardening
- outdoor design and landscape materials

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; the various segments are reported at five-year intervals for 2009, 2014, and 2019.

This report analyzes the US market for consumer-grade outdoor living products for residential do-it-yourself (DIY) applications, and excludes products intended for professional or commercial use. Values do not take into account retail markups.

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

*Outdoor Living Products: United States (FF90057)* is based on *Outdoor Living Products 2020*, 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
- licensed 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 6 | NAICS & SIC Codes Related to Outdoor Living Products

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
111421	Nursery and trees production	0181	Ornamental nursery products
111422	Floriculture production	0782	Lawn and garden services
321920	Wood container and pallet mfg	0783	Ornamental shrub and tree services
321992	Prefabricated Wood Building Mfg	2441	Nailed Wood Boxes and Shook
325311	Nitrogenous fertilizer mfg	2449	Wood Containers, NEC
325312	Phosphatic fertilizer mfg	2452	Prefabricated Wood Buildings
325314	Fertilizer (mixing only) mfg	2499	Wood products, NEC
325320	Pesticide and other agricultural chemical mfg	2511	Wood household furniture
326140	Polystyrene foam product mfg	2514	Metal household furniture
326150	Urethane and other foam product (except polystyrene) mfg	2519	Household furniture, NEC
326199	All other plastics product mfg	2873	Nitrogenous fertilizers
327110	Pottery, ceramics, and plumbing fixture mfg	2874	Phosphatic Fertilizers
327331	Concrete block and brick mfg	2875	Fertilizers, mixing only
327390	Other concrete product mfg	2879	Agricultural chemicals, NEC
332215	Metal kitchen cookware, utensil, cutlery, and flatware (except precious) mfg	3086	Plastics foam products
332216	Saw blade and handtool mfg	3089	Plastics products, NEC
332311	Prefabricated metal building and component mfg	3251	Brick and structural clay tile
332323	Ornamental and architectural metal work mfg	3269	Pottery products, NEC
332439	Other Metal Container Mfg	3271	Concrete block and brick
332913	Plumbing fixture fitting & trim mfg	3272	Concrete products, NEC
332999	All other miscellaneous fabricated metal product mfg	3299	Nonmetallic mineral products, NEC
333111	Farm machinery & equipment mfg	3421	Cutlery
333112	Lawn and garden tractor and home lawn and garden equipment mfg	3423	Hand and edge tools, NEC
333991	Power-driven handtool mfg	3432	Plumbing fixture fittings & trim
335220	Major household appliance mfg	3446	Architectural metalwork
337122	Nonupholstered wood household furniture mfg	3448	Prefabricated metal buildings
337124	Metal household furniture mfg	3469	Metal stampings, NEC
337125	Household furniture (except wood & metal) mfg	3499	Fabricated metal products, NEC
424930	Flower, nursery stock, and florists' supplies merchant wholesalers	3523	Farm machinery & equipment
444220	Nursery, garden center, and farm supply stores	3524	Lawn and garden equipment
561730	Landscaping services	3546	Power-driven handtools
		3631	Household cooking equipment
		3632	Household refrigerators & freezers
		3999	Manufacturing Industries, NEC
		5193	Flowers and florists supplies
		5261	Retail nurseries and garden 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 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

*Outdoor Living Products 2020*

### Freedonia Industry Studies

*Global Batteries*

*Global Housing*

*Global Power Lawn & Garden Equipment*

*Global Power Tools*

*Hand Tools in the US*

*Landscaping Products*

*Lawn & Garden Consumables*

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

*Lawn & Garden Robots*

*Lawn & Garden Watering Products*

*Live Goods: Plants, Trees, & Shrubbery*

*Outdoor Furniture & Grills*

*Outdoor Kitchen Equipment Market in the US*

*Power Lawn & Garden Equipment*

*Power Tools in the US*

*Sheds & Other Residential Outdoor Storage*

*Wood & Competitive Decking*

### Freedonia Focus Reports

*Batteries: United States*

*Construction: United States*

*E-Commerce: United States*

*Hand Tools: United States*

*Hardscaping Products: United States*

*Home & Garden Pesticides: United States*

*Housing: United States*

*Landscaping Products: United States*

*Landscaping Services: United States*

*Lawn & Garden Consumables: United States*

*Lighting Fixtures: United States*

*Pools & Spas: United States*

*Power Tools: United States*

*Recreation: United States*

### Freedonia Custom Research

### **Trade Publications**

*Casual Living*  
*Chemical & Engineering News*  
*Furniture Today*  
*Garden Center*  
*Garden Design*  
*Greenhouse Management*  
*Grounds Maintenance*  
*HardScape Magazine*  
*Home Furnishings News*  
*Irrigation & Green Industry*  
*Lawn & Garden Retailer*  
*Lawn & Landscape*  
*Nursery Management*  
*Outdoor Power Equipment*  
*Robotics Business Review*  
*Seed World*  
*Turf*

### **Agencies & Associations**

American Home Furnishings Alliance  
American Society of Landscape Architects  
Beyond Pesticides  
Hearth, Patio & Barbecue Association  
National Association of Home Builders  
National Association of Landscape Professionals  
National Association of the Remodeling Industry  
National Gardening Association  
Outdoor Power Equipment Institute  
United States Census Bureau  
United States Department of Agriculture  
United States Environmental Protection Agency  
United States Geological Survey  
United States International Trade Commission