



Freedonia Focus Reports
Global Collection

Global Power Lawn & Garden Equipment

September 2019



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Global Overview & Forecasts	5
Demand by Product	5
Lawn Mowers	6
Turf & Grounds Mowers	7
Chainsaws	7
Trimmers & Edgers	8
Other Equipment	8
Parts & Attachments	9
Demand by Market	11
Residential	11
Commercial	12
3. Regional Segmentation & Forecasts	14
Regional Production Overview	14
Regional Demand Overview	16
North America	18
Western Europe	20
Asia/Pacific	22
Other Regions	24
Central & South America	25
Eastern Europe	25
Africa/Mideast	25
4. Industry Structure	27
Industry Characteristics	27
Market Share	28
Husqvarna	29
Deere	30
Toro	30
5. About This Report	31
Scope	31
Sources	31
Industry Codes	32
Freedonia Methodology	33
Resources	34

List of Tables & Figures

Figure 1 Global Power Lawn & Garden Equipment Market Outlook, 2018 – 2023	4
Figure 2 Global Power Lawn & Garden Equipment Demand by Product, 2008 – 2023 (US\$ mil)	5
Table 1 Global Power Lawn & Garden Equipment Demand by Product, 2008 – 2023 (US\$ mil)	5
Figure 3 Global Power Lawn & Garden Equipment Demand by Product, 2008 – 2023 (%)	10
Figure 4 Global Power Lawn & Garden Equipment Demand by Market, 2008 – 2023 (US\$ mil)	11
Table 2 Global Power Lawn & Garden Equipment Demand by Market, 2008 – 2023 (US\$ mil)	11
Figure 5 Global Power Lawn & Garden Equipment Demand by Market, 2008 – 2023 (%)	13
Figure 6 Global Power Lawn & Garden Equipment Production by Region, 2008 – 2023 (US\$ mil)	14
Table 3 Global Power Lawn & Garden Equipment Production by Region, 2008 – 2023 (US\$ mil)	14
Figure 7 Global Power Lawn & Garden Equipment Production by Region, 2008 – 2023 (%)	15
Figure 8 Global Power Lawn & Garden Equipment Demand by Region, 2008 – 2023 (US\$ mil)	16
Table 4 Global Power Lawn & Garden Equipment Demand by Region, 2008 – 2023 (US\$ mil)	16
Figure 9 Global Power Lawn & Garden Equipment Demand by Region, 2008 – 2023 (%)	17
Figure 10 NA: Power Lawn & Garden Equipment Demand by Product, 2008 – 2023 (US\$ mil)	18
Figure 11 NA: Power Lawn & Garden Equipment Demand by Market, 2008 – 2023 (US\$ mil)	18
Table 5 NA: Power Lawn & Garden Equipment Demand by Product & Market, 2008 – 2023 (US\$ mil)	19
Figure 12 WE: Power Lawn & Garden Equipment Demand by Product, 2008 – 2023 (US\$ mil)	20
Figure 13 WE: Power Lawn & Garden Equipment Demand by Market, 2008 – 2023 (US\$ mil)	20
Table 6 WE: Power Lawn & Garden Equipment Demand by Product & Market, 2008 – 2023 (US\$ mil)	21
Figure 14 Asia/Pacific: Power Lawn & Garden Equipment Demand by Product, 2008 – 2023 (US\$ mil)	22
Figure 15 Asia/Pacific: Power Lawn & Garden Equipment Demand by Market, 2008 – 2023 (US\$ mil)	22
Table 7 Asia/Pacific: Power Lawn & Garden Equipment Demand by Product & Market, 2008 – 2023 (US\$ mil)	23
Figure 16 Other Regions: Power Lawn & Garden Equipment Demand by Region, 2008 – 2023 (US\$ mil)	24
Figure 17 Other Regions: Power Lawn & Garden Equipment Demand by Product, 2008 – 2023 (US\$ mil)	24
Table 8 Other Regions: Power Lawn & Garden Equipment Demand by Region & Product, 2008 – 2023 (US\$ mil)	26
Figure 18 Global Power Lawn & Garden Equipment Market Share by Company, 2018 (%)	28
Table 9 Leading Suppliers to the Global Power Lawn & Garden Equipment Market	29
Table 10 NAICS & SIC Codes Related to Power Lawn & Garden Equipment	32
Table 11 HS Codes Related to Power Lawn & Garden Equipment	32
Table 12 NACE Codes Related to Power Lawn & Garden Equipment	32

About This Report

Scope

This report forecasts to 2023 global demand for power lawn and garden equipment by product, market, and major world region in nominal US dollars at the manufacturer level. Product segments include:

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

Reported markets encompass:

- residential
- commercial

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2008, 2013, and 2018. Finally, global production is segmented by major world region and provided for 2008, 2013, 2018, and 2023.

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.

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

Global Power Lawn & Garden Equipment (FW90016) is based on a [comprehensive industry study](#) published by The Freedonia Group. Reported findings represent the synthesis and

About This Report

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 10 | NAICS & SIC Codes Related to Power Lawn & Garden Equipment

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
333111	Farm Machinery & Equipment Mfg	3523	Farm Machinery & Equipment
333112	Lawn & Garden Tractor & Home Lawn & Garden Equipment Mfg	3524	Lawn & Garden Equipment
333991	Power-Driven Hand Tool Mfg	3546	Power-Driven Hand Tools

Source: US Census Bureau

Table 11 | 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 12 | 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
29.93	Manufacture of other special-purpose machinery, NEC

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.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Power Lawn & Garden Equipment

Freedonia Industry Studies

Global Batteries

Global Housing

Global Power Tools

Hand Tools in the US

Landscaping Products

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

Power Lawn & Garden Equipment

Power Tools in the US

US Lawn & Garden Consumables

Freedonia Focus Reports

Agricultural Pesticides: United States

Commercial Building Construction: United States

Construction: United States

Global Housing

Global Power Tools

Hand Tools: United States

Housing: United States

Landscaping Products: United States

Lawn & Garden Consumables: United States

Power Tools: Canada

Power Tools: United Kingdom

Power Tools: United States

Freedonia Custom Research

Trade Publications

Diesel Progress

Grounds Maintenance

Lawn & Landscape

Outdoor Power Equipment

Power Transmission Engineering

Turf

Agencies & Associations

American Society of Landscape Architects
China Machinery Industry Federation
Eurostat
Federal Statistical Office (Germany)
Instituto Brasileiro de Geografia e Estatística
Instituto Nacional de Estadística (Spain)
Instituto Nacional de Estadística y Geografía (Mexico)
Istituto Nazionale di Statistica (Italy)
Korean Statistical Information Service
Ministry of Economy, Trade, and Industry (Japan)
National Bureau of Statistics (China)
National Gardening Association (US)
Outdoor Power Equipment Institute
The R&A (Scotland)
Statistics Canada
United Nations Comtrade
United States Census Bureau
United States International Trade Commission