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# Power & Hand Tools

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US Industry Study with Forecasts to **2011 & 2016**

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Study #2157 | February 2007 | \$4500 | 262 pages

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*Advances will result from product innovations, especially higher-voltage lightweight cordless electric tools, and from continued interest in DIY and hobby activities, especially among women.*

## US demand to grow 3.1% annually through 2011

Power and hand tool demand in the US is projected to rise 3.1 percent annually through 2011, reaching \$14.3 billion. Advances will result from product innovations, especially the development of higher-voltage lightweight cordless electric tools. In addition, gains will result from continued interest in DIY and hobby activities in the consumer market, especially among women. The development of new consumer-friendly battery powered tools, such as wrenches and clamps, will spur gains. Rising nonresidential building and nonbuilding expenditures will also create opportunities.

However, weak residential construction activity (including an outright decline in new housing starts) will limit gains. A flat outlook for construction and manufacturing employment will also dampen growth. Despite rising demand, production of power and hand tools in the US will remain flat, as producers expand offshore production in lower cost nations such as China. Nevertheless, the US remains a major producer of hand and pneumatic tools, and producers in these categories have sought to improve export opportunities in markets such as Asia, Eastern Europe and Latin America.

## Power tools, led by cordless products, to pace gains

Power tool demand is forecast to outpace hand tool demand due to the

## US Power & Hand Tool Demand (\$12.3 billion, 2006)



continuing popularity of cordless electric products such as saws, sanders, polishers and grinders. Hand tool demand is limited by the inherent durability of these products. Unlike power tools, common household tools such as hammers frequently outlive their owners, dampening replacement demand. In addition, product innovation is less common than in power tools, limiting opportunities for value gains.

Cordless products will continue to post the best gains, benefitting not only from macroeconomic factors but from their performance advantages vis-a-vis plug-in models. The development of improved battery technology, such as lithium-ion chemistry, will encourage both consum-

ers and professionals to use cordless technology.

## Consumer tool demand to outpace professional user segment

Professional users accounted for over two-thirds of overall tool demand in 2006. Professionals use a greater variety of tools, most of which are also more expensive than those used by consumers. However, growth in consumer tool demand will outpace the professional segment, benefitting from the ongoing popularity of do-it-yourself activities and the trade-up by consumers to feature-laden power tools.

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## Sample Text, Table & Chart

### HAND TOOLS

Shipments by Type -- Among the four major types of socket wrenches are the most common, accounting for 45 percent of total wrench shipments. Socket wrench shipments are expected to rise less than one percent through 2011. They are most commonly used with various-sized pipe fittings. They are usually and can usually be used with most manufacturers' handles. Socket wrenches are primarily used in simple automobile repair situations to tighten or loosen spark plugs and/or bolts. These wrenches are expected to remain the largest product segment despite continuing competition from impact wrenches.

Combination and open-end wrenches comprised the second largest product type in 2006. Shipments are forecast to rise less than one percent through 2011 to \$155 million. Like socket wrenches, open-end and combination wrenches are generally sold in sets. These wrenches are manufactured to a specific size and are used in numerous applications. Combination wrenches, which have one open end and one enclosed end, have virtually replaced open-end wrenches.

Shipments of adjustable wrenches will benefit from their inherent versatility, which makes them suitable for numerous applications including electrical and plumbing work and equipment repairs. Shipments are expected to expand through 2011, matching the average rate for wrenches. Most adjustable wrenches are made from alloyed steel with tension springs that keep the jaw opening locked in place. Adjustable wrenches come in two major types: pipe and crescent. Pipe wrenches, which are more commonly utilized by professionals, are used to tighten and loosen threaded pipe connections. Crescent wrenches, which are commonly utilized by both professionals and consumers, are used in various everyday applications such as turning nuts, bolts or plumbing fittings.

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TABLE VI-7

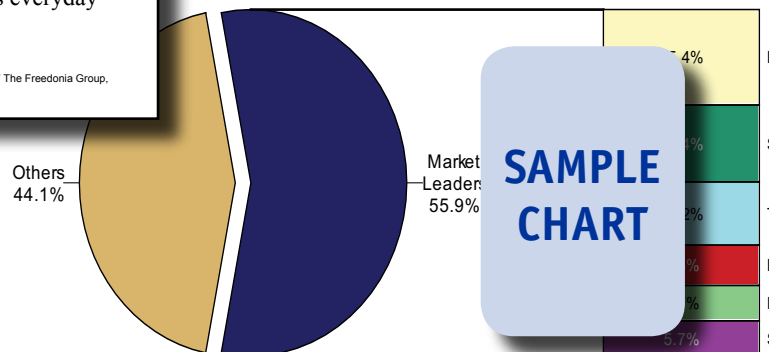
CONSUMER TOOL DEMAND BY TYPE  
(million dollars)

Item	1995	2000	2005	2010	2015
Households (millions)	100	105	110	115	120
\$ tools per household	100	105	110	115	120
Consumer Tool Demand	100	105	110	115	120
Power Tools	100	105	110	115	120
Hand Tools	100	105	110	115	120
% consumer	100	105	110	115	120
Hand Tool Demand	100	105	110	115	120
% consumer	100	105	110	115	120
Power Tool Demand	100	105	110	115	120

SAMPLE TABLE

TABLE VII-1

POWER & HAND TOOL MARKET SHARE, 2006  
(\$12.3 billion)



SAMPLE CHART

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Great Neck Saw Manufacturers Incorporated

165 East Second Street  
 Mineola, NY 11501  
 516-746-5352  
<http://www.gre>

Annual Sales:  
 Employment:

Key Products: hand tools, all-purpose tools, level  
 tool sets, level automotive tools

Great Neck Saw Manufacturers is a producer of hand tools, power tools and power tool accessories for the professional and do-it-yourself markets. The Company is privately held.

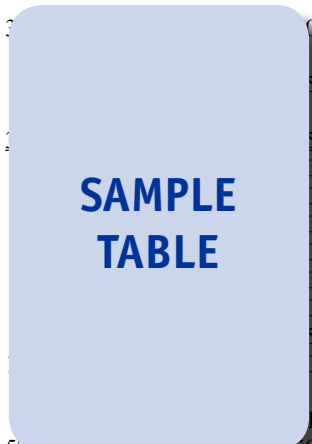
Among the Company's tool offerings are GREAT NECK hand tools, SHEFFIELD multipurpose tools, MAYES levels, and original equipment manufacturer (OEM) automotive tools. Specifically, Great Neck Saw's GREAT NECK automotive hand tools encompass specialty wrenches, pullers, screw extractors, impact tools and sockets. Other hand tools from the Company include screwdrivers; such cutting tools as hand saws, hacksaws, knives and snips; pliers; measuring tools; striking tools, including hammers, mallets, axes, hatchets, chisels and punches; woodworking tools; clamps and vises; and adjustable, combination, open end, box end, pipe, special-purpose and hex key wrenches. Great Neck Saw also makes drills and such power tool accessories as drill bits and grinding wheels. The Company's SHEFFIELD multipurpose tools include a 19-in-1 all-purpose tool and a 14-in-1 hammer tool. MAYES levels encompass laminated wood, economy, aluminum, laser, special-purpose, torpedo and other varieties.



TABLE IV-2

ELECTRIC TOOL SUPPLY & DEMAND  
 (million dollars)

Item	1995	2000	2005	2010	2015
Resident Population (million persons)	269.4	285.1	299.1	312.6	326.1
\$ electric tools per capita	14.3	16.6	19.0	21.8	25.7
Electric Tool Demand					
- net imports					
Electric Tool Shipments					
Drills					
Saws					
Sanders, Polishers & Grinders					
Screwdrivers					
Planers & Routers					
Hammers					
Other Electric Tools					
Parts & Attachments					
% electric					
Power Tool Demand	526.9	627.9	730.0	830.0	1083.0



"Cordless tool demand is expected to climb 9.2 percent annually through 2011, reaching \$1.8 billion. Gains will be fueled by advances in battery technology which allow for the design of more powerful products with longer run times. In addition, consumers will increasingly turn to cordless products since manufacturers offer combinations of cordless tools, which lower the per unit cost of purchasing rechargers. Advances in the professional market will be limited to some extent by slowing construction expenditures. ..."  
 --Section IV, pg. 52

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**OTHER STUDIES**

**World Major Household Appliances**

This study forecasts the world market for household appliances. It presents historical demand data (1996, 2001, 2006) and forecasts for the years 2011 and 2016 by type (refrigerators and freezers, clothes washers and dryers, cooking appliances, dishwashers); world region (e.g., North America, Asia/Pacific, Western Europe); and for over twenty countries. The study also considers economic trends and other factors impacting demand, details industry structure, evaluates market share and profiles major producers.

#2279 ..... 12/2007..... \$5800

**World Power Lawn & Garden Equipment**

World power lawn and garden equipment demand will grow 3.2% yearly through 2011. North America and Western Europe will stay the top markets while developing Asian countries grow the fastest. Lawn-mowers will remain the largest segment while turf and grounds equipment lead gains. This study analyzes the \$16 billion world power lawn and garden equipment industry, with forecasts for 2011 and 2016 by product, world region and for 22 nations. It also evaluates market share and profiles major players.

#2246 ..... 10/2007..... \$5500

**World Power Tools**

Global demand for power tools will grow 4.1% annually through 2011. The developing countries of Asia, especially China, will see the fastest growth based on rising incomes and advances in residential and nonresidential building construction activity. Cordless electric tools will continue to lead gains. This study analyzes the \$23.4 billion global power tool industry, with forecasts for 2011 and 2016 by product, market, world region and for 25 countries. It also evaluates company market share and profiles major producers.

#2212 ..... 08/2007..... \$5400

**Power Lawn & Garden Equipment**

US demand for power lawn and garden equipment will reach \$10.5 billion in 2011. Gains will be driven by consumer-driven product innovations and up-grades, and by the rising number of golf courses and professional landscapers. Lawnmowers will remain the largest product segment while turf and grounds equipment will grow the fastest. This study analyzes the US power lawn and garden equipment industry to 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2174 ..... 03/2007..... \$4400

**Household Appliances in China**

The Chinese household appliance market will grow 4.5% annually through 2010 and become the world's largest. Gains will be driven by low penetration rates, healthy household formation and replacement demand. Cooking appliances will remain dominant and grow the fastest, followed by dish sterilizers and dishwashers. This study analyzes China's 111 million unit major household appliance industry to 2010 and 2015 by product, market and region. It also evaluates market share and profiles major players.

#2102 ..... 09/2006..... \$4900

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