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# World Power Tools

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Industry Study with Forecasts for **2011 & 2016**

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*India will record the fastest rise in power tool demand, at over seven percent yearly through 2011. China will also post strong demand growth, and will account for nearly 60 percent of output gains.*

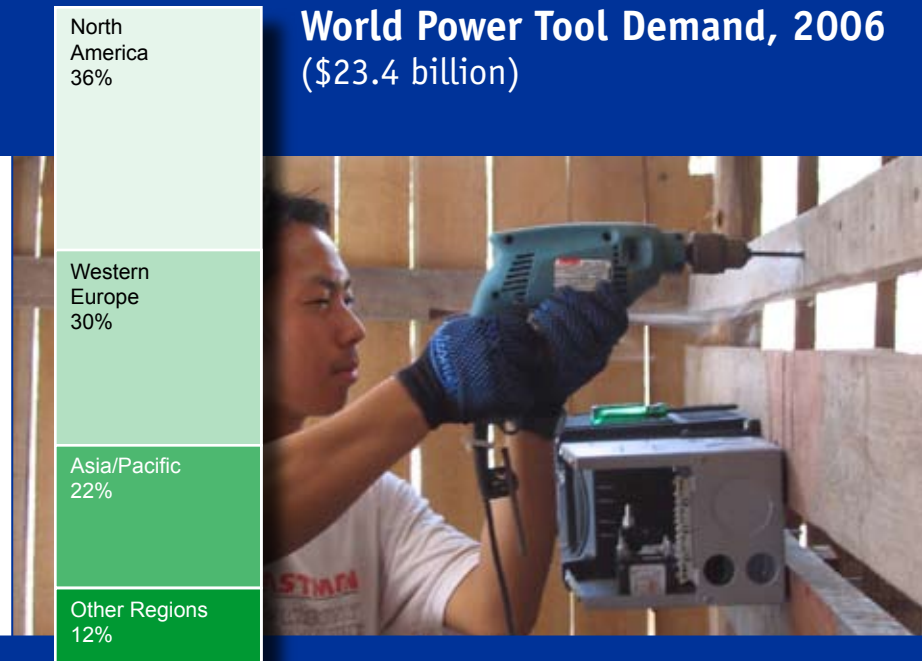
## Global demand to advance 4.1% yearly through 2011

Global demand for power tools is projected to expand 4.1 percent annually through 2011 to \$28.6 billion. The pace of growth will be most rapid in the developing countries of Asia, where rising incomes and advances in residential and nonresidential building construction activity will bolster demand. Production gains will also be strong in Asia, with China expected to account for nearly 60 percent of output gains from 2006 to 2011. India will record the fastest increase in power tool demand, at over seven percent annually through 2011. Outside of Asia, the most promising opportunities are in Latin America and the Africa/Mideast regions, where growing populations and rising construction activity will boost demand.

## Developed countries to remain dominant market

Gains for power tools in industrialized countries will be substantially slower than in developing regions, based on the maturity of the building infrastructure. However, opportunities remain for manufacturers that introduce improved products, particularly cordless models. The ongoing popularity of do-it-yourself home improvement activity in North America and Western Europe will also boost gains. The US, Western Europe and Japan will comprise over two-thirds of demand in 2011, and 58 percent of the increase in demand from 2006 to 2011.

## World Power Tool Demand, 2006 (\$23.4 billion)



## Cordless electric tools to remain fastest growing

Electric tools (plug-in and cordless) dominate world demand, representing three-fourths of power tool sales in 2006. Electric tools (most notably hand drills) will remain the leading type of power tool, due to their frequent use in both consumer and professional applications. 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 consumers and professionals to use cordless technology. The diffusion of new con-

sumer-friendly battery powered tools, such as wrenches and clamps, will also spur advances. Gains for pneumatic tools will lag the industry average, due to their limited range of applications.

## Consumer users to outpace larger professional market

Professional users accounted for the majority of the world power tool market in 2006, due to their use of a greater variety of more expensive tools compared to consumers. However, gains in consumer tool demand will outpace those of the professional market, due to the rising standards of living in developing countries.

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## Sample Text, Table & Chart

### WESTERN EUROPE

#### Germany: Supply & Demand

Power tool demand in Germany is the country the largest power tool market in Europe. Germany is home to the largest population in Western Europe, and power tool consumption is large. Germany is a major manufacturing base for motor vehicles and has the highest personal income level in Europe. However, slow growth during the 1996-2006 period worked to depress consumer spending, and thus resulted in modest gains for power tool demand.

Germany has the second largest consumer demand for power tools in the world, trailing only the US. Germany is home to over 100,000 home improvement stores. Over one-quarter of Germans often work on improving their homes, creating a significant demand for power tools.

Shipments of power tools from facilities in Germany reached \$1.9 billion in 2006, the largest producer in the region. Germany has leveraged a world-class reputation for machinery engineering technology and expertise gained from serving its large home market into a formidable position in many manufacturing industries, power tools not excepted. Among the major power tool producers with manufacturing capacity in Germany are Atlas Copco, Black & Decker, Emerson Electric, Hilti and Makita. Export markets are found in many nations, with the largest customers including EU partners and Asian nations.

Demand for power tools in Germany is projected to advance 3.5 percent per year through 2011 to \$1.9 billion. Growth in spending on both residential and nonresidential building construction in Germany is projected to recover from the negative performance of the 2001-2006 period, providing the primary impetus for growth in power tool demand.

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SAMPLE  
TEXT

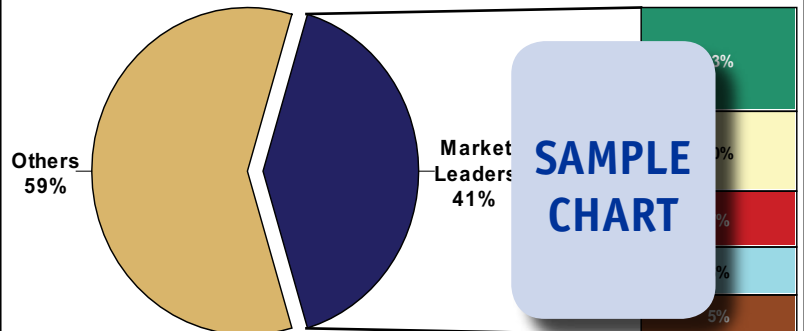
**TABLE V-7**  
**GERMANY**  
**POWER TOOL SUPPLY & DEMAND**

Item	1996	2001	2006	2011	2016
Population (million)	81.0	82.4	82.4	82.1	81.7
GDP per capita	28,000	32,000	32,000	32,000	32,000
Gross Domestic Product (bil 2005\$)	2,240	2,530	2,530	2,530	2,530
Gross Fixed Investment (bil 2005\$)	400	400	400	400	400
\$ power tools/000\$ GFI	0.000	0.000	0.000	0.000	0.000
Other Indicators					
Urban Population (million)	44.0	44.0	44.0	44.0	44.0
Motor Vehicle Park (mil units)	3.0	3.0	3.0	3.0	3.0
\$ power tools/capita	6.0	6.0	6.0	6.0	6.0
\$ power tools/mil \$ GDP	0.000	0.000	0.000	0.000	0.000
Power Tool Demand (mil \$)	1,900	2,240	2,530	2,930	3,370
net exports	0	0	0	0	0
Power Tool Shipments (mil \$)	1,900	2,240	2,530	2,930	3,370

SAMPLE  
TABLE

**CHART VIII-1**

**WORLD POWER TOOL MARKET SHARE BY COMPANY, 2006**  
 (\$23.4 billion)



SAMPLE  
CHART

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### DESA LLC

2701 Industrial Drive  
 Bowling Green, KY 42101  
 270-781-9600  
<http://www.desa.com>

Annual Sales  
 Employment:

Key Products  
 and heavy-duty

**SAMPLE  
PROFILE**

DESA LLC is a privately held manufacturer and marketer of zone heating and hearth products, security lighting, portable generators, and specialty hand and power tool products. These products are primarily sold to the home improvement and construction markets in Canada, the US, the United Kingdom, Germany, Mexico, the Netherlands, Poland and Italy.

The Company competes in the world power tool industry through the production of such power tools as pole saws, chain saws, powder-actuated fastening tools and heavy-duty staple guns. These products are sold under the REMINGTON and POWERFAST brand names.

Its REMINGTON power tools encompass electric-powered pole saws, chain saws and powder-actuated fastening tools. The Company's REMINGTON electric-powered pole saws encompass 25- and 15-centimeter models designed to trim, prune and cut firewood and landscape timbers. REMINGTON electric-powered chain saws are sold in 25-, 30-, 35- and 40-centimeter models, and are suitable for felling trees and cutting firewood, among other end uses. DESA's REMINGTON powder-actuated fastening tools encompass hammer-actuated and trigger-actuated types, which are used to drive fasteners through wood,

TABLE V-8

### GERMANY POWER TOOL DEMAND BY TYPE & MARKET (million dollars)

Item	1996	2001	2006	2011	2016
Gross Fixed Investment (bil 2005\$)	42	45	48	50	50
\$ power tools/000\$ GFI	2	2	2	2	2
Power Tool Demand	1	1	1	1	1
Electric Tools & Parts:					
Tools					95
By Product:					
Drills					20
Saws					40
Other					55
By Power Source:					
Plug-In					50
Cordless					55
Parts & Accessories					80
Pneumatic Tools					45
Engine-Driven & Others					30
By Market:					
Professional					75
Consumer	45	55	60	65	75

**SAMPLE  
TABLE**

"Shipments of power tools from Germany are forecast to rise 3.0 percent annually through 2011 to \$2.9 billion. Germany will remain the largest power tool producer in Western Europe, with over 40 percent of total regional shipments. In addition to improving domestic opportunities, producers will benefit from export opportunities to other West European nations, North America and the Asia/Pacific region. Exports to the former Eastern bloc countries should increase as well as market economies there continue to take hold. ..."

--Section V, pg. 83



**OTHER STUDIES**

**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

**Home Organization Products**

US sales of home organization products will grow 4.5% annually through 2011, driven by demographic trends favoring more organized storage needs. Metal and wire products will remain the largest type and grow the fastest, especially modular units. Products used in garages and closets will lead gains by room. This study analyzes the \$6.9 billion US home organization product industry, with forecasts for 2011 and 2016 by material, product, room and market. It also evaluates market share and profiles major producers.

#2224 ..... 09/2007..... \$4400

**Outdoor Furniture & Grills**

US demand for outdoor furniture and grills will grow 4% yearly through 2011. Demand will benefit from the increasing popularity of patios, porches and decks, and from lifestyle trends such as "cocooning" and "outdoor rooms". Patio heating products will lead gains, followed by the much larger grill segment. This study analyzes the \$6.2 billion US outdoor furniture and grill industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2221 ..... 09/2007..... \$4400

**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

**Power & Hand Tools**

US power and hand tool demand will rise 3.1% annually through 2011, supported by product innovations and continued interest in DIY and hobby activities. Power tools will lead gains based on the ongoing popularity of cordless electric products like saws, sanders and polishers. The consumer market will outpace the professional segment. This study analyzes the \$12.3 billion US power and hand tool industry to 2011 and 2016 by product and market. It also details market share and profiles major players.

#2157 ..... 02/2007..... \$4500

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