



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table  
& Chart 5](#)

[Sample Profile, Table &  
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom  
Research, Related Studies,  
Corporate Use License 8](#)

# Outdoor Furniture & Grills

---

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

---

Study #2221 | September 2007 | \$4400 | 304 pages

---

[www.freedoniagroup.com](http://www.freedoniagroup.com)



**The Freedonia Group**

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
Economic Outlook .....	5
Demographic Trends .....	8
Population.....	9
Households.....	11
Consumer Income & Spending .....	12
Personal Income & Expenditures .....	12
Consumer Financing .....	14
Building Construction Trends .....	18
Residential Construction .....	22
New Housing .....	25
Housing Stock .....	29
Single-Family Home Sales .....	31
Porch, Patio & Deck Trends .....	32
Nonresidential Construction.....	35
Nonbuilding Construction .....	38
Market Trends & Seasonality .....	41
Pricing Patterns .....	44
International Activity & Foreign Trade.....	47
Imports.....	49
Exports .....	53

### PRODUCTS

General .....	56
Outdoor Furniture .....	58
Metal.....	61
Extruded Aluminum .....	64
Cast & Wrought.....	65
Other .....	66
Wicker & Rattan .....	66
Plastic .....	69
Wood & Other .....	72
Umbrellas & Hammocks .....	76
Leading Producers .....	79
Cushions & Covers.....	80
Grills.....	83
Supply & Demand .....	84
Types.....	85
Gas .....	89
Charcoal & Other Solid Fuel.....	93
Electric & Other .....	96
In Use .....	98
Leading Producers .....	100
Grill Parts & Grilling Utensils .....	101
Patio Heating Products .....	105

### MARKETS

General .....	107
---------------	-----

Residential Buildings .....	109
Single Unit Housing .....	113
Multiple Unit Housing .....	114
Manufactured Housing.....	114
Nonresidential Buildings .....	115
Other Markets.....	117

### REGIONS

General .....	121
Regional Demographic & Economic Trends.....	123
Population Patterns .....	124
Economic Outlook.....	126
Construction Activity.....	128
Housing Outlook.....	130
Consumer Expenditures.....	133
Regional Demand for Outdoor Furniture & Grills .....	135
Northeast.....	139
New England .....	143
Middle Atlantic .....	143
Midwest .....	144
East North Central.....	149
West North Central .....	150
South .....	151
South Atlantic .....	158
East South Central.....	159
West South Central.....	160
West.....	162
Mountain .....	166
Pacific.....	167

### INDUSTRY STRUCTURE

General .....	169
Industry Composition .....	170
Market Share & Leading Manufacturers .....	173
WC Bradley .....	174
Weber-Stephen Products .....	175
Agio International .....	175
Brown Jordan.....	176
Home Casual.....	177
Product Development & Manufacturing .....	177
Competitive Strategies.....	180
Brand Name Recognition.....	180
Marketing.....	184
Conventional Advertising.....	184
Internet.....	187
Strategic Media Partnerships .....	189
Cooperative Agreements .....	190
Distribution Channels .....	192
Mass Merchandisers.....	195
Specialty Retailers .....	197

Home Centers.....	200
Other.....	201
Mergers, Acquisitions & Industry Restructuring .....	203

### COMPANY PROFILES

Agio International.....	206
All-Luminum Products.....	207
Barbeques Galore .....	208
Bradley (WC) Company.....	210
Brinkmann Corporation .....	211
Brown Jordan International .....	212
Century Furniture.....	214
CFM Corporation.....	216
China Yada Technology Group.....	218
Cox Industries .....	219
Ethan Allen Interiors .....	220
Ferrellgas Partners.....	221
Fiesta Barbeques.....	223
Furniture Brands International .....	224
Gracious Living Industries .....	226
Grand Hall Enterprise.....	227
Grosfillex Sarl .....	228
The HammockSource.....	229
Hang Zhou Weiling Steel Furniture .....	231
HC Holdings .....	231
Home Casual .....	233
Home Depot .....	236
Jarden Corporation.....	239
Keter Group.....	241
Lifetime Products.....	243
Linya Group .....	244
Lloyd/Flanders Industries .....	245
Lowe's Companies .....	246
Meadowcraft Incorporated .....	248
Menard Incorporated .....	249
Salton Incorporated .....	251
Scotts Miracle-Gro .....	253
Sears Holdings.....	256
Stark Truss.....	259
Target Corporation .....	260
Treasure Garden .....	262
Tropitone Furniture .....	263
Unaka Corporation.....	265
Vassallo Industries .....	266
Wal-Mart Stores .....	267
Weber-Stephen Products.....	270
Woodard LLC .....	273
Zhejiang Xinyue Furniture.....	275
Zhejiang Yongqiang Group .....	276
Additional Outdoor Furniture & Grill Companies .....	277

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table .....3

### MARKET ENVIRONMENT

1 Economic Indicators .....8  
 2 Households & Population .....9  
 3 Personal Income & Expenditures..... 14  
 4 Consumer Financing Environment ..... 18  
 5 Construction Expenditures ..... 22  
 6 Residential Construction Expenditures ..... 25  
 7 Housing Environment ..... 29  
 Cht Year of Construction of Housing Stock, 2006 ..... 30  
 8 Existing Single Unit Home Sales ..... 32  
 9 Porch, Patio & Deck Trends ..... 35  
 10 Nonresidential Building Construction Expenditures ..... 38  
 11 Nonbuilding Construction Expenditures ..... 41  
 12 Outdoor Furniture & Grill Market Volatility, 1996-2006..... 43  
 Cht Outdoor Furniture & Grill Market Volatility, 1997-2006..... 44  
 13 Outdoor Furniture & Grill Pricing Deflators ..... 46  
 Cht Outdoor Furniture & Grill Pricing Deflators ..... 47  
 14 US International Trade in Outdoor Furniture & Grills ..... 48  
 15 US Imports of Outdoor Furniture & Grills by Country ..... 51  
 Cht US Outdoor Furniture & Grill Imports by Type & Source, 2006 ..... 52  
 Cht Sources of US Imports as a Share of Total Demand, 1996-2006..... 53  
 16 US Exports of Outdoor Furniture & Grills by Country ..... 54  
 Cht US Outdoor Furniture & Grill Exports by Type & Destination, 2006..... 55

### PRODUCTS

1 Outdoor Furniture & Grill Supply & Demand by Product ..... 57  
 Cht Outdoor Furniture & Grill Demand by Product ..... 58

2 Outdoor Furniture Supply & Demand by Type ..... 60  
 Cht Outdoor Furniture Demand by Type, 2006 ..... 61  
 3 Metal Outdoor Furniture Supply & Demand..... 64  
 4 Wicker & Rattan Outdoor Furniture Supply & Demand..... 69  
 5 Plastic Outdoor Furniture Supply & Demand..... 72  
 6 Wood & Other Material Outdoor Furniture Supply & Demand ..... 76  
 7 Umbrella & Hammock Supply & Demand..... 79  
 Cht US Outdoor Furniture Market Share by Company, 2006..... 80  
 8 Cushion & Cover Supply & Demand.... 82  
 9 Grill Supply & Demand ..... 85  
 10 Grill Demand by Type..... 87  
 Cht Grill Demand by Type, 2006: Value vs. Volume..... 88  
 11 Gas Grill Demand ..... 92  
 12 Charcoal & Other Solid Fuel Grill Demand ..... 96  
 13 Electric & Other Grill Demand..... 97  
 14 Grills in Use by Type..... 99  
 Cht Grills in Use by Type..... 100  
 Cht US Grill Market Share by Company, 2006..... 101  
 15 Grill Part & Grilling Utensil Supply & Demand..... 104  
 16 Patio Heating Product Supply & Demand..... 106

### MARKETS

1 Outdoor Furniture & Grill Demand by Market ..... 108  
 Cht Outdoor Furniture & Grill Demand by Market, 2006..... 109  
 2 Residential Outdoor Furniture & Grill Demand by Housing Type ..... 112  
 Cht Residential Outdoor Furniture & Grill Demand by Housing Type, 2006... 112  
 3 Nonresidential Outdoor Furniture & Grill Demand ..... 117  
 4 Outdoor Furniture & Grill Demand in Other Markets ..... 120

### REGIONS

Cht Regional Market Comparison, 2006 . 123  
 1 Resident Population by Region..... 126  
 2 Regional Gross Domestic Product.... 128  
 3 Regional Construction Expenditures 130  
 4 Regional Housing Indicators..... 133  
 5 Regional Personal Consumption Expenditures ..... 135  
 6 Outdoor Furniture & Grill Demand by Region ..... 137  
 Cht Outdoor Furniture & Grill Demand by Subregion, 2006 ..... 138  
 7 Northeast Outdoor Furniture & Grill Demand by Subregion & Product.. 141  
 8 Selected Outdoor Furniture & Grill Company Facilities in the Northeast by State ..... 142  
 9 Midwest Outdoor Furniture & Grill Demand by Subregion & Product.. 146  
 10 Selected Outdoor Furniture & Grill Company Facilities in the Midwest by State ..... 147  
 11 South Outdoor Furniture & Grill Demand by Subregion & Product.. 154  
 12 Selected Outdoor Furniture & Grill Company Facilities in the South by State ..... 155  
 13 West Outdoor Furniture & Grill Demand by Subregion & Product.. 164  
 14 Selected Outdoor Furniture & Grill Company Facilities in the West by State..... 165

### INDUSTRY STRUCTURE

1 US Outdoor Furniture & Grill Sales by Company, 2006..... 172  
 Cht US Outdoor Furniture & Grill Market Share by Company, 2006 .. 174  
 2 Selected Cooperative Agreements ... 191  
 3 Selected Outdoor Furniture & Grill Company Retail Outlets..... 194  
 Cht Share of US Outdoor Furniture & Grill Retail Sales by Outlet, 2006 ..... 195  
 4 Selected Acquisitions & Divestitures ..... 204

*The increasing popularity of outdoor living areas such as patios, porches and decks, coupled with consumer trends toward spending more time at home, will support gains in outdoor furniture and grill demand.*

## US demand to grow 4% annually through 2011

US demand for outdoor furniture and grill products (including patio heaters and accessories such as covers, cushions and grilling utensils) will increase 4.0 percent annually to \$7.5 billion in 2011. The market will benefit from growth in the number of households and the increasing popularity of outdoor living areas such as patios, porches and decks. In addition, consumer lifestyle trends such as “cocooning”-- spending significant time at home -- and “outdoor rooms” -- using items such as furniture and grills to extend the home’s living space outdoors -- will support gains as consumers continue to trade up to better products. Still, increases are not expected to be as rapid as in the 2001 to 2006 period, limited by the slowdown in the single-unit housing market. Despite solid demand increases, US shipments of outdoor furniture and grills will increase less than one percent annually through 2011, limited by growth in imports, including offshoring of production by US-based manufacturers.

## Patio heating products to be fastest growing segment

The relatively small patio heating product segment will see the fastest increases, due to strong growth in the South and West where these products are more popular and to consumers’ desire to extend the season for their outdoor spaces. Grills will also see above-



average gains, while the rate of increase in furniture will nearly match the overall average -- although some segments such as wicker and rattan will experience more rapid growth.

## Residential market driven by consumer trends

The residential market accounted for more than 90 percent of total outdoor furniture and grill demand in 2006. As such, consumer spending trends and consumer lifestyle choices are critical to the industry’s well-being. Over the past decade or so, trends such as cocooning and outdoor rooms have boosted demand for outdoor furniture, grills, patio heaters and related accessories. Over

this period, many homeowners have significantly upgraded their outdoor living spaces. Initially, much of this spending focused on garden items; however, as the trend matured, spending also turned to patios and deck areas. Inexpensive plastic furniture was upgraded to higher quality metal dining sets. Consumers upgrade their outdoor spaces for a number of reasons. Among the most common are a desire to extend their home’s living space and enjoy more time at home, and to entertain family and friends. The popularity of home design television shows focusing on outdoor spaces has helped spread this trend, leading some homeowners to conclude that “investing” in outdoor spaces can improve the resale value of their home.

## Sample Text, Table & Chart

### MARKETS

#### Nonresidential Buildings

Demand for outdoor furniture and grills in nonresidential will rise 7.0 million in 2011. Gains strongest from the rebound in nonresidential construction from the rebound in nonresidential lodging and restaurant construction. In addition, nonresidential construction and an improved outlook for nonresidential construction (as the tourism industry recovers from the 2001 terrorist attack) support demand. Despite the strong growth, nonresidential applications will remain a small percentage of the total market, for well under ten percent for the foreseeable future.

Nonresidential applications for outdoor furniture and grill pass a range of commercial and institutional settings, such as hotels, golf and country clubs, amusement parks, offices, factories, schools, hospitals and government buildings. Among these, restaurants represent the vast majority of nonresidential demand for outdoor furniture and grill products.

Restaurants utilize outdoor furniture for serving patrons on decks and patios. While some establishments utilize higher-end products, most tend to demand plastic or extruded aluminum furniture, since these products offer easy cleaning, mobility and good durability at a low cost. In addition, given concerns about damage, vandalism and theft, many restaurants choose the lowest cost option available, which tends to favor plastic furniture, such as low-end stacking chairs. However, a number of cities have passed ordinances restricting the use of low-end plastic furniture by restaurants, particularly in highly visible areas. The ordinances are generally aimed at beautifying areas with high foot or motor vehicle traffic and, if widely enacted and enforced, could spur increased demand for more expensive outdoor furniture products at restaurants. Hotels utilize outdoor furniture for balconies, around pools, and at lakes or

TABLE V-10

#### SELECTED OUTDOOR FURNITURE & GRILL COMPANY FACILITIES IN THE MIDWEST BY STATE

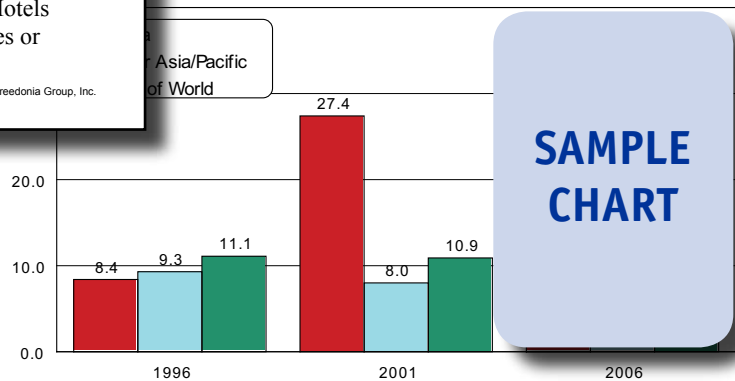
State & Company	Headquarters*	Manufacturing	Distribution Center
<b>Illinois</b>			
Salton			
Sears Holdings			
Target			
Wal-Mart Stores			
Weber-Stephen Products			
Woodard			
<b>Indiana</b>			
Brown Jordan (Wabash)			
Keter (Resin Partners)			
Lowe's			
Stark Truss			
Target			
Wal-Mart Stores			
<b>Iowa</b>			
Target			
Wal-Mart Stores			

\* includes US & division headquarters

Source: The Freedonia Group, Inc.

CHART II-5

#### SOURCES OF US IMPORTS AS A SHARE OF TOTAL DEMAND, 1996-2006 (percent of total)



## Sample Profile, Table & Forecast

**TABLE III-2**  
**OUTDOOR FURNITURE SUPPLY & DEMAND**  
(million dollars)

Item	1996	2001	2006	2011	2016
Housing Stock (million units)	110	110	110	110	110.0
\$ outdoor furniture/unit					16
Outdoor Furniture Demand	1	1	1	1	100
Metal	1	1	1	1	100
Wicker & Rattan					100
Plastic					70
Wood & Other Materials					90
Umbrellas & Hammocks					140
net imports					150
Outdoor Furniture Shipments	1408	1415	1680	1750	1850



### COMPANY PROFILES

#### All-Luminum Products Incorporated

10981 Decatur Road  
 Philadelphia, PA 19154  
 215-632-2800  
<http://www.all-luminum.com>

Annual Sales:  
 Employment:  
 Key Products:  
 chairs and tabl



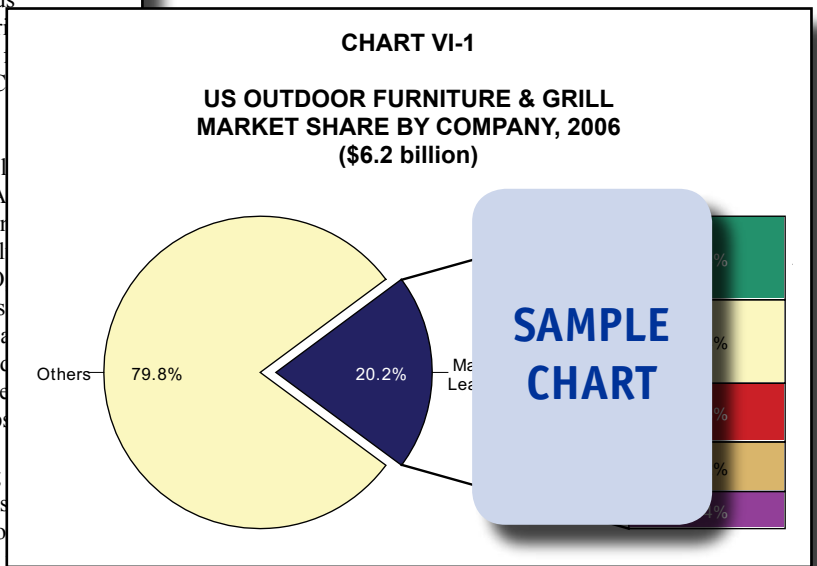
All-Lumin  
 Incorporated,  
 for the residen  
 tables and wine  
 is privately held .

The Company participates in the outdoor furniture and grill industry through the RIO CREATIONS, RIO BEACH and RIO A product lines. RIO CREATIONS products include patio and conversation sets, and folding lounge chairs and tables. Patio sets include LAGUNA, METRO, AVALON, RIVIERA, AVALON BISTRO SAFARI styles. These sets include tables, chairs and umbrellas. Conversation sets include two directors chairs and a 17-inch-dia folding table. Folding lounge chairs are made of powder-coated frames and molded plastic arms. This product line also produces table, lightweight tables with aluminum legs and hardboard top.

The RIO BEACH product line includes aluminum folding chairs and umbrellas. The rust-free aluminum folding chairs provide features as durable rayon or polyethylene covers in several color one- and five-position varieties. The product line also includes

ding lounge  
 umbrellas

Brands  
 ure, pr  
 ndoor  
 The C





**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

**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

**About The Freedonia Group**

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

**Freedonia Custom Research**

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)

[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)