



[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](#)

Home Organization Products

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

Study #2224 | September 2007 | \$4400 | 214 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Environment.....	4
Demographic Trends	8
Population	9
Households	12
Consumer Trends	13
Personal Income & Expenditures	13
Consumer Financing	15
Residential Building Construction .	19
Housing Completions	22
Housing Stock.....	25
Improvements & Repairs.....	28
Pricing	29
Foreign Trade	32
World Market.....	33

MATERIALS

General	35
Metal & Wire	37
Products	39
Suppliers.....	40
Plastic.....	42
Products	44
Suppliers.....	45
Wood	46
Products	47
Suppliers.....	48
Wicker, Rattan & Other.....	49
Wicker, Rattan & Other Weaves ..	51
Canvas & Other	
Soft-Sided Storage.....	52

PRODUCTS

General	54
---------------	----

Bins, Baskets & Totes	58
Materials.....	61
Rooms	62
Suppliers.....	63
Shelving	64
Materials.....	65
Rooms	67
Suppliers.....	68
Modular Units.....	68
Materials.....	70
Rooms	72
Suppliers.....	73
Hanging Storage	74
Materials.....	75
Rooms	76
Suppliers.....	77
Accessories & Other.....	78
Materials.....	79
Rooms	80
Suppliers.....	80

ROOMS

General	82
Bedrooms & Closets.....	84
Closets	87
Bedrooms.....	90
Family Rooms	91
Products	93
Suppliers.....	94
Garages	95
Products	98
Suppliers.....	100
Pantries & Kitchens	102
Products	103
Suppliers.....	104
Bathrooms & Utility Rooms.....	105
Products	107
Suppliers.....	108

MARKETS

General	109
Do-It-Yourself.....	111
Retailers	114
Suppliers.....	115
Professional Installation	115
Builders	117
Suppliers.....	118

INDUSTRY STRUCTURE

General	120
Industry Composition	121
Market Share	124
Competitive Strategies.....	129
Distribution	131
Marketing	135
Acquisitions & Divestitures.....	138
Cooperative Agreements.....	140

COMPANY PROFILES

Closet & Storage Concepts	143
Contemporary Closet Classics	145
Designer Garage.....	146
Elfa International.....	148
Emerson Electric	149
FirstService Corporation	156
Focus Products Group	158
Fortune Brands	160
GarageTek Incorporated	163
Genuine Parts	165
Hafele GmbH.....	166
Hirsh Industries.....	169
Home Products International	170
Industrial Wire Products	174
InterDesign Incorporated	175
Jarden Corporation.....	177
Knape & Vogt Manufacturing.....	179

(continued on next page)

Table of Contents

COMPANY PROFILES

(continued from previous page)

Myers Industries	183
Newell Rubbermaid.....	186
Pacific Closet Works.....	191
Pro-Mart Industries	192
Racor Incorporated	193
RTA Products	194
Sauder Woodworking.....	196
SCHULTE Corporation	200
Spectrum Diversified Designs	204
Sterilite Corporation.....	205
StoreWALL LLC.....	207
Whirlpool Corporation.....	208
Whitney Design	210
Windquest Companies	212
Other Companies.....	214

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Indicators.....	8
2 Population Trends	11
3 Personal Income & Expenditures.....	15
4 Consumer Financing Environment, 1996-2006.....	19
5 Residential Building Construction Expenditures...	21
6 Housing Indicators.....	25
7 Housing Stock.....	27
Cht Year of Construction of Housing Stock, 2006	28
8 Residential Improvement & Repair Expenditures	29

MATERIALS

1 Home Organization Product Demand by Material.....	36
Cht Home Organization Product Demand by Material, 2006...	37
2 Metal & Wire Home Organization Product Demand	39
3 Plastic Home Organization Product Demand	44
4 Wood-Based Home Organization Products.....	47
5 Demand for Home Organization Products Made from Wicker, Rattan & Other Materials.....	51

PRODUCTS

1 Home Organization Product Demand by Type	57
Cht Home Organization Product Demand by Type, 2006.....	57
Cht Average Spending on Home Organization Products by Type, 1996-2016	58
2 Bin, Basket & Tote Demand ...	61
3 Shelving Demand	65
4 Modular Unit Demand	70
5 Hanging Storage Demand	75
6 Home Organization Accessory & Other Product Demand	79

ROOMS

1 Home Organization Product Demand by Room.....	83
Cht Home Organization Product Demand by Room, 2006	84
2 Bedrooms & Closets: Home Organization Product Demand	87

3 Family Rooms: Home Organization Product Demand	93
4 Garages: Home Organization Product Demand	98
5 Pantries & Kitchens: Home Organization Product Demand	103
6 Bathrooms & Utility Rooms: Home Organization Product Demand	106

MARKETS

1 Home Organization Product Demand by Market	110
Cht Home Organization Product Sales by Market & Room, 2001, 2006, 2011	111
2 Do-It-Yourself Market for Home Organization Products.....	114
3 Professional Installation Market for Home Organization Products.....	117

INDUSTRY STRUCTURE

1 US Home Organization Product Sales by Company, 2006....	123
Cht Home Organization Product Market Share, 2006	124
Cht Retail Sales of Home Organization Products, 1996-2006.....	135
2 Selected Acquisitions & Divestitures	140
3 Selected Cooperative Agreements.....	142

Products to organize home garages will be the fastest growing segment, driven by more 3-car or larger garages and consumers' desire to use them for storage, hobbies and recreation.

US demand to grow 4.5% annually through 2011

Sales of home organization products in the US are forecast to increase 4.5 percent per year to \$8.6 billion in 2011. Value gains will be driven by the ongoing introduction of products with a decorative look or specialty features. Organization products for use in home garages are expected to post the strongest gains through 2011. Advances will be boosted by the growing number of homes that feature three-car or larger garages and by consumers' desire to better organize this large storage space, sometimes to make it suitable for hobbies, recreation or other uses. This trend is particularly pronounced in areas with a high water table where homes cannot have basements and in regions with moderate temperatures.

Sales of home organization products for use in closets are also projected to achieve strong growth as these products become increasingly available in a variety of retail outlets and as the number of more affordable and more user-friendly versions grows. Gains will also be aided by the increasing amount of space dedicated to closets, particularly in master suites.

Metal, wire products to remain key segment

In 2006, metal and wire home organization products accounted for the largest



share of sales by material type with 35 percent of the total. These products are also expected to post the strongest gains through 2011, benefitting from strong growth in sales of modular units for closets, pantries and garages, and cabinetry organization accessories, as well as interest in higher-end, chrome and wire mesh products. Other materials include plastic; wood; wicker, rattan and other weaves; and canvas and other soft-sided materials.

Modular storage units to post fastest gains

Among the various types of products, bins, baskets and totes accounted for the largest share of sales with 37

percent in 2006. These products, which can be decorative or purely functional, are widely used in most households to store and organize belongings of all sizes.

However, sales of modular units are forecast to post the strongest growth through 2011, benefitting from the adaptability of these systems to a homeowner's changing needs; in particular, consumers will continue to show interest in modular closet, garage and pantry systems. Modular closet systems are increasingly available using a wider variety of materials, from basic plastic-coated wire to laminate and solid wood.

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Sample Text, Table & Chart

MATERIALS

Plastic

Sales of plastic home organization products are expected to increase to \$1.2 billion in 2011. Advances in technology driven largely by the low average unit volume and pricing pressure being most placed on plastic organization products. Volume manufacturing of plastic organization products. Volume will be driven by the perception that many plastic organization products tend to buy and replace frequently. Plastic organization products also benefit from advantages such as ease of assembly, minimal maintenance, and flexibility.

**SAMPLE
TEXT**

The industry is hoping that the addition of specialty features help to improve consumer perception of plastic organization and move such products away from commodity status. These added features generally either enhance the performance or function of the component. Features that result in improved performance include air-tight latches and locks that provide greater protection for the contents of the unit, and casters and stronger handles that make the unit more portable. Plastic home organization products are also increasingly available in specialized shapes or sizes designed to fit particular jobs. For instance, companies offer longer totes to accommodate storage and organization of wrapping paper rolls and related supplies, or with a low profile and casters for storage under beds. More and more, manufacturers are also incorporating decorative elements, such as special colors and glitter, on plastic units so consumers are willing to use them in places throughout their house and not just behind closed doors. For instance, in 2007 Sterilite introduced new, brighter colors for plastic home organization products, including lapis blue, teal, and pink. Other colors include blue and pearlized pink.

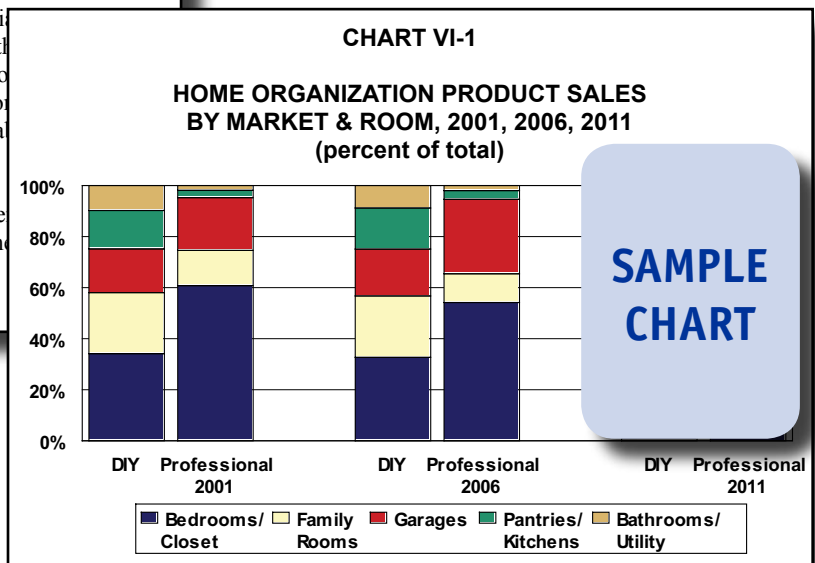
However, despite improvements in the appearance, strength, and additional features of plastic home organization products, the

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TABLE V-2
BEDROOMS & CLOSETS:
HOME ORGANIZATION PRODUCTS DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Housing Stock (millions) bedrooms/housing unit	110.0	110.0	110.0	110.0	110.0
Bedrooms (millions) \$ home org product/bedroom	2.5	2.5	2.5	2.5	2.5
Home Org in Bedrooms & Closets	2.75	2.75	2.75	2.75	2.75
By Area:					
Closets	1.5	1.5	1.5	1.5	1.5
Bedrooms	1.25	1.25	1.25	1.25	1.25
By Product:					
Bins, Baskets & Totes	0.8	0.8	0.8	0.8	0.8
Shelving	0.8	0.8	0.8	0.8	0.8
Modular Units	0.2	0.2	0.2	0.2	0.2
Hanging Storage	0.2	0.2	0.2	0.2	0.2
Accessories & Other	0.75	0.75	0.75	0.75	0.75
% bedrooms & closets	9.9	9.9	9.9	9.9	9.9
Home Organization Product Demand	2.75	2.75	2.75	2.75	2.75

**SAMPLE
TABLE**



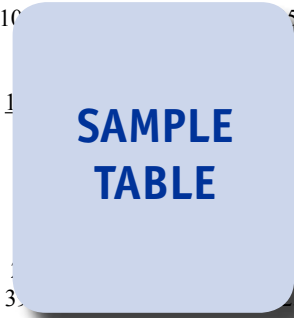
**SAMPLE
CHART**

Sample Profile, Table & Chart

TABLE IV-3

SHELVING DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Households (million)	100	100	100	100	100
\$ shelving/household					5.7
Shelving Demand	1,000	1,000	1,000	1,000	570
Metal & Wire					60
Plastic					85
Wood					05
Other					70
% shelving					4.6
Home Organization Product Demand	300	300	300	300	50



COMPANY PROFILES

Knap & Vogt Manufacturing Company

2700 Oak Industrial Drive Northeast
 Grand Rapids, MI 49508
 616-459-3311
<http://www.knapandvogt.com>

Annual Sales:
 Employment:

Key Products: closet and bathroom organization products;
 and shelving kits



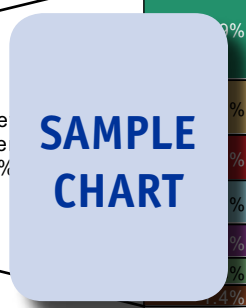
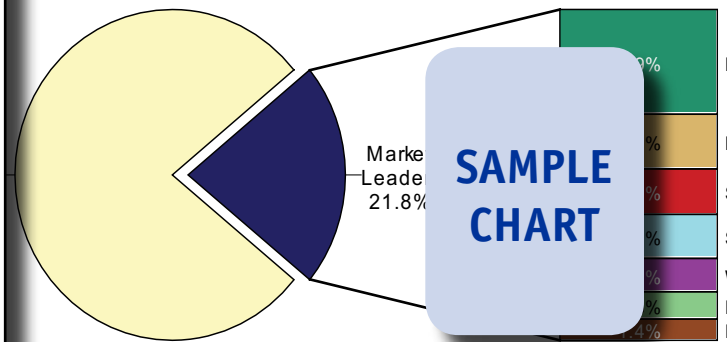
Knap & Vogt Manufacturing Company designs, manufactures and distributes residential and commercial organization solutions and office products. In July 2006, the Company was acquired by the private equity firm Wind Point Partners (Southfield, Michigan) for \$106 million.

The Company participates in the US home organization products industry through the manufacture and sale of closet, bathroom and kitchen organization products. Knap & Vogt also makes various shelving kits.

Closet & Bathroom Organization Products -- Knap & Vogt's closet organization products are available through the VIRTU and KV product lines. The VIRTU closet organizers include shallow and medium depth wire baskets; resin baskets in three sizes that are ventilated to allow for air flow; pant, tie and belt racks; shoe baskets; and object trays for holding wallets, loose change, jewelry and other small items. Closet rods in the VIRTU product line are offered in six sizes with lengths between 48 and 144 inches. Also available are pull-out units with two or three shelves in a shoe or shelf configuration.

CHART VIII-1

HOME ORGANIZATION PRODUCT MARKET SHARE, 2006
 (\$6.9 billion)



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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

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

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

Decorative Laminates

US sales of decorative laminates will grow 3.8% annually through 2011, driven by increased demand for laminate flooring, store fixtures and wall panels. Decorative foils and saturated papers will pace the dominant low-pressure laminate segment, while high-pressure laminates will lead gains. This study analyzes the US decorative laminate industry, with forecasts for 2011 and 2016 given by raw material, production process, product and market. It also evaluates company market share and profiles major firms.

#2203 06/2007..... \$4400

Residential Kitchen & Bath Countertops in China

Demand for residential kitchen and bath countertops in China will rise 7.3% per year through 2010, driven by continued strong growth in new housing completions and kitchen and bath remodeling expenditures. Remodeling will remain the fastest growing market, while solid surface materials become dominant. This study details the ¥26.7 billion residential kitchen and bath countertops market in China to 2010 and 2015 by material, product, market and geographic region. It also evaluates market share and profiles key firms.

#2115 10/2006..... \$4900

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