



World Power Lawn & Garden Equipment

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

Study #2246 | October 2007 | \$5500 | 326 pages

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

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Outlook.....	5
Personal Income & Expenditure Trends	10
Building Construction Expenditure Trends	15
World Demographic Outlook.....	17
Urbanization Patterns.....	19
Household Formation Patterns.....	21
Lawn & Garden Equipment Pricing Patterns	23
Legal & Regulatory Issues	24
Technology & Product Innovation	26

SUPPLY & DEMAND

General	28
World Power Lawn & Garden Equipment Dynamics.....	29
Regional Sales Trends	32
Products	34
Lawnmowers.....	35
Turf & Grounds Equipment	37
Other.....	39
World Power Lawn & Garden Equipment by Market.....	41
Residential.....	42
Commercial.....	44
International Trade Flows	46

NORTH AMERICA

General	49
United States	54
Canada	58
Mexico	63

WESTERN EUROPE

General	68
Belgium	72
France.....	76
Germany.....	79
Italy	84
Netherlands	89
Spain	92
Sweden	96
United Kingdom.....	100
Other Western Europe	105

ASIA/PACIFIC

General	111
Australia.....	116
China	120
India	126

Indonesia	130
Japan.....	134
New Zealand.....	139
South Korea	142
Other Asia/Pacific	146

OTHER REGIONS

Other Regions.....	151
Latin America.....	155
Brazil	160
Other Latin America.....	164
Eastern Europe	168
Hungary.....	174
Poland	177
Russia	181
Other Eastern Europe	185
Africa/Mideast.....	189

INDUSTRY STRUCTURE

General	194
Industry Composition	195
Market Share	197
Product Development.....	200
Manufacturing	201
Engine Production.....	202
Marketing	203
Distribution	206
Financial Requirements	207
Mergers, Acquisitions & Industry Restructuring.....	209
Cooperative Agreements.....	214

COMPANY PROFILES

Alamo Group	217
Ariens Company.....	221
Black & Decker	224
Blount International.....	226
Bosch (Robert) GmbH	228
Briggs & Stratton.....	229
Bush Hog LLC	236
China Changchun CHANLIN Group	238
Cifarelli SpA	239
Country Home Products	240
Dana Corporation	242
Deere & Company.....	244
Draper Tools	249
Electrolux AB	251
EMAK Group	252
Excel Industries	254
Fuji Heavy Industries.....	256
GGP Sweden AB	258
Hoffco Comet Industries.....	262
Honda Motor	264
Husqvarna AB.....	267
Jenn Feng Industrial	272

Jiangsu Linhai Group.....	273
Kawasaki Heavy Industries.....	274
Kohler Company.....	277
Kubota Corporation	280
LESCO Incorporated	283
Liaocheng Changchi Gardening & Horticulture Machinery.....	284
Makita Corporation.....	285
Marunaka Limited.....	288
Masport NZ Limited	289
McLane Manufacturing	290
Mitsui & Company	292
MTD Products	294
Sears Holdings.....	300
Shandong Huasheng Zhongtian Machinery.....	303
Shenyang Hejin Holding Investment	304
STIHL Holding	305
Techtronic Industries	309
Tecumseh Products	312
Textron Incorporated	315
Toro Company.....	319
WOLF-Garten	324
Yangzhou Weibang Garden Machine Plant	326

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 Gross Domestic Product by Region	10
2 World per Capita GDP by Region	12
Cht Relationship Between Power Lawn & Garden Equipment Demand per Capita & GDP per Capita, 2006.....	14
3 World Building Construction Expenditures by Region.....	17
4 World Population by Region.....	19
5 World Urban Population by Region.....	21
6 Number of Households by Region	22
7 Power Lawn & Garden Equipment Pricing Trends.....	24

SUPPLY & DEMAND

1 World Power Lawn & Garden Equipment Shipments by Region.....	30
Cht World Power Lawn & Garden Equipment Shipments by Region, 2006	31
Cht World Power Lawn & Garden Equipment Production Share Increase by Region, 2006-2011.....	32

(continued on next page)

List of Tables/Charts

(continued from previous page)

2	World Power Lawn & Garden	
	Equipment Demand by Region	33
Cht	World Power Lawn & Garden Equipment	
	Demand by Region, 2006.....	34
3	Power Lawn & Garden Equipment	
	Demand by Type.....	35
4	World Power Lawnmower Demand by Region.	37
5	World Turf & Grounds Equipment	
	Demand by Region.....	39
6	Other Power Lawn & Garden	
	Equipment Demand by Region	40
7	World Power Lawn & Garden	
	Equipment Demand by Market.....	42
8	Residential Power Lawn & Garden	
	Equipment Demand by Region	44
9	Commercial Power Lawn & Garden	
	Equipment Demand by Region	46
10	World Power Lawn & Garden	
	Equipment Net Exports.....	48

NORTH AMERICA

1	North America Power Lawn & Garden	
	Equipment Supply & Demand.....	51
2	North America Power Lawn & Garden	
	Equipment Demand by Type & Market	53
3	United States Power Lawn & Garden	
	Equipment Supply & Demand.....	55
4	United States Power Lawn & Garden	
	Equipment Demand by Type & Market	58
5	Canada Power Lawn & Garden	
	Equipment Supply & Demand.....	60
6	Canada Power Lawn & Garden	
	Equipment Demand by Type & Market	62
7	Mexico Power Lawn & Garden	
	Equipment Supply & Demand.....	64
8	Mexico Power Lawn & Garden	
	Equipment Demand by Type & Market	67

WESTERN EUROPE

1	Western Europe Power Lawn & Garden	
	Equipment Supply & Demand	70
2	Western Europe Power Lawn & Garden	
	Equipment Demand by Type & Market	72
3	Belgium Power Lawn & Garden	
	Equipment Supply & Demand.....	73
4	Belgium Power Lawn & Garden	
	Equipment Demand by Type & Market	75
5	France Power Lawn & Garden	
	Equipment Supply & Demand.....	77
6	France Power Lawn & Garden	
	Equipment Demand by Type & Market	79
7	Germany Power Lawn & Garden	
	Equipment Supply & Demand.....	81
8	Germany Power Lawn & Garden	
	Equipment Demand by Type & Market	84

9	Italy Power Lawn & Garden	
	Equipment Supply & Demand.....	86
10	Italy Power Lawn & Garden Equipment	
	Demand by Type & Market.....	88
11	Netherlands Power Lawn & Garden	
	Equipment Supply & Demand.....	90
12	Netherlands Power Lawn & Garden	
	Equipment Demand by Type & Market	92
13	Spain Power Lawn & Garden Equipment	
	Supply & Demand	94
14	Spain Power Lawn & Garden Equipment	
	Demand by Type & Market.....	96
15	Sweden Power Lawn & Garden	
	Equipment Supply & Demand	98
16	Sweden Power Lawn & Garden Equipment	
	Demand by Type & Market.....	100
17	United Kingdom Power Lawn & Garden	
	Equipment Supply & Demand.....	102
18	United Kingdom Power Lawn & Garden	
	Equipment Demand by Type & Market ...	105
19	Other Western Europe Power Lawn & Garden	
	Equipment Supply & Demand.....	107
20	Other Western Europe Power Lawn & Garden	
	Equipment Demand by Type & Market	110

ASIA/PACIFIC

1	Asia/Pacific Power Lawn & Garden	
	Equipment Supply & Demand.....	114
2	Asia/Pacific Power Lawn & Garden Equipment	
	Demand by Type & Market.....	116
3	Australia Power Lawn & Garden Equipment	
	Supply & Demand	118
4	Australia Power Lawn & Garden Equipment	
	Demand by Type & Market.....	120
5	China Power Lawn & Garden Equipment	
	Supply & Demand	123
6	China Power Lawn & Garden Equipment	
	Demand by Type & Market.....	125
7	India Power Lawn & Garden Equipment	
	Supply & Demand	127
8	India Power Lawn & Garden Equipment	
	Demand by Type & Market.....	130
9	Indonesia Power Lawn & Garden Equipment	
	Supply & Demand	132
10	Indonesia Power Lawn & Garden Equipment	
	Demand by Type & Market	134
11	Japan Power Lawn & Garden Equipment	
	Supply & Demand	136
12	Japan Power Lawn & Garden Equipment	
	Demand by Type & Market	138
13	New Zealand Power Lawn & Garden	
	Equipment Supply & Demand.....	140
14	New Zealand Power Lawn & Garden	
	Equipment Demand by Type & Market	142
15	South Korea Power Lawn & Garden	
	Equipment Supply & Demand.....	144

16	South Korea Power Lawn & Garden	
	Equipment Demand by Type & Market	146
17	Other Asia/Pacific Power Lawn & Garden	
	Equipment Supply & Demand.....	148
18	Other Asia/Pacific Power Lawn & Garden	
	Equipment Demand by Type & Market	150

OTHER REGIONS

1	Other Regions Power Lawn & Garden	
	Equipment Supply & Demand.....	153
2	Other Regions Power Lawn & Garden	
	Equipment Demand by Type & Market	155
3	Latin America Power Lawn & Garden	
	Equipment Supply & Demand.....	158
4	Latin America Power Lawn & Garden	
	Equipment Demand by Type & Market	160
5	Brazil Power Lawn & Garden Equipment	
	Supply & Demand	162
6	Brazil Power Lawn & Garden Equipment	
	Demand by Type & Market.....	164
7	Other Latin America Power Lawn & Garden	
	Equipment Supply & Demand.....	166
8	Other Latin America Power Lawn & Garden	
	Equipment Demand by Type & Market	168
9	Eastern Europe Power Lawn & Garden	
	Equipment Supply & Demand.....	171
10	Eastern Europe Power Lawn & Garden	
	Equipment Demand by Type & Market	173
11	Hungary Power Lawn & Garden	
	Equipment Supply & Demand.....	175
12	Hungary Power Lawn & Garden Equipment	
	Demand by Type & Market	177
13	Poland Power Lawn & Garden	
	Equipment Supply & Demand.....	179
14	Poland Power Lawn & Garden Equipment	
	Demand by Type & Market.....	181
15	Russia Power Lawn & Garden Equipment	
	Supply & Demand	183
16	Russia Power Lawn & Garden Equipment	
	Demand by Type & Market.....	185
17	Other Eastern Europe Power Lawn & Garden	
	Equipment Supply & Demand.....	187
18	Other Eastern Europe Power Lawn & Garden	
	Equipment Demand by Type & Market	189
19	Africa/Mideast Power Lawn & Garden	
	Equipment Supply & Demand.....	191
20	Africa/Mideast Power Lawn & Garden	
	Equipment Demand by Type & Market	193

INDUSTRY STRUCTURE

1	Power Lawn & Garden Equipment	
	Sales by Company, 2006	196
Cht	World Power Lawn & Garden Equipment	
	Market Share by Company, 2006	197
2	Selected Acquisitions & Divestitures	212
3	Selected Cooperative Agreements	215

[Click here to purchase online](#)

Small yards or gardens in Japan and low wages in most other Asian nations will dampen both residential and commercial demand for power lawn and garden equipment in the Asia/Pacific region.

Global demand to rise 3.2% annually through 2011

Global demand for power lawn and garden equipment is projected to expand 3.2 percent annually through 2011 to \$18.7 billion. Growth will also result from product innovations and upgrades, driven by consumer demand for equipment with increased horsepower, additional features and lighter weight. Lawnmowers will continue to be the largest segment, benefitting from their wide use in both residential and commercial applications. Turf and grounds equipment is expected to post the best gains, due to continuing growth in professional landscaping services and the rising number of golf courses worldwide. Other products such as trimmers, edgers, snow throwers, parts and accessories, will benefit from rising living standards in developing nations.

North America, Western Europe to remain dominant

The US accounted for the majority of global demand in 2006, with 56 percent of the total. On a regional basis, North America and Western Europe will continue to be the dominant markets, with nearly 90 percent of demand in 2011. Consumers in these developed nations have high per-capita income levels that allow for discretionary purchases such as power lawn and garden equipment. These areas are also home to the vast majority of the world's golf

North America
63%

Western Europe
26%

Asia/Pacific 5%

Other Regions 6%

World Power Lawn & Garden Equipment Demand, 2006 (\$16 billion)



photo courtesy of Exmark Manufacturing Company

courses, which are major consumers of power lawn and garden equipment.

Unlike in many consumer durables industries, Asia represents only about five percent of world demand. Even the prosperous nation of Japan is a relatively small market. Most Japanese do not have yards or gardens of sufficient size to justify the use of power equipment. In most other Asian nations, demand is limited by low income levels, with most consumers unable to afford power lawn and garden equipment for home use. Low wages also dampen professional demand, since the low cost of labor encourages the use of manual equipment in landscaping applications.

Commercial market to outpace residential

The residential market accounted for nearly two-thirds of power lawn and garden equipment sales in 2006. The size of the residential market results from its dominance in developed markets such as that in the US. Gains in this segment will benefit from rising personal expenditure levels. The commercial market is larger in most developing nations, as well as in Japan. Demand in the commercial market will benefit from the rising number of golf courses and professional landscapers. Professional landscapers will find increased demand to service both residential and commercial properties.

Copyright 2007 The Freedonia Group, Inc.

[Click here to purchase online](#)

**Sample Text,
 Table & Chart**

WESTERN EUROPE

Despite its high standard of living and industrialization, its regional counterparts in terms of per household power lawn garden equipment use. Unlike France, the UK, gardening has only relatively recently become a major hobby in southern European climate in Italy, where the heat discourages outdoor activities. In Italy, the use of power lawn equipment for popular activities include cutting lawns for climbing plants. In addition, many of its regional neighbors, dampening demand in the market.

**SAMPLE
 TEXT**

Power lawn and garden equipment production at facilities totaled \$845 million in 2006, leaving the country with a sizable surplus. Italy has historically been a net exporter due to its relatively low (by regional standards) labor and production costs, and its location provides access to much of Europe (including the burgeoning Eastern and Central portions), the Middle East, Africa and parts of Asia. Although Italy has markets in all the world's regions, its most important customers are found among the country's EU partners, certain non-EU West European countries, the US, and Middle Eastern nations such as Saudi Arabia. Italy is home to EMAK and Cifarelli. Among the producers with facilities in Italy are Black & Decker, Bosch and GGP Sweden.

Through 2011, power lawn and garden equipment demand in Italy is forecast to expand 3.0 percent annually to \$400 million. Gains will exceed the results recorded in the 2001-2006 period. Advances will benefit from improved macroeconomic factors, especially rising personal incomes. However, these factors will be offset to some extent by a leveling off in gardening interest in Italy. Interest in lawn and garden activity has grown during the past decade, but is expected to reach its saturation point by 2016.

TABLE V-9

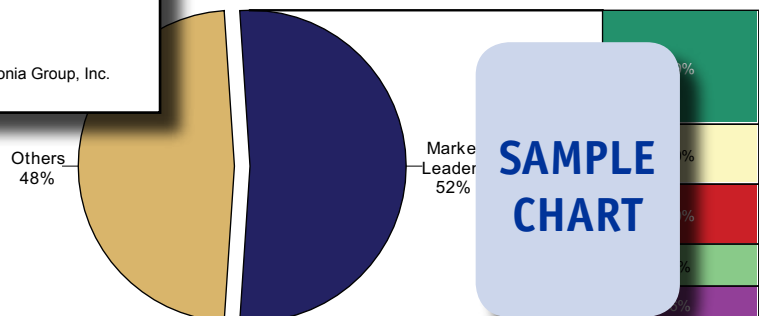
**ITALY POWER LAWN & GARDEN EQUIPMENT
 SUPPLY & DEMAND**

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil 2005\$)	1,000	1,100	1,200	1,300	1,400
\$ GDP/capita	20,000	22,000	24,000	26,000	28,000
Population (million persons)	58	58	58	58	58
urban % of total population	70	70	70	70	70
persons per household	2.3	2.3	2.3	2.3	2.3
Urban Population (million persons)	41	41	41	41	41
Households (million)	20	20	20	20	20
\$ lawn & garden equip/household	18	18	18	18	18
Lawn & Garden Equip Demand (mil \$)	360	360	360	360	360
net exports	5	5	5	5	5
Lawn & Garden Equip Shpts (mil \$)	845	845	845	845	845

**SAMPLE
 TABLE**

CHART VIII-1

**WORLD POWER LAWN & GARDEN EQUIPMENT
 MARKET SHARE BY COMPANY, 2006
 (\$16 billion)**



**SAMPLE
 CHART**

*Husqvarna share does not include 2007 acquisitions

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

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

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 upgrades, 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

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)