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Lawn & Garden Consumables

US Industry Study with Forecasts for **2012 & 2017**

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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

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The graying of the baby boom generation, which is primed for its peak gardening years, will boost demand, especially for products used in landscaping and gardening applications.

US demand to rise 4.5% annually through 2012

US demand for packaged lawn and garden consumables is forecast to increase 4.5 percent per year to \$9.3 billion in 2012. After several years of favorable sales, the lawn and garden industry hit a snag in 2007. Unfavorable weather patterns throughout much of the US, coupled with rising fuel and energy costs and lowered home values, limited volume demand for lawn and garden consumables. However, price increases mitigated this impact on market value. Many of these economic factors continued to plague the industry in 2008.

Going forward, the graying of the baby boom generation, which is primed for its peak gardening years, will boost demand, especially for products used in landscaping and gardening applications. At the same time, because of a renewed emphasis on family, many are electing to spend more time and energy in and around their homes, as well as the homes of family members and friends -- often on outdoor structures such as patios and decks, which are increasingly designed to utilize all potential living space. A well-manicured lawn or garden complements the outdoor living space design.

Growing media, fertilizers and mulch to lead gains

Best opportunities are anticipated for new products that offer convenience and

Fertilizers
38%

Pesticides
30%

Growing Media
12%

Seeds
10%

Mulch & Other
Types 10%

US Lawn & Garden Packaged Consumables Demand, 2007 (\$7.5 billion)



good performance while also meeting health and safety standards. Growth will be led by growing media, fertilizers and mulch, all of which will post above-average gains over the forecast period. These three segments are benefiting from the expanding consumer trend favoring value-added products such as fast-acting and easy-to-use fertilizers, rubber and colored mulches and premium soils. Across all product segments, organic formulations will experience more favorable increases than conventional formulations. Increased concern over the use of synthetic fertilizers and pesticides on lawns and gardens, particularly in regard to how these chemicals impact the environment and the health of people and pets, will

provide opportunities for organic products. Sales of organics will be spurred by substantial product improvements, increasing product availability, lower prices and more effective marketing, particularly as leading lawn and garden consumables suppliers enter the market.

In contrast, sales will be sluggish for pesticides, which made up 30 percent of the market in 2007. Increasing concern over the environmental and health effects of chemical use will dampen pesticides' prospects. Attempts to control lawn maintenance costs, as well as competition from combination products that incorporate pesticides with fertilizers, will further depress gains.

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Sample Text, Table & Chart

REGIONAL MARKETS

South

The South is the nation's largest region in terms of population and economic activity. During the 1990s and early 2000s, the South enjoyed growth in population that exceeded the national average. Population growth in the region have led to a transformation of the region into a region of larger metropolitan areas. Major cities such as Charlotte, Houston and San Antonio have experienced rapid growth through population and annexation of surrounding areas. The South has been unable to older cities of the Northeast and Midwest. While earlier economic growth involved attracting manufacturing facilities from regions with higher labor costs, growth in the early to mid-1990s was based on a broad array of economic activity. Diversification into financial services and information technology, and increased trade with Latin America and Mexico have helped boost the prominence of the South in the national economy. However, like the other US regions, the South experienced a slowdown in GDP growth from 1997 to 2002 as the US experienced a recession in 2001. Nevertheless, economic growth remained above the national average, and this continued through the 2002-2007 period. The South will continue to see strong economic growth, posting above-average gains through 2012. Population growth will remain above the national average through the same period.

Demand for lawn and garden consumables in the South is projected to expand 4.8 percent per year to \$2.0 billion in 2012, supported by the continued shift of the over 55-year-old population into the region. Individuals in this cohort are especially likely to make sure that their lawns and gardens are well cared for (to maintain and/or increase the property's value), whether they do the work themselves or hire a professional service. In addition, these individuals usually have more leisure time than those in younger age groups, making them more likely to participate in gardening activities and to play golf. Thus, the continued influx of older

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SAMPLE TEXT

TABLE III-7

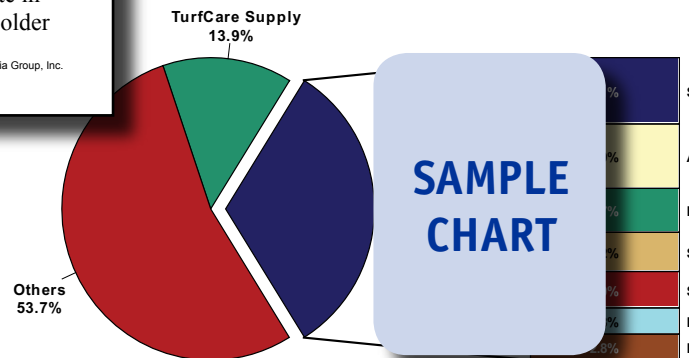
HERBICIDE SALES IN LAWN & GARDEN APPLICATIONS (million dollars)

Item	1997	2002	2007	2012	2017
Lawn & Garden Pesticide Sales	15,700	17,000	18,500	19,800	21,000
% herbicides	75	75	75	75	75
Lawn & Garden Herbicide Sales	11,775	12,750	13,875	14,850	15,750
By End User:					
Professional	1,178	1,278	1,378	1,478	1,578
Consumer	10,597	11,472	12,497	13,372	14,172
By Active Ingredient:					
2,4-D	1,178	1,278	1,378	1,478	1,578
Glyphosate	1,178	1,278	1,378	1,478	1,578
Other	8,219	8,914	9,719	10,400	11,094
\$/lb	1.00	1.00	1.00	1.00	1.00
Lawn/Garden Herbicide Sales (mil lb)	4,750	5,100	5,450	5,800	6,150

SAMPLE TABLE

CHART VI-3

PROFESSIONAL LAWN & GARDEN CONSUMABLES MARKET SHARE, 2007 (\$3.6 billion)



SAMPLE CHART

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

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies will reach \$7.6 billion in 2011 based on substantial growth in nonresidential construction and floor space. Manual cleaning products like wipes and automated floor cleaning equipment such as backpack vacuums will lead gains. Industrial buildings will outpace all other markets. This study analyzes the \$6.5 billion US janitorial equipment and supplies industry to 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.
 #2181 03/2007..... \$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 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

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