

[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](#)

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# Power Lawn & Garden Equipment

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US Industry Study with Forecasts for **2013 & 2018**

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Study #2478 | April 2009 | \$4600 | 260 pages

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## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
Macroeconomic Outlook .....	4
Personal Income & Expenditure Patterns .....	9
Demographic & Employment Trends .....	11
Housing Outlook .....	14
Household Formations & Housing Stock Patterns .....	14
Housing Completions .....	17
Pricing Patterns .....	20
Market Trends .....	22
Regulatory & Environmental Issues .....	24
Air Emissions .....	25
Noise Pollution .....	26
Yard Waste .....	27
Technology .....	27
World Power Lawn & Garden Equipment Market .....	28
US Foreign Trade .....	30
Exports .....	31
Imports .....	32

### MATERIALS

General .....	35
Metals .....	36
Plastic .....	39
Other Materials .....	41

### MARKETS

General .....	43
Residential .....	45
Commercial .....	47
Landscape Firms .....	48
Landscape Services Outlook .....	49
Lawn & Garden Equipment Demand .....	51
Golf Courses .....	52
Golf Courses Outlook .....	52
Lawn & Garden Equipment Demand .....	54
Government & Other .....	56
State & Municipal Government Outlook .....	56
Lawn & Garden Equipment Demand .....	57

### PRODUCTS

General .....	60
Lawnmowers .....	63

Riding 66	
Front Engine .....	67
Rear Engine .....	69
Non-Riding .....	70
Self-Propelled .....	72
Push .....	72
Foreign Trade .....	73
Turf & Grounds Equipment .....	75
Mowers .....	78
Riding .....	80
Non-Riding .....	81
Other .....	82
Turf Tractors & Related Equipment .....	83
All Other Turf Care Equipment .....	84
Foreign Trade .....	86
Trimmers & Edgers .....	88
Wire Blade .....	90
Fixed Blade .....	92
Garden Tractors & Rotary Tillers .....	93
Garden Tractors .....	94
Rotary Tillers .....	96
Snow Throwers .....	98
Dual-Stage .....	100
Single-Stage .....	102
Foreign Trade .....	103
Blowers, Vacuums & Sweepers .....	104
Hedge Trimmers & Other .....	107
Parts & Attachments .....	109
Power Source .....	112
Gas Equipment .....	113
Electric Equipment .....	115

### REGIONAL TRENDS

General .....	118
Regional Demographic & Economic Trends .....	119
Regional Population Outlook .....	120
Regional Economic Outlook .....	122
Regional Housing Trends .....	123
Northeast .....	125
Midwest .....	127
South .....	128
West .....	131

### INDUSTRY STRUCTURE

General .....	134
Industry Composition & Market Share .....	135
Residential .....	137
Commercial .....	139
Mergers & Acquisitions .....	141

Competitive Strategies .....	144
Research & Product Development .....	146
Manufacturing .....	148
Marketing .....	150
Distribution .....	153
Residential Distribution Channels .....	153
Home Centers .....	154
Mass Merchandisers .....	155
Hardware & Other .....	156
Commercial Distribution Channels .....	157
Cooperative Agreements .....	158

### COMPANY PROFILES

Alamo Group .....	162
Ariens Company .....	166
Bad Boy Incorporated .....	169
Black & Decker .....	170
Blount International .....	172
Briggs & Stratton .....	174
Bush Hog .....	181
Country Home Products .....	182
Dana Holding .....	184
Deere & Company .....	186
Excel Industries .....	190
Fuji Heavy Industries .....	192
GGP Sweden .....	193
Hoffco Comet Industries .....	195
Home Depot .....	197
Honda Motor .....	199
Husqvarna AB .....	202
Jenn Feng Industrial .....	208
Kawasaki Heavy Industries .....	210
Kohler Company .....	212
Kubota Corporation .....	215
Lowe's Companies .....	218
Makita Corporation .....	219
McLane Manufacturing .....	221
Metalcraft of Mayville .....	222
Mitsui & Company .....	224
Moridge Manufacturing .....	226
MTD Products .....	228
Schiller Grounds Care .....	233
Sears Holdings .....	237
Shindaiwa Corporation .....	240
STIHL Holding .....	243
Swisher Mower & Machine .....	246
Techtronic Industries .....	248
Tecumseh Products .....	251
Textron Incorporated .....	252
Toro Company .....	254
Walker Manufacturing .....	259

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table ..... 3

### MARKET ENVIRONMENT

1 Macroeconomic Indicators..... 9  
 2 Personal Income & Expenditures ..... 11  
 3 Population..... 14  
 4 Households & Housing Stock ..... 16  
 5 Private Housing Completions ..... 20  
 6 Lawn & Garden Equipment Pricing ..... 22  
 7 Power Lawn & Garden Equipment  
 Market Trends, 1998-2008..... 24  
 8 Power Lawn & Garden Equipment  
 Foreign Trade..... 30  
 Cht Power Lawn & Garden Equipment  
 Exports by Destination, 2008 ..... 32  
 Cht Power Lawn & Garden Equipment  
 Imports by Source, 2008..... 34

### MATERIALS

1 Power Lawn & Garden Equipment  
 Material Consumption ..... 36  
 2 Power Lawn & Garden Equipment  
 Metal Consumption ..... 38  
 3 Power Lawn & Garden Equipment  
 Plastic Consumption ..... 41  
 4 Power Lawn & Garden Equipment  
 Other Material Consumption ..... 42

### MARKETS

1 Power Lawn & Garden  
 Equipment Markets ..... 44  
 Cht Power Lawn & Garden Equipment  
 Markets, 2008..... 45  
 2 Residential Market: Power Lawn  
 & Garden Equipment Demand ..... 47  
 3 Commercial Market: Power Lawn  
 & Garden Equipment Demand ..... 48  
 4 Landscaping Services Revenue  
 & Establishment Data..... 50  
 5 Landscape Establishments Market: Power  
 Lawn & Garden Equipment Demand .. 52  
 6 Golf Courses ..... 54

7 Golf Course Market: Lawn &  
 Garden Equipment Demand..... 55  
 8 Government Expenditures..... 57  
 9 Government & Other Market: Power  
 Lawn & Garden Equipment Demand .. 59

### PRODUCTS

1 Lawn & Garden Equipment  
 Supply & Demand ..... 62  
 Cht Power Lawn & Garden Equipment  
 Demand by Product, 2008 ..... 63  
 2 Lawnmower Supply & Demand..... 65  
 3 Riding Mower Shipments..... 67  
 4 Front Engine Riding Mower Shipments.. 68  
 5 Rear Engine Riding Mower Shipments... 70  
 6 Non-Riding Lawnmower Shipments ..... 71  
 7 Lawnmower Foreign Trade ..... 75  
 8 Turf & Grounds Equipment  
 Supply & Demand ..... 78  
 9 Turf & Grounds Mower Shipments ..... 79  
 10 Riding Turf & Grounds  
 Mower Shipments ..... 80  
 11 Non-Riding Turf & Grounds  
 Mower Shipments ..... 82  
 12 Other Turf & Grounds Mowing  
 Equipment Shipments..... 83  
 13 Turf Tractor & Related  
 Equipment Shipments..... 84  
 14 All Other Turf Care  
 Equipment Shipments..... 86  
 15 Turf & Grounds Equipment  
 Foreign Trade..... 88  
 16 Trimmer & Edger Supply & Demand ..... 90  
 17 Wire Blade Trimmer &  
 Edger Shipments ..... 92  
 18 Fixed Blade Trimmer &  
 Edger Shipments ..... 93  
 19 Garden Tractor & Rotary Tiller  
 Supply & Demand ..... 94  
 20 Garden Tractor Shipments ..... 96  
 21 Rotary Tiller Shipments ..... 98  
 22 Snow Thrower Supply & Demand..... 100  
 23 Dual-Stage Snow Thrower Shipments.. 101  
 24 Single-Stage Snow Thrower Shipments 103

25 Blower, Vacuum & Sweeper  
 Supply & Demand ..... 107  
 26 Hedge Trimmer & Other Lawn & Garden  
 Equipment Supply & Demand..... 109  
 27 Lawn & Garden Equipment Parts &  
 Attachments Supply & Demand ..... 111  
 28 Lawn & Garden Equipment  
 Shipments by Power Source..... 113  
 29 Gas-Powered Lawn & Garden  
 Equipment Shipments..... 115  
 30 Electric Lawn & Garden  
 Equipment Shipments..... 117

### REGIONAL TRENDS

1 Power Lawn & Garden Equipment  
 Demand by Region..... 119  
 2 Population by Region ..... 121  
 3 Gross Domestic Product by Region ..... 123  
 4 Regional Home Sales &  
 New Housing Units ..... 124  
 5 Northeast Lawn & Garden  
 Equipment Demand..... 126  
 6 Midwest Lawn & Garden  
 Equipment Demand..... 128  
 7 South Lawn & Garden  
 Equipment Demand..... 131  
 8 West Lawn & Garden  
 Equipment Demand..... 133

### INDUSTRY STRUCTURE

1 US Power Lawn & Garden Equipment  
 Sales by Company, 2008 ..... 136  
 Cht Power Lawn & Garden Equipment  
 Market Share, 2008..... 137  
 Cht Residential Power Lawn & Garden  
 Equipment Market Share, 2008..... 139  
 Cht Commercial Power Lawn & Garden  
 Equipment Market Share, 2008..... 141  
 2 Selected Acquisitions & Divestitures .. 143  
 Cht Residential Power Lawn & Garden  
 Equipment Sales by  
 Distribution Channel, 2008 ..... 154  
 3 Selected Cooperative Agreements ..... 160

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*Product innovations, which are being driven by consumer demand for equipment that is easier to use, more efficient, lighter weight and with additional safety features, will help spur value gains.*

## US demand to rise 2.7% annually through 2013

Power lawn and garden equipment demand in the US is forecast to rise 2.7 percent annually through 2013, reaching \$9.7 billion. Although gains are expected to be sluggish in the short term, the housing market is expected to recover by 2013, creating opportunities in the consumer market. In addition, a positive outlook for the landscaping industry will provide opportunities. Product innovations, which are being driven by consumer demand for equipment that is easier to use, more efficient, and with additional safety features and lighter weight, will also spur value gains. However, gains will be limited by continuing struggles in the golf industry, where the total number of courses is expected to decline.

## Key residential market to benefit from housing turnaround

The residential market dominates power lawn and garden equipment sales, representing 62 percent of the total in 2008. In addition to benefitting from the turnaround in housing completions, gains in the residential market will be boosted by solid growth in disposable income levels. Opportunities in the commercial market will be strongest in the landscaping industry. The number of professional landscaping firms will continue to rise, benefitting from an aging US population.



## Lawnmowers to continue as largest product segment

Lawnmowers will continue to be the largest product segment, due to their wide use in both residential and commercial applications. Lawnmowers will be among the fastest growing products through 2013, benefitting from recovery in the housing market, as these are among the first items purchased by new homeowners. Despite the improving durability of original equipment, parts and accessories demand will advance due to the rising amount of stock in use. Turf and grounds equipment is expected to post gains due to the continued growth in the number of professional landscapers.

## West to be fastest growing regional market

The South will remain the largest regional market for power lawn and garden equipment, accounting for over one-third of total demand in 2013. Demand in the South results from the region's size, extensive consumer market base and favorable climate. The West is expected to post the strongest advances through 2013, due to relatively healthy economic conditions and a growing population. The Midwest and Northeast will lag the US average, despite strong housing gains in the Midwest.

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## Sample Text, Table & Chart

### REGIONAL TRENDS

#### Northeast

The Northeast region consists of two subregions: New England and the Middle Atlantic. Historically, the region's economy was based on manufacturing. However, through the latter half of the 20th century and into the early years of the new millennium, manufacturing decreased in importance, as many producers relocated to areas with lower production costs. Industries that have sprung up in manufacturing's place include high technology and financial services. Despite shifting focus to these newer industries, the region's economy will lag behind those of the South and West, growing 4.0 percent per year through 2013. Moreover, population growth in the Northeast will remain well below the national average.

Demand for power lawn and garden equipment in the Northeast is forecast to rise to \$1.5 billion, well below the US average of \$2.5 billion. The region's below average housing starts and population growth are not a good indicator for any region in the country. The region's population, including the important manufacturing sector, is declining.

Although the smallest of the regions, the Northeast remains a significant market for lawn and garden equipment, accounting for over 20 percent of total demand in 2008. Offsetting the negative growth factors will be the region's high per capita lawn and garden equipment consumption, the highest in the nation. The residents of the Northeast region utilize a wide variety of equipment based on the presence of four distinct seasons and heavily treed terrain. The Northeast will also remain a large market for snow throwers due to the long winter season in both the New England and Middle Atlantic subregions. Since climatic factors are more diverse than in other regions, the Northeast consumes a larger amount of higher-end equipment, such as garden tractors, dual-stage snow throwers and riding mowers, creating further opportunities.

**SAMPLE TEXT**

TABLE IV-3

### COMMERCIAL MARKET: POWER LAWN & GARDEN EQUIPMENT DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil \$)	8,000	10,000	12,000	14,000	16,000
\$ equip/mil \$ GDP	0.0125	0.0100	0.0083	0.0071	0.0063
Commercial Market	1,000	1,200	1,400	1,600	1,800
Landscape Firms	500	600	700	800	900
Golf Courses	200	250	300	350	400
Government & Other	300	350	400	450	500
% commercial	12.5%	12.0%	11.7%	11.4%	11.3%
Power Lawn & Garden Equip Demand	100	120	140	160	180

**SAMPLE TABLE**

CHART VII-2

### REGIONAL POWER LAWN & GARDEN EQUIPMENT MARKET SHARE, 2008 (\$5.3 billion)



**SAMPLE CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Excel Industries Incorporated

200 South Ridge Road  
 Hesston, KS 67062  
 620-327-4911  
<http://www.hu>

Annual Sales:  
 Employment:

Key Products: Attachments

Excel Inc. provides commercial turf maintenance equipment. The line includes a wide range of mowers and attachments for edging, grass collection, snow removal and other activities.

The Company participates in the US lawn and garden equipment industry through the manufacture of riding and walk-behind mowers and attachments. These products are primarily sold under the HUSTLER brand name. Excel Industries makes its products in Hesston, Kansas. The Hesston plant occupies 245,000 square feet, including a 95,000-square-foot powder-coat paint facility.

Excel's HUSTLER riding mowers are available in residential, commercial, industrial and golf styles. Residential riding mowers from the Company comprise MINI FASTRAK, FASTRAK, and FASTRAK SUPER DUTY models. Excel's MINI FASTRAK mowers are made with 16-horsepower (hp) engines from Honda Motor Company Limited (Japan), or 15- or 17-hp engines from Kohler Company (Kohler, Wisconsin). These mowers also feature 36- or 42-inch cutting decks and its SMOOTHTRAK twin-lever steering systems. FASTRAK mowers from the Company have V-twin engines from Honda or Kawasaki Heavy



TABLE V-8

### TURF & GROUNDS EQUIPMENT SUPPLY & DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil \$)					0
\$ equip/mil \$ GDP					9
Turf & Grounds Equipment Demand					0
net exports					0
Turf & Grounds Equipment Shipments					0
Mowers					5
Tractors & Related Equipment					5
All Other Turf Equipment					0
% turf & grounds equipment					7
Lawn & Garden Equip Shipments					0



"Shipments of riding turf and grounds mowers in the US are forecast to rise 2.1 percent annually to \$1.8 billion in 2013. Unit shipments will also experience gains, with expected annual growth of 1.5 percent through 2013, reaching 210,000. Reflecting trends for all grounds and turf equipment, gains will benefit from economic recovery. However, the steadily declining number of golf courses will dampen gains. In addition, decelerating spending patterns among municipalities will limit opportunities."  
 --Section V, pg. 80

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**OTHER STUDIES**

**World Power Tools**

This study analyzes the global power tool industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by product (e.g., electric drills, electric saws, pneumatic, engine-driven), market (professional, consumer), world region (e.g., North America, Western Europe, Asia/Pacific) and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2514 ..... 06/2009..... \$5700

**Agricultural Equipment in China**

This study analyzes the agricultural equipment industry in China. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by product type (e.g., farm tractors, harvesting machinery, plowing and cultivating machinery, planting and fertilizing machinery, parts and attachments), and region (e.g., Central-North, Central-East). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2475 ..... 05/2009..... \$5200

**Landscaping Products**

US landscaping product demand is forecast to grow 6.1% yearly through 2013, based on a recovery in the housing market. Decorative products will benefit from the relatively low market penetration of water features. Hardscapes will see favorable growth as consumers value pavers, stones and boulders for patios, walkways and surrounds. This study analyzes the \$5.6 billion US landscaping product industry, with forecasts for 2013 and 2018 by type, market, end use and region. It also evaluates market share and profiles industry players.

#2488 ..... 04/2009..... \$4700

**Power & Hand Tools**

US power and hand tool demand will grow 3.3% annually through 2012. Gains will be driven by continued consumer interest in DIY and home remodeling activities, the ongoing introduction of new products and a recovery in the professional construction market. Power tools will continue to outpace hand tools, especially cordless electric types. This study analyzes the \$12.3 billion US power and hand tool industry, with forecasts for 2012 and 2017 by product and market. It also evaluates market share and profiles industry players.

#2432 ..... 12/2008..... \$4700

**World Agricultural Equipment**

Global demand for agricultural equipment will rise 3.8% annually through 2012, paced by the accelerating mechanization of farming in large markets such as China and India. In industrialized areas, replacement demand will be aided by higher value "precision agriculture" equipment with GPS and wireless sensors. This study analyzes the \$93.2 billion world agricultural equipment industry, with forecasts for 2012 and 2017 by type, world region and 26 countries. It also evaluates market share and profiles industry competitors.

#2373 ..... 07/2008..... \$5600

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