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Landscaping Products

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

Study #2488 | April 2009 | \$4700 | 229 pages

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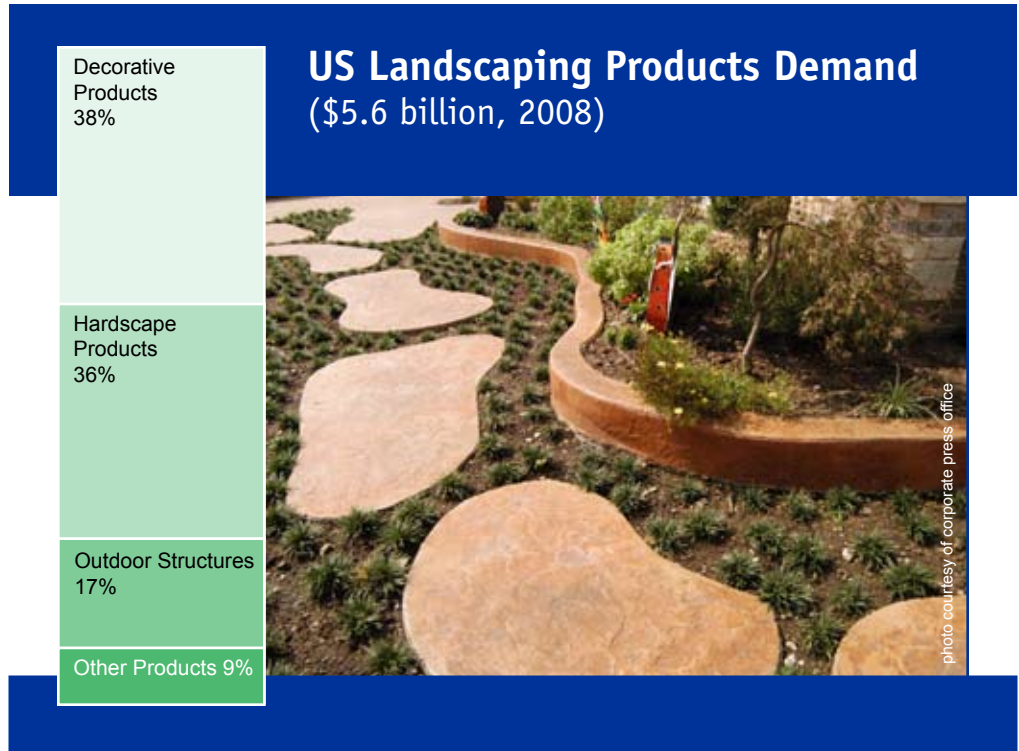
Lifestyle trends focusing on family and staying at home will benefit landscaping products as homeowners seek to maximize their home's potential, primarily by creating outdoor living spaces.

US demand to increase 6.1% yearly through 2013

US demand for landscaping products is forecast to increase 6.1 percent per year to \$7.5 billion in 2013, an acceleration from the pace set during the 2003-2008 period. Although gains are expected to be modest in the short term due to recessionary conditions, the housing market is expected to recover by 2013, creating opportunities for landscaping products. In addition, lifestyle trends focusing on family and staying at home will promote the use of landscaping products as homeowners look for ways to maximize their home's potential, primarily by creating outdoor living spaces. However, gains will be limited by a marked slowdown in the construction of nonresidential buildings. Continuing struggles in the golf industry, where growth in new course construction will weaken, will also restrict landscaping product demand.

Hardscape products, outdoor structures among best opportunities

Landscaping products include a variety of items -- decorative products, hard-scape products, outdoor structures and other products -- used to improve the appearance of lawns, vegetable and flower gardens, borders and other areas of residential, commercial or municipal properties. Gains in demand for decorative products will benefit from the relatively low market penetration of water



features (e.g., ponds and fountains), as more property owners look to these items as a way of reducing unwanted nearby noise and promoting tranquility. Product developments featuring easy installation and energy saving technology will promote demand for lighting, which is increasingly used to accent pathways, statuary, green goods and water features.

Hardscapes will continue to face competition from alternative products and structures, such as wood decking. Nevertheless, these products will experience favorable growth as consumers value the aesthetics and durability of various concrete products (e.g., pavers), and stones and boulders in the construc-

tion of patios and walkways, and surrounds for outdoor fireplaces, ponds and in-ground swimming pools.

A renewed interest in food gardening (e.g., berries, herbs and vegetables) will fuel demand for greenhouses, while other outdoor structures, such as gazebos and pergolas, will benefit from their increasing incorporation in outdoor living areas. Among other landscaping products, heating features such as chimineas will achieve the most rapid gains, as homeowners incorporate elements in their outdoor space designed to promote an oasis-like atmosphere and extend the time they can enjoy their outdoor space.

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Sample Text, Table & Chart

REGIONAL MARKETS

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's importance decreased in importance, as many producers relocated to the South and West for lower production costs. Industries that have sprung up in manufacturing's place include high technology and financial services. In the Northeast, the shifting focus to these newer industries, the region's economy has grown faster than those of the South and West, growing 4.0 percent per year through 2008. Moreover, population growth in the Northeast will remain well above the national average.

Demand for landscaping products in the Northeast is forecast to reach \$1.5 billion, below the national average of \$1.8 billion. The region's below-average economic growth, combined with a population, including a significant portion of the population, including a significant portion of the population, also dampen growth. The landscaping industry will continue to grow, but at a slower rate than in the past.

-- with closures in the Northeast and the opening of newly constructed courses in the West and South -- further restricting opportunities in the region for landscaping products.

Although the smallest of the regions, the Northeast remains a significant market for landscaping products, accounting for over 20 percent of total demand in 2008. Offsetting the negative growth factors will be the region's high per capita landscaping product spending, the highest in the nation. Although the region experiences harsh winters, a significant amount of money is spent in order to enjoy the outdoors during the rest of the year. The freeze/thaw cycle that accompanies the change in seasons also impacts which materials are best suited for landscaping products. In edging, for example, plastic items are better able to handle

TABLE III-2

DECORATIVE PRODUCTS DEMAND BY TYPE, MARKET & END USER (million dollars)

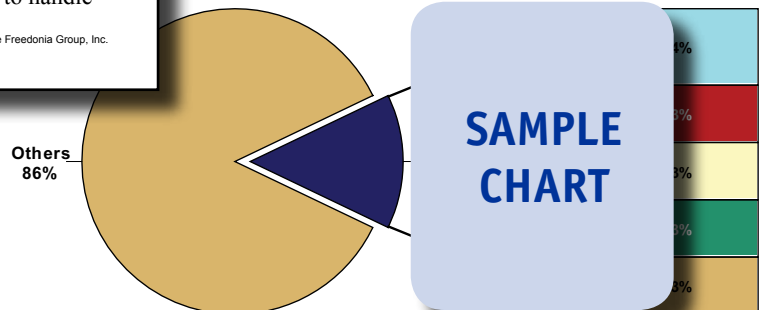
Item	1998	2003	2008	2013	2018
Resident Population (million)					35
\$ decorative products/capita					10
Decorative Products Demand					10
By Type:					
Water Features					10
Lighting					5
Bird & Wild Animal Products					10
Pots & Planters					10
Other					5
By Market:					
Residential					5
Nonresidential					10
Nonbuilding					5
By End User:					
Consumer					10
Professional					10
% decorative products					2
Landscaping Products Demand	5	5	5	5	80

SAMPLE TABLE

SAMPLE TEXT

CHART VI-1

LANDSCAPING PRODUCTS SALES BY COMPANY, 2008 (\$5.6 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-2

RESIDENTIAL MARKETS FOR LANDSCAPING PRODUCTS
(million dollars)

Item	1998	2003	2008	2013	2018
Residential Construct Expend (bil \$)					240
\$ landscaping products/000\$ expend					5
Residential Landscaping Products					20
By Type:					
Decorative Products					55
Hardscape Products					70
Outdoor Structures					10
Other					75
By Application:					
New					15
Improvement & Repair					35
% residential					1
Landscaping Products Demand	3189	4300	5000	7340	10180



COMPANY PROFILES

Pavestone Company LP

4835 LBJ Freeway, Suite 700
 Dallas, TX 75244
 972-404-0400
<http://www.pavestone.com>

Annual Sales:
 Employment:

Key Products: concrete pavers, edgers, and rocks

Pavestone manufactures landscaping products for commercial, residential, contractor, industrial applications. The privately held Company markets its products throughout the US.

The Company is active in the US landscaping products industry through the manufacture of concrete pavers, blocks, edgers and patio stones. Pavestone also makes rocks for landscape applications.

Pavers -- Pavers from the Company are made in a variety of styles, including ADIRONDACK HERITAGE, COLONY COBBLE HERITAGE, GRASSTONE I, VILLA STONE, PLAZA STONE, SYMMETRY and VINTAGE STONE HERITAGE. ADIRONDACK HERITAGE pavers, which are offered in square and rectangular shapes, feature textured surfaces to mimic the look of cobblestone paving. Pavestone's COLONY COBBLE HERITAGE pavers have a weathered texture and are laid in a running bond pattern to give the appearance of Colonial architecture. GRASSTONE I pavers from the Company are permeable types with a honeycomb shape that allow grass and other vegetation to grow through the pavement. These pavers are suitable for soil stabilization and other applications.



"Residential demand for landscaping products is forecast to rise 8.2 percent per year to \$4.7 billion in 2013, an acceleration from the pace set during the 2003-2008 period, which was marked by a housing downturn and strained disposable income (from rising fuel and food costs, and ballooning adjustable mortgage rates, as well as job loss). While a challenging environment continued into early 2009, macroeconomic conditions are expected to improve through the remainder of the forecast period, providing opportunities for landscaping products, particularly in new housing. In addition ..."
 --Section IV, pg. 118-9

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OTHER STUDIES

Wood & Competitive Decking

Although wood decking demand in the US will be flat through 2013, alternative decking will grow nearly 10% annually. Nevertheless, wood decking will continue to account for the majority of decking demand in volume and value. The residential market will remain dominant as consumers add amenities to their existing decks. This study analyzes the \$4.1 billion US decking industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates market share and profiles industry players.

#2487 04/2009..... \$4800

Green Building Materials

US "green" building material demand is projected to rise 7.2% yearly through 2013, driven mainly by a recovery of the residential market. Forest Stewardship Council (FSC)-certified lumber and wood panels, water-efficient plumbing fixtures and fittings, and energy-efficient lighting fixtures will grow at double-digit rates. This study analyzes the \$60 billion US green building material industry, with forecasts for 2013 and 2018 by type, market and region. It also considers market environment factors and profiles industry players.

#2459 02/2009..... \$4700

Fencing

US demand for fencing will reach 935 million linear feet in 2012, supported by a recovery in the residential fencing market. Plastic and composite fencing will be the fastest growing materials, as these products continue to penetrate the large residential fencing market at the expense of wood products. The Midwest and West regions will lead gains. This study analyzes the US fencing industry, with forecasts for 2012 and 2017 by product, market and region. It also evaluates market share and profiles industry players.

#2415 10/2008..... \$4600

Lawn & Garden Consumables

US demand for packaged lawn and garden consumables will grow 4.5% yearly through 2012, as baby boomers enter their peak gardening years. Best prospects include value-added products such as fast-acting and easy-to-use fertilizer, rubber and colored mulches and premium growing media. This study analyzes the \$7.5 billion US lawn and garden consumables industry, with forecasts for 2012 and 2017 by product, market, application, end user and region. It also details market share and profiles major players

#2337 05/2008..... \$4600

Brick & Block

US demand for brick and block will reach \$7.9 billion in 2012. Growth will be greatest in concrete products, reflecting stronger growth in key nonresidential building markets. Demand for clay brick will benefit from a recovery in residential building activity, especially in new single-family housing. This study analyzes the 14.2 billion unit US brick and block industry, with forecasts for 2012 and 2017 by product, market, application and US geographic region. It also evaluates company market share and profiles major players.

#2331 05/2008..... \$4500

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