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# World Power Tools

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

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Study #2514 | June 2009 | \$5700 | 324 pages

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*Recovery in the bedrock US market will reflect continued enthusiasm for do-it-yourself projects as well as the introduction of improved products, especially cordless electric models.*

## Global power tool demand to rise 3.7% annually through 2013

Global demand for power tools is forecast to rise 3.7 percent per year through 2013, approaching \$29 billion. Despite being presently mired in a recession, the bedrock US market will provide the best opportunities, accounting for slightly over one-third of the additional demand generated between 2008 and 2013. Recovery in US demand will reflect a turnaround in the current housing crisis, as well as continued enthusiasm for do-it-yourself projects by US consumers. US power tool sales will also benefit from the introduction of improved products, especially cordless electric models.

## Power tool demand in BRIC countries to fare well

The BRIC economies -- Brazil, Russia, India and China -- will all fare well. Demand in China and India will rise over six percent per annum, benefitting not only from continued gains in construction, but also from rising industrial production. Gains in Russia and Brazil will exceed the global average, benefitting from strong increases in improvement and repair construction activity; many of the buildings built in Russia during the USSR period (in particular, those built in the 1950s and 1960s) are currently in need of repair.

## World Power Tool Demand, 2008 (\$24.1 billion)



Production of power tools is expected to continue to shift to Asia, largely driven by Chinese manufacturing. China is projected to account for almost one-third of global shipments in 2013, with a significant share exported to the US. Chinese production will also benefit from rising exports to the rest of the Asia/Pacific region. Outside of Asia, Eastern Europe is expected to post the strongest gains, due to both rising domestic demand and export opportunities to Western Europe.

## Professional power tool users to remain dominant

Professional users account for the majority of world power tool demand,

due to their use of a greater variety of more expensive tools compared to consumers. The professional market will continue to comprise over 70 percent of the market through 2013 and beyond due to the growing levels of capital investment globally, which will boost construction expenditures. In addition, rising industrial output will create opportunities in the professional market. Consumer tool demand will be aided by the ongoing popularity of do-it-yourself activities in developed nations, and the improving standards of living in developing countries. Tool producers will continue to target the consumer segment with a variety of marketing approaches, including strategies aimed at women.

## Sample Text, Table & Chart

### ASIA/PACIFIC

#### South Korea: Supply & Demand

Demand for power tools in South Korea was \$ about eight percent of the Asia/Pacific total. The in tool use in South Korea exceeds that of all other As except Australia and Japan. During the 2003-2008 power tools was adversely affected by a drop in res tion; the amount of newly added residential floor sp of housing starts both declined considerably, as did expenditures. However, increases in industrial and tion expenditures provided opportunities for power

Power tool shipments from facilities in South I million in 2008. Industry output is insufficient to m and South Korea had a trade deficit equivalent to 30 in 2008. Major foreign sources of supply include Ja Western Europe. The indigenous South Korean pov finds export markets in the US, among its Asia/Paci Western Europe. Among the companies active in S ant, Hilti and Makita.

Demand for power tools in South Korea is fore percent per million. Growth of construction activity in k for most of the prior decade. Because th activity is forecast to be favor- able over th for power tools will be sustained. Nonreside ular, commercial, industrial, and infrastr institutions, healthcare facilities) construction. in South Korea, benefitting power tool demand. A number of important projects will be undertaken or completed during this period. The International Financial Center in Seoul, which will be completed in 2013, is a good example; the project involves the construction of three inter-connected, high-rise office buildings, a

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**SAMPLE  
TEXT**

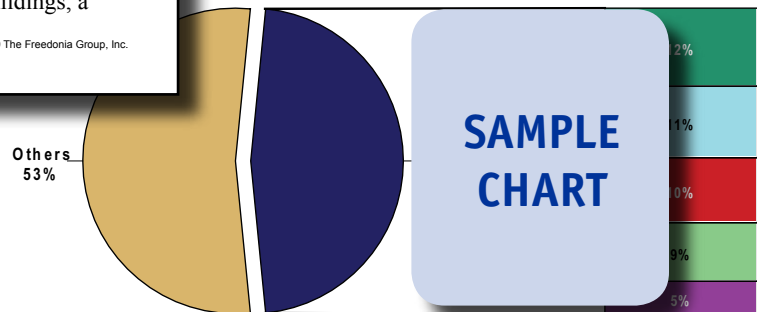
**TABLE VI-14**  
**SOUTH KOREA**  
**POWER TOOL DEMAND BY TYPE & MARKET**  
**(million dollars)**

Item	1998	2003	2008	2013	2018
Gross Fixed Investment (bil 2007\$)	27	27	27	27	27
\$ power tools/000\$ GFI	1	1	1	1	1
Power Tool Demand					
By Type:					
Electric Tools & Parts					
Tools					
By Product					
Drills					
Saws					
Sanders, Polishers & Grinde					
Other					
By Power Source					
Plug-In					
Cordless					
Parts & Accessories					
Pneumatic Tools					
Engine-Driven & Others					
By Market:					
Professional					
Consumer					

**SAMPLE  
TABLE**

**CHART VIII-1**

**POWER TOOL MARKET SHARE BY COMPANY, 2008**  
**(\$24.1 billion)**



**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Kulkarni Power Tools Limited

Shirol 416 103  
 Kolhapur, Maharashtra  
 India  
 91-2322-6615  
<http://www.kp>

Annual Sales:  
 Employment:

Key Products:  
 hammers, drill

**SAMPLE  
PROFILE**

Kulkarni Power Tools (KPT) designs and manufactures power tools primarily under the POWERMASTER brand name. The Company's offerings are sold throughout Asia and Africa.

The Company is active in the world power tool industry through the production of power tools for construction, metalworking and woodworking applications. For construction end uses, KPT makes such tools as cutting tools, impact drills, grinders, polishers and rotary hammers. A representative cutting tool is the KM4SAK2 concrete cutter, which is suitable for cutting through tiles, blocks, stones and bricks. Impact drills from the Company are offered in single- and two-speed models. Grinders are produced in heavy-duty, miniature and heavy-duty miniature types. KPT's polishers include the RSP1 variety, which features a ball bearing-constructed gearbox for enhanced durability. A specific rotary hammer from the Company is the KH22 model that has two gears, a depth stopper and an auxiliary handle.

KPT's metalworking tools encompass angle grinders, drills and sanders. Among the Company's angle grinders is the PSS-02 type that

**TABLE VI-13**  
**SOUTH KOREA**  
**POWER TOOL SUPPLY & DEMAND**

Item	1998	2003	2008	2013	2018
Population (million)					49.4
GDP per capita	15				40
Gross Domestic Product (bil 2007\$)					10
Gross Fixed Investment (bil 2007\$)	2				0.5
\$ power tools/000\$ GFI					21
Other Indicators					
Urban Population (million)					14
Construction Expend (bil 2007\$)	1				2.0
\$ power tools/capita					1.7
\$ power tools/000\$ construction					2.0
\$ power tools/mil \$ GDP					20
Power Tool Demand (mil \$)					80
net exports					90
Power Tool Shipments (mil \$)	2				390

**SAMPLE  
TABLE**

"South Korea's shipments of power tools are forecast to expand 3.3 percent per year through 2013 to \$330 million. Gains will result from not only rising capital investment levels in the domestic market, but also from export opportunities to developing nations in the region. The nation's trade deficit will continue to widen, as increased competition from offshore suppliers in both domestic and overseas markets limits shipment gains."

--Section VI, pg. 156

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**OTHER STUDIES**

**Power Lawn & Garden Equipment**

US power lawn and garden equipment demand will reach \$9.7 billion in 2013. Lawnmowers will remain the largest segment and be among the fastest growing, along with turf and grounds equipment. The South will stay the largest regional market while the West is expected to post the strongest advances. This study analyzes the US power lawn and garden equipment industry, with forecasts for 2013 and 2018 by material, market, product, power source and region. It also evaluates market share and profiles industry players.

#2478 ..... 04/2009..... \$4600

**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

**Consumer Water Purification & Air Cleaning Systems**

US consumer water purification and air cleaning system demand will increase 4.4% annually through 2012. Reverse osmosis and distillation types will be the fastest growing water purification systems. Electrostatic air cleaners will outpace conventional air filtration systems. This study analyzes the \$1.2 billion US purification and cleaning system industry, with forecasts for 2012 and 2017 by technology, product and regional market. It also evaluates market share and profiles industry players.

#2419 ..... 10/2008..... \$4700

**Machine Tools in China**

Machine tool demand in China will grow 13% yearly through 2012, based on rapid growth in durable goods production and infrastructure expansion and modernization. Metal cutting tools will outpace other products, spurred by strong growth in manufacturing investment. Industrial machinery will remain the largest market. This study analyzes the 328.5 billion yuan machine tools industry in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates market share and profiles industry players.

#2390 ..... 09/2008..... \$5100

**World Major Household Appliances**

Global white goods demand will grow 3.1% yearly through 2011. India will lead gains based on low penetration rates and rising living standards. Replacement demand will spur growth in developed areas as users replace broken appliances and trade up for newer models like more efficient "green" types. This study analyzes the 413 million unit world white goods industry, with forecasts for 2011 and 2016 by product, world region and for 25 countries. It also evaluates market share and profiles major players.

#2279 ..... 01/2008..... \$5800

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