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Home Organization Products

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

Study #2527 | July 2009 | \$4600 | 248 pages



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INDUSTRY STRUCTURE

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As baby boomers move to smaller homes and their children move into dorm rooms and first apartments, they will look for ways to organize their possessions in these smaller spaces.

US demand to rise 4.3% annually through 2013

Demand for home organization products in the US will increase 4.3 percent annually through 2013, as consumers purchase items that will make their lives easier and more organized. Demographic trends will also provide opportunities. For instance, as baby boomers become empty-nest families and move to smaller homes, they will look for ways to organize their possessions in these spaces. Also, the children of the baby boom generation are moving into dorm rooms and first apartments, many of which are also small spaces that require organization products for comfortable living. The sharp downturn in the housing market in 2007 and 2008 also caused many homeowners to invest in built-in organization systems, either to upgrade homes they plan to stay in or to differentiate homes that are being sold.

Modular units to post strongest gains

Bins, baskets and totes accounted for the largest share of home organization product sales in 2008, with 38 percent of the total market. These products are widely used in most households to store and organize belongings of all sizes. However, sales of modular units are expected to post the strongest gains. The ongoing interest in organizing closets and garages will benefit sales of modular units. The development of modular systems tailored to other rooms will also provide opportunities.

Bedrooms & Closets
35%

Family Rooms
22%

Garages
19%

Kitchens & Pantries
15%

Bathrooms & Utility Rooms
9%

US Home Organization Product Demand (\$7.2 billion, 2008)



photo courtesy of corporate press office

Applications in garages, closets hold best prospects

Sales of home organization products for use in garages are expected to post the strongest gains through 2013. This reflects the relative immaturity of the garage storage market, continued increases both in the share of homes with garages and in the average size of garages, and consumer desires to make the space suitable for hobbies or other activities. Sales of home organization products for use in closets are also projected to achieve above average growth, supported by the increasing availability of these items in a variety of retail outlets. Value gains will be boosted by high-end closet systems made from

solid wood or laminated panels and by the increasing demand for closet systems outside of the master bedroom.

Applications in garages, closets hold best prospects

Metal and wire home organization products accounted for the largest share of sales by material type, with just under one-third of the total in 2008. These products are also expected to post above average gains through 2013, benefitting from strong growth in sales of modular units and cabinetry organization accessories. However, demand for wood- and laminate-based products is expected to post the fastest gains over the forecast period.

Sample Text, Table & Chart

ROOMS

Closets

Demand for home organization products used in closets is projected to reach \$1.2 billion in 2013. Growth will be driven by the popularity of closet organization products and systems prominently marketed in television shows. As consumers turn to big box home improvement stores for their closet organization, value gains will be boosted by the use of modular units made from solid wood or laminated panels. Such systems are increasingly being installed in higher-end construction projects. Similarly, there is greater penetration of mid-level closet systems, especially wire and laminated panels, into the new home construction market. As more consumers become accustomed to the use of such systems in their master bedroom closets, many will venture to install such systems to other closets throughout the home. The popularity of television shows such as "Clean House" on Style Network (E! Entertainment Television) also boosts consumer awareness of closet organization systems, which are often featured on these programs.

Modular units or systems are the most popular type of closet organization products because most types are adjustable with shelves that move along a system such as brackets or slatwall. However, even more fixed systems assembled from matching cubbies, cabinets and shelves can be adjusted by adding new or different components at a later date. This adjustability is popular because the systems can be altered as the needs of the homeowner or the future homeowners change. Drawers, shoe cubbies, drawer dividers, slide out baskets and doors are the most commonly requested specialty components on modular closet systems. Key manufacturers of modular closet systems include Classy Closets, Closet & Storage Concepts, Contemporary Closet Classics, Emerson Electric's ClosetMaid subsidiary, FirstService (via California Closets), Newell Rubbermaid, Pacific Closet Works, Sauder Woodworking, SCHULTE and Windquest's ORG Custom Closets and Easy Track divisions.

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TABLE V-2

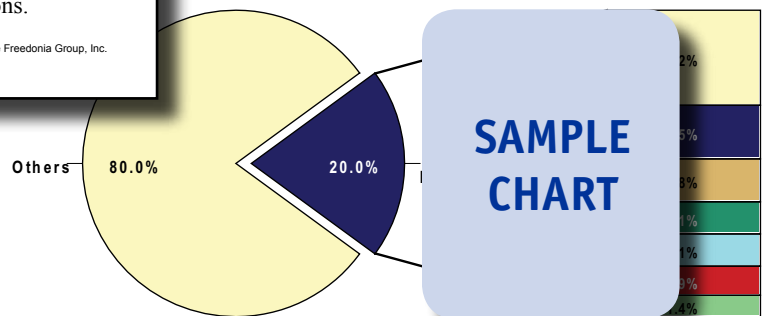
BEDROOMS & CLOSETS: HOME ORGANIZATION PRODUCT DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
Housing Stock (millions)	110	115	120	125	130
\$ bedroom & closet home org/household	10	15	20	25	30
Bedrooms (millions)	100	105	110	115	120
\$ bed & closet home org/bedroom	10	15	20	25	30
Bedroom & Closet Home Organization Product Demand	4416	5017	7210	8500	10750
% bedrooms & closets	8.8	14.3	20.0	25.0	30.0
Home Organization Product Demand	4416	5017	7210	8500	10750

SAMPLE
TABLE

CHART VII-1

HOME ORGANIZATION PRODUCT MARKET SHARE, 2008 (\$7.2 billion)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE IV-2
BIN, BASKET & TOTE DEMAND
(million dollars)

Item	1998	2003	2008	2013	2018
Households (million)	10	10	10	10	9.0
\$ bins, baskets & totes/household					3
Bin, Basket & Tote Demand	1	1	1	1	50
Metal & Wire					30
Plastic					20
Wood					35
Wicker, Rattan & Other					35
% bins, baskets & totes	4	4	4	4	0
Home Organization Product Demand	4	4	4	4	50

**SAMPLE
TABLE**

COMPANY PROFILES

Industrial Wire Products Incorporated

2005 West North Service Road
 Sullivan, MO 63080
 573-468-5151
<http://www.inc>

Annual Sales:
 Employment:

**SAMPLE
PROFILE**

Key Products: ts, shelves,
 racks and bask and shelves,
 hanging bask

Industrial Wire Products is a producer of polyvinyl-coated wire products for residential organization applications. The privately held company also makes wire fabricated products for the commercial refrigeration, and industrial and commercial heating, ventilation and air conditioning markets.

The Company is active in the US home organization product industry through the manufacture of organization systems under such brand names as RAFTER SOLUTIONS, STORAGE SOLUTIONS, SCRAPBOOK SOLUTIONS and LOCKER SOLUTIONS. For example, RAFTER SOLUTIONS products are shelving units designed to hang under stairwells, and from rafters in basements and attics to maximize storage space. These units, which can hold up to 75 pounds of small- and medium-sized items, feature two shelves that are adjustable in 8-inch increments. Additionally, the shelving units can be hung parallel or perpendicular to ceiling rafters.

STORAGE SOLUTIONS products from Industrial Wire Products consist of metal wire carts, shelves, racks and baskets that incorporate

“Demand for home organization products in the do-it-yourself (DIY) market is expected to increase 4.0 percent annually to \$7.5 billion in 2013. Increased demand for many items that are naturally part of the DIY market because they require no installation (e.g., bins, baskets, totes, ready-to-assemble shelves and modular storage) will support overall gains. In addition, greater retail space devoted to home organization products and increased in-store and online assistance for customers interested in installing their own systems will benefit demand. Furthermore ...”
 --Section VI, pg. 134

OTHER STUDIES

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

Residential Kitchen & Bath Countertops in China

Demand for countertops in China will grow 4.6% annually through 2012. Kitchen countertops will remain dominant while bathroom applications grow the fastest. Solid surface types will continue to gain market share on natural stone, tile and laminates. The most engineered stone segment will post the fastest growth. This study analyzes the 65.7 million square meter countertop industry in China, with forecasts for 2012 and 2017 by material, product, market and region. It also evaluates market share and profiles industry players.

#2450 02/2009..... \$5100

Builders' Hardware

US builders' hardware demand will rise to \$11 billion in 2012, driven by a recovery in housing. Locks and other safety devices will remain the largest segment and grow the fastest, especially electromechanical types. Furniture will continue as the largest application while safety and protection products and cabinets lead gains. This study analyzes the US builders' hardware industry, with forecasts for 2012 and 2017 by material, product, application, market and region. It also evaluates market share and profiles industry players.

#2379 09/2008..... \$4600

Cabinets

US demand for cabinets will grow 3.9% annually through 2012. A rebound in new housing construction and building design trends that lead to greater cabinet use per residence will support gains. The dominant kitchen cabinet segment will further benefit from the rising use of kitchen-type cabinets in other rooms. This study analyzes the \$15.3 billion US cabinet industry, with forecast for 2012 and 2017 by material, product, market and region. It also evaluates market share and profiles industry competitors.

#2364 06/2008..... \$4700

Solid Surface Materials & Other Cast Polymers

US cast polymer demand will grow 3.6% annually through 2012. Gains will be driven by engineered stone based on its resistance to stains, impacts and moisture and its ability to have a wide range of colors and embedded materials. Solid surface products will remain the largest segment. This study analyzes the 222 million square foot US cast polymer industry, with forecasts for 2012 and 2017 by material, product, end use and regional market. It also evaluates company market share and profiles major players.

#2319 04/2008..... \$4500

About The Freedonia Group

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