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World Power Lawn & Garden Equipment

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

Study #2542 | August 2009 | \$5800 | 351 pages



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

www.freedoniagroup.com

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Despite a sluggish outlook in the shorter term, the bedrock US market will provide the best opportunities, accounting for about one-half of additional demand generated between 2008 and 2013.

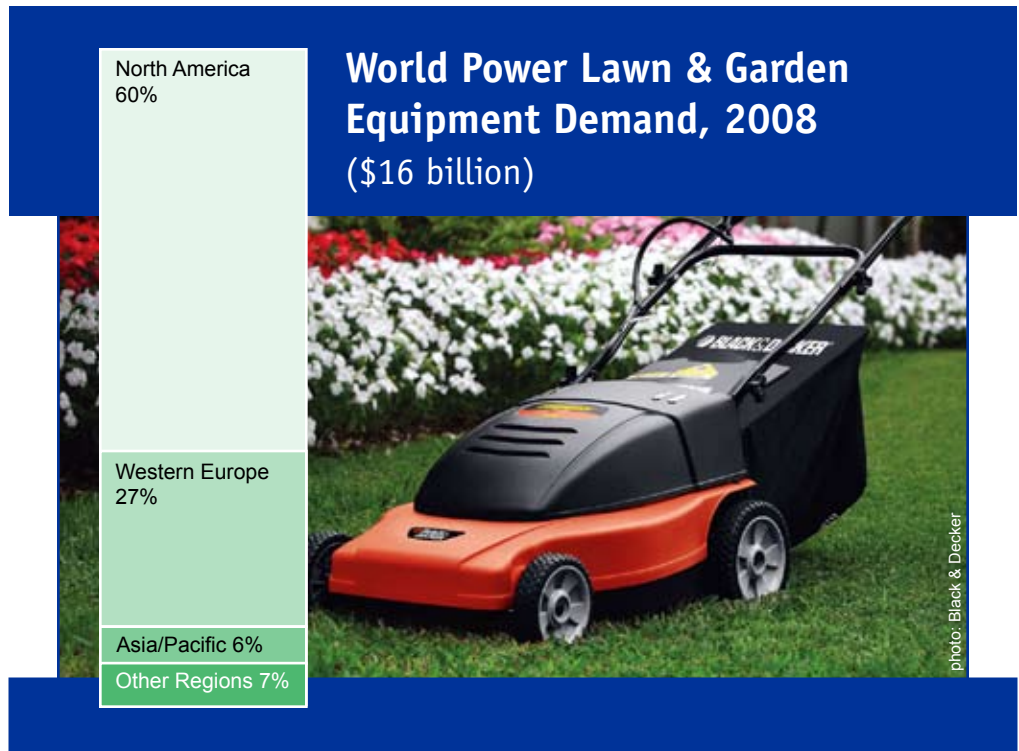
Global demand to rise 2.8% yearly through 2013

Global demand for power lawn and garden equipment is projected to expand 2.8 percent annually through 2013 to \$18.4 billion. Despite a sluggish outlook in the shorter term, the bedrock US market will provide the best opportunities, accounting for slightly over one-half 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 consumers' continued enthusiasm for lawn care. US power lawn and garden equipment sales will also benefit from the introduction of improved products, such as cordless electric models.

Western regions to remain dominant markets

On a regional basis, North America and Western Europe will continue to be the dominant markets, together comprising over 85 percent of demand in 2013. Consumers in these developed nations have high per capita income levels which allow for discretionary purchases such as power lawn and garden equipment. These areas are also home to the vast majority of the world's golf courses, which are major consumers of power lawn and garden equipment.

Despite its large population and above-average per annum growth, Asia will remain a relatively small market for power lawn and garden equipment.



Demand throughout much of the region is limited by low income levels, with most consumers unable to afford power lawn and garden equipment for home use. Low wages also dampen professional demand, since the low cost of labor encourages the use of manual equipment in landscaping applications. Even Japan, a prosperous nation, is a relatively small market, since most Japanese homes do not have yards of sufficient size to justify the use of power equipment.

Lawnmowers to continue as largest product segment

Lawnmowers will continue to be the largest product segment, benefitting from

their wide use in both residential and commercial applications. Turf and grounds equipment is expected to post gains, due to continuing growth in the number of professional landscapers in many countries worldwide. Trimmers and edgers, like lawnmowers, will benefit from their widespread use in both residential and commercial markets. However, value gains for trimmers and edgers will be limited by intense price competition from China. Other products, which include rotary tillers, leaf blowers, snow throwers, parts and accessories, will benefit from rising standards of living in developing nations.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Demand by Type & Market

India comprised a \$1.5 trillion economy in 2008. Demand for power lawn and garden equipment in 2008. Demand for power lawn and garden equipment is dominated by the professional market. Despite growth, household penetration of power lawn and garden equipment is extremely small, a function of the high degree of poverty characterizing vast segments of the population. Moreover, although India is home to several large cities (e.g., Mumbai), about 70 percent of the population continued to live in rural areas in 2008, a further drag on potential development of power lawn and garden markets in the country. Spotty electricity distribution and fairly low standards of living in many areas of India work to restrain demand in residential applications.

Demand for power lawn and garden equipment is dominated by the professional market. Despite growth, household penetration of power lawn and garden equipment is extremely small, a function of the high degree of poverty characterizing vast segments of the population. Moreover, although India is home to several large cities (e.g., Mumbai), about 70 percent of the population continued to live in rural areas in 2008, a further drag on potential development of power lawn and garden markets in the country. Spotty electricity distribution and fairly low standards of living in many areas of India work to restrain demand in residential applications.

High poverty rates affect power lawn and garden equipment demand not only in the residential sector. Unlike in the developed world, therefore, there is no significant demand for lawn mowers. However, in the golf sector, demand has reached over 1 million units. Developers integrate

The market for power lawn and garden equipment is projected to rise at a 136

**SAMPLE
 TEXT**

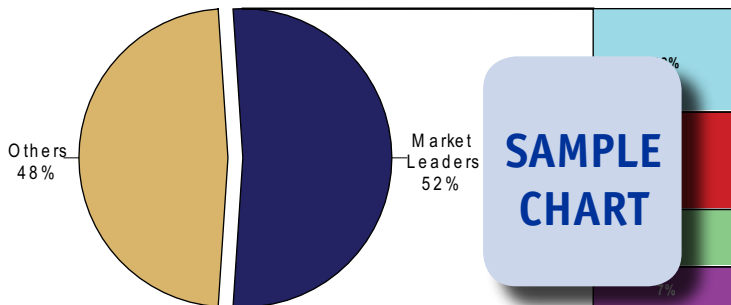
TABLE V-9

ITALY -- POWER LAWN & GARDEN EQUIPMENT
 SUPPLY & DEMAND

Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil 2007\$)	1,000	1,200	1,400	1,600	1,800
\$ GDP/capita	20,000	24,000	28,000	32,000	36,000
Population (million persons)	58	59	60	61	62
urban % of total population	70	71	72	73	74
persons per household	2.3	2.3	2.3	2.3	2.3
Urban Population (million persons)	41	42	43	44	45
Households (million)	18	18	18	18	18
\$ lawn & garden equip/household	100	100	100	100	100
Lawn & Garden Equip Demand (mil \$)	1,800	1,800	1,800	1,800	1,800
net exports	0	0	0	0	0
Lawn & Garden Equip Shpts (mil \$)	1,200	1,200	1,200	1,200	1,200

**SAMPLE
 TABLE**

CHART VIII-1
 WORLD POWER LAWN & GARDEN EQUIPMENT
 MARKET SHARE, 2008
 (\$16.1 billion)

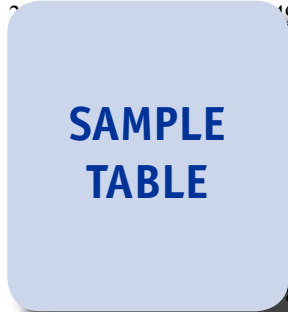


**SAMPLE
 CHART**

Sample Profile, Table & Forecast

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ITALY - POWER LAWN & GARDEN EQUIPMENT
DEMAND BY TYPE & MARKET
 (million dollars)

Item	1998	2003	2008	2013	2018
Lawn & Garden Equipment Demand					190
By Type:					
Lawnmowers					80
Turf & Grounds Equipment					40
Trimmers & Edgers					45
Others					75
By Market:					
Residential					95
Commercial					85



COMPANY PROFILES

Masport NZ Limited
 1-37 Mount Wellington Highway
 Panmure
 Auckland
 New Zealand
 64-9-571-1200
 http://www.masport.co.nz

Annual Sales:
 Employment:

Key Products: ~~walk-behind and riding mowers, chipper/shredders,~~
 blowers and blower/vacuums, cultivators & line trimmers/brush cutters

Masport manufactures and markets a range of home and garden products, including lawn mowers, barbecues and patio heaters. The Company is owned by a private investor.

The Company is active in the world lawn and garden equipment industry through the production and marketing of a range of items. In June 2007, a private investor purchased Masport from Goldman Sachs JBWere Pty Limited (Australia), a subsidiary of Goldman Sachs & Company (US), for US\$32 million. The Company markets its tools through three product lines: MASPORT, MORRISON and MERCURY. MASPORT products comprise chipper/shredders and walk-behind mowers. The MORRISON line includes walk-behind mowers, chipper/shredders, blowers and blower/vacuums, cultivators, and line trimmers/brush cutters. Masport markets riding mowers via the MERCURY line.

MASPORT mowers comprise SERIES 18, SERIES 19, and MAXICUT types. SERIES 18 mowers are manufactured with engines.

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“Shipments of power lawn and garden equipment from factories in Italy are projected to rise 3.1 percent annually through 2013, reaching \$1.1 billion. The nation’s trade surplus will widen as power lawn and garden equipment demand accelerates in a number of export markets. However, shipment gains will be limited to some extent by the maturity of the domestic market and by continuing stiff competition from foreign producers.”

--Section V, pg. 94

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OTHER STUDIES

World Power Tools

Global demand for power tools is forecast to rise 3.7% per year through 2013. The US market will provide the best opportunities, reflecting a turnaround in the current housing crisis, continued enthusiasm for do-it-yourself projects and the introduction of improved products, especially cordless electric models. This study analyzes the world power tool industry, with forecasts for 2013 and 2018 by product, market, world region and for 25 countries. It also evaluates market share and profiles industry players.

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

Agricultural Equipment in China

Demand for agricultural equipment in China is projected to grow 6.8% yearly through 2012. Gains will be driven by ongoing farm mechanization efforts as rural incomes rise and labor is lost to urban migration. Tractors and harvesting machines will remain key segments while parts and attachments grow the fastest. This study analyzes the 85 billion yuan agricultural equipment industry in China, with forecasts for 2012 and 2017 by product and regional market. It also evaluates market share and profiles industry players.

#2475 06/2009..... \$5200

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

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies will reach \$7.6 billion by 2013. Gains will be supported by new product development activity, leading to increased sales of higher-value goods. Innovations will be increasingly focused on better ergonomic equipment design and products that address environmental concerns. This study analyzes the US janitorial equipment and supply industry, with forecasts for 2013 and 2018 by type, market and region. It also evaluates company market share and profiles 33 industry competitors.

#2469 03/2009..... \$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

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