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Outdoor Furniture & Grills

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

Study #2554 | December 2009 | \$4700 | 328 pages



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INDUSTRY STRUCTURE

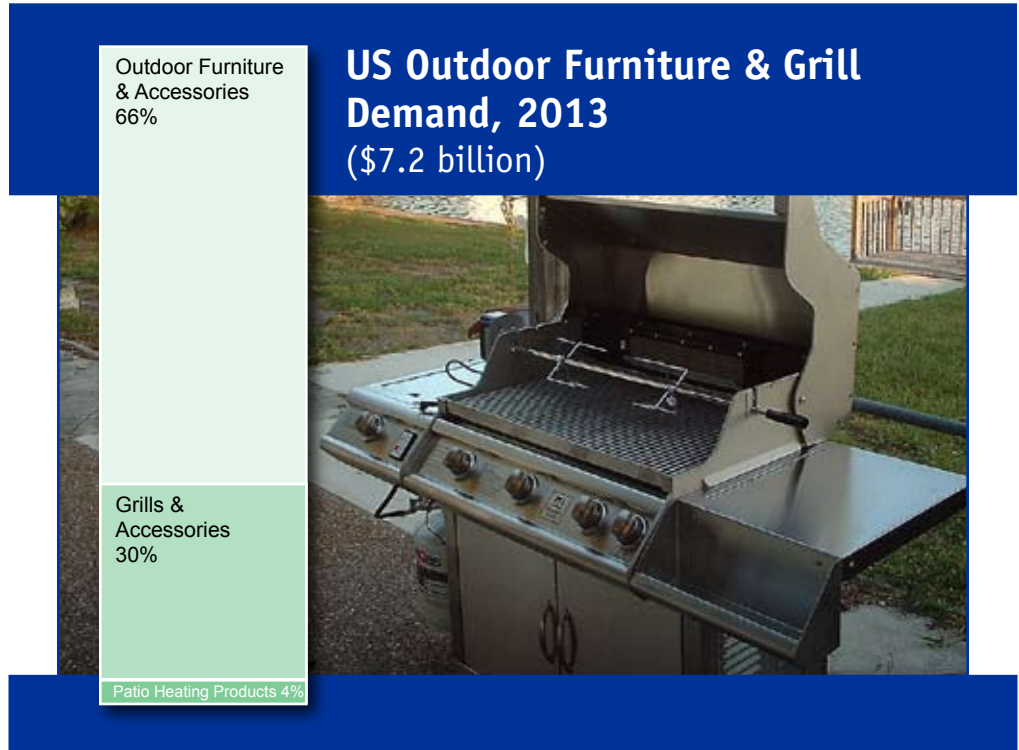
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Consumer lifestyle trends such as “staycations” and “outdoor rooms” will help support gains by encouraging consumers to invest in outdoor spaces and trade up to better products.

US demand to increase 3.9% yearly through 2013

US demand for outdoor furniture and grill products will increase 3.9 percent annually to \$7.2 billion in 2013. The market will benefit from growth in the number of households and the increasing popularity of outdoor living areas such as patios, porches and decks. In addition, consumer lifestyle trends such as “staycations” (spending vacation time at home rather than travelling) and “outdoor rooms” (using furniture, designs and decorations intended to extend the home’s living space outdoors) will support gains by encouraging consumers to invest in outdoor spaces and trade up to better products. While many of these trends will remain in place, some retrenchment in consumer spending will slow gains going forward. Both the grill and furniture segments will match the industry’s overall pace, with grill sales supported by demand for more expensive, highly featured grills and furniture sales bolstered by solid gains in metal furniture, and cushion and covers.

In addition, continued strong increases in imports, particularly inexpensive products from low-cost countries, will help to limit value gains. Chinese imports of outdoor furniture and grills rose fivefold between 1998 and 2008, growing from 14 percent of total US demand to 43 percent. While Chinese suppliers have taken significant market share from US-based producers, they have also taken share from other suppliers throughout Asia. Furthermore, some of the increase



in imports is the result of US-based companies shifting production to China in order to better compete with low-cost imports. Similarly, many of the leading retailers of outdoor furniture and grills obtain at least a share of their private label products from Chinese suppliers -- often on a short-term contract manufacturing basis. As a result, shipments from US facilities will continue to underperform demand, rising just 2.6 percent annually through 2013.

Housing rebound, trends to boost residential market

Due to the dominance of the residential market, which comprised over 90 percent of total outdoor furniture and grill demand in 2008, housing trends and

fashions in the home decorating segment are the primary drivers of demand. Over the past decade or so, these factors have significantly aided the growth of the industry and driven demand for upgrades to outdoor furniture and grill products -- such as from trading inexpensive plastic furniture for higher quality metal dining sets. Consumers refurbish their outdoor spaces for a number of reasons, including extending their home’s living space, enjoying more time at home, and entertaining family and friends. Going forward, the expected rebound in the housing market combined with the continued popularity of outdoor rooms and a strong focus on home activities will provide opportunities in the residential market.

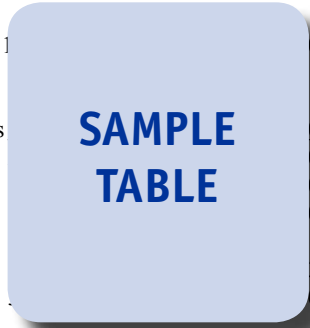
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Sample Profile, Table & Forecast

TABLE IV-2
RESIDENTIAL OUTDOOR FURNITURE & GRILL DEMAND BY HOUSING TYPE (million dollars)

Item	1998	2003	2008	2013	2018
Households (million)					
\$ furniture & grills/household					
Residential Outdoor Furniture & Grills					
Single-Family Housing					
Multifamily Housing					
Manufactured Housing					
% residential					
Outdoor Furniture & Grill Demand					



COMPANY PROFILES

Yotrio Group Company Limited
 Jiangnan Road
 Linhai City, Zhejiang Province
 China
 86-576-8595-6
 http://www.yotrio.com

Annual Revenue: \$100 million (2009)
 Employment: 1,000
 Key Products: chairs, ottomans, tables, dining sets

SAMPLE PROFILE

Yotrio Group Company Limited is a privately owned holding company that manufactures a range of outdoor leisure products, including patio furniture, umbrellas and gazebos. The Company operates through several subsidiaries, including Outdoor Yongqiang Ningbo Company Limited, Shanghai Kadi Leisure Products Company Limited and Taizhou Yongjiang Arts & Crafts Company Limited. Yotrio Group's products are exported to more than 100 countries, including the US, Canada, Germany, France, the Netherlands, Hong Kong and Australia.

The Company participates in the US outdoor furniture and grill industry through the manufacture and marketing of a variety of outdoor furniture products under the YOTRIO brand name. Representative products include chairs, loveseats, ottomans, tables, dining sets and swinging chairs. Seating is available in a range of styles, including woven rattan, textile with aluminum frames, wrought iron, wood, folding, reclining and beach types; while Yotrio Group's tables are produced in tea, folding, wrought iron, wood, and bended- and straight-foot styles. In addition to these products, the Company makes a variety of umbrellas, including pull, push, lamplight, beach and hanging types.

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"Demand for outdoor furniture and grills in single-family dwellings will increase 4.3 percent annually to \$5.4 billion in 2013, exceeding growth in the overall residential market. Gains will be supported by the rebound in single-family home construction as the housing market recovers. The continued popularity of outdoor rooms will also support increases. In addition, many consumers believe that comfortable outdoor spaces improve a home's resale value, which should further drive improvements such as ..."
 --Section IV, pg. 122

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OTHER STUDIES

Countertops

US demand for countertops is forecast to rise 2.4% yearly through 2013. Products made from engineered and natural stone will grow the fastest while laminates remain the largest segment. The residential market will remain dominant based on a rebound in housing construction and continued consumer interest in high-value countertops. This study analyzes the 674 million square foot US countertop industry, with forecasts for 2013 and 2018 by material and market. It also evaluates market share and profiles industry players.

#2552 09/2009..... \$4800

Home Organization Products

US demand for home organization products will rise 4.3% annually through 2013. Bins, baskets and totes will remain the largest group while modular units grow the fastest. Garage units will overtake family room products as the second largest segment, with closet organizers also doing well. This study analyzes the \$7.2 billion US home organization product industry, with forecasts for 2013 and 2018 by material, product, room and market. It also evaluates company market share and profiles industry players.

#2527 07/2009..... \$4600

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

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

Coated Fabrics

US coated fabrics demand will reach 655 million square yards in 2012. Sales will be spurred by gains in motor vehicle production, protective clothing output and building construction. Vinyl- and other nonrubber-coated fabrics will remain dominant, while natural rubber-, neoprene-, silicone rubber- and other rubber-coated fabrics will grow the fastest. This study analyzes the \$3 billion US coated fabrics industry, with forecasts for 2012 and 2017 by product, substrate and market. It also details market share and profiles industry players.

#2448 01/2009..... \$4800

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