



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)

Lawn & Garden Consumables

US Industry Study with Forecasts for **2014 & 2019**

Study #2635 | May 2010 | \$4900 | 323 pages

www.freedoniagroup.com



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

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Outlook	5
Demographic Trends	8
Consumer Income & Spending Patterns	11
Housing Outlook	13
Nonresidential Building Trends	18
Lawn & Garden Market Overview	21
Home Gardening Activity Outlook	24
Landscaping & Lawn Care Industry Outlook	28
Golf Course Outlook.....	30
Agrochemical Market Overview	32
Organic Gardening Outlook	35
Regulatory & Environment Issues	37
Pesticides	38
Other Lawn & Garden Consumables	41
Raw Materials	42
Pricing Issues	44
Historical Market Trends	47
International Activity & Foreign Trade	50

PRODUCTS

General	51
Fertilizers	54
Media, Formulations & Type.....	57
Organic	60
Applications & Markets	62
Pesticides	64
Herbicides	68
Insecticides	71
Other Pesticides.....	75
Organic	78
Growing Media.....	80
Packaged Soil.....	83
Soil Amendments	86
Compost.....	88
Peat	90
Other Soil Amendments	92
Seeds	92
Grass & Turf Seed.....	95
Other Seeds	98
Mulch.....	100
Other	105

MARKETS, APPLICATIONS & END USERS

Markets	107
Residential	109
Golf Courses.....	113
Government & Institutional.....	117
Commercial & Industrial.....	119
Other Markets.....	121
Applications	124
Lawn & Turf Care	125
Gardens & Borders.....	129
Other Applications	132
End Users	134
Consumer/DIY	135
Professional	138
Lawn Care & Landscaping	
Service Firms	139
Other Professional End Users	141

REGIONAL MARKETS

General	143
Regional Demographic & Economic Trends	144
Regional Population Patterns	144
Regional Economic Trends	146
Regional Housing Trends	148
Regional Lawn & Garden	
Consumables Demand	150
Northeast	152
Midwest	154
South	155
West	158

INDUSTRY STRUCTURE

Industry Composition	160
Market Share	162
Consumer Products.....	163
Professional Products	167
Industry Restructuring	171
Competitive Strategies.....	174
Brand Name Recognition	175
Marketing	177
Conventional Advertising	178
Strategic Media Partnerships	179
Internet.....	179
Other.....	180
Packaging.....	181
Product Line Expansion.....	181
Product Focus	183
Cooperative Agreements.....	184

Manufacturing	186
Distribution Channels	188
Retail Distribution	188
Home Centers.....	189
Mass Merchandisers.....	190
Garden Centers.....	192
Mail Order/Internet.....	192
Other.....	193
Professional Market Distribution	195
Direct Sales	195
Professional Service Firms	196
Agricultural Chemical Distributors	196
Other.....	197

COMPANY PROFILES

Ace Hardware	198
Agrium Incorporated	199
Andersons Incorporated	204
BASF SE.....	207
Bayer AG	213
Bonide Products.....	220
Burpee (W. Atlee).....	223
Central Garden & Pet	224
Deere & Company.....	232
Dow Chemical.....	234
DuPont (EI) de Nemours.....	237
Espoma Company	240
FMC Corporation.....	243
Griffin Industries.....	247
Haifa Chemicals	248
Home Depot.....	249
Jiffy International.....	251
Land O' Lakes	253
Lebanon Seaboard.....	255
Lowe's Companies	260
McLaughlin Gormley King	262
Monsanto Company	263
Premier Tech	267
Royal Barenbrug	270
Scotts Miracle-Gro.....	272
Sears Holdings.....	283
ServiceMaster Company.....	284
Simplot (JR) Company	286
Spectrum Brands.....	290
Sumitomo Chemical.....	295
Sun Gro Horticulture.....	302
Syngenta AG.....	305
TurfCare Supply.....	311
Wal-Mart Stores	312
Woodstream Corporation	314
Zep Incorporated	317
Additional Companies	319

List of Tables

EXECUTIVE SUMMARY

1 Summary Table 3

MARKET ENVIRONMENT

1 Macroeconomic Indicators..... 8
 2 Population & Households 11
 3 Personal Consumption Expenditures..... 13
 4 New Housing Indicators..... 18
 5 Nonresidential Building Stock..... 21
 6 Lawn & Garden Sales &
 Service Revenues..... 24
 7 Consumer Lawn & Garden
 Retail Expenditures..... 28
 8 Landscaping & Lawn Care Indicators.... 30
 9 Golf Courses & Acreage 32
 10 Agrochemical Demand 34
 11 Organic Gardening Product Sales 37
 12 Lawn & Garden Chemical
 Raw Materials Demand..... 43
 13 Lawn & Garden Consumables Prices..... 47
 14 Lawn & Garden Consumables
 Market, 1999-2009 49

PRODUCTS

1 Lawn & Garden Consumables Sales
 by Type & Formulation 53
 2 Fertilizer Sales in Lawn &
 Garden Applications..... 57
 3 Fertilizer Sales in Lawn & Garden
 Applications by Media & Type..... 60
 4 Fertilizer Sales in Lawn & Garden
 Applications by Formulation..... 62
 5 Fertilizer Sales in Lawn & Garden
 Applications by Application & Market 64
 6 Pesticide Sales in Lawn &
 Garden Applications..... 67
 7 Herbicide Sales in Lawn &
 Garden Applications..... 71
 8 Insecticide Sales in Lawn &
 Garden Applications..... 75
 9 Other Pesticide Sales in Lawn &
 Garden Applications..... 78
 10 Pesticide Sales in Lawn & Garden
 Applications by Formulation..... 80
 11 Growing Media Sales in Lawn &
 Garden Applications..... 83

12 Packaged Soil Sales in Lawn & Garden
 Applications by Type & Formulation.. 86
 13 Packaged Soil Amendment Sales in
 Lawn & Garden Applications by Type 88
 14 Seed Sales in Lawn &
 Garden Applications..... 95
 15 Mulch Sales in Lawn &
 Garden Applications..... 104
 16 Other Consumables Sales in
 Lawn & Garden Applications..... 106

MARKETS, APPLICATIONS & END USERS

1 Lawn & Garden Consumables
 Sales by Market..... 108
 2 Residential Market for Lawn
 & Garden Consumables 113
 3 Golf Course Market for Lawn
 & Garden Consumables 116
 4 Government & Institutional Market for
 Lawn & Garden Consumables 119
 5 Commercial & Industrial Market for
 Lawn & Garden Consumables 121
 6 Other Markets for Lawn
 & Garden Consumables 124
 7 Lawn & Garden Consumables
 Sales by Application 125
 8 Lawn & Turf Care Applications for
 Lawn & Garden Consumables 129
 9 Garden & Border Applications for
 Lawn & Garden Consumables 132
 10 Other Applications for Lawn
 & Garden Consumables 134
 11 Lawn & Garden Consumables
 Sales by End User 135
 12 Consumer/DIY Market for Lawn
 & Garden Consumables 137
 13 Professional Market for Lawn
 & Garden Consumables 139
 14 Lawn Care & Landscaping Service
 Firm Market for Lawn
 & Garden Consumables 141
 15 Other Professional Markets for
 Lawn & Garden Consumables 142

REGIONAL MARKETS

1 Population by Region 146
 2 Gross Domestic Product by Region 148

3 Regional Housing Indicators..... 150
 4 Lawn & Garden Consumables
 Sales by Region..... 152
 5 Northeast Demand for Lawn
 & Garden Consumables 153
 6 Midwest Demand for Lawn
 & Garden Consumables 155
 7 South Demand for Lawn
 & Garden Consumables 157
 8 West Demand for Lawn
 & Garden Consumables 159

INDUSTRY STRUCTURE

1 US Lawn & Garden Consumables
 Sales by Company, 2009 161
 2 Selected Acquisitions & Divestitures.. 173
 3 Selected Cooperative Agreements 186

List of Charts

MARKET ENVIRONMENT

1 Lawn & Garden Consumables
 Sales per Capita, 1999-2009..... 49

PRODUCTS

1 Lawn & Garden Consumables
 Sales by Type, 2009 54

MARKETS, APPLICATIONS & END USERS

1 Lawn & Garden Consumables
 Sales by Market, 2009 109

INDUSTRY STRUCTURE

1 US Lawn & Garden Consumables
 Market Share, 2009..... 163
 2 Consumer Lawn & Garden Consumables
 Market Share, 2009..... 164
 3 Professional Lawn & Garden
 Consumables Market Share, 2009.... 169

The weak economy and food safety concerns have created a renewed interest in home gardening, a trend that will likely continue, promoted by new, easier to use gardening products.

US demand to rise 2.4% annually through 2014

US demand for packaged lawn and garden consumables, which include fertilizers, pesticides, growing media, seeds, mulch, and other related products, is forecast to increase 2.4 percent per year to \$9.0 billion in 2014. The weak economy and food safety concerns have created a renewed interest in home gardening, a trend that will likely continue going forward. A number of other factors will contribute to a positive outlook for packaged lawn and garden consumables. These factors include a rebound in the housing market that will boost product demand for residential landscaping; the graying of baby boomers that will increase the size of the population in their peak gardening years; and more time spent around homes and investing in lawn and garden consumables to enhance that living experience.

Seeds, growing media to be fastest growing types

Best opportunities are anticipated for new products which offer convenience and good performance while also meeting health and safety standards. Growth will be led by seeds, fertilizers and growing media, all of which will post above-average gains through 2014. Growing media is benefiting from the expanding consumer trend favoring value-added products such as premium soils. Seed demand will benefit from accelerated use of grass seed as new home construction rebounds. A renewed interest in food gardening will also provide opportuni-



ties for seeds. Across all product segments, organic formulations will experience more favorable increases over conventional formulations. Sales of organics will be spurred by substantial product improvements, a rising number of products, lower prices and more effective marketing, particularly as more leading lawn and garden consumables suppliers enter the market. Fertilizers will benefit from the continued popularity of food gardening, as well as the rebound in the housing market where these products are often used during the installation of lawns.

In contrast, sales will be slower for pesticides. Value demand for these products will be limited as a result of a moderation in pricing after the highs of the 2004-2009

period. Increasing concern over the environmental and health effects of chemical use will dampen prospects for these products in volume terms. Attempts to control lawn maintenance costs will further depress gains.

Residential market to benefit from gardening

The large residential market will benefit not only from solid participation in home gardening activity, including lawn care and food gardening, but also from the recovering housing market. The smaller nonresidential market will not fare as well due to a slowdown in the construction of nonresidential buildings, as well as a continuing weakness in the golf industry and reduced maintained turf acreage.

Copyright 2010 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

PRODUCTS

Herbicides

Demand for lawn and garden herbicides is forecast to increase by 1.5 percent per year to \$1.3 billion in 2019. Growth will be limited in extent by a weak private economy and increased competition from private-label products. Demand for leading products will be limited by lack of patent protection for leading products and the introduction of new formulations, including granular and ready-to-use formulations. Demand for granular and ready-to-use formulations will increase due to use and store packaging. Demand for granular and ready-to-use formulations will increase due to use and store packaging. Demand for granular and ready-to-use formulations will increase due to use and store packaging.

Herbicides are used to kill or prevent weeds and other unwanted vegetation. They are used in lawn care to kill dandelions and other weeds that disrupt the look of the lawn. Herbicides are used to kill weeds that compete with planted fruits and vegetables for soil nutrients, water and sunlight. They are also used to kill weeds in sidewalk and driveway cracks, or elsewhere in yards where unwanted plant life has emerged or may emerge. In general, herbicides are either selective or nonselective and either pre-emergent or post-emergent. Selective herbicides are generally used in settings where unwanted vegetation has grown amid grass or garden plants; they are designed to act against target organisms, but leave non-target organisms unharmed. Nonselective herbicides kill indiscriminately, making them useful for uses like sidewalk crack maintenance, as well as for patios and other outdoor living spaces. Pre-emergent herbicides are used to prevent weeds and other vegetation from growing, while post-emergent herbicides are designed to kill weeds after they sprout. Herbicides are sold to consumers in a wide variety of formulations, including granular and ready-to-use. Granular herbicides are often packaged in bags or tubs.

68

Copyright 2010

SAMPLE
TEXT

TABLE IV-2

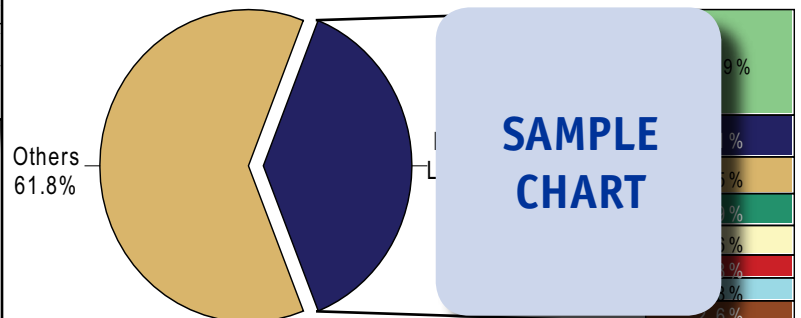
RESIDENTIAL MARKET FOR LAWN & GARDEN CONSUMABLES (million dollars)

Item	1999	2004	2009	2014	2019
Households (millions)	113	113	113	113	113
\$ consumables/household	6	6	6	6	6
Residential Consumables Sales	700	700	700	700	700
By End User:					
Consumer/DIY	500	500	500	500	500
Professional	200	200	200	200	200
By Application:					
Lawn Care	400	400	400	400	400
Other	300	300	300	300	300
By Type:					
Fertilizers	200	200	200	200	200
Pesticides	200	200	200	200	200
Growing Media	100	100	100	100	100
Seeds	50	50	50	50	50
Mulch	50	50	50	50	50
Other	50	50	50	50	50
% residential	6	6	6	6	6
Total Lawn & Garden Consumables	4917	6740	7950	8950	11000

SAMPLE
TABLE

CHART VI-3

PROFESSIONAL LAWN & GARDEN CONSUMABLES MARKET SHARE (\$3.9 billion, 2009)

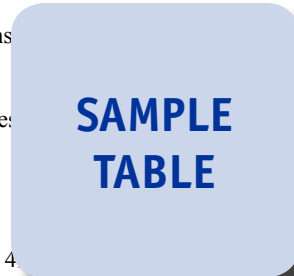


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE V-5
NORTHEAST DEMAND FOR LAWN & GARDEN CONSUMABLES
 (million dollars)

Item	1999	2004	2009	2014	2019
Northeast Resident Population (millions)					5
\$ consumables/capita					7
Northeast Lawn & Garden Consumables:					0
Consumer/DIY					0
Professional					0
% Northeast					7
Lawn & Garden Consumables Sales	4				0



COMPANY PROFILES

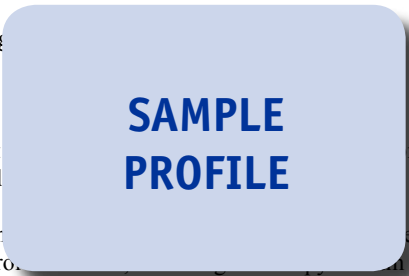
McLaughlin Gormley King Company
 8810 Tenth Avenue North
 Golden Valley, MN 55427
 763-544-0341
 http://www.mgk.com

Annual Sales:
 Employment:
 Key Products: household insecticide
 chemicals and

McLaughlin Gormley King Company is a world producer of insect control products, including natural and synthetic pyrethroids. In addition to raw chemical ingredients, the Company supplies manufacturing-use intermediates and formulated insect control products, including insecticides, repellents, insect growth regulators and synergists. MGK's products are used in a variety of markets, including agricultural pest control, structural pest control, industrial and institutional, consumer home and garden, vector control and veterinary applications. MGK operates a 100,000-square-foot manufacturing facility in Chaska, Minnesota where it conducts botanical refining, reaction and distillation, formulating, filling and packaging operations.

The Company is active in the US lawn and garden consumable industry via the production of natural pyrethrum and synthetic pyrethroid insecticide chemicals. These products are used to produce insecticides for household, industrial, lawn and garden, and other applications. MGK also makes intermediates, including EXPONENT insecticide synergist, formulated to increase the effectiveness of insecticides. Formulated insecticides from the Company include products sold under the PYGANIC, ONSLAUGHT, RIPTIDE, NYGUARD, VENDETTA, SECTOR and VAMPYRE brand names.

262 Copyright 2010 The Freedonia Group, Inc.



“Demand for lawn and garden consumables in the Northeast is forecast to rise 1.0 percent annually through 2014 to \$2.1 billion, a pace of growth that will be below the US average. Advances will be limited by the region’s below- average housing completion outlook, which is the weakest for any region in the country. In addition, the outward migration of population, including the important 55-and-over demographic, will dampen growth.”

--Section V, pg. 152-3

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

[Click here to learn more about the Corporate Use License](#)

ORDER FORM

F-WEB.2635

Lawn & Garden Consumables \$4900

Corporate Use License (add to study price) * + \$2600

Additional Print Copies @ \$600 each *
Total (including selected option) \$_____

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Credit Card #

MM	YY
<table border="1" style="border-collapse: collapse; width: 20px; height: 20px;"> </table>	<table border="1" style="border-collapse: collapse; width: 20px; height: 20px;"> </table>

Expiration

Signature _____

Name _____

Title _____

Company _____

Division _____

Street _____
(No PO Box please)

City/State/Zip _____

Country _____

Phone _____ Fax _____

Email _____

* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature _____

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2600; one additional user, add \$600; two additional users, add \$1200; three additional users, add \$1800.

Signature _____

OTHER STUDIES

World Lawn & Garden Consumables

Global lawn and garden consumable demand will grow 4.3% annually through 2014. Gains will be influenced by the dominant US market, while developing regions grow the fastest from a smaller base. Seeds, fertilizers and growing media will provide fast growth. This study analyzes the \$12.7 billion world lawn and garden consumable industry, with forecasts for 2014 and 2019 by product, market, world region and for 17 countries. It also evaluates company market share and profiles industry participants.

#2678.....October 2010..... \$5800

World Pesticides

Global demand for pesticides will rise 2.9% yearly through 2014. Gains will reflect a reversal of declines in 2009, caused in part by a price drop for the leading herbicide, glyphosate. Herbicides and insecticides will remain the largest types. Central and South America will offer the best growth opportunities. This study analyzes the \$45 billion world pesticide industry, with forecasts for 2014 and 2019 by product, market, world region and for 39 countries. It also evaluates company market share and profiles industry participants.

#2664.....August 2010..... \$5800

Home & Garden Pesticides

US home and garden pesticide demand will rise 4.1% yearly through 2013. Insecticides will remain the largest type based on concerns about insect-borne diseases and imported aggressive insects. Fungicides and other types will be the fastest growing segment. Household applications will outpace lawn and garden uses. This study analyzes the \$1.4 billion US home and garden pesticide industry, with forecasts for 2013 and 2018 by product, application and raw material. It also evaluates company market share and profiles industry players.

#2589.....January 2010..... \$4700

Outdoor Furniture & Grills

US outdoor furniture and grill demand will increase 3.9% annually through 2013. 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 cushions and covers. This study analyzes the \$6 billion US outdoor furniture and grill industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates company market share and profiles industry players.

#2554.....December 2009..... \$4700

Lawn, Garden & Agricultural Packaging

US lawn, garden and agricultural packaging demand will reach \$1.7 billion in 2013. Consumer preferences for convenient, user-friendly packaging will benefit reclosable pouches, dispensing closures and other value-added types. Agriculture will remain the largest market while the consumer market grows the fastest. This study analyzes the US lawn, garden and agricultural packaging industry, with forecasts for 2013 and 2018 by market, application and product. It also evaluates market share and profiles industry players.

#2555.....September 2009..... \$4600

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)

[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)