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World Lawn & Garden Consumables

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

Study #2678 | October 2010 | \$5800 | 317 pages

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A turnaround in the US housing market, as well as continued consumer enthusiasm for lawn and garden care and a renewed interest in food gardening, will drive gains in demand.

Global demand to rise 4.3% yearly through 2014

Global demand for lawn and garden consumables is forecast to increase 4.3 percent per year to \$15.7 billion in 2014. The bedrock US market, which accounted for roughly 54 percent of the global total in 2009, will continue to influence growth trends in the aggregate. A turnaround in the US housing market, as well as continued consumer enthusiasm for lawn and garden care and a renewed interest in food gardening, will drive gains. Growth at the global level will also benefit from rising incomes and the development of a middle class in industrializing nations, which will create demand for lawn and garden products, including consumables that had previously been considered more as luxury items. Limiting further growth will be environmental and economic concerns among various end users, which will lead to increasing efforts to reduce the use of pesticides, fertilizers and other chemical treatments on lawns and gardens.

North America, Western Europe to remain dominant

North America and Western Europe will continue to be the dominant regional markets, together comprising over three-quarters of total demand in 2014. These developed areas generally have a high percentage of households with lawns, as well as high per capita income levels that allow for discretionary purchases such as consumables used to improve

World Lawn & Garden Consumables Demand, 2009 (\$12.7 billion)



the aesthetics of a home owner's surroundings. Increased interest in home gardening in developed countries will boost demand for a variety of consumables, such as flower and vegetable seeds, mulch, growing media, and fertilizers. These regions also support the vast majority of the world's golf courses and other recreational fields, which are major consumers of lawn and garden consumables.

Developing areas to see most rapid growth

The most rapid growth in lawn and garden consumables demand is forecast for the developing areas of Asia, Central and South America, and the Africa/

Mideast region. Despite large populations, these areas will remain relatively small markets for lawn and garden consumables due to several factors, including low income levels, and geographic and cultural conditions. In addition, these areas tend to have a large number of high rise apartment dwellings or extensive rural environments; in either case, a well manicured lawn is of low importance. Nevertheless, as personal income levels grow and individuals have the monetary resources for nonessential items, the importance of having aesthetically pleasing surroundings will also likely increase, providing opportunities for lawn and garden consumables.

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Sample Text, Table & Chart

NORTH AMERICA

Canada: Demand by Product

Demand for lawn and garden consumables in Canada is to increase to 5 million in 2014. Demand for lawn and garden consumables in Canada is higher than the global average. The relative demand for lawn and garden consumables will continue to grow as single-family home construction increases and new households participating in home construction will contribute to gains, particularly for products commonly used in landscaping a new home, such as grass seed, growing media, and fertilizers. A deceleration in nonresidential construction activity, sluggishness in the golf course industry, and environmental regulations limiting aesthetic use of fertilizers and pesticides will limit further gains.

Volume sales for fertilizers and pesticides will be sluggish due to tightening environmental regulations regarding chemicals used in consumer applications. Pricing gains for fertilizers, after a moderation in 2009, will support market value gains through 2014. Numerous municipalities and the province of Ontario have banned (with certain exceptions) the use of cosmetic pesticides. Although biopesticides and certain low-risk products are available, most conventional pesticides are no longer available for use in lawn care and other residential uses under the terms of Ontario's ban, which went into effect in 2009. This will clearly restrict the prospects for 2,4-D and other widely used lawn care pesticides, but will create opportunities for alternative products. In 2010, for example, Scotts Miracle-Gro introduced SCOTT'S WEED-B-GON, a ready-to-use liquid herbicide that controls weeds, derived from iron. While not as pervasive, environmental concerns impacting the use of fertilizers also exists in some areas. Suppliers are spending money on promotional materials educating the general public on the proper use of lawn and garden fertilizers.

TABLE V-7

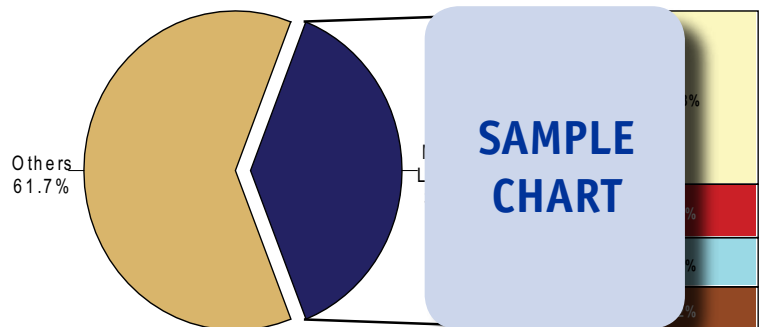
GERMANY: LAWN & GARDEN CONSUMABLES DEMAND BY MARKET (million dollars)

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008\$)	250	300	350	400	450
Households (million persons per household)	40	41	42	43	44
Population (million persons)	82	82	82	82	82
Urban	45	45	45	45	45
Nonurban	37	37	37	37	37
\$ consumables/capita	20	20	20	20	20
Lawn & Garden Consumables Demand	20	20	20	20	20
Professional	10	10	10	10	10
Consumer	10	10	10	10	10

SAMPLE TABLE

CHART VIII-1

WORLD LAWN & GARDEN CONSUMABLES MARKET SHARE (\$12.7 billion, 2009)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-6
CHINA: LAWN & GARDEN CONSUMABLES DEMAND BY PRODUCT
 (million dollars)

Item	1999	2004	2009	2014	2019
Lawn & Garden Consumables Demand					
Fertilizers					
Pesticides					
Growing Media					
Other Consumables					

SAMPLE TABLE

COMPANY PROFILES

JCAM Agri Company Limited
 6-6 Kandasuda-cho, 2-chome
 Chiyoda-ku, Tokyo 101
 Japan
 81-3-5297-8900

Annual Sales:
 Employment:

Key Products: compound fertilizers

JCAM Agri was formed in October 2009 when Chisso Corporation (Japan) combined the operations of their Chisso-Asahi Fertilizer Company Limited joint venture (Japan) with the Mitsubishi Chemical Agri Incorporated subsidiary (Japan) of Mitsubishi Chemical Corporation (Japan). The Company, which is 42.25-percent owned by Chisso, 22.75-percent owned by Asahi Kasei and 35-percent owned by Mitsubishi Chemical, manufactures and markets controlled-release and slow-release fertilizers primarily for the agricultural, and turf and ornamental sectors.

JCAM Agri competes in the world lawn and garden consumables industry through the production of controlled-release, slow-release and compound fertilizers, which can be used in a range of turf and ornamental applications, among others. For example, JCAM Agri makes NUTRICOTE and MEISTER controlled-release nitrogen-phosphorous-potassium fertilizers with micronutrients, which feature a polymer coating. These products can be made with various release patterns to fit the specific application. Although NUTRICOTE and MEISTER fertilizers are primarily designed for use with rice crops, they are also suitable for turf, ornamental, and fruit and vegetable applications. Other fertilizers from the Company include IBDU and CDU slow-release nitrogen

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SAMPLE PROFILE

“Demand for lawn and garden consumables in China is projected to grow at a 7.3 percent annual pace through 2014 to \$420 million. The country will continue to outpace the average rate of increase worldwide. Ongoing improvement in the standard of living and a growing middle class will continue to present opportunities for lawn and garden consumables. Despite concerns over their environmental impact, ongoing growth in the number of golf courses, a byproduct of the nation’s development, will also boost gains since these are consumables-intensive areas. In addition, ...”

--Section VI, pg. 123

OTHER STUDIES

Power & Hand Tools

US demand for power and hand tools will increase 4.1% yearly through 2014. Gains will be driven by a rebound in housing starts and ongoing consumer interest in DIY and home remodeling activities. Power tools will continue to outpace hand tools, while professional demand will grow more rapidly than consumer demand. This study analyzes the \$9 billion US power and hand tool industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.
 #2695 November 2010 \$4900

World Pesticides

Global demand for pesticides will rise 2.9% yearly to 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

Lawn & Garden Consumables

US demand for packaged lawn and garden consumables will grow 2.4% yearly through 2014. Seeds and growing media will be the fastest growing products. The large residential segment will benefit from solid participation in home lawn care and food gardening. This study analyzes the \$8 billion US lawn and garden consumables industry, with forecasts for 2014 and 2019 by type, formulation, market, application, end use and US region. It also evaluates company market share and profiles industry players.
 #2635 May 2010 \$4900

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

World Power Lawn & Garden Equipment

Global demand for power lawn and garden equipment will expand 2.8% annually through 2013. The bedrock US market will provide the best opportunities based in part on improved products such as cordless electric models. North America and Western Europe will remain the dominant markets. This study analyzes the \$16.1 billion world power lawn and garden equipment industry, with forecasts for 2013 and 2018 by product, world region and for 22 countries. It also evaluates market share and profiles industry players.
 #2542 August 2009 \$5800

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