Power & Hand Tools

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

Study #2695 | November 2010 | $4900 | 359 pages

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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

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Professional tool demand will benefit from an expected rebound in housing starts, while consumer demand will benefit from continued interest in DIY and home remodeling activities.

US demand to rise 4.1% annually through 2014

Demand for power and hand tools in the US will increase 4.1 percent annually to $11 billion in 2014. Gains will be driven by the rebound in housing starts, since construction constitutes the largest professional source of demand. Although difficult in the shorter term, the US housing market is expected to recover by 2014, creating demand in the professional sector. In the meantime, consumer demand will benefit from continued interest in DIY and home remodeling activities. The expected recovery in manufacturing activity will also boost gains, as will the ongoing introduction of new products -- especially improved cordless tools.

Power tools to continue outpacing hand tools

Maintaining established trends, growth in demand for power tools will continue to outpace that for hand tools, climbing 4.3 percent annually through 2014. Demand increases for power tools traditionally outpace gains for hand tools as better-performing, more competitively priced powered units replace hand tools. In addition, product innovations will continue to broaden the potential pool of power tool users, with more powerful cordless tools attracting more professional demand. The hand tool market, while rising a solid 3.8 percent per year, will be limited by the inherently simple design of these products, which allows for only modest innovation and pricing increases, as well as rising competition from cordless power tools. In addition, many hand tools are designed to last decades, dampening opportunities for replacement demand.

Professional demand to grow faster than consumer

Through 2014, professional demand will grow more rapidly than consumer demand as many of the leading professional markets recover from sharp declines in 2008 and 2009. In addition, professional users purchase the majority of power and hand tools in dollar terms. This reflects the greater concentration of expensive power tools among professional users, and their requirements for more durable, value-added hand tools. Because they use tools more consistently than consumers, professional users also must replace tools more frequently, except for some basic hand tools. Given the amount of use, professionals are often willing to pay more for better quality tools, since the initial investment often pays off over the long run through better performance and longer tool life. Consumers, on the other hand, are more likely to shop by price, and rarely have need of certain expensive tool systems like pneumatics and hydraulics. Consumer demand is also less predictable, being tied to individual participation in home maintenance and repair, various hobbies, DIY automobile repair and other diverse factors.

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Sample Text,
Table & Chart

TABLE IV-5

ELECTRIC SAW SUPPLY & DEMAND
(million dollars)

Item	1999	2004	2009	2014	2019
Resident Population (million persons)	2[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
$ electric saws per capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]1
Electric Saw Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
By Type:					
Circular	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
By Power Source:					
Plug-In	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Cordless	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
- net imports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Electric Saw Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
% saws	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]8
Electric Tool Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]950

SAMPLE TABLE

POWER TOOLS

Demand by Electric Power Source

Electric power tools are composed of two major types: [illegible] corded) and cordless. Plug-in electric tools receive energy d[illegible] an electrical outlet and have faced increasing competition fr[illegible] types since the commercialization of rechargeable batteries i[illegible] 1980s. Since then, demand for cordless tools has dramatical[illegible] spurred by improvements in cordless tool performance and a[illegible] variety of cordless tool offerings. Initially, cordless tools we[illegible] at consumers or as replacements for less commonly used pro[illegible] tools, since the early generation batteries did not provide suf[illegible] er or long enough discharge cycles to stand up to more powe[illegible] professional applications. However, as battery technology ha[illegible] and manufacturers have developed better motors and power r[illegible] techniques, the scope of applications for cordless tools has ex[illegible] dramatically and now includes most types of power tools.

Demand for cordless tools in the US is projected to increase 9.1 [illegible] billion in 2014. Advances will result from the [illegible]less tools featuring lithium-ion batteries, which [illegible]d lighter weight than the nickel-based batteries [illegible]esult, tool manufacturers are developing cordless [illegible]wer and long run times, limiting downtime to [illegible]he fastest increases are expected in applications [illegible] have had lower rates of penetration, such as electric saws, although all types of cordless tools will grow more rapidly than the overall average for electric tools.

SAMPLE TEXT

Drills are by far the largest segment of the cordless tool[illegible] representing 55 percent of total demand in 2009. Cordless d[illegible] been outgrowing plug-ins for over a decade, and have provid[illegible] for the development of higher voltage cordless products. Ot[illegible] tools available include screwdrivers, reciprocating saws, san[illegible]

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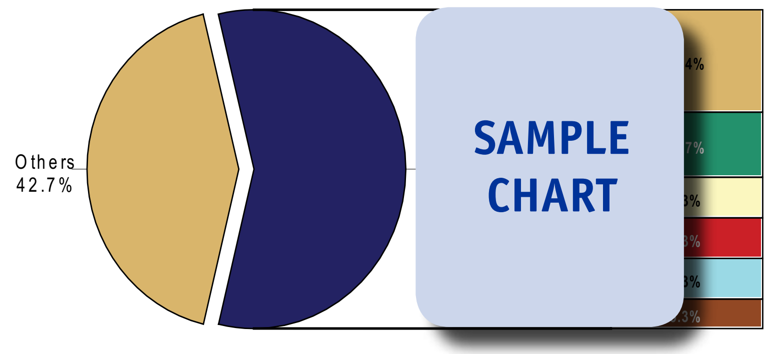
Copyright 2010

CHART VII-1

POWER & HAND TOOL MARKET SHARE BY COMPANY
($9.0 billion, 2009)



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Sample Profile, Table & Forecast

TABLE V-4

PLIERS SUPPLY & DEMAND
(million dollars)

Item	1999	2004	2009	2014	2019
Resident Population (million persons)	2				8.0
$ pliers per capita					.6
Pliers Demand					45
- net imports					30
Pliers Shipments					65
Solid Joint					02
Slip Joint					63
% pliers					.2
Hand Service Tool Demand	2				700

SAMPLE TABLE

COMPANY PROFILES

Senco Brands Incorporated
4270 Ivy Point Boulevard
Cincinnati, OH 45245
513-388-2000
http://www.senco.com

Annual Sales:
Employment:

Key Products: ... cordless nailers; screwdrivers; ...

SAMPLE PROFILE

Senco Br... ower and hand tools. In May ... orporated (Newport, Kentucky), filed for Chapter 11 bankruptcy protection. In July 2009, private equity firm Wynnchurch Capital Limited (Rosemont, Illinois) purchased the operating assets of Senco Brands, which conducted business as SENCO Products Incorporated at that time, from Sencorp.

The Company is active in the US power and hand tool industry through the production of pneumatic nailers, staplers and pinners; cordless nailers; screwdrivers; and compressors. Pneumatic nailers from Senco Brands include drywall, coil, Brad and joist hanger types. Specific products include the FRAMPRO 701XP pneumatic nailer, which features a fixed firing valve for improved tool life and speed, and a urethane sleeve cap that protects the sleeve from wear; the SENCO SN70XP model, a framing nailer designed to drive ring, screw and smooth shank nails in lengths from 2 to 3-1/2 inches; and the SENCO SLP20 Brad nailer, which is capable of driving both slight-headed and medium-headed brads in various lengths.

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"Demand for pliers will rise 3.6 percent annually to $460 million in 2014. The recovery in the US construction market and growth in the number of households will support demand increases in the professional and consumer sectors, respectively. In addition, the pliers market will benefit from the diffusion of specialized, more expensive pliers (e.g., pliers with antistatic handles) and application-specific products (e.g., pliers developed for use with PVC pipe and oil filters). Unlike many hand tools, pliers also ..."
--Section V, pg. 152

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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 Major Household Appliances

Global major appliance demand will rise 2.8% yearly through 2013, driven primarily by market penetration in developing countries. In developed regions, appliance sales will depend mainly on steady replacement demand, new home building and the development of new features that prompt upgrading. This study analyzes the 434 million unit world major appliance industry, with forecasts for 2013 and 2018 by product, world region and for 25 countries. It also evaluates company market share and profiles industry players.

#2588 ....December 2009 .... $6100

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

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

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 ....June 2009 .... $5700

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