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Landscaping Products

US Industry Study with Forecasts for **2015 & 2020**

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Sales will post a strong improvement through 2015 from a reduced 2010 base, promoted by a recovery in US housing activity, including new construction and existing home sales.

US demand to rise 7.6% annually through 2015

US demand for landscaping products is projected to increase 7.6 percent per year to \$5.9 billion in 2015, reflecting a rebound following the 2007-2009 recession. Overall growth in landscaping products demand will be promoted by a recovery in US housing activity, including new construction and existing home sales. Landscaping products sales will post a strong improvement through 2015 from a reduced 2010 base.

Decorative lighting, pavers among best prospects

Among products, gains in demand for decorative products, the largest segment with 44 percent of the market in 2010, will benefit from rapidly increasing interest in water features as more property owners look to these items as a way of masking unwanted nearby noise and promoting tranquility. Product developments featuring easy installation and energy saving technology will promote demand for decorative lighting, which is expected to achieve double-digit annual gains through 2015. Decorative lighting is increasingly used to accent pathways, statuary, green goods and water features. Hardscapes will experience the fastest growth through 2015 as consumers value outdoor living spaces. Concrete products will continue to account for the largest share of the hardscapes segment. Among concrete products, pavers are forecast to achieve

US Landscaping Products Demand (\$4.1 billion, 2010)



Decorative Products
44%

Hardscape Products
30%

Outdoor Structures
17%

Other Types 9%

photo: Monster Landscaping

double-digit annual growth, a result of the recovering housing market, as well as greater penetration of permeable types in ecologically sensitive locations. Pavers, as well as stones and boulders, are considered attractive and durable materials for constructing patios, walkways, and surrounds for outdoor fireplaces, ponds and in-ground swimming pools. Despite many opportunities, hardscapes will continue to face competition from alternative products and structures, such as wood decking.

Residential segment to be fastest growing market

Among markets, the dominant residential segment will experience a healthy

rebound through 2015, spurred by improving US housing activity and pent-up demand among consumers who postponed landscaping renovations during the 2007-2009 recession. In addition to improved macroeconomic conditions, landscaping products demand in the residential market will benefit from the continued trend of creating outdoor living spaces. With nonresidential construction expenditures set to increase through 2015, demand for landscaping products in this segment will rebound from a low 2010 level. In addition, pent-up demand from the recession will promote sales of landscaping products to the nonbuilding market, such as golf courses and parks.

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Sample Text, Table & Chart

PRODUCTS

Hardscape Products

Demand for hardscape products (e.g., concrete products, stones and boulders, clay brick, aggregates and other) is forecast to reach \$10 billion in 2015. Above any other landscaping product, concrete products will drive demand, as living space will drive demand, and concrete is an integral part of the design of these areas. The rebound in new housing construction will be the rebound in new housing construction, depending on improvements of existing housing. Demand on the construction and improvement of both the nonresidential and nonbuilding sectors will restrict further growth in hardscape products demand. Hardscape materials find use in a variety of landscaping applications including patios and walls. These products can be used in the construction of a patio, which is basically the "flooring" of an outdoor living area. Designs of outdoor spaces continue to become more elaborate, utilizing several hardscape materials in one plan for added texture and visual detail, as well as enhancing function. For example, in addition to using concrete pavers as patio material, concrete block may be used to create a short wall surrounding the patio. This short wall can be capped with a smooth surface, creating additional, optional seating. Other uses for hardscapes include walkways and borders.

Price points for hardscape products are varied, depending on the material used and size of the product, among other issues. Clay bricks, for example, are low unit cost, low value-added products which tend to record relatively slow growth in average prices over time. Nonbuilding is generally at higher price points, partially due to the weight of the items. Most suppliers of hardscape materials dealt with rising energy and transportation costs during the 2007-2008 period.

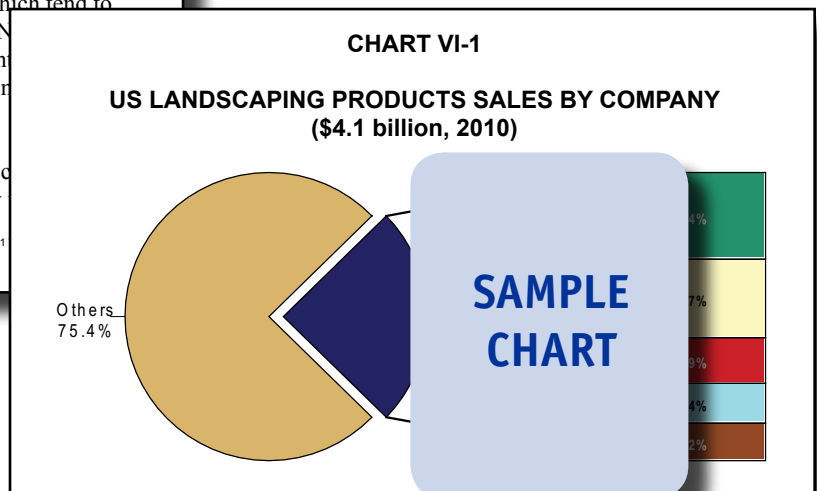
Weight is an issue for trade for most items in the hardscape category, making long distance transportation economically

88

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TABLE III-9
CONCRETE DEMAND BY TYPE, APPLICATION & MARKET
 (million dollars)

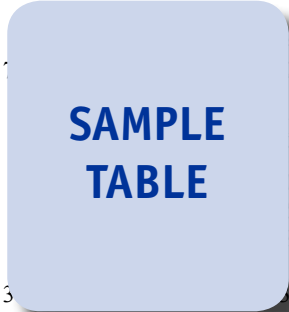
Item	2000	2005	2010	2015	2020
Hardscape Products Demand					0
% concrete					4
Concrete Demand					5
By Type:					
Concrete Pavers					0
Ready Mix Concrete					0
Concrete Blocks & Other Concrete					5
By Application:					
Patios					5
Walkways					5
Edging & Other					5
By Market:					
Residential					0
Nonresidential					0
Nonbuilding					5



Sample Profile, Table & Forecast

TABLE IV-4
RESIDENTIAL IMPROVEMENT & REPAIR MARKET
FOR LANDSCAPING PRODUCTS
 (million dollars)

Item	2000	2005	2010	2015	2020
Housing Stock (million)					45
\$ landscaping products/house					21
Residential I&R Landscaping Products					15
Decorative Products					70
Hardscape Products					35
Outdoor Structures					50
Other					90
% improvement & repair	3				1.6
Residential Landscaping Products	2353	3362	2240	3485	4390



COMPANY PROFILES

Woodstream Corporation
 69 North Locust Street
 Lititz, PA 17541
 717-626-2125
 http://www.w

Annual Sales:
 Employment:

Key Products: bird feeders, bird houses and bi

SAMPLE PROFILE

Woodstream is a privately held manufacturer and marketer of pest control, wildlife control, and lawn and garden care products for residential home, lawn and garden applications. The Company primarily offers its products to consumers through a variety of retail, Internet and mail-order catalog outlets. Woodstream is jointly owned by two private equity firms: Brockway Moran & Partners Incorporated (Boca Raton, Florida) and Code, Hennessy & Simmons LLC (Chicago, Illinois).

The Company participates in the US landscaping products industry via the production and sale of outdoor living and garden decoration products. Many of these products are sold through the COBRACO line, which includes fire pits, plant structures and yard accents. COBRACO fire pits are offered in a range of round and square styles with cast iron, copper or steel finishes. These products include bowls, tubs and rings, as well as portable models and do-it-yourself kits. COBRACO plant structures include various deck, floor and multipurpose planters, as well as hanging baskets, flower boxes and window boxes. Additionally, the COBRACO line of plant structures includes such specialty planters as extra-large, multi-tiered, commercial and mailbox types. Among other COBRACO plant structures are styles for climbing

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“Demand for landscaping products in the West is forecast to increase 8.3 percent annually to \$1.1 billion. The West’s share of total landscaping product sales fell from 2005 to 2010, reflecting the impact of the housing crisis and general economic recession on the region. During 2005 to 2010, the West was faced with the most rapid declines among all regions in overall construction spending and new private housing units. Going forward ...”

--Section V, pg. 165

OTHER STUDIES

Geosynthetics

US demand for geosynthetics is projected to advance 6.8 percent annually through 2015. Nonwoven and woven/knit geotextiles will remain the dominant segment and offer good growth prospects, driven by construction and transportation infrastructure markets. Geonets will achieve the fastest gains from a much smaller base. This study analyzes the 904 million square yard US geosynthetics industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2744 May 2011 \$4900

Green Building Materials

US demand for green building materials is projected to expand thirteen percent annually through 2015. The largest value gains will be from concrete products featuring recycled content (e.g., fly ash, blast furnace slag), which will surpass floor coverings to become the largest green building material segment by 2015. This study analyzes the \$38.7 billion US green building material industry, with forecasts for 2015 and 2020 by product, market and US region. The study also evaluates company market share and profiles industry participants.

#2733 April 2011 \$4900

Power Lawn & Garden Equipment

US demand for power lawn and garden equipment will increase 5.7 percent yearly through 2015. Turf and grounds equipment and garden tractors and rotary tillers will be the fastest growing segments, while lawnmowers will remain dominant. The fastest regional gains will be posted in the South and Midwest. This study analyzes the \$7.9 billion US power lawn and garden equipment industry, with forecasts for 2015 and 2020 by product, market, material and US region. The study also evaluates company market share and profiles 34 industry players.

#2756 April 2011 \$4900

Precast Concrete Products

US demand for precast concrete products is forecast to rise 6.1 percent annually through 2015. Residential building will be the fastest growing market, led by foundations, basement walls and floors. Architectural components will be the fastest growing products, spurred by decorative facades, door and window surrounds and siding. This study analyzes the \$8.4 billion US precast concrete products industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles 34 industry competitors.

#2746 March 2011 \$4800

Lawn & Garden Consumables

US demand for packaged lawn and garden consumables will grow 4.5 percent 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 \$6.9 billion US lawn and garden consumables industry, with forecasts for 2014 and 2019 by product, market, application, end user and US region. It also evaluates company market share and profiles industry players.

#2635 May 2010 \$4900

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:

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