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Power Lawn & Garden Equipment

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

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

MATERIALS

MARKETS

PRODUCTS

REGIONAL TRENDS

INDUSTRY STRUCTURE

COMPANY PROFILES

Power Lawn & Garden Equipment

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

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

MATERIALS

MARKETS

PRODUCTS

REGIONAL TRENDS

INDUSTRY STRUCTURE

Growth in equipment sales will be promoted by an improvement in new home construction and existing home sales, as well as by a renewed growth in the landscaping services business.

US demand to rise 5.7% annually through 2015

US demand for power lawn and garden equipment will increase 5.7 percent yearly to $10.4 billion in 2015 as the industry rebounds from the 2007-2009 recession. Overall growth in equipment sales will be promoted by an improvement in US housing activity, including new construction and existing single-family home sales. Equipment demand will also benefit from a return to growth in the landscaping services business. While industry sales will post a strong rebound through 2015, longer-term growth will be more moderate due to slowing product pricing gains and declining opportunities in some key commercial markets, particularly golf courses.

US Power Lawn & Garden Equipment Demand, 2010
($7.9 billion)

Residential market to outpace commercial uses

Between the residential and commercial markets, residential sales account for the larger share of power lawn and garden equipment demand. The residential market will experience a healthy rebound through 2015, spurred by improving US housing activity and pent-up demand among consumers who postponed equipment purchases during the 2007-2009 recession.

Sales to the commercial market will grow more slowly than residential equipment sales through 2015, while still rebounding from a low 2010 level. Commercial sales will benefit from improvements in landscaping service revenues and increases in the number of US landscaping establishments, which represent the largest commercial market segment. In addition, pent-up demand from the recession will promote sales of higher-value commercial equipment to golf courses and government and other facilities. Over the longer term, equipment demand in the golf course segment will be inhibited by the declining number of courses. Longer-term demand in the government and other segment will be moderated by economic pressures on government agencies to cut or privatize services such as parks and grounds upkeep.

Turf, grounds equipment among fastest growing

Through 2015, equipment demand will pick up across nearly all the product segments. Turf and grounds equipment and garden tractors and rotary tillers will be the fastest growing segments in value terms. The high prices commanded by turf and grounds equipment make this the largest category after lawnmowers. Demand for snow throwers will slow from the peak sales seen in 2005 and 2010. Parts and attachments will show little improvement in sales gains from the pace of the 2005-2010 period. Parts and attachments generally post stronger growth when economic uncertainty favors repairs over new purchases.

Sample Text, Table & Chart

TABLE V-22

SNOW THROWER SUPPLY & DEMAND (million dollars)

Item	2000	2005	2010	2015	2020
Households (mil)					
snow throwers/000 households					
$ snow throwers/household					
Snow Thrower Demand (000)					
$/unit					
Snow Thrower Demand					
Dual-Stage					
Single-Stage					
+ net exports					
Snow Thrower Shipments					

SAMPLE TABLE

MARKETS

Residential

Demand for power lawn and garden equipment in the re market is forecast to grow 6 billio This will be a strong turnarc e resi segment from 2005 to 2010. going will benefit from rapid gains s, wh plummeted in the later years Grow purchases by younger indivi me ov few power lawn and garden p t gains ment demand. In addition, replacement demand will be high product segments that saw strong sales growth in the early 20 of these products are nearing the point where they might feas replacement, particularly as consumers have more discretionary spending money available to make such decisions.

SAMPLE TEXT

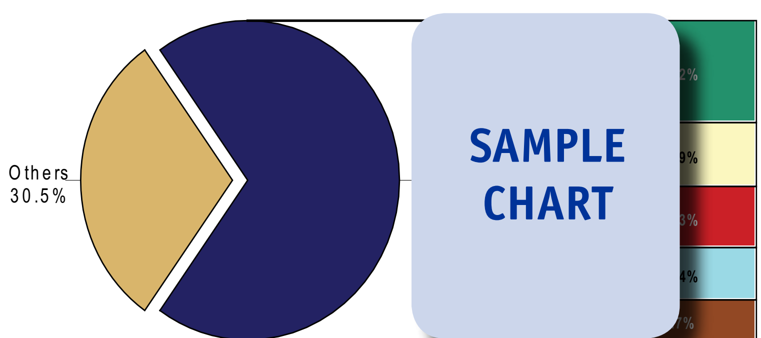
Lawnmowers dominate residential sales of power lawn and garden equipment due to their necessity and to their relatively high costs compared to most other residential products. In most US households with a lawn, a lawnmower is regarded as an indispensible tool. In addition to their importance to basic yard maintenance, lawnmowers have remained a strong area of sales growth in the US due to greater product offerings by producers that include self-propelled, zero-turn-radius, and electric power options. Other products that have continued to see strong sales in the residential segment include trimmers and edgers and snow throwers. Residential demand for garden tractors and rotary tillers has declined over the past decade, in part because these products are geared to a more niche market of garden enthusiasts. Nonetheless, residential these products is also expected to post rapid gains through 2

Alongside the general improvement expected in the US market, the residential power lawn and garden equipment ma

49 Copyright 2011

CHART VII-1

POWER LAWN & GARDEN EQUIPMENT MARKET SHARE ($7.9 billion, 2010)



SAMPLE CHART

Power Lawn & Garden Equipment

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Sample Profile, Table & Forecast

TABLE VI-7

SOUTH POWER LAWN & GARDEN EQUIPMENT DEMAND
(million dollars)

Item	2000	2005	2010	2015	2020
South Households (million)					
$ lawn & garden equipment/househol					
South Power L&G Equipment Demand					
Residential					
Commercial					
% South					
US Power L&G Equipment Demand					

SAMPLE TABLE

COMPANY PROFILES

Bad Boy Incorporated
102 Industrial Drive
Batesville, AR 72501
870-698-0090
http://www.badboymowers.com

Annual S
Employ

Key Pro ... hind mowers and
related a

SAMPLE PROFILE

Bad ... s (ZTR) riding and
walk-be ... accessories. The
privately ... d gasoline-powered
multiterrain vehicles (MTVs).

The Company participates in the US lawn and garden equipment industry through the manufacture and sale of ZTR riding and walk-behind lawn mowers and related accessories designed for commercial applications. In addition, Bad Boy manufactures a range of electric- and gasoline-powered MTVs that can be used to transport lawn and garden equipment, and lawn waste. Bad Boy operates manufacturing facilities in Batesville (2) and Melbourne, Arkansas that occupy a total of approximately 600,000 square feet. Products are distributed via a network of authorized dealers in the US, Canada, the United Kingdom, Denmark, Australia and New Zealand.

Bad Boy's ZTR riding mowers are sold through the AOS Diesel, Outlaw, Lightning Z, PUP, ZT, Commercial ZT and MZ series. Many of these mowers feature solid steel construction, hydraulic cooling systems and Bad Boy's EZ-RIDE system, which incorporates independent

201

"Demand for power lawn and garden equipment in the South is forecast to grow 6.1 percent per annum to $3.9 billion in 2015. The South is the country's largest equipment market due to, among other factors, its large population and strong regional economy, as well as its leading golf course industry. Through 2015, the South is expected to post the fastest regional growth in existing single-family home sales and the second fastest growth in new private housing units, ..."
--Section VI, pg. 150

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Other Studies

World Power Tools

This study analyzes the world power tool industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., electric drills, electric saws, electric sanders, pneumatic tools, engine-driven tools), market (professional, consumer), world region and for 25 countries. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2763 .... May 2011 .... $6100

Landscaping Products

This study analyzes the US landscaping product industry. It presents historical demand data (2000, 2005, 2010) and forecasts for 2015 and 2020 by product (e.g., water features, lighting, bird and wild animal products, pots and planters, hardscape, sheds, gazebos, arches, trellises and pergolas, hobby greenhouses, bridges), market (residential, nonresidential, nonbuilding), end use (consumer/DIY, professional) and US region. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2747 .... May 2011 .... $4900

Power & Hand Tools

US demand for power and hand tools will rise 4.1 percent 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 Lawn & Garden Consumables

Global lawn and garden consumable demand will grow 4.3 percent 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 percent 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

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