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Home Organization Products

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

Study #2774 | June 2011 | \$4900 | 265 pages



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Gains will be supported in part by new decorative and specialty home organization products as well as by the strong growth in larger, more expensive closet and garage systems.

US demand to rise 3.6% annually through 2015

US demand for home organization products will increase 3.6 percent annually to \$8.6 billion in 2015. Demand will be driven by an expected rebound in residential construction and consumer spending. Gains will also be supported by the introduction of decorative and specialty home organization products as well as by the strong growth in larger, more expensive closet and garage systems. Demographic trends, such as baby boomers becoming empty nesters and moving into smaller homes and their children moving into college housing and first apartments, will also provide opportunities given that small spaces benefit from organization products.

Preventing even more rapid growth will be the commoditization of many home organization products, competition from producers in low manufacturing cost countries and the expected moderation in prices for many raw materials. In addition, large retailers, especially mass merchandisers and big box home improvement stores, will exert pricing pressure on home organization product manufacturers, partly through their rising use of lower-cost private label lines.

Modular units to be fastest growing products

Bins, baskets and totes accounted for the largest share of home organization product sales in 2010, with 37 percent of the total market. These products, which

US Home Organization Product Demand by Room, 2010 (\$7.2 billion)

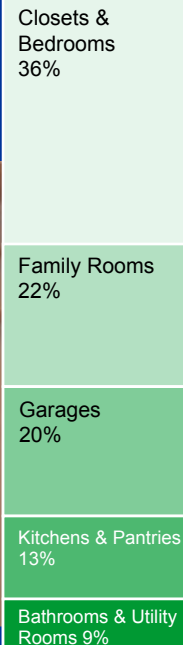


photo: Closets Design

can be decorative or purely functional, are widely used in most households to store and organize belongings of all sizes. Demand for modular units is expected to post the fastest annual gains among home organization products, rising 4.9 percent annually through 2015. Advances will be supported by the flexibility provided by modular units, which allow consumers to seamlessly add on to or redesign existing organization systems.

Garage products to be fastest growing segment

Sales of home organization products for use in garages are expected to post the fastest gains, rising 5.5 percent per year

through 2015. In part, this reflects the relative immaturity of the garage storage market. However, advances will also be aided by increases both in the share of homes with garages and in the average size of garages, along with consumer desires to make the garage space suitable for hobbies or other activities. Sales of home organization products for use in closets will also achieve above-average growth, supported by the increasing availability of these items in a variety of retail outlets. Gains will be boosted by high-end closet systems made from solid wood or laminated panels and by rising consumer demand for closet systems outside of the master bedroom.

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Sample Text, Table & Chart

MARKETS

Do-It-Yourself

Demand for home organization products in the do-it-yourself market is projected to increase through 2015. Demand will be supported by the growing market as a whole, the greater availability of products and increased in-store promotion. Consumers are interested in installing their own systems. DIYers of modular systems are increasing through DIY channels and targeted advertising. Installation and providing enhanced customizable systems. In addition, positive factors, the DIY market is expected to underperform the home organization product industry. In part, this will reflect a shift among a number of products which are naturally part of the DIY market because they require no installation (e.g., bins, baskets, totes and hanging storage). In addition, several products which are typically professionally installed, such as modular systems and many types of shelving, are expected to post better than average increases.

The market for DIY home organization products will continue to be supported by the popularity of DIY activities, which can provide a sense of accomplishment and an opportunity to save money. The cost-saving aspect of DIY projects can be especially important in difficult economic times and therefore supported a boost in the DIY market starting in 2007. As the economy improves going forward, DIY market gains will moderate to some degree; however, a renewed sense of confidence is likely to boost DIY demand. Some consumers also prefer DIY installation because of a greater potential to adjust the system by piecing components from a variety of manufacturers -- in contrast to professional installers or builders who often work with a single manufacturer's limited range of suppliers.

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SAMPLE
TEXT

TABLE V-4

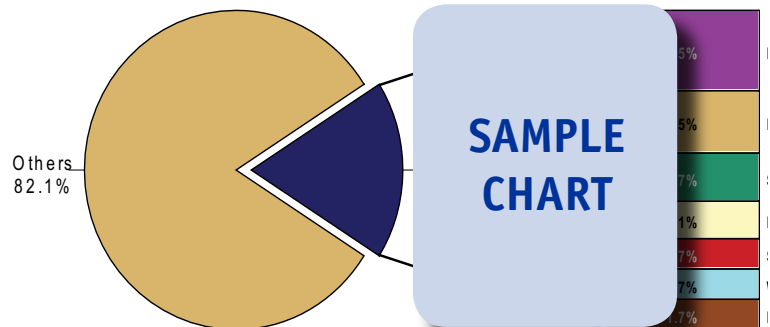
GARAGES: HOME ORGANIZATION PRODUCT DEMAND (million dollars)

Item	2000	2005	2010	2015	2020
Housing Stock (millions)					
\$ garage home organization/house					
Garages & Carports (millions)					
\$ garage home organization/garage					
Garage Home Organization Products					
Bins, Baskets & Totes					
Shelving					
Modular Units					
Hanging Storage					
Accessories & Other					
% garages					
Home Organization Product Demand					

SAMPLE
TABLE

CHART VII-1

US HOME ORGANIZATION PRODUCT MARKET SHARE BY COMPANY (\$7.2 billion, 2010)

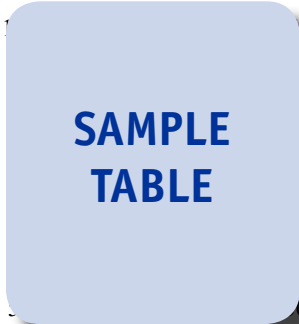


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE IV-2
BIN, BASKET & TOTE DEMAND
(million dollars)

Item	2000	2005	2010	2015	2020
Households (million)					0
\$ bins, baskets & totes/household					2
Bin, Basket & Tote Demand					00
Metal & Wire					45
Plastic					70
Wood					35
Wicker, Rattan & Other					00
% bins, baskets & totes					0
Home Organization Product Demand					00



COMPANY PROFILES

Elfa International AB
 Elagatan 5
 59387 Vaestervik
 Sweden
 46-490-846-00
 http://www.elfa.se

Annual Sales: (any)
 Employment:

Key Products: wall-mounted racks, and other

SAMPLE PROFILE

Elfa International manufactures and markets organization systems for residential applications. The Company is a wholly owned subsidiary of Container Store Incorporated (Coppell, Texas), a retailer of storage systems that is majority owned by private investment firm Leonard Green & Partners LP (Los Angeles, California).

The Company is active in the US home organization products industry through the manufacture and sale of shelving and drawer systems, door- and wall-mounted racks, and other storage accessories for closets, living and family rooms, pantries, laundry rooms, utility rooms and garages. These products are sold under the ELFA brand name and are covered by a ten-year warranty.

Shelving systems from Elfa International are offered in solid and ventilated types that are installed using the Company's EASY HANG horizontal tracks and standards, or made as freestanding units. These systems can be equipped with such accessories as shelf dividers and liners; gliding tie, belt and pant racks; shoe racks; hanging clothes and valet rods; hooks; and jewelry trays. The Company's solid shelving

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"Demand for bins, baskets and totes is projected to rise 2.5 percent annually to \$3 billion in 2015. While the rate of increase will trail the overall pace for home organization products, it represents an improvement coming out of the economic downturn. In addition, demand in 2015 will be almost \$350 million higher than 2010 levels, representing a strong opportunity for producers."

--Section IV, pg. 70

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OTHER STUDIES

Janitorial Equipment & Supplies

This study analyzes the US janitorial equipment and supply industry. It presents historical demand data (2000, 2005, 2010) and forecasts for 2015 and 2020 by type (e.g., brushes and brooms, mops and dusters, sponges and scrubbing pads, bags and containers, vacuum cleaners, carpet cleaning equipment, sprayers, floor machine pads), market (e.g., office buildings, institutional buildings, commercial buildings) and US region. The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#2742 July 2011 \$4900

World Power Tools

World power tool demand is projected to rise 4.4 percent annually through 2015. The pace of growth will be the fastest in developing Asian countries, although the US will also provide solid growth opportunities with an expected turnaround in the current housing crisis. Electric tools will remain dominant, with cordless product posting the best gains. This study analyzes the \$22 billion world power tool industry, with forecasts for 2015 and 2020 by product, market, world region and for 25 countries. The study also evaluates company market share and profiles industry players.

#2763 June 2011 \$6100

Landscaping Products

US demand for landscaping products is projected to increase 7.6 percent per year through 2015, as sales post a strong improvement from a reduced 2010 base. Concrete products and other hardscapes will see the fastest growth, while decorative products (e.g., water features, lighting, bird and wild animal products) remain the largest segment. This study analyzes the \$4.1 billion US landscaping product industry, with forecasts for 2015 and 2020 by product, market, end use and US region. The study also evaluates company market share and profiles industry players.

#2747 June 2011 \$4900

Molding & Trim

US demand for molding and trim is forecast to grow ten percent annually through 2014, driven by a rebound in new residential construction expenditures. Despite competition from plastics and wood-plastic composites, wood will remain the leading material. Other products such as exterior trim will outpace molding and stairwork. This study analyzes the \$6.3 billion US molding and trim industry, with forecasts for 2014 and 2019 by material, product and market. It also evaluates company market share and profiles industry players.

#2729 February 2011 \$4900

Cabinets

US demand for cabinets is forecast to expand 7.4 percent annually through 2014, spurred by a rebound in housing completions from depressed 2009 levels. The expected recovery in residential building construction will support demand gains for all cabinet types, especially kitchen and bathroom cabinets. This study analyzes the \$10.6 billion US cabinets industry, with forecasts for 2014 and 2019 by material, product, market and geographic region. It also evaluates company market share and profiles industry players.

#2663 August 2010 \$4900

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