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# World Power Lawn & Garden Equipment

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

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Study #2797 | August 2011 | \$6100 | 365 pages

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*Opportunities will exist in the golf industry outside the US, as golf participation rates are expected to grow due to rising standards of living and a continued emphasis on golf tourism.*

## World demand to rise 4.8% annually through 2015

World power lawn and garden equipment demand is forecast to rise 4.8 percent yearly to \$18.9 billion in 2015. Overall growth in equipment sales will be promoted by an improvement in housing activity in the key US and West European markets. While industry sales will post a strong rebound through 2015, longer-term growth will be more moderate due to slowing product pricing gains. Opportunities will exist in the golf industry outside the US, as participation rates are expected to grow due to rising standards of living and a continued emphasis on golf tourism.

## Dominant US market to provide best opportunities

Despite a sluggish outlook in the shorter term, the bedrock US market will provide the best opportunities, accounting for over 60 percent of the additional demand generated through 2015. North America and Western Europe will continue to be the dominant markets, together comprising over 85 percent of demand in 2015. Consumers in these developed nations have high per capita income levels that allow for discretionary purchases such as power lawn and garden equipment. These areas are also home to the vast majority of the world's golf courses, which are major consumers of power lawn and garden equipment.



## Turf, grounds equipment to be fastest growing products

Among product groups, lawnmowers will continue to comprise the largest percentage of sales. Demand for lawnmowers will benefit from the upturn in new housing units in the US and Western European markets. Turf and grounds equipment is expected to post the fastest gains, due to continuing growth in the number of professional landscapers in developed countries. Aging populations in the US and throughout Europe will boost this trend. Trimmers and edgers, like lawnmowers, will benefit from their widespread use in both residential and commercial markets.

## Electric equipment to outpace gasoline-powered

Between the two types of power sources, demand for electric lawn and garden equipment will grow at a faster pace, led by battery-powered types. Suppliers are promoting growth in this segment by incorporating more effective battery technologies into their products and introducing electric options into new product categories such as riding mowers. However, gasoline- and diesel-powered equipment will continue to lead industry sales by value, a reflection of their dominance in the key US market and within high value product categories.

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## Sample Text, Table & Chart

### WESTERN EUROPE

#### Sweden: Supply & Demand

Demand for power lawn and garden equipment in Sweden was valued at \$1.72 billion in 2010, accounting for 1.7% of the country's total demand. The country posted solid gains from 2005 to 2010, from \$1.3 billion to \$1.72 billion, as both capital expenditures and equipment demand increased. However, demand was adversely affected by the economic downturn and investment gains from 2005 to 2010.

**SAMPLE  
 TEXT**

Although the country has a high per capita income, expenditures on power lawn and garden equipment are below the regional average, reflecting the fact that gardening is not as popular in Sweden as in some of its regional neighbors. Climatic conditions range from temperate in the southern portion of the country to subarctic in the north.

The commercial market in Sweden benefits from the popularity of golf in the nation. The country is home to over 175 courses, making it one of the most golf-intensive nations in the world (on a per capita basis). In addition to local golfers, Swedish courses serve a significant number of tourists. Northern Sweden even offers 24-hour play during the months of June and July, as its location within the Arctic Circle provides constant daylight during this period.

Shipments of power lawn and garden equipment from Swedish manufacturing facilities totaled \$70 million in 2010, among the larger non-G8 West European nations. Much after the pattern of Germany, the Swedish industry has developed considerable expertise in the manufacture of engineered machinery and industrial equipment. However, Sweden runs a trade deficit in power lawn and garden equipment equivalent to over 10% of total demand. Production growth has been limited by slowing demand, as well as by fierce competition in export markets.

114

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TABLE V-15

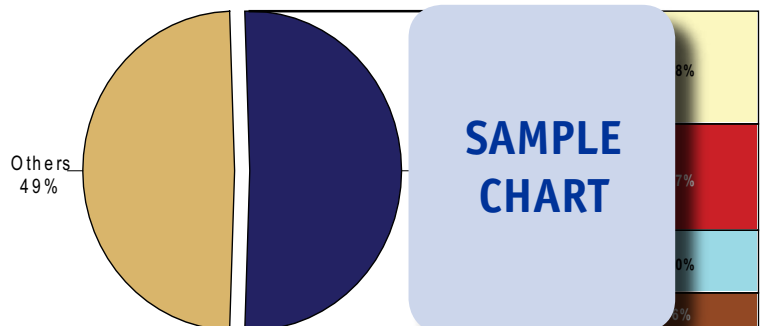
### SWEDEN: POWER LAWN & GARDEN EQUIPMENT SUPPLY & DEMAND

Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil 2009\$)	300	350	400	450	472
\$ GDP/capita	30,000	35,000	40,000	45,000	47,000
Population (million persons)	9.0	9.2	9.4	9.6	9.6
urban % of total population	85	85	85	85	85
persons per household	2.0	2.0	2.0	2.0	2.0
Urban Population (million persons)	7.7	7.8	8.1	8.2	8.2
Households (million)	4.5	4.5	4.5	4.5	4.5
\$ lawn & garden equip/household	170	170	170	170	170
Lawn & Garden Equip Demand (mil \$)	1,300	1,500	1,720	1,720	1,720
net exports	0	0	0	0	0
Lawn & Garden Equipment Shpts (mil \$)	70	70	70	70	70

**SAMPLE  
 TABLE**

CHART VIII-1

### WORLD POWER LAWN & GARDEN EQUIPMENT MARKET SHARE (\$14.9 billion, 2010)

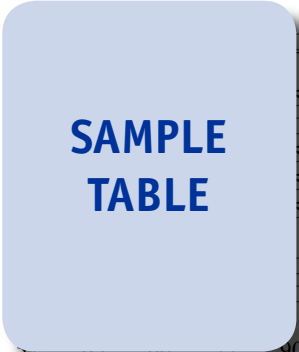


**SAMPLE  
 CHART**

## Sample Profile, Table & Forecast

**TABLE V-16**  
**SWEDEN: POWER LAWN & GARDEN EQUIPMENT**  
**DEMAND BY TYPE & MARKET**  
 (million dollars)

Item	2000	2005	2010	2015	2020
Lawn & Garden Equipment Demand					
By Type:					
Lawnmowers					
Turf & Grounds Equipment					
Trimmers & Edgers					
Other Equipment					
Parts & Attachments					
By Market:					
Residential					
Commercial					
By Power Source:					
Gasoline	52	65	66	77	90
Electric & Other	15	20	15	20	25



**COMPANY PROFILES**

**Global Garden Products Group**  
 via del Lavoro 6  
 31033 Castelfranco, Veneto  
 Italy  
 39-0423-450-1  
 http://www.ggp

Annual Sales: (11)  
 Employment: (11)

Key Products: string and hedge trimmers, cultivators, blowers and scarifiers

Global Garden Products (GGP) Group is a producer of lawn and garden equipment, including lawn mowers and tractors, trimmers, brush cutters and snow throwers. The Company is privately held.

The Company is active in the world lawn and garden equipment industry via the production of walk-behind and riding mowers, lawn tractors, brush cutters, string and hedge trimmers, cultivators, chipper/shredders, blowers, scarifiers and snow throwers. These products are marketed under such brand names as STIGA, CASTELGARDEN, MOUNTFIELD and ALPINA to customers in approximately 100 countries worldwide.

**Products** -- The STIGA product line comprises walk-behind and riding mowers, lawn tractors, tractor-drawn implements, brush cutters, string trimmers, hedge trimmers, cultivators, chipper/shredders and snow blowers, among other items. STIGA walk-behind mowers include gasoline-, ethanol- and electric-powered models with the Company's proprietary MULTICLIP mulching capabilities. These

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"Swedish power lawn and garden shipments are forecast to rise 2.7 percent per annum through 2015 to \$80 million, an acceleration from the 2005-2010 pace. Manufacturers will benefit from an improved domestic market. However, competition from regional and Asian countries in export markets will limit gains. The country is home to Husqvarna and GGP Sweden, leading producers of power lawn and garden equipment. Numerous multinationals are also active in Sweden through distributors or sales offices."  
 --Section V, pg. 117

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**OTHER STUDIES**

**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

**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

**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 consumables 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 consumables 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

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